

In UCPATH, several methods will be used to pay summer salary – which includes summer research, summer administrative service, and Summer Session teaching for academic appointees. This document describes the different methods and provides departments with criteria to decide how to transact summer salary actions in UCPATH.

For this process to be successful:

- The academic appointee must secure summer employment for teaching, research, or service
- The academic appointee must communicate details of their summer employment to their AP Partner/AP Staff member prior to the month of service
- The AP Partner/AP Staff member must determine how to transact summer salary in UCPATH, and consult with UCR's Academic Personnel Office (APO) for necessary guidance or approvals
- The Central Academic Personnel Office processes summer salary for all Faculty Administrator jobs only (all requests for Faculty Administrators summer salary transactions must be sent to Central APO)
- The Shared Service Centers (SSC) must process summer salary transactions for non-Faculty Administrator jobs quickly and accurately

There are three different ways to enter Summer Salary:

1. Add as additional compensation on an existing job
2. Add as base compensation on a new or concurrent job
3. Add as additional compensation on a new or concurrent job if an MOU requires a specific title for the summer teaching appointment or it is the only job

1. Additional Compensation for AY employees, when payroll certification is not required

Summer compensation should be established on the job where the additional compensation applies and paid via the PayPath module or as Additional Pay in the Self Service Transactions links module under the following conditions:

- On the primary professorial job when payroll certification *is not* required
- On the primary professorial job for Summer Session teaching
- Administrative ninths on the administrative job (i.e. department Chair receives a summer 1/9 for service) using Earn Code **DIF**

UCR Best Practice: Additional Compensation, when payroll certification is not required, should be paid as recurring Additional Pay in order for it to remain on the job for historical purposes, even if it is only for one month.

Step-by-Step Guidelines and Notes:

- The modules for Summer Compensation entry on Job can be accessed either through PayPath Actions or Self Service Transaction Links
- Summer Compensation can be entered in multiple transactions, one or more months at a time, as recurring Additional Pay
- Summer Compensation can also be entered in a single transaction by selecting “+” on Effective Date when using the same Earnings Code and/or selecting “+” on Earnings Code (*Alternate Method*)
 - o **WARNING:** the entire transaction will be denied, if there is an issue with **ANY** part of the request
 - o **BEST Practice:** enter summer compensation one month per transaction (July and August can be made in a single transaction if there are no changes to amount or Earn Code)

| Steps | PayPath Actions | Self Service Transaction Links |
|-------|--|--|
| 1. | Enter EE’s ID or name | Additional Pay |
| 2. | Select appropriate job | Enter EE’s ID or name |
| 3. | Additional Pay Data tab | Select appropriate job |
| 4. | Select Earnings Code: <ul style="list-style-type: none"> - ACA (admin) - ACR (research) - ACS (Summer-403) – used by Professorial or other primary job code - ASN (Summer-No 403) – used by Lecturer, Associate_In, TA and Visiting Professor series - DIF (admin) – used for part-time admin appts. and dept. chair appts. | Select Earnings Code: <ul style="list-style-type: none"> - ACA (admin) - ACR (research) - ACS (Summer-403) – used by Professorial or other primary job code - ASN (Summer-No 403) – used by Lecturer, Associate_In, TA and Visiting Professor series - DIF (admin) – used for part-time admin appts. and dept. chair appts. |
| 5. | Effective Date (always 1 st of month) <ul style="list-style-type: none"> - If July and August will be 100%, this can be entered in single line (07/01/19 – 08/31/19) | Effective Date (always 1 st of month) <ul style="list-style-type: none"> - If July and August will be 100%, this can be entered in single line (07/01/19 – 08/31/19) |
| 6. | End Date (always last day of the month) | End Date (always last day of the month) |

| | | |
|-----|--|--|
| 7. | Reason: New Additional Pay | Reason: New Additional Pay |
| 8. | Pay Period Amount: requested amount | Pay Period Amount: requested amount |
| 9. | Goal Amount: LEAVE BLANK | Goal Amount: LEAVE BLANK |
| 10. | Uncheck "Prorate Additional Pay" | Uncheck "Prorate Additional Pay" |
| 11. | Applies to Pay Periods = First for monthly paid EE's | Applies to Pay Periods = First for monthly paid EE's |
| 12. | Comments: i.e. \$XX,XXX Summer Salary for <Month(s)> | Comments: i.e. \$XX,XXX Summer Salary for <Month(s)> |
| 13. | Submit | Submit |

The screenshots below are set up for Research Summer Compensation entered in a single transaction for four months (June – September) (Alternate Method):

- Annual salary = \$183,800; 1/12 rate = \$15,316.67; 1/9 rate = \$20,422.22; 0.5/9 = \$10,211.11 (June & Sept)

New Additional Pay Find | View All First 1 of 1 Last

*Earnings Code: **ACR** Additional Comp-Research

Effective Date Find | View All First 3 of 3 Last

*Effective Date: **06/01/2019**

Payment Details Find | View All First 1 of 1 Last

Addl Seq #: 1

End Date: **06/30/2019** Reason: **New Additional Pay**

Pay Period Amt: **\$10,211.11**

Goal Amount: Goal Balance:

Prorate Additional Pay

Applies To Pay Periods

First Second Third

Job Information

Employee Type: Salaried Standard Hours: 40.00

Compensation Rate: \$15,316.666666 Frequency:

Default Job Data

New Additional Pay Find | View All First 1 of 1 Last

*Earnings Code: **ACR** Additional Comp-Research

Effective Date Find | View All First 2 of 3 Last

*Effective Date: **07/01/2019**

Payment Details Find | View All First 1 of 1 Last

Addl Seq #: 1

End Date: **08/31/2019** Reason: **New Additional Pay**

Pay Period Amt: **\$20,422.22**

Goal Amount: Goal Balance:

Prorate Additional Pay

Applies To Pay Periods

First Second Third

Job Information

Employee Type: Salaried Standard Hours: 40.00

Compensation Rate: \$15,316.666666 Frequency:

Default Job Data

New Additional Pay Find | View All First 1 of 1 Last

*Earnings Code: **ACR** Additional Comp-Research

Effective Date Find | View All First 1 of 3 Last

*Effective Date: **09/01/2019**

Payment Details Find | View All First 1 of 1 Last

Addl Seq #: 1

End Date: **09/30/2019** Reason: **New Additional Pay**

Pay Period Amt: **\$10,211.11**

Goal Amount: Goal Balance:

Prorate Additional Pay

Applies To Pay Periods

First Second Third

Job Information

Employee Type: Salaried Standard Hours: 40.00

Compensation Rate: \$15,316.666666 Frequency:

Screenshot of 1/9 Administrative Summer Compensation for a Department Chair:

New Additional Pay Find | View All First 1 of 1 Last

*Earnings Code: **DIF** Summer Differential

Effective Date Find | View All First 1 of 1 Last

*Effective Date: **07/01/2019**

Payment Details Find | View All First 1 of 1 Last

Addl Seq #: 1

End Date: **07/31/2019** Reason: **New Additional Pay**

Pay Period Amt: **\$15,255.56**

Goal Amount: Goal Balance:

Prorate Additional Pay

Applies To Pay Periods

First Second Third

Job Information

Employee Type: Salaried Standard Hours: 0.01

Compensation Rate: Frequency:

Default Job Data

Position: **DEPARTMENT CHAIR**

2. Additional Compensation for AY employees, when payroll certification is required

Summer compensation should be established on an additional job under the following conditions:

- When payroll certification *is* required
- The Summer appointment is the only job and wages must be reported for ACA purposes

Step-by-Step Guidelines and Notes:

1. Process a concurrent academic hire into the appropriate position
 - a. Use AY-1/9 Researcher job code when payroll certification is required
 - b. The Position should be established with an FTE of 1.0 and have the “Include FTE” box **unchecked**. This will allow the FTE on the job to be adjusted.

| Primary Job Title | Professorial Job Code | Corresponding Researcher Job Code |
|---|-----------------------|-----------------------------------|
| Professor – AY | 001100 | 003205 |
| Associate Professor – AY | 001200 | 003215 |
| Assistant Professor – AY | 001300 | 003225 |
| Professor – AY – B/E/E | 001143 | 001982 |
| Associate Professor – AY – B/E/E | 001243 | 001984 |
| Assistant Professor – AY – B/E/E | 001343 | 001986 |

2. Effective date should be the first month in which summer salary is requested (06/01/19, 07/01/19, 08/01/19 or 09/01/19)
3. On the Job Data tab, enter the position number; most of the fields will be automatically populated
4. FTE should correspond to the FTE requested for the first month of summer salary (for 2019, June has a max of 0.5263; July and August have a max of 1.0; and September has a max of 0.7368)
 - a. If FTE does not correspond, it will need to be adjusted in PayPath after the concurrent hire is approved
 - a. Maximum FTE per position is 1.0; if July and August will exceed 1.0, an additional concurrent hire into another Researcher position will be required for the additional percentage
5. Academic Duration of Appt = End Date (Academic Term Appts)
6. Enter the correct step to generate the UCANNL
7. Add the UCOFF1 to match the professorial salary, if applicable
 - a. If participating in NSTP, be sure to add the UCGCYN rate as well
8. Compensation Frequency = UC_9M
9. Expected Job End date should be the end of the last month of summer salary (06/30/19, 07/31/19, 08/31/19 or 09/30/19)
10. Check “End Job Automatically” box
 - a. If this is not done, you will need to go back and end the job at the end of summer employment else the employee will continue to be paid on this job until it has been terminated
11. On the Earnings Dist tab, Enter Job Earnings Distribution
 - a. without NSTP:
 - i. Earnings Distribution Type = By Percent
 - ii. Aggregate Comp Rate is automatically populated based on FTE
 - iii. Earnings Code = ACR

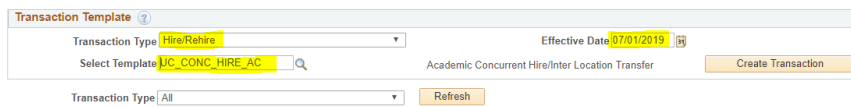
- iv. Percent of Distribution = 100
- b. With NSTP:
 - i. Earnings Distribution Type = By Percent
 - ii. Aggregate Comp Rate is automatically populated based on FTE
 - iii. Earnings Code = ACR
 - iv. Percent of Distribution = 100
- 12. Click on Addl Pay tab
 - a. Enter Initiator Comments
 - b. Click Save and Submit

Screenshots of Summer Compensation on Additional Job:

- *Processing a concurrent hire for a request for summer salary from July 1 – September 30:*

Smart HR Transactions

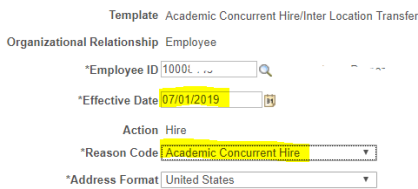
Select a template and press Create Transaction.



Smart HR Transactions

Enter Transaction Details

The following transaction details are required.



- Adding Position Number for the concurrent job and filling in or updating open fields, no NSTP

Smart HR Transactions

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_CONC_HIRE_AC Name:
 Effective Date: 07/01/2019 Action/Action Reason: HIR/CN1 (Academic Concurrent Hire)
 Employee ID: 1000 Employee Record:

Personal Data Job Data Earns Dist Addl Pay

| Employee Information | | | |
|--|---|----------------------------|---|
| Work Location - Position Data | | | |
| *Position Number <input type="text" value="40025791"/> | | | |
| Work Location - Job Fields | | | |
| Business Unit | <input type="text" value="RVCMP"/> | Department | <input type="text" value="D01055"/> |
| Location Code | <input type="text" value="P6508"/> | Establishment ID | <input type="text" value="UCR"/> |
| Job Information - Job Code | | | |
| Job Code <input type="text" value="003205"/> | | | |
| Job Information - United States | | | |
| FLSA Status <input type="text" value="Exempt"/> | | | |
| Job Labor - Union Code | | | |
| Union Code <input type="text" value="FX"/> | | | |
| Job Information - Reporting Information | | | |
| Reports To Position Number <input type="text" value="40007701"/> | | | |
| Job Information - Employee Classification | | | |
| Employee Classification | <input type="text" value="10"/> | Classified/Unclassified | <input type="text" value="Academic Ind"/> |
| Job Information - Standard Hours | | | |
| Standard Hours | <input type="text" value="40.000000"/> | FTE | <input type="text" value="1.000000"/> |
| UC Job Data | | | |
| Academic Duration of Appt | <input type="text" value="End Date (Academic Term)"/> | Location Use End Date | <input type="text"/> |
| Location Use Type | <input type="text"/> | Post Docs Anniversary Date | <input type="text"/> |
| Job - Salary Plan | | | |
| Salary Administration Plan | <input type="text" value="T012"/> | Salary Grade | <input type="text" value="1"/> |
| Step | <input type="text" value="9"/> | | |
| Job Compensation - Pay Components | | | |
| Comp Rate Code | Compensation Rate | Compensation Frequency | Rate Code Source |
| 1 UCANNL | 167200.000000 | A | Salary Step |
| 2 UCOFF1 | 16600.000000 | A | Manual |
| Job Compensation - Payroll Currency and Frequency | | | |
| *Compensation Frequency <input type="text" value="UC_9M"/> | | | |
| Work Location - Expected Job End Date | | | |
| Expected Job End Date <input type="text" value="09/30/2019"/> | | | <input checked="" type="checkbox"/> End Job Automatically |

component:

[Return to Enter Transaction Details Page](#)

- Adding Position Number for the concurrent job and filling in or updating open fields, including NSTP component:

Template: UC_CONC_HIRE_AC Name: [Redacted]
 Effective Date: 07/01/2019 Action/Action Reason: HIR/CN1 (Academic Concurrent Hire)
 Employee ID: 100L Employee Record:

Employee Information

Work Location - Position Data

*Position Number

Work Location - Job Fields

Business Unit Department
 Location Code Establishment ID

Job Information - Job Code

Job Code

Job Information - United States

FLSA Status

Job Labor - Union Code

Union Code

Job Information - Reporting Information

Reports To Position Number

Job Information - Employee Classification

Employee Classification Classified/Unclassified

Job Information - Standard Hours

Standard Hours FTE

UC Job Data

Academic Duration of Appt Location Use End Date

Location Use Type Post Docs Anniversary Date

Job - Salary Plan

Salary Administration Plan Salary Grade
 Step

Job Compensation - Pay Components Personalize | Find | View All | First | 1-3 of 3 | Last

| Comp Rate Code | Compensation Rate | Compensation Frequency | Rate Code Source |
|----------------|-------------------|------------------------|------------------|
| 1 UCANNL | 167200.000000 | A | Salary Step |
| 2 UCOFF1 | 16600.000000 | A | Manual |
| 3 UCGCYN | 55100.000000 | A | Manual |

Job Compensation - Payroll Currency and Frequency

*Compensation Frequency

Work Location - Expected Job End Date

Expected Job End Date End Job Automatically

- Updating Job Earnings Distribution (JED) on Earnings Distribution tab:
 - o Percent of Distribution must always equal 100%, even for partial ninths.

Smart HR Transactions

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_CONC_HIRE_AC Name: ...
 Effective Date: 07/01/2019 Action/Action Reason: HIR/CN1 (Academic Concurrent Hire)
 Employee ID: 1000... Employee Record:

Personal Data Job Data **Earns Dist** Addl Pay

Employee Information

Job Earnings Distribution Type

Earnings Distribution Type: **By Percent** Aggregate Comp Rate: **20422.220000**

Job Earnings Distribution Personalize | Find | View All | First 1 of 1 Last

| Earnings Code | Compensation Rate | Percent of Distribution |
|---------------|-------------------|-------------------------|
| 1 ACR | | 100.000000 + - |

[Return to Enter Transaction Details Page](#)

Save and Submit Save for Later Cancel [Supporting documents](#)

- To submit the transaction, click *Addl Pay* tab, add comments then click “Save and Submit”:

Smart HR Transactions

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_CONC_HIRE_AC Name: [Employee Name]
 Effective Date: 07/01/2019 Action/Action Reason: HIR/CN1 (Academic Concurrent Hire)
 Employee ID: 1000000000 Employee Record:

Personal Data | Job Data | Earns Dist | **Addl Pay**

| Employee Information | | | | | | |
|----------------------|---------------|---------------------------|-------------------|------------------|-----|--|
| Additional Pay | | | | | | |
| Effective Date | Earnings Code | Reason for Additional Pay | Earnings End Date | Add'l Pay Amount | Hou | |
| 1 | | Not Specified | | 0 | | |

[Return to Enter Transaction Details Page](#)

Save and Submit | Save for Later | Cancel | [Supporting documents](#)

Transaction ID: NEW
Initiator Comments: 1/9 Summer Salary for July and August

If the employee will not be receiving the same percentage as the first month or is requesting additional months beyond the end date, you will need to make the change for the other months in PayPath:

1. Enter either the EE’s name or ID
2. Be sure to select the correct job – Researcher 1/9
3. To extend the end date, if applicable, on the Job Data Tab
 - a. Enter the effective date
 - b. Action = DTA (Data Change)
 - c. Action Reason = EXT (Add/Extend Appointment)
 - d. Update Appointment End Date
 - e. Be sure “End Job Automatically” box is checked
 - f. Enter Job Data Comments (copy the comments to enter later)
4. On the Additional Pay Data tab
 - a. Paste comments from previous screen in the Initiator’s Comments box
 - b. Click Save and Submit

Once this has been approved by AWE, you can make the other necessary changes

5. Enter either the EE’s name or ID
6. Be sure to select the correct job – Researcher 1/9
7. On the Position Data tab
 - a. Enter the effective date (07/01/19, 08/01/19 or 09/01/19)
 - b. Position Change Reason = TIT (Temporary Increase in Time) OR TRT (Temporary Reduction in Time)
 - c. Update FTE to correspond with the summer compensation requested

8. On the Job Data tab
 - a. The effective date flows through from the change on Position
 - b. The Comp Rate in the Earnings Distribution should now reflect the new rate which is still assigned to ACR with 100% distribution
 - c. Enter Job Data Comments: i.e. 100% Summer Salary for July and August (copy the comments to enter later)
9. On the Additional Pay tab,
 - a. Paste the comments from the previous screen in the Initiator's Comments box
 - b. Click Save and Submit

Screenshot of Job Data tab before increase to FTE:

| | |
|----------------------------------|--|
| Salary Grade: 3 | Step: 5 |
| FTE: 0.780000 | Employee Class: 10 Academic: Non Faculty |
| Appointment End Date: 09/30/2019 | End Job Automatically: <input checked="" type="checkbox"/> |

Earnings Distribution Type: By Percent Comp Rate: 8,164.000000 Standard Hours: 31.20 Pay Frequency: UC_9M UC 1/9th Rate

| Pay Components | | | Personalize Find | First | 1-2 of 2 | Last |
|----------------|---------------|------------------------|--------------------|-------|----------|------|
| Rate Code | Comp Rate | Compensation Frequency | | | | |
| 1 UCANNL | 78,000.000000 | Annual | | | | + |
| 2 UCOFF1 | 16,200.000000 | Annual | | | | + - |

| Earnings Distribution | | | Personalize Find | First | 1 of 1 | Last |
|-----------------------|--------------|----------------|--------------------|-------|--------|------|
| Earnings Code | Comp Rate | Distribution % | | | | |
| 1 ACR | 8,164.000000 | 100.000 | | | | |

Screenshot of Job Data tab after increase to FTE:

| | |
|----------------------------------|--|
| Salary Grade: 3 | Step: 5 |
| FTE: 1.000000 | Employee Class: 10 Academic: Non Faculty |
| Appointment End Date: 09/30/2019 | End Job Automatically: <input checked="" type="checkbox"/> |

Earnings Distribution Type: By Percent Comp Rate: 10,466.666667 Standard Hours: 40.00 Pay Frequency: UC_9M UC 1/9th Rate

| Pay Components | | | Personalize Find | First | 1-2 of 2 | Last |
|----------------|---------------|------------------------|--------------------|-------|----------|------|
| Rate Code | Comp Rate | Compensation Frequency | | | | |
| 1 UCANNL | 78,000.000000 | Annual | | | | + |
| 2 UCOFF1 | 16,200.000000 | Annual | | | | + - |

| Earnings Distribution | | | Personalize Find | First | 1 of 1 | Last |
|-----------------------|---------------|----------------|--------------------|-------|--------|------|
| Earnings Code | Comp Rate | Distribution % | | | | |
| 1 ACR | 10,466.666667 | 100.000 | | | | |

3. Additional Compensation on a New or Concurrent Job

Summer compensation should be paid as additional compensation on a new or concurrent job under the following conditions:

- If an MOU requires a specific title for the summer teaching appointment
- It is the employee's only job not subject to ACA reporting

Step-by-Step Guidelines and Notes:

1. Process a concurrent academic hire into the appropriate position under job codes 001550 (Lecturer), 001501 (Associate_In), 002310 (Teaching Assistant), or the appropriate level of the Visiting Professor series job codes
2. No base compensation should be established on the new or concurrent job; do not use UCWOS
3. Recurring additional compensation can be established through a subsequent Additional Compensation transaction once the onboarding transaction has been finalized by UCPC.
 - a. Even if the employee will be paid for only one month, enter it as recurring additional pay (that is paid out one time)
4. Follow the same instructions as listed on page 1 of this document