Workforce Administration

PHCMWFAL280:
PayPath Transactions – Part II
## Introductions

### Instructor
- Name
- UC role
- UCPATH role
- Years at UC
- Functional experience

### Attendees
- Name
- University role
- Years at UC
- Expectations for this training
Training Logistics

Safety and Housekeeping

- Emergency evacuation procedures
- Restrooms
- Course duration: 2 hours
- Breaks

Classroom Etiquette

- Please turn off cell phones
- No email or web surfing
- Return from breaks on time
- Please use trash receptacles in the room
Parking Lot

- Capture any questions or concerns that cannot be addressed during class
- Provide follow up to all attendees of this class
Course Agenda

1: Additional Pay

2: Combination Changes
Course Objectives

By the end of this course, you should be able to:

- Initiate additional pay PayPath transactions.
- Initiate various PayPath combination transactions.
Additional Pay

Module 1
The module learning objectives are:

- Describe the Additional Pay system process.
- Initiate additional pay PayPath transaction.
- Initiate update to additional pay PayPath transaction.
- Initiate retroactive additional pay PayPath transaction.
Additional Pay – Overview

- **Additional Pay** is any compensation above a University employee’s regular, base compensation.

- There are two types of additional pay transactions:
  - One-time – applies to a single pay cycle or non-consecutive pay cycles.
  - Recurring – payments are paid over multiple, consecutive pay periods.

- Additional pay transactions entered in PayPath are routed for approvals and then transferred to a staging table to be processed automatically by the nightly additional pay batch upload process.
Additional Pay – Overview

- Additional pay for hourly employees must be entered as a flat per pay period amount.
  - All prorated payments should be calculated prior to entering the flat amount.
  - The system prorates only for terminated employees.

- When an employee is hired and the Hire Template transaction has been submitted for approval, the employee is not available in PayPath until the Hire Template has been approved and processed by UCPC WFA Production.
  - After the employee is available in PayPath, the employee’s additional pay data cannot be updated until the nightly process has assigned his or her pay group.
Additional Pay – System Process

- Role: PayPath Initiator

- Navigate to PayPath Actions
- Review employee information
- Enter additional pay
- Save and submit
There are several **Earn Codes** available to identify the type of additional pay. The list of additional pay **Earn Codes** is based on the earnings program tied to the employee’s paygroup. Below are a few examples.

### Staff Examples

<table>
<thead>
<tr>
<th>Earn Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AWD</td>
<td>Incentive Award</td>
</tr>
<tr>
<td>BON</td>
<td>Bonus</td>
</tr>
<tr>
<td>CRT</td>
<td>Certification Pay</td>
</tr>
<tr>
<td>SAS</td>
<td>Stipend-Admin-Staff</td>
</tr>
<tr>
<td>XSC</td>
<td>Star Spot Award Central</td>
</tr>
<tr>
<td>XSL</td>
<td>Star Award Local</td>
</tr>
<tr>
<td>XUI</td>
<td>UC Incentive Program</td>
</tr>
</tbody>
</table>

### Academic Examples

<table>
<thead>
<tr>
<th>Earn Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAP</td>
<td>Academic Award Program</td>
</tr>
<tr>
<td>AWD</td>
<td>Incentive Award</td>
</tr>
<tr>
<td>DIF</td>
<td>Summer Differential</td>
</tr>
<tr>
<td>FRA</td>
<td>Faculty Recruitment Allowance</td>
</tr>
<tr>
<td>HON</td>
<td>Honorarium</td>
</tr>
<tr>
<td>ICP</td>
<td>Incentive Pay</td>
</tr>
</tbody>
</table>
**Additional Pay Data Page**

If the employee has existing additional pay, it displays in the Current Additional Pay section. In this example, the employee does not have existing additional pay set up.

Use the PayPath Actions **Additional Pay Data** page to enter specific information about the payment.

### Enter the Earnings Code, Effective Date and Pay Period Amount
- Enter the **Earnings Code**.
- Specify the **Effective Date**.
- Input the **Pay Period Amount**.
- You can also enter a **Goal Amount** or **End Date**.

### This section displays a summary of the employee’s current job data.

### Enter comments you want the approver to see during the review of this request and upload supporting documents as necessary.
In this example, the employee has existing additional pay, which displays in the Current Additional Pay section.
Watch as your instructor demonstrates how to initiate an additional pay PayPath transaction in UCPath.

Follow along using the UCPath topic.
- Open the UCPath Help site and refer to the *Initiate Additional Pay PayPath Transaction (Staff/Acad)* topic.

Launch the **Print It** version of the topic.

At the end of the demonstration, you will have the opportunity to practice this task.
Exercise

Initiate Additional Pay PayPath Transaction (Staff/Acad)

- This is your opportunity to practice this task on your own.
  - Open the UCPath Help site and refer to the *Initiate Additional Pay PayPath Transaction (Staff/Acad)* topic.
- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.
Updates can be made to existing recurring additional pay transactions.

The update must be for the same Earnings Code.

The update must have an Effective Date that is within the existing recurring pay Effective Date (start date) and End Date.

After you enter the Earnings Code and the new Effective Date, the current recurring information populates and the Override Data button appears. Click the Override Data button to open the recurring information fields for edit.
Watch as your instructor demonstrates how to update an existing recurring additional pay PayPath transaction in UCPath.

Follow along using the UCPath Help topic.
- Open the UCPath Help site and refer to the *Initiate Update to Additional Pay PayPath Transaction (Staff/Acad)* topic.

Launch the **Print It** version of the topic.

At the end of the demonstration, you will have the opportunity to practice this task.
Exercise

Initiate Update to Additional Pay PayPath Transaction (Staff/Acad)
- This is your opportunity to practice this task on your own.
  - Open the UCPath Help site and refer to the *Initiate Update to Additional Pay PayPath Transaction (Staff/Acad)* topic.
- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.
Retroactive dating is available for recurring and one-time additional pay.

The steps for entering a retroactive additional pay transaction are similar to any other additional pay, with the exception of the Effective Date.

In the Effective Date field, enter the previous pay period date that the additional pay should have started.
Initiate Retroactive Additional Pay PayPath Transaction (Staff/Acad)

- Watch as your instructor demonstrates how to initiate a retroactive additional pay PayPath transaction in UCPath.
- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *Initiate Retroactive Additional Pay PayPath Transaction (Staff/Acad)* topic.
- Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.
Exercise

Initiate Retroactive Additional Pay PayPath Transaction (Staff/Acad)

- This is your opportunity to practice this task on your own.
  - Open the UCPath Help site and refer to the *Initiate Retroactive Additional Pay PayPath Transaction (Staff/Acad)* topic.

- Launch the **Try It** version of the topic.

- Ask your instructor for assistance.
Having completed this module, you should be able to:

- Describe the Additional Pay system process.
- Initiate additional pay PayPath transaction.
- Initiate update to additional pay PayPath transaction.
- Initiate retroactive additional pay PayPath transaction.
Module Review

Introduction

- You now have the opportunity to assess your knowledge of the information presented in this module.
- The questions and answers presented in this review help you to determine whether you remember and understand the important points.
Check Your Understanding

Join at kahoot.it and enter the game PIN

88 Players

Kahoot!

Ready to join?

Start
Combination Changes

Module 2
The module learning objectives is:

- Initiate various PayPath combination transactions.
Combination Changes – Overview

- There are many circumstances where a combination of changes are needed between position, job data and additional pay.
- The following slides provide direction for additional practice on some of the common combination changes.
Things to Remember …

- Multiple **Position Data** and **Job Data** changes can be entered in a single PayPath transaction; however, they must have the same **Effective Date**.
  - You can enter multiple **Additional Pay** entries with different **Effective Dates** in a single PayPath transaction.

- When a position change is entered, a new row is automatically inserted in the **Job Data** page and displays the updated position data fields.

- All **Job Data** fields that are controlled by **Position Data** appear as display-only.

- After a PayPath transaction is submitted for approval (Pending Approval status), you cannot enter another PayPath transaction for that employee until the pending transaction has been processed by all Approvers.
Initiate Position + Job Data Change PayPath Transaction

- Watch as your instructor demonstrates how to initiate a combination change PayPath transaction in UCPath.
- Follow along using the UCPath Help topic.
  - **Academic**: Open the UCPath Help site and refer to the *Initiate Position + Job Data Change PayPath Transaction (Acad)* topic.
  - **Academic Health Sciences Compensation Plan (HSCP)**: Open the UCPath Help site and refer to the *Initiate Position + Job Data Change PayPath Transaction (Acad HSCP)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *Initiate Position + Job Data Change PayPath Transaction (Staff)* topic.
- Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.
Exercise

Initiate Position + Job Data Change PayPath Transaction

- This is your opportunity to practice this task on your own.
  - **Academic**: Open the UCPath Help site and refer to the *Initiate Position + Job Data Change PayPath Transaction (Acad)* topic.
  - **Academic (HSCP)**: Open the UCPath Help site and refer to the *Initiate Position + Job Data Change PayPath Transaction (Acad HSCP)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *Initiate Position + Job Data Change PayPath Transaction (Staff)* topic.

- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.
Initiate Job Data Change + Additional Pay PayPath Transaction

- Watch as your instructor demonstrates how to initiate a combination change PayPath transaction in UCPath.
- Follow along using the UCPath Help topic.
  - **Academic:** Open the UCPath Help site and refer to the *Initiate Job Data Change + Additional Pay PayPath Transaction (Acad)* topic.
  - **Staff:** Open the UCPath Help site and refer to the *Initiate Job Data Change + Additional Pay PayPath Transaction (Staff)* topic.
- Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.
Exercise

Initiate Job Data Change + Additional Pay PayPath Transaction

- This is your opportunity to practice this task on your own.
  - **Academic**: Open the UCPath Help site and refer to the *Initiate Job Data Change + Additional Pay PayPath Transaction (Acad)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *Initiate Job Data Change + Additional Pay PayPath Transaction (Staff)* topic.
- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.
Initiate Position + Job Data + Additional Pay Change PayPath Transaction

- Watch as your instructor demonstrates how to initiate a combination change PayPath transaction in UCPath.
- Follow along using the UCPath Help topic.
  - **Academic**: Open the UCPath Help site and refer to the *Initiate Position + Job Data + Additional Pay Change PayPath Transaction (Acad)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *Initiate Position + Job Data + Additional Pay Change PayPath Transaction (Staff)* topic.
- Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.
This is your opportunity to practice this task on your own.

- **Academic**: Open the UCPath Help site and refer to the *Initiate Position + Job Data + Additional Pay Change PayPath Transaction (Acad)* topic.

- **Staff**: Open the UCPath Help site and refer to the *Initiate Position + Job Data + Additional Pay Change PayPath Transaction (Staff)* topic.

- Launch the **Try It** version of the topic.

- Ask your instructor for assistance.
Initiate Job Data FTE Override PayPath Transaction

- Watch as your instructor demonstrates how to initiate a job data FTE override PayPath transaction in UCPath.
- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *Initiate Job Data FTE Override PayPath Transaction (Staff/Acad)* topic.
- Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.
Exercise

Initiate Job Data FTE Override PayPath Transaction

- This is your opportunity to practice this task on your own.
  - Open the UCPath Help site and refer to the Initiate Job Data FTE Override PayPath Transaction (Staff/Acad) topic.
- Launch the Try It version of the topic.
- Ask your instructor for assistance.
Having completed this module, you should be able to:

- Initiate various PayPath combination transactions.
Course Review
Course Agenda

1: Additional Pay

2: Combination Changes
**Putting It All Together**

- **Additional Pay** is any compensation above a University employee’s regular, base compensation.

- There are two types of additional pay transactions:
  - One-time – applies to a single pay cycle or non-consecutive pay cycles.
  - Recurring – payments are paid over multiple, consecutive pay periods.

- Updates can be made to existing recurring additional pay transactions.

- Retroactive dating is available for recurring and one-time additional pay.
Course Objectives Review

Having completed this course, you should be able to:

- Initiate additional pay PayPath transactions.
- Initiate various PayPath combination transactions.
Review parking lot

- Have all questions been answered during our class?
- Are there any new questions to add to the list?
The **UCPath Help** site is your first level of support. Search for conceptual content, job aids or step-by-step instructions for UCPath tasks.

- From the UCPath portal homepage, expand the **Help / FAQ** section on the left side of the page and then click the appropriate link to open the site. An Adobe PDF version is available for users with screen readers.
- From any UCPath page or component, click the **Help** link in the upper right corner of the page to find help topics specific to the page/component.