

RETROACTIVE EQUITY PROCESS

POST-SALARY INCREASE PROGRAM IMPLEMENTATION

STEP 1 - MO 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: 3/1/2021)
2. Action Code: PAY = Pay Rate Change
3. Action Reason Code: EQU = Equity

Position Data | **Job Data** | Additional Pay Data

Employee Empl ID Empl Record 0 [Funding](#)
[Work Fo](#)
[Person C](#)

Staff: Career HR Status: Active Payroll Status: Active

Job Data Find | View All

Effective Date: 03/01/2021

Effective Sequence: 0

Action: PAY Pay Rate Change

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 Frequ
1 UCANNL		Annual

Earnings Distribution Personalize | Find | [?](#)

Earnings Code	Comp Rate	Distribution %
1		

UC Job Data

ERIT/Phased Retirement End Dt: Probation Code: None

Trial Employment End Date: PY Career Duration:

Location Use End Date: Probation End Date:

Location Use Type: Cubicle

Job Data Comments: Employee is eligible for an Equity Increase effective 3/1/2021.

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			
Employee Type:	Salaried	Standard Hours:	40.00
Compensation Rate:	\$6,232.530000	Frequency:	Monthly
Default Job Data			
Position:	40028842	COMPENSATION ANL 3	
Business Unit:	SBCMP	UC Santa Barbara Campus	
Department:	PERS		
Job Code:	007726	COMPENSATION ANL 3	
FTE:	1.000000		
Employee Status:	Active	Expected Job End Date:	

Save for Later

Save And Submit

Cancel

Upload \ View Supporting

Transaction ID NEW

Workflow Status Apprvl Prc

Request Status In Progress

Initiator's Comments Entered Employee's 5% Equity Increase. |

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 - MO 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 (Ex: 7/1/2021)
11. Action Code: PAY = Pay Rate Change
12. Action Reason Code: ATB = Across-The-Board

Job Data

Effective Date: 07/01/2021

Effective Sequence: 1

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	Compensation Frequency
1 UCANNL		Annual

Earnings Distribution

Earnings Code	Comp Rate	Distribution %
1		

UC Job Data

ERIT/Phased Retirement End Dt: []

Probation Code: None

Location Use End Date: []

Location Use Type: []

Trial Employment End Date: []

PY Career Duration: []

Probation End Date: []

Cubicle: []

Job Data Comments: Adjust Salary Increase Program 3% Increase based on retro equity effective 3/1/2021.

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 Increase Program adjustment, please verify that the retro pay issued

18. The system should automatically calculate the retro pay.

No additional action needed

- a. Review the first paycheck after these types of comp rate changes to confirm the system properly issued retro pay.
- b. IF the system did not issue retro pay due, 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