ASE-GSR ADMINISTRATORS
UCPATH WORKSHOP

Hershey Hall 158
Tuesday, October 2, 2018
10am – 12pm

UCLA Graduate Division
UCLA Business Transformation Office
OVERVIEW

• Person Org Summary
  *Conflicting FLSAs: Exempt vs. Nonexempt*

• Appointment Entry
  *Smart HR Template*

• Best Practices
  *Uploading Paperwork*

• Additional Compensation

• Short Work Break

• Terminations

• Academic Policy Updates

• COGNOS Resources

• Childcare Reimbursement

• Employee-Based Benefits

• Links & Resources
Person Organizational Summary

Person Organizational Summary
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Search
Clear

Person Organizational Summary

Person ID 1004771

Benefit Eligibility Hours
Limited Hours Career
Floater Hours Career

Employment Instances

Last Hire Date 10/10/2016

Assignments

Personalize | Find | First | Last 1 of 1

ASE
GSR Administrators UCPath Workshop | 3
Person Organizational Summary

STOP

Table:

<table>
<thead>
<tr>
<th>Union Code</th>
<th>FLSA Status</th>
<th>Pay Group</th>
<th>Employee Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restricted</td>
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<td>4ST</td>
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<table>
<thead>
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<th>Union Code</th>
<th>FLSA Status</th>
<th>Pay Group</th>
<th>Employee Type</th>
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</thead>
<tbody>
<tr>
<td></td>
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</table>
# Inter-location Appointments

## Person Organizational Summary

<table>
<thead>
<tr>
<th>Person ID</th>
<th>Benefit Eligibility Hours</th>
<th>Limited Hours Career</th>
<th>Floater Hours Career</th>
<th>Inactive Status</th>
<th>Last Hire Date</th>
<th>Payroll Status</th>
<th>Termination Date</th>
<th>Appointment Expired</th>
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## Employment Instances

<table>
<thead>
<tr>
<th>ORG Instance</th>
<th>HR Status</th>
<th>Payroll Status</th>
<th>Inactive</th>
<th>Last Hire</th>
<th>Assignment</th>
<th>Description</th>
<th>Expected Job End Date</th>
<th>FTE</th>
<th>Employee Class</th>
<th>Union Code</th>
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<th>Pay Group</th>
<th>Employee Type</th>
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<th>Probation End Date</th>
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<tbody>
<tr>
<td>0</td>
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<td></td>
<td></td>
<td></td>
<td>MECMP</td>
<td>Biological Sciences (MCS)</td>
<td>05/16/2018</td>
<td>Terminated</td>
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<td></td>
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<td></td>
<td></td>
<td>None</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>LACOM</td>
<td>Integrative Biology &amp; Physiology</td>
<td>09/30/2018</td>
<td>0.502500</td>
<td>Academic: Academic Student</td>
<td>99</td>
<td>E</td>
<td>4AC</td>
<td>Academic: Student</td>
<td>None</td>
<td></td>
</tr>
</tbody>
</table>
Concurrent Jobs w/Conflicting FLSAs

Exempt vs. Nonexempt

The hiring department must coordinate with other hiring unit(s) and obtain approval from the necessary Central Office(s) (APO, CHR, Graduate Division) to arrive at a single FLSA status for the hiring departments to use. Once the Central Office(s) has approved the FLSA you may proceed with the hire as directed by the central offices.
Appointment Entry – Smart HR Template

<table>
<thead>
<tr>
<th>Template</th>
<th>Description</th>
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<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 Concurrent Hire/Inter Location Transfer</td>
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<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 - Staff Only</td>
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<tr>
<td>UC_REHIRE_AC</td>
<td>Rehire - Academic</td>
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<tr>
<td>UC_RENW_CWR</td>
<td>Renew Contingent Worker - Without Position</td>
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<tr>
<td>UC_RENW_CWR_POSN</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>
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<tr>
<td>UC_VOL_TERM</td>
<td>Voluntary Termination</td>
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</table>

Always Use **ACADEMIC** Templates for ASE/GSR Hires
Hire - Split Appointments

- First job?
  - Never been hired by UC? YES! UC_FULL_HIRE_AC
    New Hire Academic Template
  OR
    YES! UC_RE_HIRE_AC
    Academic Re-Hire

- First job?
  - Previously held job at any UC? YES!

- Second job?
  - Wait for approved first job
  - Submit template for second job YES! UC_CONC_HIRE_AC
    Academic Concurrent Hire

NOTE: Always take into account the Approval Workflow Engine (AWE) process before initiating concurrent hires.
**Employee Information**

- **Position Number**: [Redacted]
- **Job Code**: 003276
- **FLSA Status**: Exempt
- **Union Code**: 99
- **Standard Hours**: 20.000000
- **FTE**: 0.500000

**Verify!**

- Position Number
- Job Code
- FLSA
- Union Code
- FTE

---

**Template:** UC_FULL_HIRE_AC  
**Name:** [Redacted]  
**Effective Date:** 09/25/2018  
**Action/Action Reason:** HR/HIR (Hire - No Prior UC Affiliation)  
**Employee ID:** NEW  

**Personal Data**  
- [Image of personal data fields]

**Job Data**  
- [Image of job data fields]

**Earnings Dis/Addl Pay**  
- [Image of earnings dis/addl pay fields]

**Person Profile**  
- [Image of person profile fields]

---

**[Image of additional fields and forms]**
### Job Information - Employee Classification

| Standard Hours | 20.000000 |

### UC Job Data

| Academic Duration of Appl |  |
| Location Use Type |  |

### Job - Salary Plan

<table>
<thead>
<tr>
<th>Salary Administration: T022</th>
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<tr>
<td>Plan</td>
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<td>Step</td>
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### Job Compensation - Pay Components

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### Work Location - Expected Job End Date

| Expected Job End Date | 12/31/2018 |

---

**VERIFY!**

Step

Comp Rate Code

Comp Rate

Comp Frequency

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<th>Value Description</th>
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<th>Comp Rate</th>
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<td>4</td>
<td>UCANL</td>
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<td>5</td>
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<td>6</td>
<td>UCANL</td>
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<tr>
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<td>UCANL</td>
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<td>31.943767</td>
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<tr>
<td>8</td>
<td>UCANL</td>
<td>65700</td>
<td>34.665172</td>
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<td>UCANL</td>
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<td>10</td>
<td>UCANL</td>
<td>76620</td>
<td>36.695402</td>
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</table>
## Job Data/Position Data

<table>
<thead>
<tr>
<th>Teaching Assistantships</th>
<th>GSR</th>
<th>Readers, Tutors, Etc.</th>
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</thead>
<tbody>
<tr>
<td><strong>FLSA Status</strong></td>
<td>Exempt</td>
<td>Exempt</td>
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<td><strong>Union Code</strong></td>
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<td>Monthly (MO)</td>
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<tr>
<td>Job Title</td>
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<td>Rate Code</td>
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<tr>
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<tr>
<td>GSR</td>
<td>003276</td>
<td>UCANNL</td>
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<tr>
<td>Assistant</td>
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<td>UCANNL</td>
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<tr>
<td>Associate</td>
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<tr>
<td>Fellow</td>
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<tr>
<td>Reader</td>
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<tr>
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<tr>
<td>Re. Tutor II</td>
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<td>UCHRLY</td>
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</tbody>
</table>
NEW HIRES/RE-HIRES

- Enter the following information in the comments section: (refer to attached Job-Aid for more detail on each field)
- Citizenship Status (US Citizen, Permanent Resident or Alien Authorized to Work in US).
- I-9 Section 2 Date
- E-Verify Date (if employee is working on E-Verify required fund)
- Work Authorization End Date (If there is a Work Authorization End Date)

Send I-9 form to Central Resource Unit (same as sending to Payroll Services as in the past)

If Nonresident Alien requiring GLACIER: Submit Initial GLACIER Online Entry form to request GLACIER set up: [https://request.finance.ucla.edu/secure/?frm_id=GLACIERRequest](https://request.finance.ucla.edu/secure/?frm_id=GLACIERRequest)

Note: Form will now require both UID and UCPath EmplID for the employee.
WORK AUTHORIZATION EXTENSION OR CHANGE OF STATUS

• Process I-9 re-verification (Section 3) of Form I-9
• Send information regarding change in status to workauthorization@ucop.edu
• Send I-9 form to Central Resource Unit (same as sending to Payroll Services as in the past)

If Nonresident Alien with a GLACIER record: Remind employee to update GLACIER and submit new forms ASAP.
HIRING EMPLOYEES WHO DO NOT YET HAVE SSN

If a New Hire does not have SSN at the time of hire:

• Clearly note in the comments: EMPLOYEE DOES NOT HAVE A SOCIAL SECURITY NUMBER
• Open a case to update SSN as soon as they receive a number.

If a Nonresident Alien requiring GLACIER: Make sure that they know to still update GLACIER and submit forms prior to receiving SSN, and then to update and resubmit, once they receive their number.
Best Practices
Documents to Upload

- Initial Appointment Offer Letter
- Supplemental Letter (TA Duties & Responsibilities)
- Statement of Understanding
- Authorization to Work Over 50% Time (if applicable)
- Dashew Approval Letter (if applicable)
- Multiple FLSA Form (coming soon)
- Other supplemental materials

HELPFUL HINTS/LINKS

All uploaded Documents MUST be Completed and Signed!
Appointment Paperwork Process

- **Statement of Understanding** not changing. Provide to student and keep signed copy in personnel file.

- **Exception Requests** for grad student employment must be approved PRIOR to providing appointment letter.

- **International Graduate Students** – Dashew Center approval must be obtained PRIOR to providing appointment letter (this is applicable only if F-1 employed at ≥ 50% time).
Additional Compensation

Substitute TA

Substitute teaching work performed by an ASE is compensable when coordinated and approved by the hiring unit.

Best ASE/GSR Award

Awards based upon achievement as an employee are to be paid through UCPath as an employee award.

<table>
<thead>
<tr>
<th>Type of Add’l Compensation</th>
<th>Earn Code</th>
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<tbody>
<tr>
<td>Substitute TA</td>
<td>RGN</td>
</tr>
<tr>
<td>Best ASE/GSR Award</td>
<td>AWD</td>
</tr>
</tbody>
</table>
Childcare Reimbursement Program

- For registered UCLA students holding at least a **25%** ASE and/or GSR appointment during the academic year and who have (a) qualified dependent(s)
- Up to **$1,100/quarter** or **$1,650/semester**

Links:  
- Childcare Reimbursement Website  
- Childcare Administrative Q&As
Short Work Break

SWB should ONLY be used for ASE/GSR under the following circumstances (**no exceptions**):

- In between quarters (e.g., employed fall and spring – SWB during winter)
- Winter break
- Spring break
- Summer break

Action Reason Code: **GST**

Limited to 4 consecutive months.

Must only be used when there is an intent to return to student employment at the end of the SWB, but the job does not necessarily need to be in place.
Terminations

- “Expected Job End Date” field in job record does not automatically end the job record. A termination transaction must be submitted to end job record.
- Exempt employees will continue to receive payment while job is active
- Consult with Graduate Division and/or Labor Relations for Involuntary Terminations (other than Appointment Expired)
Academic Apprentice Personnel (AAP) Policy Reminders and UCPath
Job Code & Step Changes

- **Academic Apprentice Personnel** No retroactive changes are allowed for ASE/GSR job codes or steps after the quarter begins.

- **TAs** - Advances are made upon recommendation by the chair of the department, based on performance evaluations by supervising faculty (which must be documented if advancement).

- **Promotions/step advancements** must occur no later than two weeks before the beginning of the appointment.
12/18 ASE Quarter Rule

No more than 12 quarters as an ASE. Approval for appointments beyond this limit must be obtained before the start of the proposed appointment term (only if student has Advanced to Doctoral Candidacy).

12/18 ASE Quarter Count Report

Contact your GD Fellowships & Financial Services workgroup representative, provide UID and Empl ID.

Allow 5-7 working days.

All UC-wide ASE appointments count towards the quarter count. The Person Org Summary will display all ASE appointments for LA, Merced, Riverside, Santa Barbara. Utilize it to identify ASE appointments from other UC campuses.
Data/Reporting Resources
COGNOS (CDW) Reports

Graduate Student File Creation Report

• To determine fee remission eligibility based on job FTE
• Generates a list of students hired in ASE/GSR job codes if their job FTE is 25% or higher.

IMPORTANT: Academic eligibility must be validated PRIOR to hiring.

If Grad Div identifies an ineligible student holding an ASE/GSR position, remission benefits will be automatically removed. The department may be held liable for paying remissions “out-of-pocket.”
File Creation Report – Identify Fee Remission Eligibility

SELECT: UCPath Reports > Systemwide Reports > Workforce Administration > Graduate Student File Creation Report
Parameters: Enter 'Time Period' and 'Dept ID'

Enter Year and Month range from below time period.

Time Period:
- From: June 2018
- To: June 2018

R-219 Graduate Student File Creation Report

<table>
<thead>
<tr>
<th>Time Period:</th>
<th>June 2018 - June 2018</th>
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</thead>
<tbody>
<tr>
<td>Location:</td>
<td>4 - UCLA LOS ANGELES</td>
</tr>
<tr>
<td>Business Unit</td>
<td>LACMP - UCLA Campus</td>
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<tr>
<td>Organization</td>
<td>ALL</td>
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<tr>
<td>Department ID</td>
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Report Parameters:
- Time Period: June 2018 - June 2018
- Location: 4 - UCLA LOS ANGELES
- Business Unit: LACMP - UCLA Campus
- Organization: ALL
- Department ID: 0875 - PSYCHOLOGY

<table>
<thead>
<tr>
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<th>Employee UCL ID</th>
<th>Employee Primary Full Name</th>
<th>FAU</th>
<th>Job Employee Record Number</th>
<th>Job Effective Date</th>
<th>Department ID</th>
<th>Department Desc</th>
<th>Expected End Date</th>
<th>Department Code</th>
<th>Job Code Desc</th>
<th>Job FTE Number</th>
<th>Job Annual Rate</th>
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COGNOS (CDW) Reports

Distribution of Payroll Expense Report (DOPE)

- To verify fee remission charges for students and to reconcile ledgers
- Canned Report
  - Prepared in advance for repeated use (campus-wide)
  - Parameter-driven (Can run by Dept, FAU, UCLA UID, or UCPath ID)
  - Cannot save your own version
  - Downloadable to Excel and filtered
- Includes breakdown of fee remissions charged to the department
  - Sums the fee remission charged per student for the pay period selected

The Distribution of Payroll Expenses (DOPE) report includes the breakdown of fee remissions charged to the department for students receiving fee remission benefits. There is also a field that sums the total fee remission charged per student for the pay period. It is labeled “Graduate Student (TOTAL).”
DOPE Report - Verify Fee Remission Charges

SELECT: UCPATH Reports > Systemwide Reports > Payroll > Distribution of Payroll Expenses (DOPE)
The amounts are displayed towards the end of the row per eligible student under fields: Grad Stud Hlth Insur Amt (GSHIP), Grad Stud Tuition Rem Amt (TUITREM), Grad Stud Fee Rem Amt (FEEREM), and Grad Stud Part Fee Rem Amount (GSPFR).
Employee Based Benefits

**ASE**
- Fee Remissions
- Advance Loans
- Childcare Reimbursement
- Childbirth Accommodation Funding
- Fee Deferral
- Sick Leave

**GSR**
- Fee Remissions
- Advance Loans
- Childcare Reimbursement
- Childbirth Accommodation Funding
- Fee Deferral
- Vacation

For a list of additional benefits see the UAW/UC contract
Links & Resources

UCPath

UCPath Training Resources & Help
UCPath Training Glossary
DOS to Earning Code
UCPath Help Site
UCPath Job Aid: Template Transactions
At-A-Glance - Hire/Rehire
Job Aid: Concurrent Hire – Aligning FLSA Status
UCPath FAQ

Graduate Division

Go.Grad
Academic Apprentice Hiring Checklist for Depts
Academic Apprentice Personnel Manual
Academic Apprentice Salary Scales
Authorization to Work More than 50% Time
Statement of Understanding
Online Fee Remissions

Fee Deferral Resources

Fee Deferral Access Request Form
Fee Deferral Instructions
Fee Deferral Statement of Understanding
Fee Deferral Payment Deadlines – Term Calendar
Coming September 23, 2018, the UCPath Center will serve as the centralized hub for your payroll, benefits, and other transactions like those noted below:

- Paycheck
- Vacation and sick leave accruals or balances
- FMLA, pregnancy leave, and other personal leave eligibility
- Deductions and calculations
- Benefits enrollment
- Family medical eligibility verification
- Health insurance premiums while on leave
- Employment verification
- Extended absences
- and more...

Your first point of contact for questions or issues related to your...

Specially-trained UCPath Center staff are available to assist you through the UCPath Path Portal or by phone Monday – Friday, from 8:00 am – 5:00 pm (PST).

UCPath Center
855.982.7284
ucpath.ucla.edu

UCPath Portal
ucpath.universityofcalifornia.edu

For more information, visit ucpath.ucla.edu