Summer Sessions Job Aid

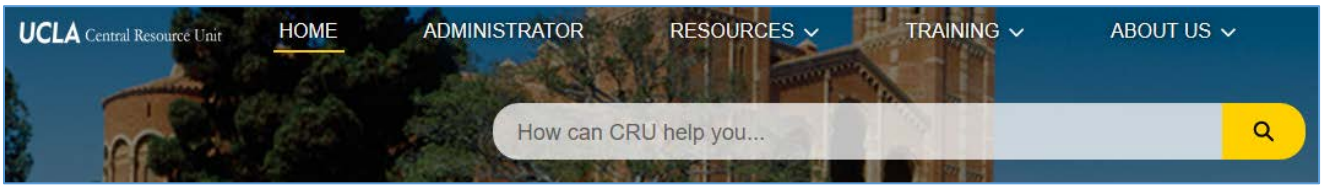
This job aid has been assembled based on other UCPath job aids for functions that you are likely to use in the Summer Sessions hiring and payment process.

We've done our best to ensure the instructions in this job aid are accurate, but you may encounter instructions that are unclear or that you think are inaccurate. This is a work in progress. So we encourage you to contact us if you have any suggestions for improvement of the job aid. Please send comments to Alma Zavala, azavala@summer.ucla.edu.

This job aid is divided into five sections:

- Create or Update a Summer Sessions Position
- New Position Funding
- Hiring
- Additional Pay
- Manage Accruals for BYH Entries
  Please discontinue using Manage Accruals to process Summer Sessions BYH entries. A new method is in the works!

Navigate to the UCLA Central Resource Unit (CRU) Web site to find detailed information



CRU Web site home page

Click on **Training**, **UCLA JOB AIDS** for help

- Position Management
- General Ledger/Funding
- Template Transactions including Hiring
- Compensation
- Manage Accruals job aid

Document History

- May 30, 2019 – Created
- June 3, 2019 – Reformatted document for clarity and improved navigation.
- June 21, 2019 – Funding: There is no cost center in a Summer Sessions FAU. Added Additional Pay instructions to Hiring.
- June 24, 2019—Additional Pay: added wording suggesting that Additional Pay be processed during a hire using the Addl Pay tab so it can be set up in advance.
- July 30, 2019—Additional Pay: corrected wording for Effective Date. Manage Accruals: added that 24 hours is the maximum per line.
- July 31, 2019—Expanded Manage Accruals instructions regarding when they should be processed.
- August 5, 2019—Updated link to Managing Accruals job aid. Updated effective dates and end dates wordings in Additional Pay.
- August 12, 2019—Discontinue using Manage Accruals until the new method is worked out.
- August 16, 2019—Added a warning in Additional Pay that data can vanish unpredictably if entered during the hiring process. Check to be sure the data is there after the transaction is approved.

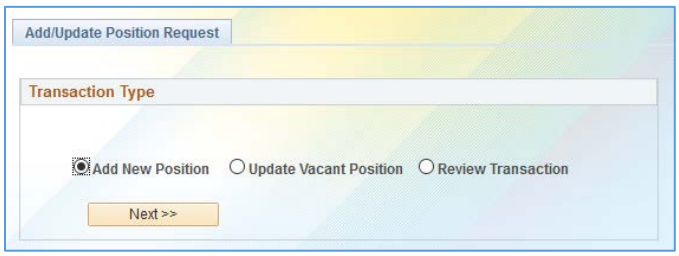
Go to top

Create or Update a Summer Sessions Position

A separate Summer Sessions position should normally be created, even for instructors with similar titles, because unlike the regular year, a Summer Sessions position's **Salary Admin Plan** code is **BYA**, and because funding is tied to Summer Sessions FAUs.

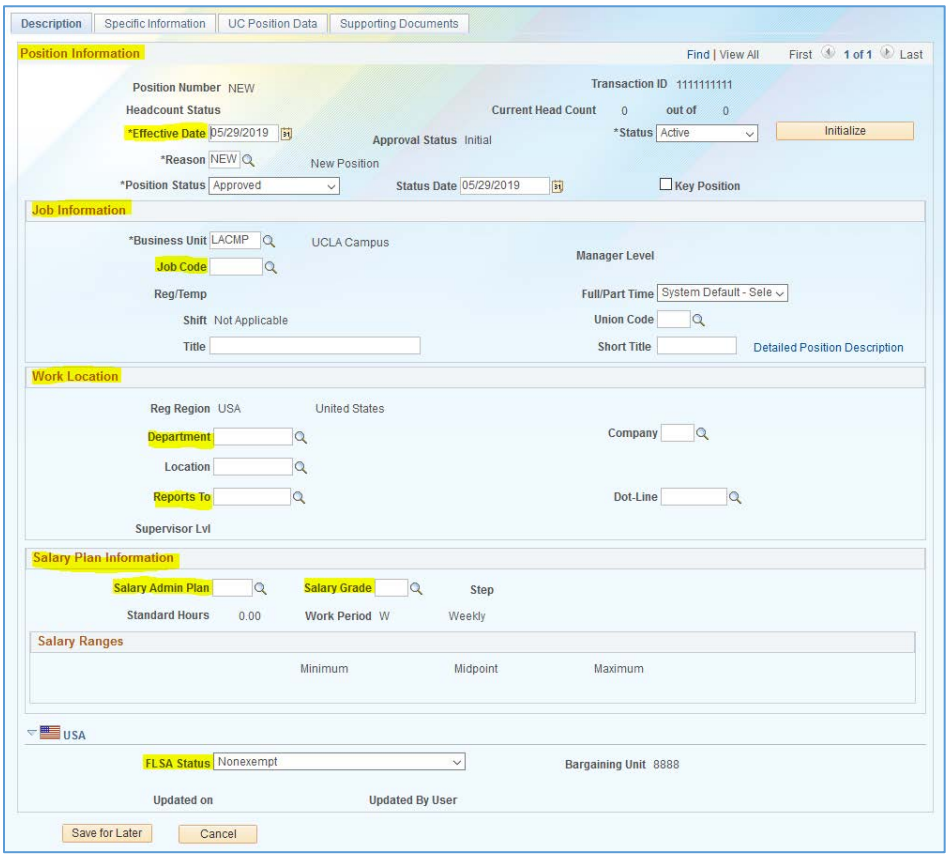
New Position

Navigation > PeopleSoft Menu > UC Customizations > UC Extensions > **Position Control Request**



Add/Update Position Request screenshot

1. Click ***Add New Position*** and press the ***Next>>*** button.



Position Description screenshot

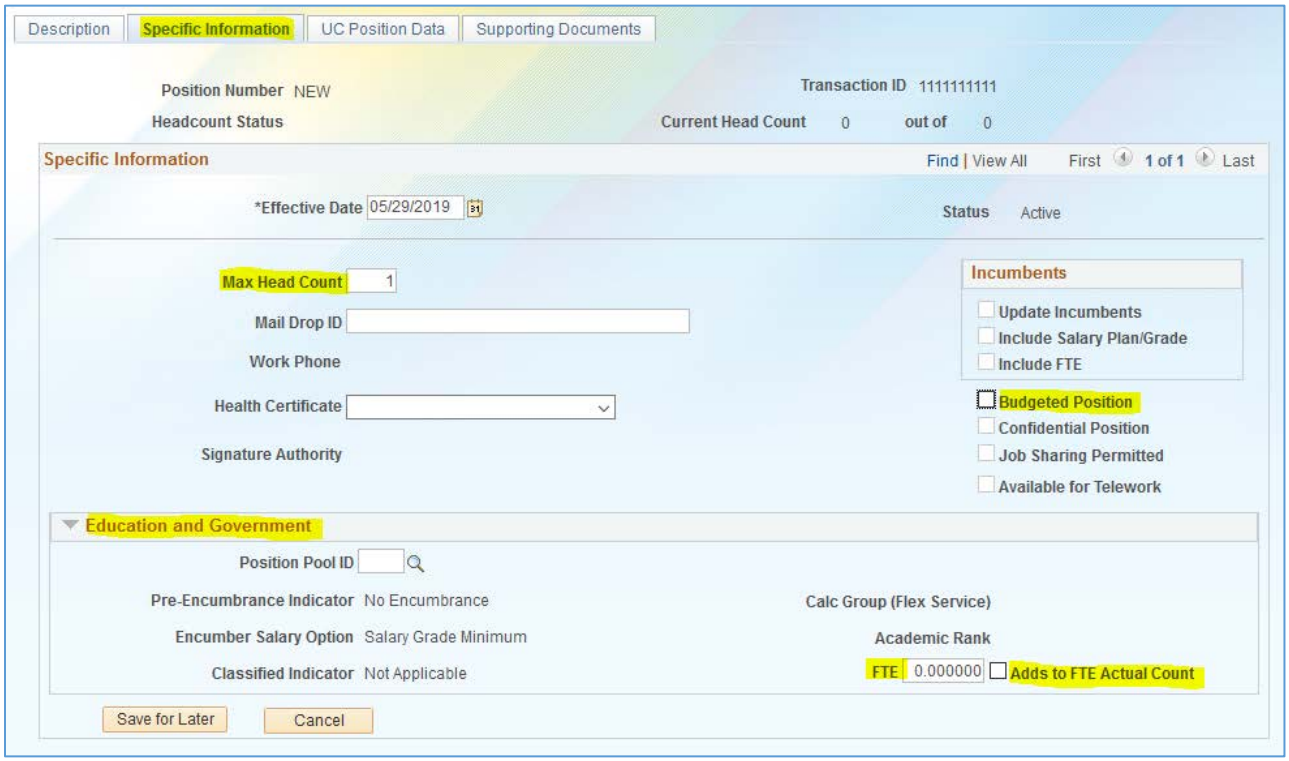
2. Under the **Description** tab, enter the **Position Information***,* **Job Information***,* **Work Location**, **Salary Plan Information,** and **FLSA Status** sections.

   - **Position Information**: The **Effective Date** should be before the Summer Sessions start date to ensure the position is available for the summer
   - **Job Information**: Select the appropriate **Job Code**
     - For any **Unit 18** title and for people with no academic appointment, use **001550 Lecturer in Summer Sessions**
     - Most other academic **Job Codes** will be the same as in the regular year, like 001100 Professor, 001108 Visiting Professor, 001200 Associate Professor, 001208 Visiting Associate Professor, 001300 Assistant Professor, 001308 Visiting Assistant Professor
     - Here are the job codes for TAs, and the job code for all lecturers:

Job Code	**Title**
Teaching Assistants	
002310	Teaching Assistant
001506	Teaching Associate
002300	Teaching Fellow
Lecturers	
001550	Lecturer in Summer Sessions

   - **Work Location**: Enter the **Department** code, which will populate the **Location** code, and enter the **Reports To** position number.
   - **Salary Plan Information**: select **BYA** for **Salary Admin Plan** (this BYA is not an Earn Code). Leave **Salary Grade** blank.
   - **FLSA Status** is **Exempt** for these positions
     - Be sure that all other elements of the employee's record have a matching ***Exempt*** **FLSA Status** and a ***Monthly*** **Pay Frequency.**
     - If the employee holds a Non-Exempt or Biweekly position, consult the Academic Personnel Office or Graduate Division to resolve the discrepancy.

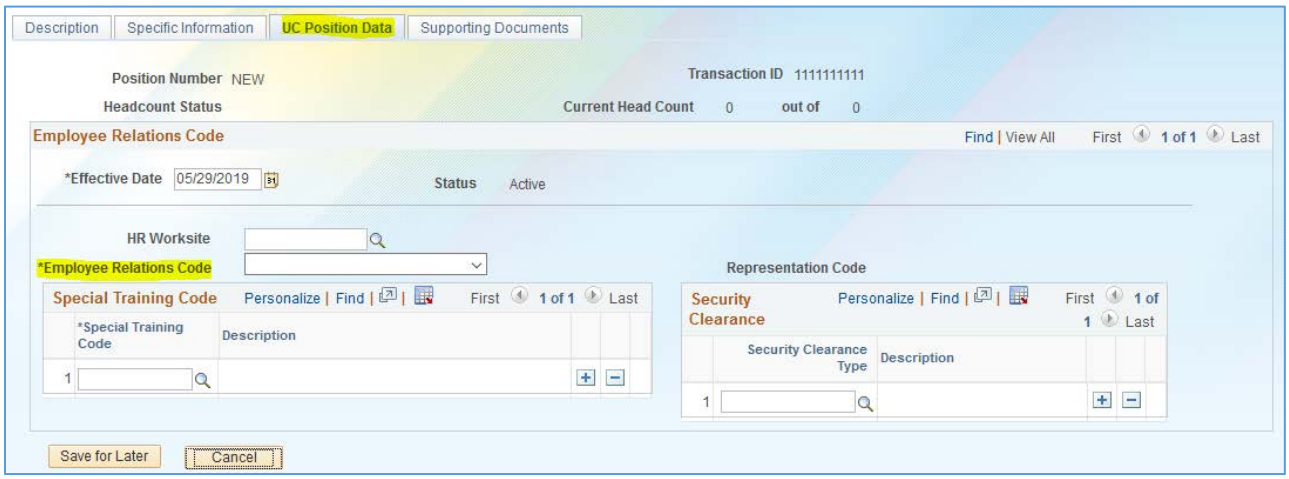
3. Next, click the ***Specific Information*** tab



Specific Information tab screenshot

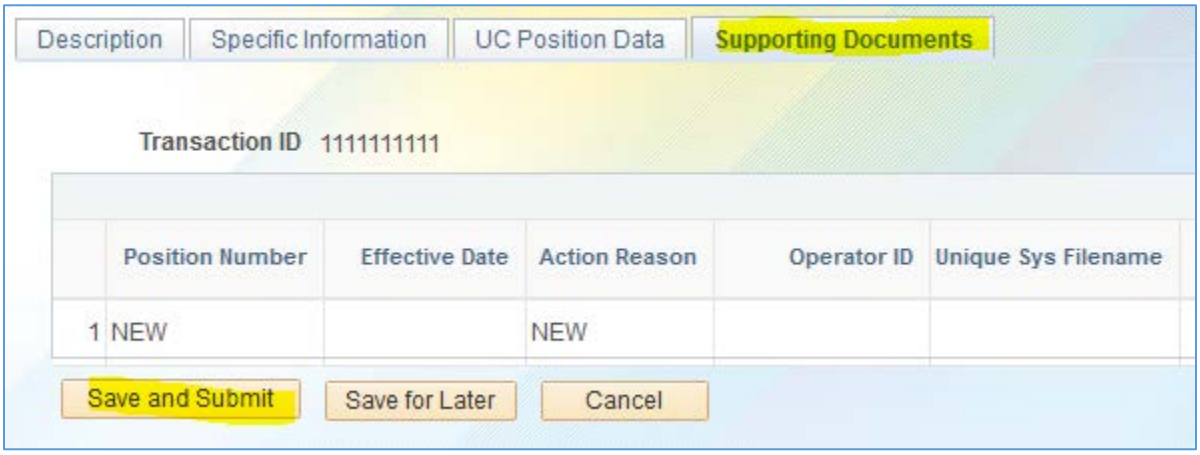
- Verify that the max head count is "1."
- Summer Sessions positions are not budgeted, so be sure the **Budgeted Position** box is unchecked.
- Add the **FTE** in the **Education and Government** section
  - Do not check **Adds to FTE Actual Count**
  - FTE will not affect the payment because the payment will be made via the *Recurring Additional Pay* process.

4. Click the **UC Position Data** tab and enter the appropriate **Employee Relations Code**.



UC Position Data tab screenshot

5. When you are finished entering position details, click the **Supporting Documents** tab and press the ***Save and Submit*** button.



Supporting Documents tab screenshot

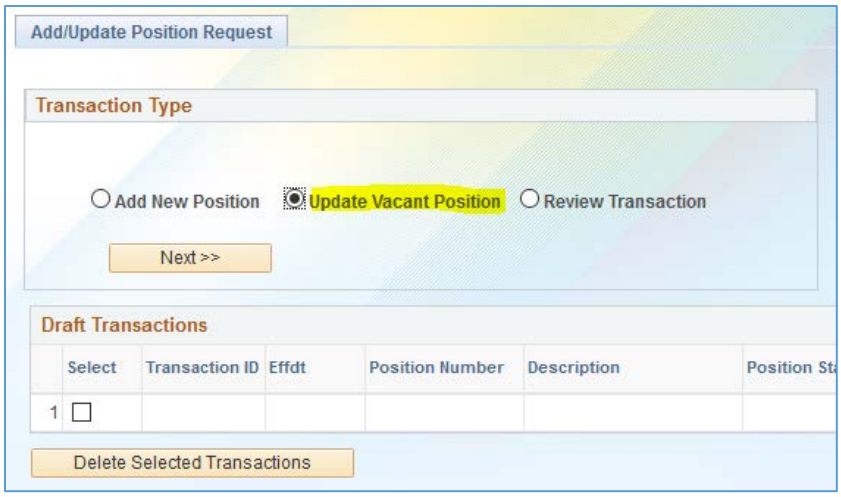
6. The transaction has been submitted for approval. The position number is assigned after approval.

Update an Existing Summer Sessions Position

If there are vacant positions from previous Summer Sessions appointments, they can be reused. Navigate to **Position Control** and **Update Vacant Position** to change the data in the vacant positions as necessary.

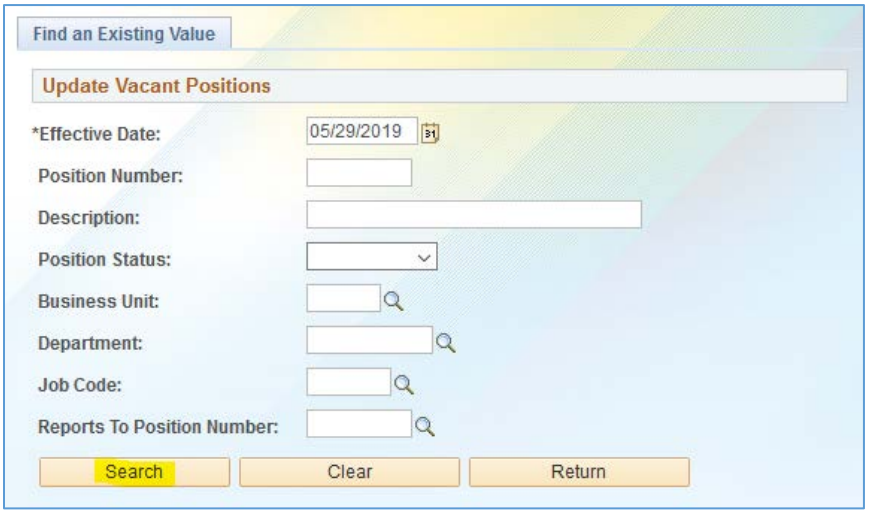
Navigation > PeopleSoft Menu > UC Customizations > UC Extensions > **Position Control Request**

1. Select ***Update Vacant Position*** and click ***Next>>***



Add/Update Position Request screenshot

2. Enter the position and click ***Search:***



Search for an existing position screenshot

3. Update the information in the various tabs as necessary, as described above: **Description, Specific Information, UC Position Data, Supporting Documents**

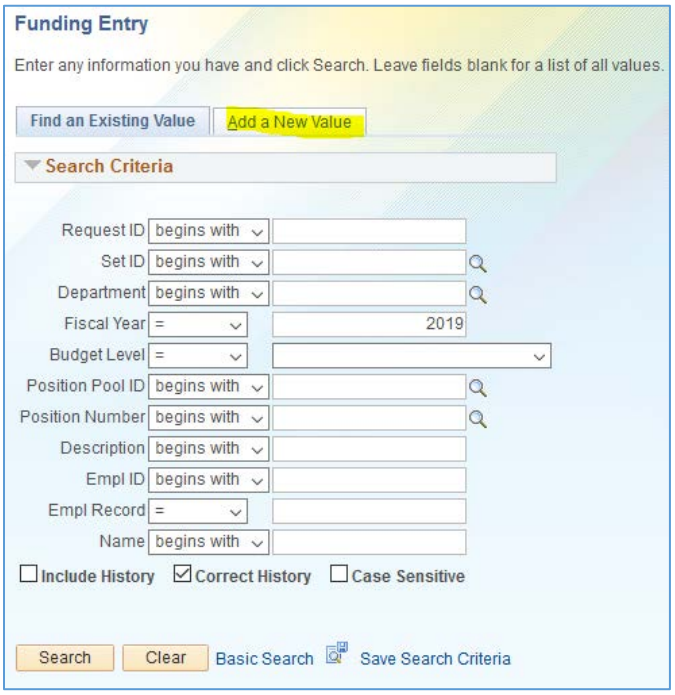
Go to top

New Position Funding

Also see the funding job aid on the Central Resource Unit Web site.

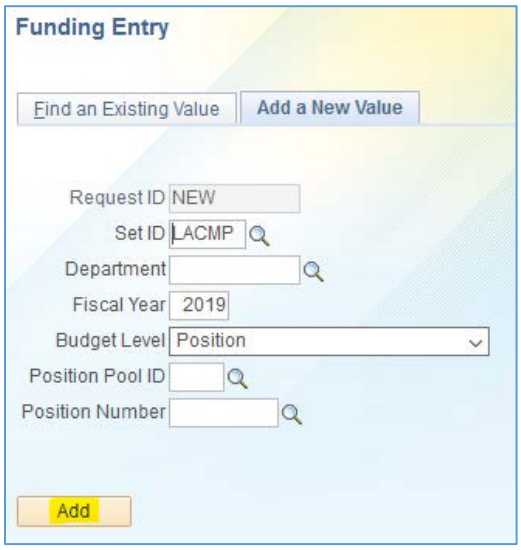
Navigation > PeopleSoft Menu > Set Up HCM > Product Related > Commitment Accounting > UC Customizations > **Funding Entry**

1. Click ***Add a New Value***



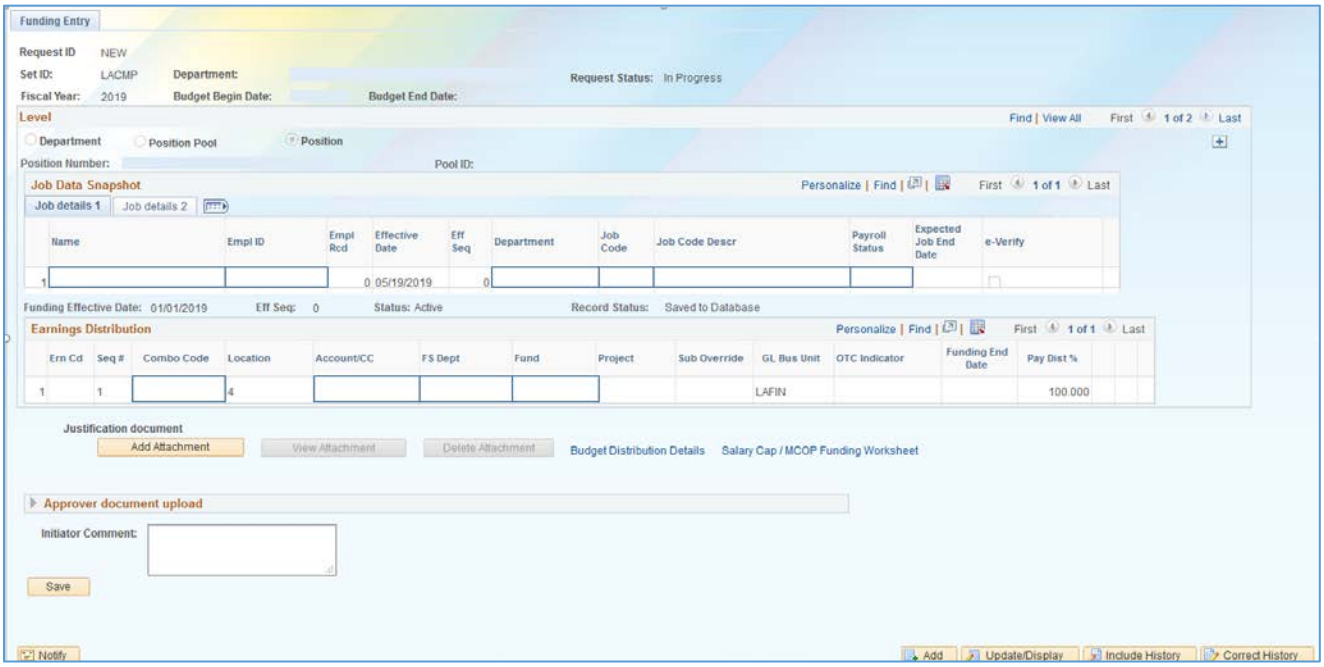
Funding Entry landing page screenshot

2. Find the position and click ***Add***

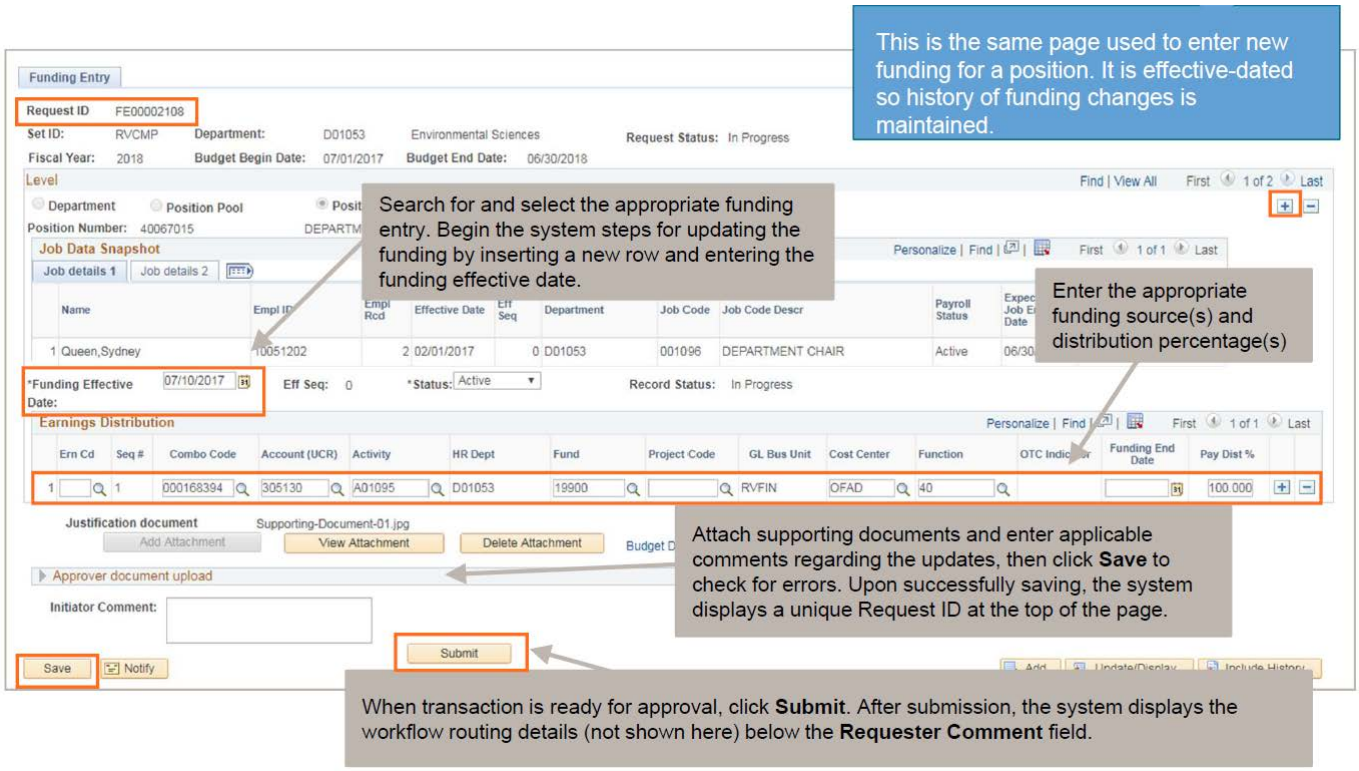


Funding Entry Add a New Value search page

3. This screen appears:



Blank Funding Entry screenshot



Position Funding from course presentation

Account number:
When entering the **FAU/Chart String**, use the Summer Sessions 409*xxx* account number assigned to your department. There is no cost center.

Fund:

- The fund in even-numbered calendar years is 20290; in odd-numbered years, 20291.
- Travel Study Programs use funds 20298 and 20299.
- Institutes use funds 20288 and 20289.

Sub:
Summer Sessions uses different subs for different populations, just to classify expenses better.

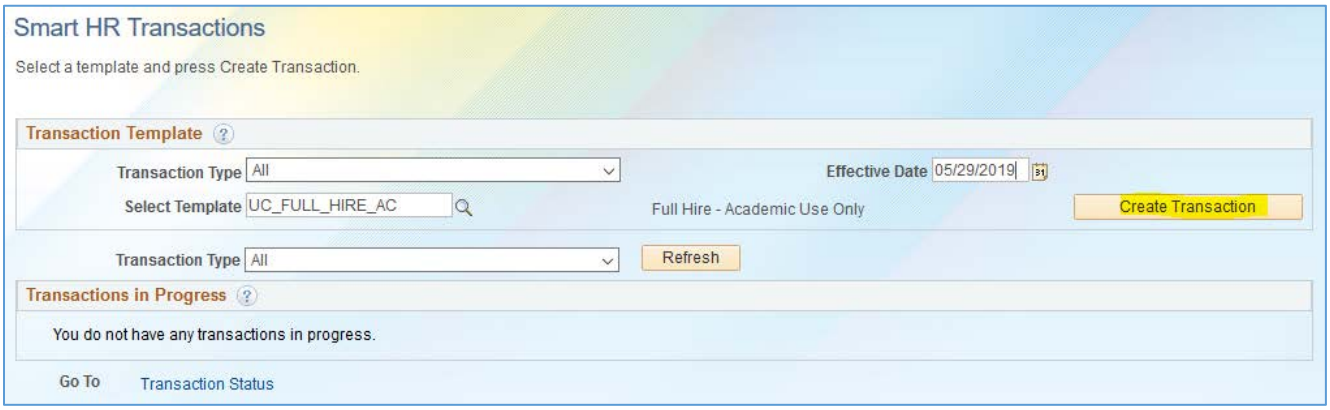
- Use sub 2 for TAs
- Use sub 5 for hourly hires, like readers or lab assistants
- Use sub 7 for faculty and lecturers

Go to top

Hiring

Hires are processed the same in Summer Sessions as in the regular year, using a **Smart HR Template**.

Navigation > PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**



Smart HR Transactions screenshot

1. Select the template, enter an **Effective Date**, and click **Create Transaction**
   - Here are the available templates:

Available Templates

Template	Description
UC_ADD_CWR	Add Contingent Worker - No Position Data
UC_ADD_CWR_POSN	Add Contingent Worker With Position
UC_COM_CWR	Complete Contingent Worker Instance
UC_CONC_HIRE	Staff Concurrent Hire/Inter Location Transfer
UC_CONC_HIRE_AC	Academic Concurrent Hire/Inter Location Transfer
UC_EXT_CWR	Extend CWR Appointment
UC_EXT_CWR_POSN	Extend CWR (with Position) Appointment
UC_FULL_HIRE	Full Hire - Staff Only
UC_FULL_HIRE_AC	Full Hire - Academic Use Only
UC_INVOL_TERM	Involuntary Termination
UC_PERSON_DATA	UC Personal Data
UC_REHIRE	UC Rehire - All Employees
UC_REHIRE_AC	Rehire - Academic
UC_RENW_CWR	Renew Contingent Worker - Without Position
UC_RENW_CWR_POS	Renew CWR Instance - with Position
UC_RETIREMENT	Retirement
UC_TRANSFER	Intra-Business Unit Transfer - Staff Only
UC_TRANSFER_AC	Intra-Business Unit Transfer - Academic Only
UC_VOL_TERM	Voluntary Termination

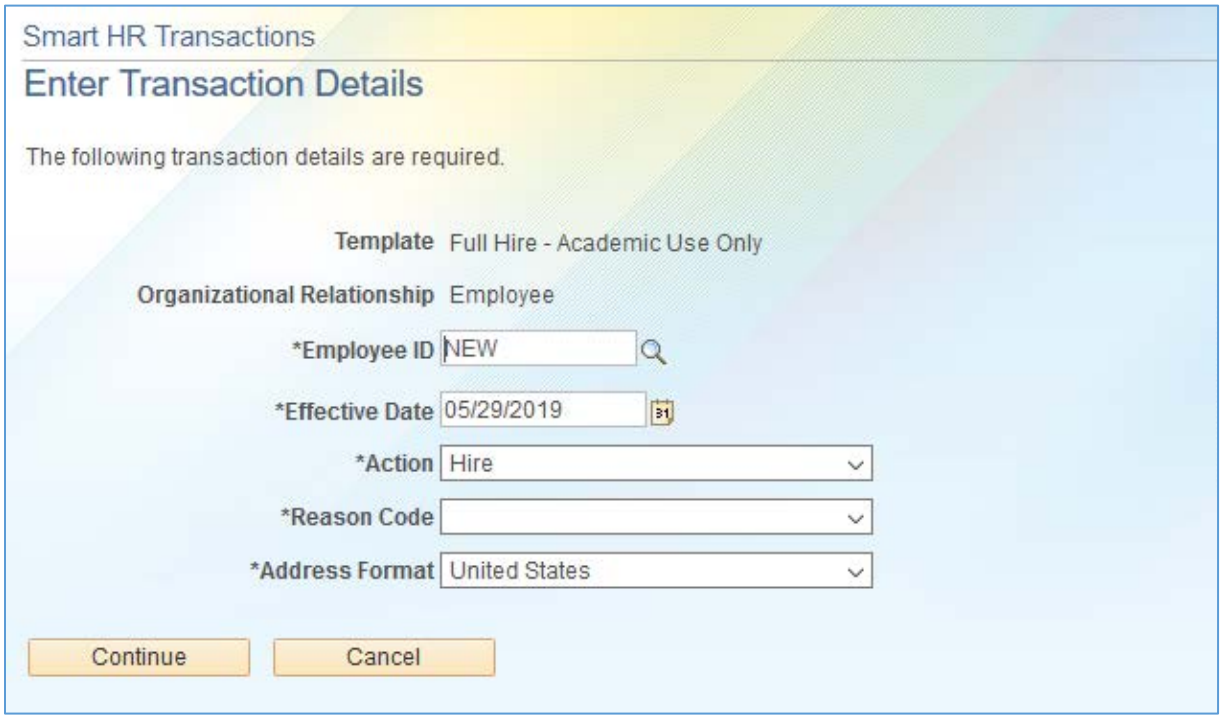
Available Smart HR Transaction templates

- It's likely that you would use one of these templates for a Summer Sessions hire:

UC_CONC_HIRE_AC	Academic Concurrent Hire/Inter Location Transfer
UC_FULL_HIRE_AC	Full Hire – Academic Use Only
UC_REHIRE_AC	Rehire – Academic

2. For a new hire, in the **Select Template** field, select **UC_FULL_HIRE_AC**.
   - Select the appropriate template if yours is another type of hire.

3. After clicking Create Transaction, this screen appears



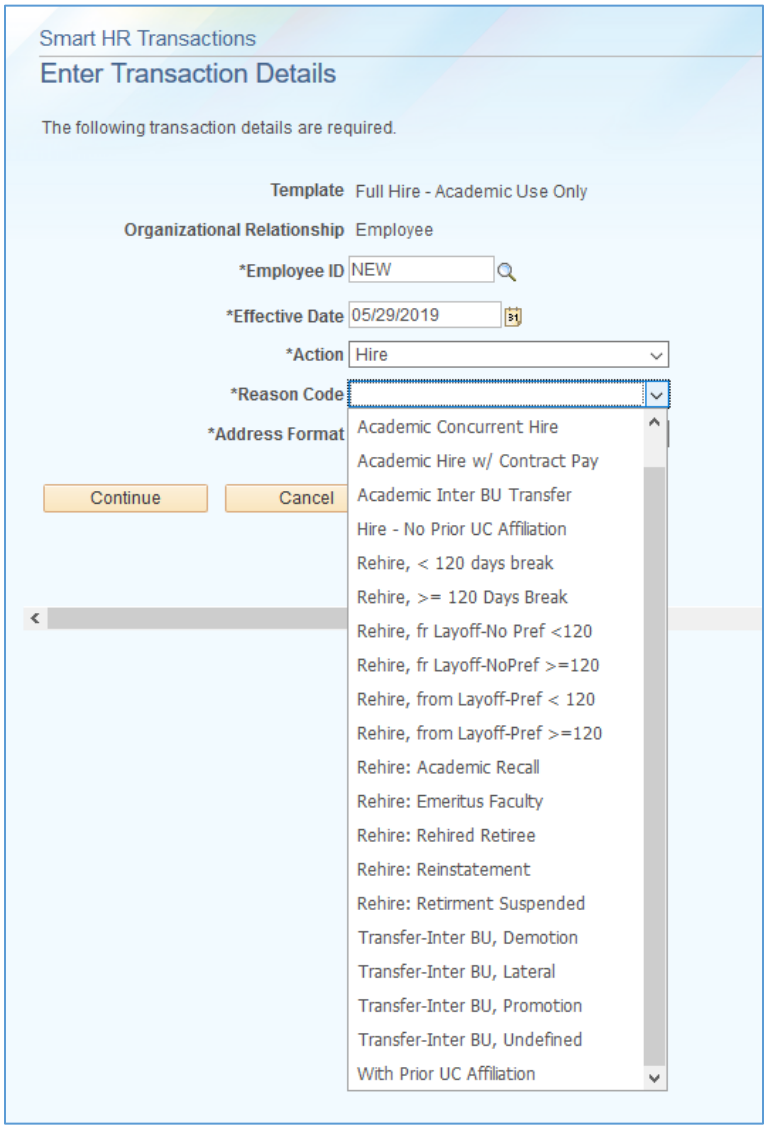
Enter Transaction Details screenshot

4. For the **Effective Date**, use the first date of employment, usually the first day of the session:

Session	Begin date	End date
A	6/24/2019	8/2/2019
8 week	6/24/2019	8/16/2019
9 week	6/24/2019	8/23/2019
10 week	6/24/2019	8/30/2019
C	8/5/2019	9/13/2019

Session Dates

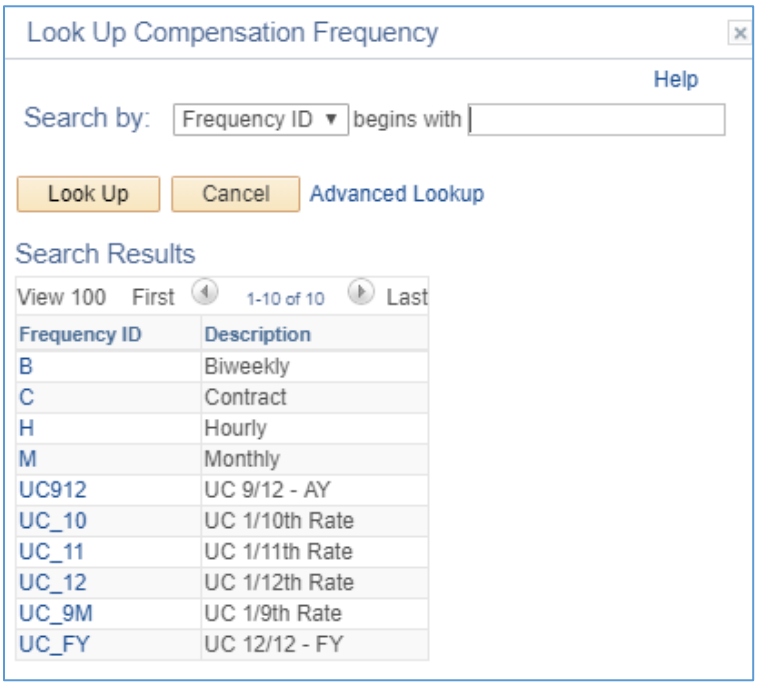
5. Enter the **Reason Code**



Reason codes

6. After clicking **Continue**, you will be taken to the **Enter Transaction Information** screen, where you enter the requested data in each tab: **Personal Data**, **Job Data**, **Earns Dist**, **Addl Pay**, and **Person Profile**
7. On the **Job Data** tab, leave all compensation fields blank so the Job Record will be created with no compensation. Instead, the flat payment will be entered in the **Additional Pay** section.
    - In **Job Data**, it's important to leave compensation fields *blank*, and not *zero*.

8. Summer Sessions hires are normally paid monthly.



9. Enter compensation details in the **Addl Pay** tab
    - See the Additional Pay section below for more information about **Effective Date, Earnings Code, Reason for Additional Pay, Earnings End Date,** and **Add'l Pay Amount**

Rehiring academic employees

- If the employee has a **terminated *academic* UCPath job record**, choose **UC_REHIRE_AC** (Rehire – Academic) in the **Select Template** field and press the ***Create Transaction*** button.
    - In the **Enter Transaction Details** screen, **Reason Code** field, select **Rehire, < 120 days break** or **Rehire, > or = 120 days break** as appropriate.
- If the employee has a **terminated *staff* UCPath job record**, choose **UC_FULL_HIRE_AC** (Full Hire – Academic Use Only) in the **Select Template** field and press the ***Create Transaction*** button. In the **Enter Transaction Details** screen, **Reason Code** field, select **Rehire, < 120 days break** or **Rehire, > or = 120 days break** as appropriate.
    - Be sure to overwrite the **EMPL ID** field with the employee's existing **EMPL ID**; don't allow this field to default to **NEW**.
- For rehiring an employee who was **in PPS but has no prior record in UCPath**, choose **UC_FULL_HIRE_AC** (Full Hire – Academic Use Only) in the **Select Template** field and press the ***Create Transaction*** button. In the **Enter Transaction Details** screen, **Reason Code** field, select **Hire – No Prior UC Affiliation**.

Go to top

Additional Pay

- Summer Sessions uses the **Additional Pay** process to create payment transactions.
  - You can complete the **Additional Pay** process during the hiring process, using the **Addl Pay** tab. Doing so allows you to add additional pay before the job begin date.
    - But if you're adding **Additional Pay** as part of the **Smart HR Transactions** hiring process, once the transaction has been approved, it's best to return to the **Self Service Additional Pay** screen to confirm that the **Additional Pay** data is there. **Additional Pay** data added as part of **Smart HR Transactions** can vanish unpredictably for some employees. If the data is not there, submit the information again as a separate **Additional Pay** transaction.
  - The **Additional Pay** process described here, using **Self Service Transaction Links**, can be used outside of the hiring process; for example, for someone who is already hired.
    - But a **Self Service Additional Pay** transaction must be entered on or after the job begin date and cannot be entered in advance.
- Summer Sessions pay dates are August 1* for Session A, and September 1** for Session C (the actual pay date may change if August 1 or September 1 falls on a weekend or holiday, see below).

Pay Date	Session
August 1*	Session A, 6 weeks
	Session A, 8 weeks
	Session A, 9 weeks
	Session A, 10 weeks
September 1**	Session C, 6 weeks

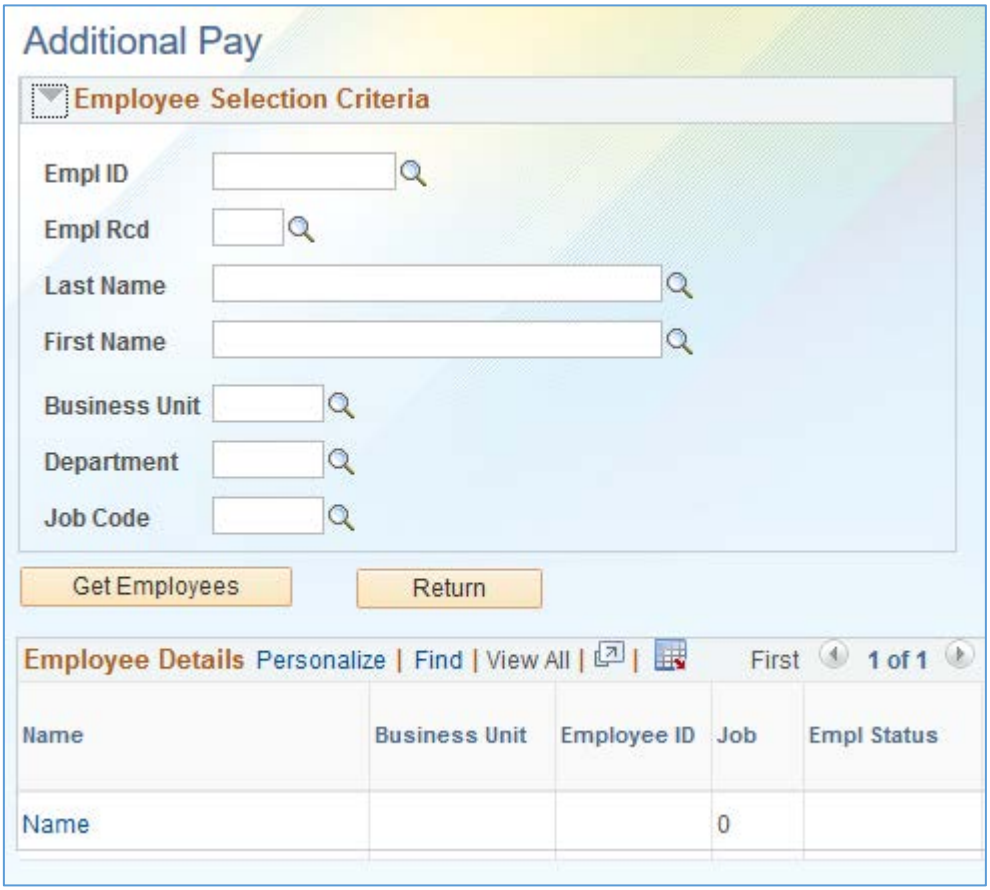
*August 1 pay date changes to	**September 1 pay date changes to
7/31/2020	8/30/2019
7/30/2021	8/30/2024
7/31/2026	8/29/2025
7/30/2027	8/31/2029

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

1. Click the Additional Pay link to begin the steps for entering a recurring additional pay transaction.

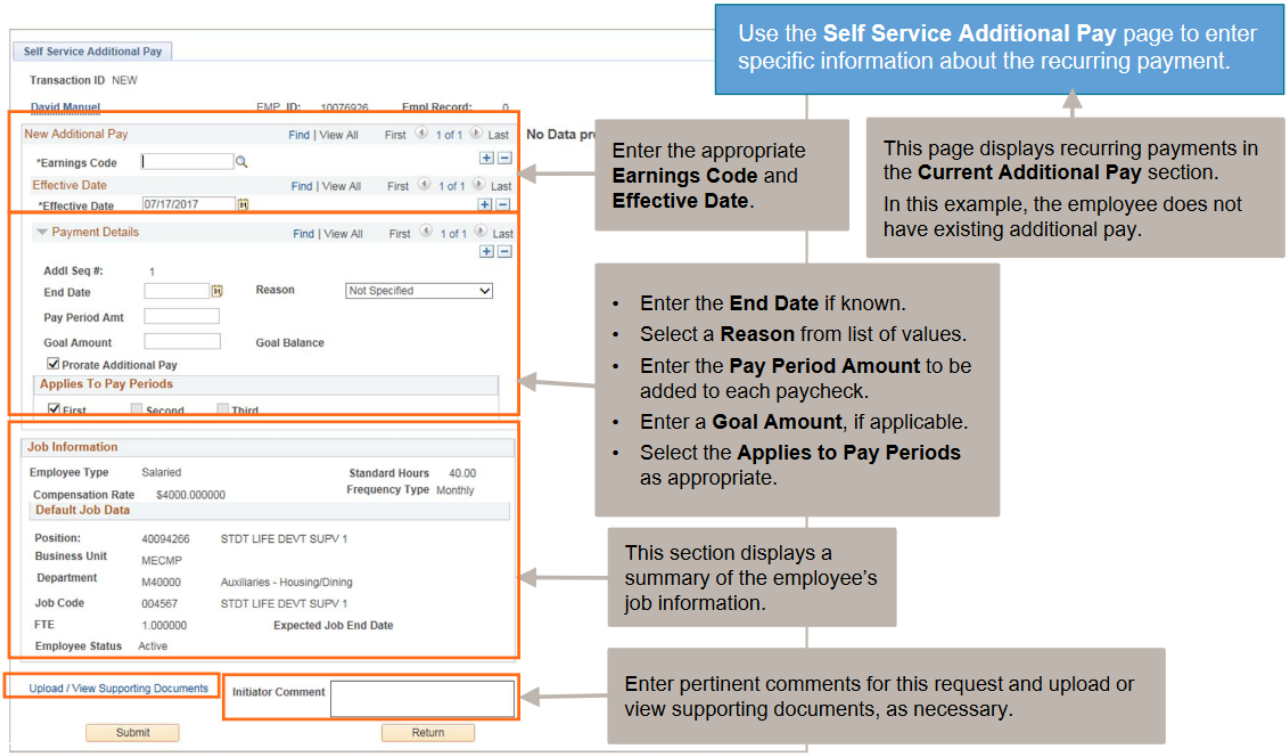
Self-Service Transaction Links screenshot

2. Find the employee.



Additional Pay Employee Selection Criteria

3. Enter Transaction Details:



Self Service Additional Pay course presentation

4. Enter the appropriate **Earnings Code**.
   - Summer Sessions **Earnings Codes**:
     - **ACS** (formerly SSC) for continuing faculty and lectures who are in the retirement system;
     - **ASN** (formerly SST) for TAs, temporary instructors, and non-academics.

5. Enter the **Effective Date**.
   - **Effective Date** is July 1 for Session A; August 1 for Session C *or* the first day of Session C if it is later than August 1. (Session Dates)
     - Also use July 1 if the instructor is receiving the same amount for Session A as for Session C and you want to combine the payments into one transaction for both payments instead of using a separate transaction for each session.

6. Enter the **End Date**.
   - **End Date** is July 31 for Session A *or* the last day of Session A if it is earlier than July 31; August 31 for Session C. (Session Dates)
     - If the instructor is receiving the same amount for Session A as for Session C, and you want to combine the payments into one transaction for both payments instead of using a separate transaction for each session, use August 31 as the end date (and July 1 as the effective date).

7. Select a **Reason** from list of values.
   - Select **New Additional Pay**.

8. Enter the **Pay Period Amount** to be added to each paycheck.
    - Enter the full amount for the session.
    - If the instructor is receiving the same amount for Session A as for Session C, and you want to combine the payments into one transaction for both payments instead of using a separate transaction for each session, enter the amount that will be the same for Session A as for Session C.
        - E.g., if an instructor is to receive $5,000 for Session A and $5,000 for Session C, enter $5,000 in the pay period amount. Do not enter $10,000.

1. You need not enter a **Goal Amount**.
2. Uncheck **Prorate Additional Pay**
3. In the **Applies to Pay Periods** section, check **First**.
4. Enter **comments**. You need not upload supporting documents.
5. Click **Submit** to initiate the approval routing process.

Go to top

Manage Accruals for BYH entries

Please discontinue using this method to process Summer Sessions BYH entries. A new method is in the works!

Also see the ***Manage Accrual*** job aid.

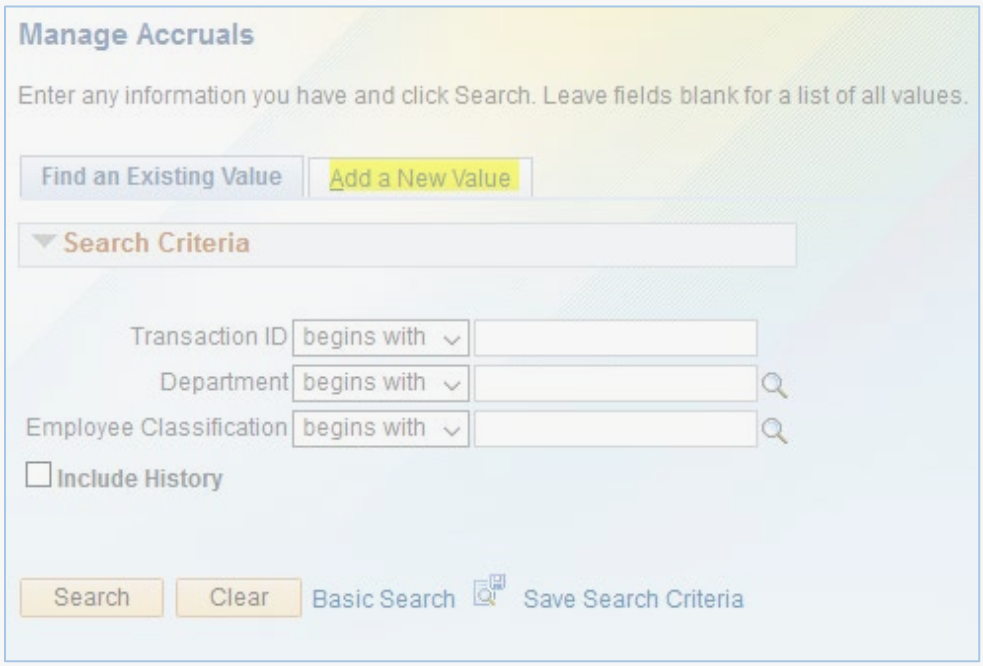
BYH transactions allow UCPath to capture time-related data that cannot be captured through a time and attendance system, like for Summer Sessions positions. BYH transactions enable UCPath to determine eligibility for different types of benefits, like for Affordable Care Act purposes.

Manage Accruals transactions must be entered in UCPath on or after the position effective date, in or after the period to which they apply, and within the deadlines of the period in which you process them.

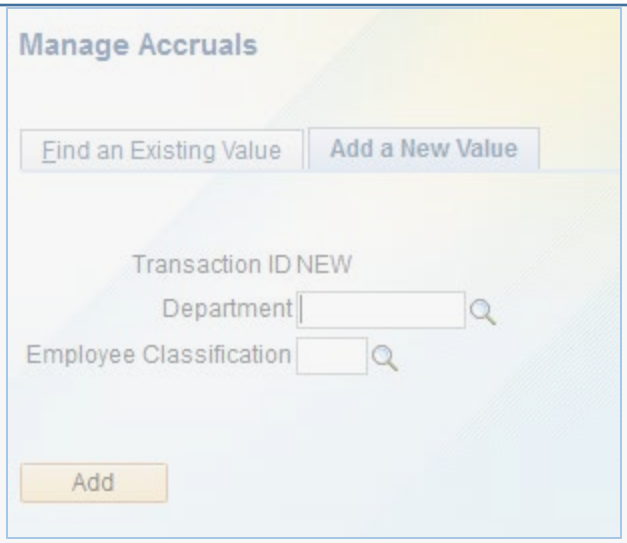
- For example, for a position with a June 22 effective date and a July 31 end date,
  - June hours must be entered on or after the June 22 effective date;
  - July hours must be entered on or after July 1;
  - June and July hours could be entered in August before the August deadline,
    - With June hours separate from July hours,
    - And a maximum of 24 hours per row

Navigation > PeopleSoft Menu > UC Customizations > UC Extensions > **Manage Accruals**

1. Click **Add a New Value**



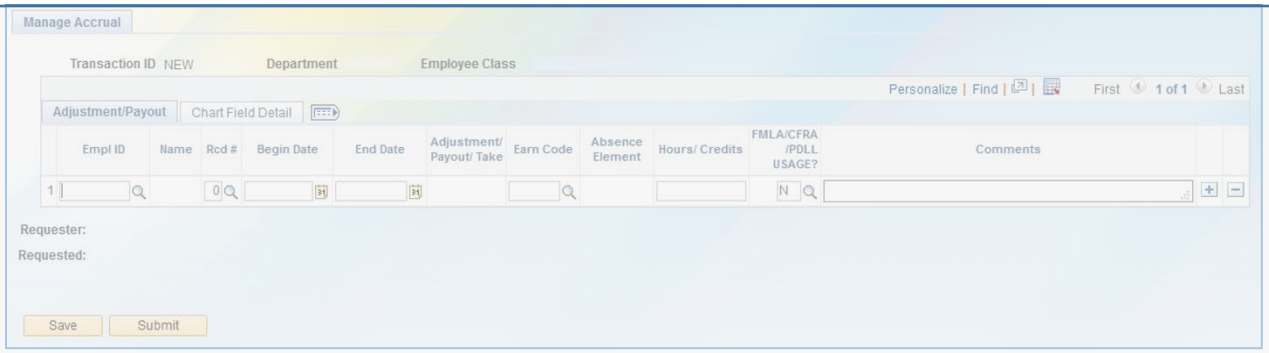
Manage Accruals landing page screenshot



Add a New Value screenshot

2. Enter the six-character **Department** code, and the **Employee Classification** code, and click **Add**.
    - Enter a transaction for only one **Department** and one **Employee Class** combination at a time.
    - Employee Classes and Codes:

EMPL Class	Description	Short Description
1	Staff: Contract	Contract
2	Staff: Career	Career
3	Academic: Recall	Ac Recall
4	Staff: Limited	Limited
5	Student: Casual/Restricted	Student
6	Staff: Per Diem	Per Diem
7	Staff: Partial Year Career	PartYr Car
8	Staff: Floater	Floater
9	Academic: Faculty	Ac Faculty
10	Academic: Non Faculty	Non Fac
11	Academic: Academic Student	Ac Student
13	Staff: Contingent Worker	CWR Staff
14	Academic: Contingent Worker	CWR Acad
15	Staff: Rehired Retiree	RehRetiree
20	Academic: Conversion	Ac Conv
21	Academic: Emeriti	Ac Emeriti
22	Academic: Deans/Faculty Admin	Ac Dean/FA
23	Academic: Post Docs	Ac PostDoc
24	Academic: Medical Residents	Ac Med Res



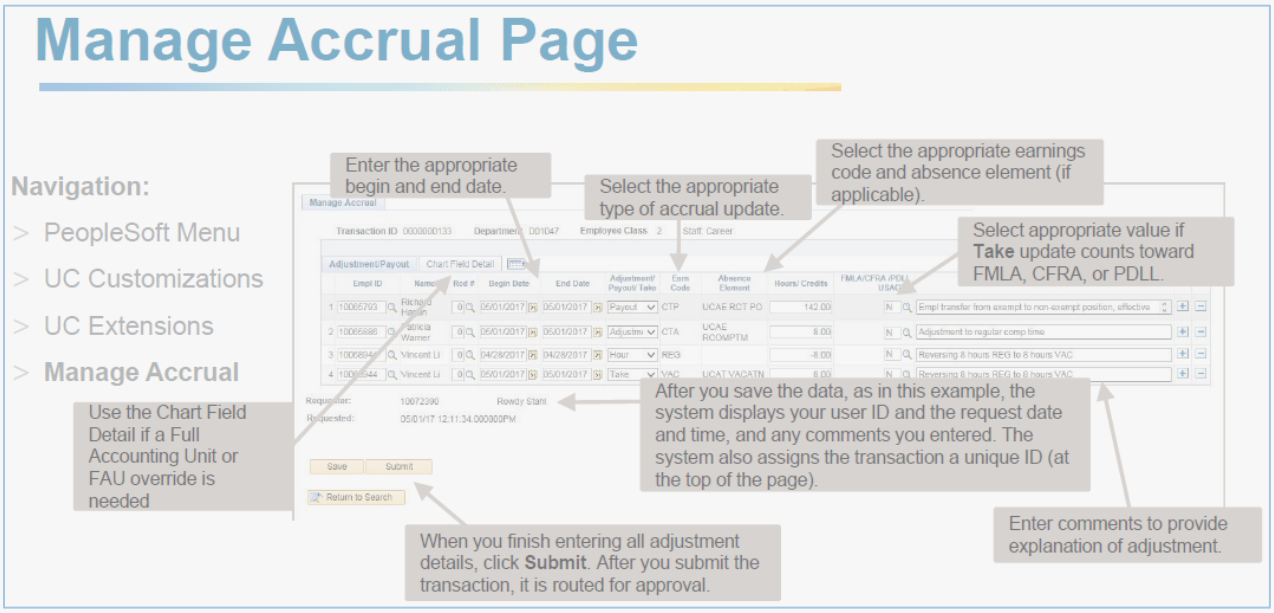
Manage Accrual page snapshot

3. Enter **Empl ID** to find the employee
4. See the chart below for **Begin Date**, **End Date**, and **Hours**

Session	Month	Begin Date	End Date	Days	Percent Time	Hours
Session A 6 weeks	June	6/24/2019	6/30/2019	5	50%	20
Session A 6 weeks					100%	40
Session A 6 weeks	July	7/1/2019	7/31/2019	23	50%	92
Session A 6 weeks					100%	184
Session A 6 weeks	August	8/1/2019	8/2/2019	2	50%	8
Session A 6 weeks					100%	16
Session A 8 weeks			8/16/2019	12	50%	48
Session A 8 weeks					100%	96
Session A 9 weeks			8/23/2019	17	50%	68
Session A 9 weeks					100%	136
Session A 10 weeks			8/30/2019	22	50%	88
Session A 10 weeks					100%	176
Session C		8/5/2019	8/30/2019	20	50%	80
Session C					100%	160
Session C	September	9/2/2019	9/13/2019	10	50%	40
Session C					100%	80

5. Enter the **Begin Date**
6. Enter the **End Date**
7. The **Begin** and **End Dates** must be in the same month/pay period, so each Summer Sessions instructor will need at least two transactions to cover different months in a session.
8. In the **Adjustment/Payout/Take** field, select **Hour**.
9. Enter the **Earn Code**
    - The Earn Code is **BYH**
10. Enter the number of hours in the **Hours/Credits** field; see the chart above.
    - Manage Accrual allows up to 24 hours per row. Add a new row for more than 24 hours (see step 13)
11. The **FMLA/CFRA/PDLL USAGE?** code is **N**.
12. The **Comments** field is required; you can enter the appropriate detail, such as "Summer Sessions BYH hours for June."

13. You may click the ✚ **Add a new row** button to add additional rows for this person, or for additional employees from the same department with t he same empl class value.
14. Click the **Save** button when you are finished entering accrual adjustment details on this page.
    - If there are no errors, the **Requester** field displays your employee ID and name. The **Requested** field displays the date and time you saved the transaction.
    - The **Transaction ID** field at the top left, displays a unique, system-generated transaction number.
15. Click the **Submit** button to prompt AWE approval workflow for this transaction.
    - If you navigate away from the page without clicking **Submit**, you can search for your saved transaction using the **Manage Accruals** search page.



Manage Accrual course presentation snapshot