Summer Sessions Job Aid

This job aid has been assembled based on other UCPaht 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

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 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.
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

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:

```
<table>
<thead>
<tr>
<th>Job Code</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Teaching Assistants</td>
</tr>
<tr>
<td>002310</td>
<td>Teaching Assistant</td>
</tr>
<tr>
<td>001506</td>
<td>Teaching Associate</td>
</tr>
<tr>
<td>002300</td>
<td>Teaching Fellow</td>
</tr>
<tr>
<td>Lecturers</td>
<td></td>
</tr>
<tr>
<td>001550</td>
<td>Lecturer in Summer Sessions</td>
</tr>
</tbody>
</table>
```

- **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](image)

- 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](image)
5. When you are finished entering position details, click the Supporting Documents tab and press the Save and Submit button.

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.

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

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

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

Search for and select the appropriate funding entry. Begin the system steps for updating the funding by inserting a new row and entering the funding effective date.

Enter the appropriate funding source(s) and distribution percentage(s).

Attach supporting documents and enter applicable comments regarding the updates, then click Save to check for errors. Upon successfully saving, the system displays a unique Request ID at the top of the page.

When transaction is ready for approval, click Submit. After submission, the system displays the workflow routing details (not shown here) below the Requester Comment field.

Position Funding from course presentation
**Account number:**
When entering the **FAU/Chart String**, use the Summer Sessions 409xxx 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
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**

Select a template and press Create Transaction.

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

**Available Templates**

<table>
<thead>
<tr>
<th>Template</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC_ADD_CWR</td>
<td>Add Contingent Worker - No Position Data</td>
</tr>
<tr>
<td>UC_ADD_CWR_POSN</td>
<td>Add Contingent Worker With Position</td>
</tr>
<tr>
<td>UC_COM_CWR</td>
<td>Complete Contingent Worker Instance</td>
</tr>
<tr>
<td>UC_CONC_HIRE</td>
<td>Staff Contingent Hire/Inter Location Transfer</td>
</tr>
<tr>
<td>UC_CONC_HIRE_AC</td>
<td>Academic Concurrent Hire/Inter Location Transfer</td>
</tr>
<tr>
<td>UC_EXT_CWR</td>
<td>Extend CWR Appointment</td>
</tr>
<tr>
<td>UC_EXT_CWR_POSN</td>
<td>Extend CWR (with Position) Appointment</td>
</tr>
<tr>
<td>UC_FULL_HIRE</td>
<td>Full Hire - Staff Only</td>
</tr>
<tr>
<td>UC_FULL_HIRE_AC</td>
<td>Full Hire - Academic Use Only</td>
</tr>
<tr>
<td>UC_INVOL_TERM</td>
<td>Involuntary Termination</td>
</tr>
<tr>
<td>UC_PERSON_DATA</td>
<td>UC Personal Data</td>
</tr>
<tr>
<td>UC_REHIRE</td>
<td>UC Rehire - All Employees</td>
</tr>
<tr>
<td>UC_REHIRE_AC</td>
<td>Rehire - Academic</td>
</tr>
<tr>
<td>UC_RENW_CWR</td>
<td>Renew Contingent Worker - Without Position</td>
</tr>
<tr>
<td>UC_RENW_CWR_POS</td>
<td>Renew CWR Instance - with Position</td>
</tr>
<tr>
<td>UC_RETIREMENT</td>
<td>Retirement</td>
</tr>
<tr>
<td>UC_TRANSFER</td>
<td>Intra-Business Unit Transfer - Staff Only</td>
</tr>
<tr>
<td>UC_TRANSFER_AC</td>
<td>Intra-Business Unit Transfer - Academic Only</td>
</tr>
<tr>
<td>UC_VOL_TERM</td>
<td>Voluntary Termination</td>
</tr>
</tbody>
</table>
- It’s likely that you would use one of these templates for a Summer Sessions hire:

<table>
<thead>
<tr>
<th>Template</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC_CONC_HIRE_AC</td>
<td>Academic Concurrent Hire/Inter Location Transfer</td>
</tr>
<tr>
<td>UC_FULL_HIRE_AC</td>
<td>Full Hire – Academic Use Only</td>
</tr>
<tr>
<td>UC_REHIRE_AC</td>
<td>Rehire – Academic</td>
</tr>
</tbody>
</table>

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](image)

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

<table>
<thead>
<tr>
<th>Session</th>
<th>Begin date</th>
<th>End date</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>6/24/2019</td>
<td>8/2/2019</td>
</tr>
<tr>
<td>8 week</td>
<td>6/24/2019</td>
<td>8/16/2019</td>
</tr>
<tr>
<td>9 week</td>
<td>6/24/2019</td>
<td>8/23/2019</td>
</tr>
<tr>
<td>10 week</td>
<td>6/24/2019</td>
<td>8/30/2019</td>
</tr>
<tr>
<td>C</td>
<td>8/5/2019</td>
<td>9/13/2019</td>
</tr>
</tbody>
</table>
5. Enter the **Reason Code**

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.
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).

<table>
<thead>
<tr>
<th>Pay Date</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 1*</td>
<td>Session A, 6 weeks</td>
</tr>
<tr>
<td></td>
<td>Session A, 8 weeks</td>
</tr>
<tr>
<td></td>
<td>Session A, 9 weeks</td>
</tr>
<tr>
<td></td>
<td>Session A, 10 weeks</td>
</tr>
<tr>
<td>September 1**</td>
<td>Session C, 6 weeks</td>
</tr>
</tbody>
</table>

*August 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 |

**September 1 pay date changes to

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 screenshot]
3. 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.

   This page displays recurring payments in the Current Additional Pay section. In this example, the employee does not have existing additional pay.

   • 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.

   Self Service Additional Pay course presentation

4. Enter the appropriate Earnings Code.
   • Summer Sessions Earnings Codes:
     o ACS (formerly SSC) for continuing faculty and lectures who are in the retirement system;
     o 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)
     o 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)
     o 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.
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](image)

   *Manage Accruals landing page 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:

<table>
<thead>
<tr>
<th>EMPL Class</th>
<th>Description</th>
<th>Short Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Staff: Contract</td>
<td>Contract</td>
</tr>
<tr>
<td>2</td>
<td>Staff: Career</td>
<td>Career</td>
</tr>
<tr>
<td>3</td>
<td>Academic: Recall</td>
<td>Ac Recall</td>
</tr>
<tr>
<td>4</td>
<td>Staff: Limited</td>
<td>Limited</td>
</tr>
<tr>
<td>5</td>
<td>Student: Casual/Restricted</td>
<td>Student</td>
</tr>
<tr>
<td>6</td>
<td>Staff: Per Diem</td>
<td>Per Diem</td>
</tr>
<tr>
<td>7</td>
<td>Staff: Partial Year Career</td>
<td>PartYr Car</td>
</tr>
<tr>
<td>8</td>
<td>Staff: Floater</td>
<td>Floater</td>
</tr>
<tr>
<td>9</td>
<td>Academic: Faculty</td>
<td>Ac Faculty</td>
</tr>
<tr>
<td>10</td>
<td>Academic: Non Faculty</td>
<td>Non Fac</td>
</tr>
<tr>
<td>11</td>
<td>Academic: Academic Student</td>
<td>Ac Student</td>
</tr>
<tr>
<td>12</td>
<td>Staff: Contingent Worker</td>
<td>CWR Staff</td>
</tr>
<tr>
<td>13</td>
<td>Academic: Contingent Worker</td>
<td>CWR Acad</td>
</tr>
<tr>
<td>14</td>
<td>Staff: Rehired Retiree</td>
<td>RehRetiree</td>
</tr>
<tr>
<td>20</td>
<td>Academic: Conversion</td>
<td>Ac Conv</td>
</tr>
<tr>
<td>21</td>
<td>Academic: Emeriti</td>
<td>Ac Emeriti</td>
</tr>
<tr>
<td>22</td>
<td>Academic: Deans/Faculty Admin</td>
<td>Ac Dean/FA</td>
</tr>
<tr>
<td>23</td>
<td>Academic: Post Docs</td>
<td>Ac PostDoc</td>
</tr>
<tr>
<td>24</td>
<td>Academic: Medical Residents</td>
<td>Ac Med Res</td>
</tr>
</tbody>
</table>
3. Enter Empl ID to find the employee
4. See the chart below for Begin Date, End Date, and Hours

<table>
<thead>
<tr>
<th>Session</th>
<th>Month</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Days</th>
<th>Percent Time</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Session A 6 weeks</td>
<td>June</td>
<td>6/24/2019</td>
<td>6/30/2019</td>
<td>5</td>
<td>50%</td>
<td>20</td>
</tr>
<tr>
<td>Session A 6 weeks</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100%</td>
<td>40</td>
</tr>
<tr>
<td>Session A 6 weeks</td>
<td>July</td>
<td>7/1/2019</td>
<td>7/31/2019</td>
<td>23</td>
<td>50%</td>
<td>92</td>
</tr>
<tr>
<td>Session A 6 weeks</td>
<td>August</td>
<td>8/1/2019</td>
<td>8/2/2019</td>
<td>2</td>
<td>50%</td>
<td>8</td>
</tr>
<tr>
<td>Session A 6 weeks</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100%</td>
<td>16</td>
</tr>
<tr>
<td>Session A 8 weeks</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Session A 9 weeks</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Session A 10 weeks</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Session C</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 the 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.

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**Manage Accrual Page**

**Navigation:**
- PeopleSoft Menu
- UC Customizations
- UC Extensions
- **Manage Accrual**

**Instructions:**
- **Enter the appropriate begin and end date.**
- **Select the appropriate type of accrual update.**
- **Select the appropriate earnings code and absence element (if applicable).**
- **Enter comments to provide explanation of adjustment.**
- After you save the data, the system displays your user ID and the request date and time, and any comments you entered. The system also assigns the transaction a unique ID (at the top of the page).

**Use the Chart Field Detail if a Full Accounting Unit or FAU override is needed.**

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**Manage Accrual course presentation snapshot**