

# RETROACTIVE EQUITY PROCESS

## POST-SALARY INCREASE PROGRAM IMPLEMENTATION

### STEP 1 - BW Employees

Initiate a PayPath Action for the Equity Increase

Navigate to **JOB DATA** Tab in PayPath

### Job Data Section

1. Enter the effective date of the Equity Increase (Ex: 3/7/2021)
2. Action Code: PAY = Pay Rate Change
3. Action Reason Code: EQU = Equity

[Person Urc](#)

**Job Data** Find | View All

Effective Date: 03/07/2021	Action: PAY Pay Rate Change
Effective Sequence: 0	Action Reason: EQU Equity

### Pay Components Section / UC Job Data Section

4. Enter the new comp rate based on the approved equity increase
5. In the Job Data Comments box, enter the reason for the comp rate change.

**Pay Components** Personalize | Find | [?] | [?]

Rate Code	Comp Rate	Compensation Freq
1 UCHRLY	30.480000	Hourly

**Earnings Distribution** Personalize | Find | [?] | [?]

Earnings Code	Comp Rate	Distribution %
1		

**UC Job Data**

ERIT/Phased Retirement End Dt: 01/09/2021	Trial Employment End Date:
Probation Code: None	PY Career Duration:
Location Use End Date:	Probation End Date:
Location Use Type:	Cubicle:

Job Data Comments: Employee awarded a 5% equity increase effective 3/7/2021

Navigate to **ADDITIONAL PAY** Tab at top of page

## Initiator Comments / Save and Submit

6. Scroll to the bottom of the page to where you see the **initiator's comments box** and the **Save and Submit** button
7. Enter the initiator's comments indicating to your approver the reason for this PayPath action.
8. Click on the Save and Submit button.

Job Information			
<b>Employee Type:</b>	Hourly	<b>Standard Hours:</b>	40.00
<b>Compensation Rate:</b>	\$27.650000	<b>Frequency:</b>	Hourly
Default Job Data			
<b>Position:</b>	40074315	COMPENSATION ANL 2	
<b>Business Unit:</b>	SBCMP	UC Santa Barbara Campus	
<b>Department:</b>	PERS		
<b>Job Code:</b>	007725	COMPENSATION ANL 2	
<b>FTE:</b>	1.000000		
<b>Employee Status:</b>	Active	<b>Expected Job End Date:</b>	

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**Transaction ID** NEW  
**Workflow Status** Apprvl Prc  
**Request Status** In Progress

<b>Initiator's Comments</b>	Entered employee's 5% equity increase.
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**User ID** SBCMP\_WFAInitiator\_001

*This sends the equity increase PayPath transaction through AWE to the department approver.*

## Approval Workflow Engine (AWE)

9. Once the department approver approves the transaction, the increase writes directly to the UCPath system.

Proceed to STEP 2  
*Recalculate the annual increase from the Salary Increase Program.*

## STEP 2 - BW Employees

After the department approver approves the first PayPath transaction (equity increase), a **second** PayPath transaction is required to adjust the comp rate to reflect the salary increase program based on the retro equity increase.

### Navigate to **JOB DATA** Tab in PayPath

#### Job Data Section

10. Enter the effective date of the Salary Increase Program Increase (Ex: 6/27/2021).
11. Action Code: PAY = Pay Rate Change
12. Action Reason Code: ATB = Across-The-Board

Job Data Find | View All

Effective Date: 06/28/2021

Effective Sequence: 0

Action: PAY Pay Rate Change

Action Reason: ATB Across-The-Board

#### Pay Component Section & UC Job Data Section

13. Calculate the general salary increase\* on top of the salary that was equity adjusted and enter it as the new comp rate.
14. Scroll down the page to the Job Data Comments box and enter the reason for the comp rate change.

**Pay Components**

Rate Code	Comp Rate
1 UCHRLY	31.390000

**Earnings Distribution**

Earnings Code	Comp Rate
1	

**UC Job Data**

ERIT/Phased Retirement End Dt: 01/09/2021

Probation Code: None

Location Use End Date:

Location Use Type:

Trial Employment End Dt:

PY Career Durati

Probation End Dt:

Cub

**Job Data Comments:** Adjusted Salary Increase Program based on 5% equity increase effective 3/7/2021.

## Initiator Comments / Save and Submit

15. Follow Steps 6, 7, and 8 above.

## Approval Workflow Engine (AWE)

16. Once the department approver approves the transaction, the increase writes directly to the UCPath system.

## Review Pay

17. After the department approver approves the Salary Program Increase adjustment, please verify that the retro pay issued.
- The system should automatically calculate the retro pay.  
*No additional action needed*
  - Review the first paycheck after these types of comp rate changes to confirm the system properly issued retro pay.
  - IF the system did not issue retro pay, submit a one-time payment request via ServiceNow to BFS.

## \*How to Calculate the **General Salary Increase** (NOT Merit)

For any non-represented employee eligible to receive an increase through a general increase program (not a merit increase).

- Calculate the percentage increase based on the monthly salary for MO paid and, *based on the hourly rate for BW paid.*
- Once you add the percentage increase to the monthly rate, you must **round UP** to the whole dollar (not down). THEN, multiply by 12 to get the new comp rate to input into UCPath.
- For hourly paid, add the percentage increase and **round UP** to the cent to get the new comp rate to input into UCPath.*

- MONTHLY EXAMPLE based on 3%:**  
 $\$12,345.67/\text{MO} \times 1.03 = \$12,716.04$  -- round up to \$12,717  
then multiply by 12 = \$152,604
- HOURLY EXAMPLE based on 3%:**  
 $\$32.45/\text{HR} \times 1.03 = \$33.4235$  -- round up to \$33.43

## End of Process