

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 Shared Service Centers (SSC) must process summer salary transactions for Faculty's 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"> <li>- ACA (admin)</li> <li>- ACR (research)</li> <li>- ACS (Summer-403) – used by Professorial or other primary job code</li> <li>- ASN (Summer-No 403) – used by Lecturer, Associate_In, TA and Visiting Professor series</li> <li>- DIF (admin) – used for part-time admin appts. and dept. chair appts.</li> </ul>	Select Earnings Code: <ul style="list-style-type: none"> <li>- ACA (admin)</li> <li>- ACR (research)</li> <li>- ACS (Summer-403) – used by Professorial or other primary job code</li> <li>- ASN (Summer-No 403) – used by Lecturer, Associate_In, TA and Visiting Professor series</li> <li>- DIF (admin) – used for part-time admin appts. and dept. chair appts.</li> </ul>
5.	Effective Date (always 1 <sup>st</sup> of month) <ul style="list-style-type: none"> <li>- If July and August will be 100%, this can be entered in single line (07/01/19 – 08/31/19)</li> </ul>	Effective Date (always 1 <sup>st</sup> of month) <ul style="list-style-type: none"> <li>- If July and August will be 100%, this can be entered in single line (07/01/19 – 08/31/19)</li> </ul>
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: <b>LEAVE BLANK</b>	Goal Amount: <b>LEAVE BLANK</b>
10.	<b>Uncheck</b> "Prorate Additional Pay"	<b>Uncheck</b> "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

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**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

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**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:  Additional Comp-Research

**Effective Date** Find | View All First 1 of 3 Last

\*Effective Date:

**Payment Details** Find | View All First 1 of 1 Last

Addl Seq #: 1

End Date:  Reason:

Pay Period Amt:

Goal Amount:  Goal Balance:

Prorate Additional Pay

**Applies To Pay Periods**

First  Second  Third

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**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:  Summer Differential

**Effective Date** Find | View All First 1 of 1 Last

\*Effective Date:

**Payment Details** Find | View All First 1 of 1 Last

Addl Seq #: 1

End Date:  Reason:

Pay Period Amt:

Goal Amount:  Goal Balance:

Prorate Additional Pay

**Applies To Pay Periods**

First  Second  Third

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**Job Information**

Employee Type: Salaried Standard Hours: 0.01

Compensation Rate:  Frequency:

**Default Job Data**

Position:

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
Lect SOE-AY	001607	001608
SR Lect SOE-AY	001603	001604
Lect PSOE-AY	001680	001681

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

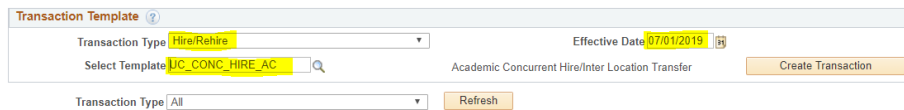
- a. Enter Initiator Comments
- b. Click Save and Submit

*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.

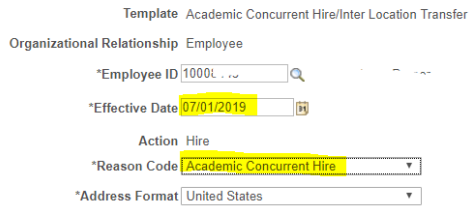


The screenshot shows a web interface for creating HR transactions. At the top, there is a 'Transaction Template' dropdown menu with a question mark icon. Below it, the 'Transaction Type' is set to 'Hire/Rehire'. To the right, the 'Effective Date' is set to '07/01/2019'. Below these, there is a 'Select Template' dropdown menu with 'UC\_CONC\_HIRE\_AC' selected. To the right of this dropdown, the text 'Academic Concurrent Hire/Inter Location Transfer' is displayed. A 'Create Transaction' button is located to the right of the template dropdown. At the bottom, there is another 'Transaction Type' dropdown menu set to 'All' and a 'Refresh' button.

Smart HR Transactions

Enter Transaction Details

The following transaction details are required.



The screenshot shows the 'Enter Transaction Details' form. At the top, the 'Template' is 'Academic Concurrent Hire/Inter Location Transfer'. Below this, the 'Organizational Relationship' is 'Employee'. The '\*Employee ID' field contains '1000'. The '\*Effective Date' field contains '07/01/2019'. The 'Action' is 'Hire'. The '\*Reason Code' dropdown menu is set to 'Academic Concurrent Hire'. The '\*Address Format' dropdown menu is set to 'United States'.

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

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			
<b>Work Location - Position Data</b>			
*Position Number <input type="text" value="40025791"/>			
<b>Work Location - Job Fields</b>			
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"/>
<b>Job Information - Job Code</b>			
Job Code <input type="text" value="003205"/>			
<b>Job Information - United States</b>			
FLSA Status <input type="text" value="Exempt"/>			
<b>Job Labor - Union Code</b>			
Union Code <input type="text" value="FX"/>			
<b>Job Information - Reporting Information</b>			
Reports To Position Number <input type="text" value="40007701"/>			
<b>Job Information - Employee Classification</b>			
Employee Classification	<input type="text" value="10"/>	Classified/Unclassified	<input type="text" value="Academic Ind"/>
<b>Job Information - Standard Hours</b>			
Standard Hours	<input type="text" value="40.000000"/>	FTE	<input type="text" value="1.000000"/>
<b>UC Job Data</b>			
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"/>
<b>Job - Salary Plan</b>			
Salary Administration Plan	<input type="text" value="T012"/>	Salary Grade	<input type="text" value="1"/>
Step	<input type="text" value="9"/>		
<b>Job Compensation - Pay Components</b>			
Personalize   Find   View All   First   1-2 of 2   Last			
Comp Rate Code	Compensation Rate	Compensation Frequency	Rate Code Source
1 UCANNL	167200.000000	A	Salary Step
2 UCOFF1	16600.000000	A	Manual
<b>Job Compensation - Payroll Currency and Frequency</b>			
*Compensation Frequency <input type="text" value="UC_9M"/>			
<b>Work Location - Expected Job End Date</b>			
Expected Job End Date <input type="text" value="09/30/2019"/>			<input checked="" type="checkbox"/> End Job Automatically

[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:   
 Effective Date: 07/01/2019      Action/Action Reason: HIR/CN1 (Academic Concurrent Hire)   
 Employee ID: 1001      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	<input type="text" value="UCANNL"/>	<input type="text" value="167200.000000"/>	<input type="text" value="A"/>	Salary Step	<input type="button" value="+"/>	<input type="button" value="-"/>
2	<input type="text" value="UCOFF1"/>	<input type="text" value="16600.000000"/>	<input type="text" value="A"/>	Manual	<input type="button" value="+"/>	<input type="button" value="-"/>
3	<input type="text" value="UCGCYN"/>	<input type="text" value="55100.000000"/>	<input type="text" value="A"/>	Manual	<input type="button" value="+"/>	<input type="button" value="-"/>

**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: ...  
 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**

**Additional Pay**      Personalize | Find | View All | First 1 of 1 Last

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
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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	Additional Comp-Research 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
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Pay Components			Personalize   Find   [Print]   [Refresh]	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   [Print]   [Refresh]	First	1 of 1	Last
Earnings Code	Comp Rate	Distribution %				
1 ACR	10,466.666667	100.000				

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### 3. Additional Compensation on a New or Concurrent Job

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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