Payroll

PHCMPAYL200: Additional Compensation and Pay Adjustment Requests
Intended Audience

The target audience for this course are employees in:

- Shared Services Centers (SSC)
- Business and Financial Services (BFS)
- UCPath (PeopleSoft) System

****Department personnel will be using ServiceLink****
Instructor

- Dora Rubio
- UCPath role: FOM/UCPath Financial Process Trainer
- Years at UC: -1
- Previous experience: 10 years of corporate compliance training experience.
Housekeeping

Cell Phones

Breaks

Restrooms
Course Agenda

1: Additional Compensation

2: Final Pay and Off-Cycle Pay Requests
Course Objectives

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

- Describe the two categories of additional compensation.
- Submit one-time payment and recurring additional pay requests.
- Submit final pay and off-cycle pay requests.
- Search for and view an employee’s paycheck data.
Additional Compensation

Module 1
The module learning objectives are:

- Describe the two categories of additional compensation.
- Describe the additional compensation request process.
- Submit a one-time payment request.
- Submit a recurring additional pay request.
Additional Compensation – Process Overview

- Additional compensation is any payment that is in addition to an employee’s regular base compensation
- Two categories of payments:
  - One-time
  - Recurring
- Access the One-Time Payments page or Self Service Additional Pay page in UCPath to enter the appropriate payment details

Examples

- Summer session teaching
- Department chair stipends
- Clinical incentives
- Consultant services
- Reading manuscripts
- Lectures and similar services
- Certification pay
- Uniform allowance
- Military service / Supplement pay for non-exempt employees
- STAR award
- Z Payments
- Honoraria
- Housing Allowance
Additional Compensation – System Process

1. Navigate to the **Self-Service Transaction Links** page
2. Click the **One-Time Payments** or **Additional Pay** link
3. Search for and select the appropriate employee record
4. Enter payment details
5. Submit for review and approval
Click the **One-Time Payments** link to begin the steps for entering a one-time payment transaction.

Click the **Additional Pay** link to begin the steps for entering a recurring additional pay transaction.
One-Time Additional Pay – Select Employee

Enter search criteria and click **Get Employees** to search for the appropriate employee record.

The **Employee Details** section displays the employee record(s) that match the search criteria. Click the employee’s name to select the employee and display the **One-Time Payments** page on which you enter payment details.
One-Time Additional Pay – Enter Transaction Details

Use the One-Time Payments page to enter specific information about the payment.

If one or more existing one-time payments is set up for this employee, this page displays payment details in the Current One-Time Payments section. In this example, the employee does not have existing payments.

Enter payment details, including the earnings code, earnings amount and earnings begin and end dates.

Enter comments you want the approver to see during his or her review of this request.

Click Submit to initiate the approval workflow.
Submit One-Time Payment Request Exercise

- Open the UCPath Help site: https://goo.gl/uYQ7Qt
Recurring Additional Pay – Self Service Transaction Transaction Links Page

**Navigation:** PeopleSoft Menu > UC Customizations > UC Extensions > Self Service Transaction Links

<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Additional Pay</strong></td>
<td>Grant an employee additional pay</td>
</tr>
<tr>
<td><strong>One-Time Payments</strong></td>
<td>Submit one-time payments for approval</td>
</tr>
<tr>
<td><strong>Upload One-Time Payment File</strong></td>
<td>Submit one-time payment file for approval</td>
</tr>
<tr>
<td><strong>Payroll Request</strong></td>
<td>Submit Final Pay or Off-Cycle Payment For Approval</td>
</tr>
<tr>
<td><strong>Manage Accruals</strong></td>
<td>Submit Payouts, Accruals, Adjustments, Takes and Hours adjustments for approval</td>
</tr>
<tr>
<td><strong>Approve One Time Pay</strong></td>
<td>Approve One Time Pay</td>
</tr>
<tr>
<td><strong>Approve One Time File</strong></td>
<td>Approve One Time File</td>
</tr>
<tr>
<td><strong>Approve Payroll Requests</strong></td>
<td>Approve Payroll Requests</td>
</tr>
<tr>
<td><strong>Upload E-084 File</strong></td>
<td>Upload E-084 File</td>
</tr>
<tr>
<td><strong>Approve Additional Pay</strong></td>
<td>Approve Additional Pay</td>
</tr>
</tbody>
</table>

Click the **Additional Pay** link to begin the steps for entering a recurring additional pay transaction.
Recurring Additional Pay – Select Employee

Enter search criteria and click **Get Employees** to search for the appropriate employee record.

The **Employee Details** section displays the employee record(s) that match the search criteria. Click the employee’s name to select the employee and display the **Self Service Additional Pay** page on which to enter payment details.
Recurring Additional Pay – Enter Transaction Details

Use the **Self Service Additional Pay** page to enter specific information about the recurring payment.

- Enter the appropriate **Earnings Code** and **Effective Date**.
- Enter the **End Date** if known.
- Select a **Reason** from list of values.
- Enter the **Pay Period Amount** to be added to each paycheck.
- Enter a **Goal Amount**, if applicable.
- Select the **Applies to Pay Periods** as appropriate.

This section displays a summary of the employee’s job information.

Enter pertinent comments for this request and upload or view supporting documents, as necessary.
In this example, the employee has existing additional pay set up in UCPath.

<table>
<thead>
<tr>
<th>Self Service Additional Pay</th>
<th>Current Additional Pay</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Transaction ID</strong></td>
<td>**Find</td>
</tr>
<tr>
<td><strong>Carmela Ulink</strong></td>
<td>**Find</td>
</tr>
<tr>
<td><strong>New Additional Pay</strong></td>
<td>**Find</td>
</tr>
<tr>
<td><strong>Earnings Code</strong></td>
<td>**Find</td>
</tr>
<tr>
<td><strong>Effective Date</strong></td>
<td>**Find</td>
</tr>
<tr>
<td><strong>Effective Date</strong></td>
<td>**Find</td>
</tr>
<tr>
<td><strong>Payment Details</strong></td>
<td>**Find</td>
</tr>
<tr>
<td><strong>Addi Seq #</strong></td>
<td>**Find</td>
</tr>
<tr>
<td><strong>End Date</strong></td>
<td>**Find</td>
</tr>
<tr>
<td><strong>Pay Period Amt</strong></td>
<td>**Find</td>
</tr>
<tr>
<td><strong>Goal Amount</strong></td>
<td>**Find</td>
</tr>
<tr>
<td><strong>Prorate Additional Pay</strong></td>
<td>**Find</td>
</tr>
<tr>
<td><strong>Applies To Pay Periods</strong></td>
<td>**Find</td>
</tr>
<tr>
<td><strong>First</strong></td>
<td>**Find</td>
</tr>
<tr>
<td><strong>Second</strong></td>
<td>**Find</td>
</tr>
<tr>
<td><strong>Third</strong></td>
<td>**Find</td>
</tr>
</tbody>
</table>

**Job Information**

<table>
<thead>
<tr>
<th>Employee Type</th>
<th>Hourly</th>
<th>Standard Hours</th>
<th>40.00</th>
<th>Frequency Type</th>
<th>Hourly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compensation Rate</td>
<td>$57.160000</td>
<td>Standard Hours</td>
<td>40.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Default Job Data**

<table>
<thead>
<tr>
<th>Position</th>
<th>40047270</th>
<th>CLIN NURSE 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>LAMED</td>
<td>UCLA Medical Center</td>
</tr>
<tr>
<td>Department</td>
<td>200100</td>
<td>Neuropsychiatric Hospital</td>
</tr>
<tr>
<td>Job Code</td>
<td>009139</td>
<td>CLIN NURSE 2</td>
</tr>
<tr>
<td>FTE</td>
<td>1.000000</td>
<td>Expected Job End Date</td>
</tr>
<tr>
<td>Employee Status</td>
<td>Active</td>
<td>Expected End Date</td>
</tr>
</tbody>
</table>
Correction/Update – Recurring Additional Pay – 1

Enter the same Earnings Code and the new Effective Date to populate the Payment Details with the existing information.

Click the Override Data button to access and modify the Payment Details.
In this example, the **End Date** and **Pay Period Amount** fields were modified for this additional pay.

Enter **Initiator Comments** as necessary and click the **Submit** button.
Workflow Approval Notification – 1

Click the link in the email notification to access the transaction request and view the data.
In this example, the additional pay request submitted by the initiator has been approved by two manager levels.
Submit Recurring Additional Pay Request Exercise

- Open the UCPath Help site: [https://goo.gl/uYQ7Qt](https://goo.gl/uYQ7Qt)
Having completed this module, you should be able to:

- Describe the two categories of additional compensation.
- Describe the additional compensation request process.
- Submit a one-time payment request
- Submit a recurring additional pay request.
Check Your Understanding

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.
The two categories of additional compensation are:

A. One-time payments and recurring payments
B. Recurring payments and job earnings distribution
C. Stipends and certification pay
D. Bonuses and overtime pay
E. None of the above
False: Use the **One-Time Payments** page to submit a one-time payment request. Use the **Self Service Additional Pay** page to submit a recurring payment request.
Final Pay and Off-Cycle Pay Requests

Module 2
The module learning objectives are:

- Describe the final pay/off-cycle pay request process.
- Submit a final pay request.
- Submit an off-cycle pay request.
- Search for and view an employee’s paycheck data.
Submit a final pay request or an off-cycle pay request for an employee using the Payroll Requests self-service component.

Circumstances that trigger requests include:
- Final pay requests
- Administrative errors (for example, timesheet not submitted)
- Settlement cases

Submitting a request triggers approval workflow routing and stages the approved payment in the system while it awaits processing by UCPC.

A published calendar on the UCPath Portal details the off-cycle payroll calendar, which includes cutoff dates and times for processing requests.

Off-cycle check distribution defaults to an employee’s standard pay distribution (for example, direct deposit, paper check and so on).
Navigate to the Payroll Requests page

Select the Final Pay option and select Termination Type

Search for and select the applicable employee record

Enter earnings and leave details

Submit for review and approval
Off-Cycle Pay Request – System Process

1. Navigate to the Payroll Requests page
2. Select the Off-Cycle option and select a Reason
3. Search for and select the applicable employee record
4. Enter earnings and leave details
5. Submit for review and approval
Self Service Transaction Links Page

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > Self Service Transaction Links

Click the Payroll Request link to submit a final pay request or an off-cycle pay request.
Final Pay Request – Select Employee

Select the payment request **Final Pay**.

After selecting **Final Pay**, you must select the **Termination Type**.

Enter the **Empl ID** and click the **Get Employees** button.

The **Employee Details** section displays the employee record(s) that match the search criteria. Click the employee **Name** link to display the page on which you enter payment details.

<table>
<thead>
<tr>
<th>Name</th>
<th>Business Unit</th>
<th>Empl ID</th>
<th>Empl Status</th>
<th>Action</th>
<th>Reason Code</th>
<th>Effective Date</th>
<th>Position Number</th>
<th>Dep</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chandran, Carol</td>
<td>UCOP1</td>
<td>10001681</td>
<td>Active POS</td>
<td>RTC</td>
<td></td>
<td>12/01/2016</td>
<td>40001216</td>
<td>814100</td>
</tr>
</tbody>
</table>
Final Pay Request – Enter Earnings Details

This component is comprised of two pages: Earnings and Leave.

If appropriate, you can enter details for more than one earnings code on the same transaction.

Current payroll request information also appears on this page.

Use the Initiator Comments field to enter request details that help the location approver understand any special circumstances or necessary information during the review and approval process.

Upload or view supporting documents.

Return to the Payroll Request page.
Final Pay Request – Enter Leave Details

Use the **Leave** page to enter any sick or vacation time that has been taken in the current pay period.

Sick and vacation time used must be entered by day. Add a new row for each day to record hours.

Select the **Payout Accruals** check box to indicate to UCPC to calculate and enter final payout codes, such as TRM, and amounts.

Submit to begin the approval process.

**Earnings Begin** and **Earnings End** dates should be the same to indicate one day.
Off-Cycle Pay Request – Select Employee

Select the Off Cycle request option.

You must also select the Reason for the off-cycle request.

Enter the Empl ID and click the Get Employees button.

The Employee Details section displays the employee record(s) that match the search criteria. Click the employee Name link to display the page on which you enter payment details.
This component contains two pages: Earnings and Leave.

If appropriate, you can enter details for more than one earnings code on the same transaction.

The Off-Cycle check box defaults to selected.

Use the Initiator Comments field to enter notes and comments regarding the transaction.

Submit for review and approval.

Upload or view supporting documents.

Current payroll request information also appears on this page.
Submit Final Pay Request Exercise

- Open the UCPath Help site: [https://goo.gl/uYQ7Qt](https://goo.gl/uYQ7Qt)
Submit Off-Cycle Pay Request Exercise

- Open the UCPath Help site: [https://goo.gl/uYQ7Qt](https://goo.gl/uYQ7Qt)
Navigation: PeopleSoft Menu > Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck

Use the Paycheck Earnings page to view detailed earnings information, including earnings other than regular pay.

Review Paycheck Data

Use the Paycheck Taxes page to view detailed tax information and totals for calculated earnings, deductions and net pay.

Use the Paycheck Deductions page to view detailed deduction information and totals for calculated earnings, taxes and net pay.
Review Paycheck Summary

Navigation: PeopleSoft Menu > Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck Summary

View paycheck details, including earnings, taxes and deductions on a single page.

Click ► to expand each section you want to view. Click ▼ to collapse a section.
Open the UCPath Help site: https://goo.gl/uYQ7Qt

Job Aid: Review Paycheck
Having completed this module, you should be able to:

- Describe the final pay/off-cycle pay request process.
- Submit a final pay request.
- Submit an off-cycle pay request.
- Search for and view an employee’s paycheck data.
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.
Multiple Choice

You initiate a final pay request or an off-cycle pay request for an employee using the _________ self-service component.

A. One-Time Payments
B. Additional Pay
C. Off-Cycle Payment
D. Payroll Request
E. None of the above
False: Click the **Submit** button to save the transaction to a custom transaction table. After final approval, the records are moved to a staging table for UCPC payroll processing.
Course Agenda

1: Additional Compensation

2: Final Pay and Off-Cycle Pay Requests
Putting It All Together

- Navigate to the **Self Service Transaction Links** page to begin the steps for initiating:
  - Additional compensation requests: one-time and recurring
  - Final pay and off-cycle payment requests
- Submit an additional pay and final pay/off-cycle pay request to trigger approval workflow routing and stage the approved payment for processing by UCPC.
- You cannot enter a final pay request until UCPC has processed the termination template transaction submitted by your location.
Course Objectives Review

Having completed this course, you should be able to:

- Describe the two categories of additional compensation.
- Submit one-time payment and recurring additional pay requests.
- Submit final pay and off-cycle pay requests.
- Search for and view an employee’s paycheck data.
Where to Get Help

- 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.
Additional Courses

- UCPath WFAL210 Allocation Compensation
- UCR APCOMP120 Additional Compensation for Academic Personnel
- Job Aids – ServiceLink Additional Compensation
FOMUCPathtraining@ucr.edu
TRAINING RESOURCES

Resources are continually updated. Don’t see what you are looking for? Send an email to fomucpathtraining@ucr.edu and let us know.

- **Tools and Navigation**
  - Videos
    - ServiceLink Video

- **Salary Cost Transfer**
  - Job Aid
    - Review Retro Distribution in UCPath

- **Position Data Management (PDM)**
  - Job Aid
    - Entering a New Position in ServiceLink
    - Position Control Request
    - Initiating a ServiceLink New Position Request

- **Extended Leave (Medical)**

- **Extended Leave (Non-Medical)**

- **Offboarding**
  - Job Aid
Your Feedback Please

https://tinyurl.com/ucrfomucpathfeedback
Thank You