UCSB UCPath

UCPath **INTSRUCTIONS**

ADDING ERIT to an Employee's Job Record

- ❑ STEP 1:   To enter ERIT you need to process a PayPath transaction. ***Navigation*: PeopleSoft > UC Customizations > UC Extensions > PayPath Actions**

- ❑ STEP 2:   Enter the name or employee ID number for the employee who is adding ERIT and click search.

- ❑ STEP 3:   The first screen is the Position Data tab, move past this to the Job Data tab.

- ❑ STEP 4:   Enter the Beginning Effective Date for the ERIT (note: ERIT must begin on the first day and end on the last day of the pay period).

- ❑ STEP 5:   Enter the action code of JED – Earnings Distribution Change.

- ❑ STEP 6:   Enter the action reason code of ERT – ERIT-EE Reduction in Time.

Position Data	Job Data	Additional Pay Data

Empl Record   0

Funding Entry Page
Work Force Job Summary
Person Org Summary

Staff: Career   HR Status: Active   Payroll Status: Active

Job Data   Find | View All   First 1 of 1 Last

Effective Date: 01/01/2019   Action: JED   Earnings Distribution Change

Effective Sequence: 0   Action Reason: ERT   ERIT-EE Reduction in Time

❑ STEP 7:   Use the Earnings Distribution Type dropdown menu to select 'By Percent.'

❑ STEP 8:   In the Earning Distribution box on the first row enter the distribution percentage of REG pay. If an employee is a Staff Physician or other type of employee that does not use REG, make sure to use the appropriate earn code.

❑ STEP 9:   In the Earnings Distribution section click the '+' box to add a new row.

❑ STEP 10:   In the new row enter the earn code of ERT and the distribution percentage of the ERIT.

❑ STEP 11:   In the UC Job Data section enter the end date of the ERIT.

❑ STEP 12:   Add comments to the Job Data Comments box telling the approver why you created the transaction.

| Earnings Distribution Type: | By Percent ∨ | | Comp Rate: 6,095.470000 | Standard Hours: 40.00 | Pay Frequency: | M 🔍 Monthly |

Pay Components Personalize | Find | 🗗 | 🔢 First ◀ **1 of 1** ▶ Last

	Rate Code		Comp Rate	Compensation Frequency		
1	UCANNL	🔍	73,145.640000	Annual		➕ ➖

Earnings Distribution Personalize | Find | 🗗 | 🔢 First ◀ **1-2 of 2** ▶ Last

	*Earnings Code		Comp Rate	Distribution %		
1	REG	🔍 Regular Pay	4,571.602500	75.000		➕ ➖
2	ERT	🔍 ERIT-Regular	1,523.867500	25.000		➕ ➖

UC Job Data

ERIT/Phased Retirement End Dt:	12/31/2019 📅	Trial Employment End Date:	📅
Probation Code:	None ∨	PY Career Duration:	∨
Location Use End Date:	📅	Probation End Date:	📅
Location Use Type:	∨		

Job Data Comments: Employee adding ERIT at 25% through 12/31/19.

UCSB UCPath

- ✓ Please be aware that the system will calculate the percentage of REG and ERIT regardless of the employee being paid hourly or monthly.

- ✓ For Positions with job codes designated as FLSA Exempt, the reduced compensation reflecting the ERIT reduction must be at least $47,476 annually to maintain the FLSA Exempt status.

- ✓ If the ERIT percentage reduces the compensation below $47,476 annually, the FLSA status of the position must change from Exempt to Non-Exempt.
  Instructions to update the FLSA status are below.

  - ❑ *Navigation:* **PeopleSoft > UC Customizations > UC Extensions > PayPath Actions**

  - ❑ Position Data tab – override the FLSA field from Exempt to Non-Exempt and submit the transaction for approval.

  - ❑ Submit an inquiry (on behalf of the employee) to the UCPath Center attaching a completed Job Data Update form requesting a pay group update changing the pay cycle from monthly to bi-weekly.

  - ❑ The Job Data Update form is NOT required **IF** the position update/FLSA override process is completed at the beginning of a new hire/rehire transaction.

    - • **…Instead**, use the comment box of the New Hire/Rehire Template to inform the UCPath Center the override is complete, the reason for the override, and request the update of the pay group from monthly to bi-weekly.

    - • Remember, for the UCPath Center to see the comments, use the comment box in the template and not the initiator or approver comment boxes.

*IF extending an ERIT, make sure to extend the end date of the ERIT Period.