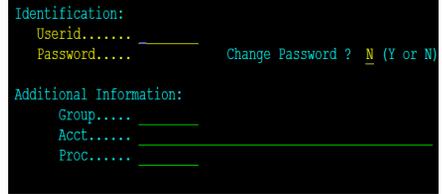### Dec. 5 – Last Day for Monthly Employee PPS Data Entry:

Following this date, changes for monthly employees will be unavailable within PPS. Campus departments will be able to begin entering transactions for monthly employees into ServiceLink on Dec. 18.

```
Identification:
   Userid....... _____
   Password.....          Change Password ? N (Y or N)

Additional Information:
   Group..... _____
   Acct...... _____
   Proc...... _____
```

Budget Mapping for Staffing	
Before UC Path: Triggers for Budgeted Employees in Staffing	**Future State / FOM UC Path: Triggers for Budgeted Positions in Staffing** *DOS Codes, 99/99/99 end dates and other end dates are eliminated in PATH*
BC10, BC12, BC13, BC14, BC25, BC26	BC10, BC12, BC13, BC14 Only Expense Group 142 BC25 No BC26; a Provision will need to be created
<u>DOS Codes:</u>	<u>New EARN Codes: end dates no longer applicable</u>
REG with 99/99/99	REG or blank (also coded as regular)
ASP & COA with any end date	No ASP or COA codes
HS1 with any end date HSY with 99/99/99	HSR, HSN, HSP (Biomed)

UCRFS Test Environment snapshot; EID & names hidden

	Budgeted Position	EmplID	Position Number	Position Description	Title Code
1	Y		40104754	FINANCIAL ANL 3	0077
2	Y		40104811	FINANCIAL ANL MGR 1	0002
3	Y		40097584	FINANCIAL ANL 4	0077
4	Y		40103546	FINANCIAL ANL 3	0077
5	Y		40101093	FINANCIAL ANL MGR 3	0002
6	N		40102753	FINANCIAL ANL 3	0077
7	P		40098247	EXEC AST 3	0073
8	Y		40103307	FINANCIAL ANL 4	0077
9	Y		40102192	FINANCIAL ANL 4	0077

Initial Upload – Date Determined by Path Team

1. There is a new category in UCRFS Applications under Staffing, "Budgeted Positions."
2. Once prompted after the initial upload, units will need to change "P" pending to Yes or No: Yes for permanently budgeted positions and No for positions that are not permanently budgeted.
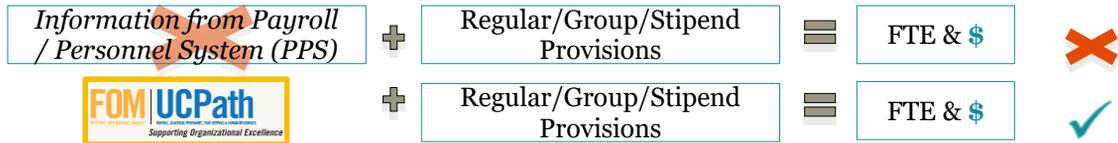
Changes to Ongoing Staffing Maintenance

1. The nightly update process will preserve the Budgeted Position as long as there are no changes.
2. Changes to any of the following fields will reset the Budgeted Position back to Pending: Employee ID, FTE, FAU, or Job Code, Position Code, DOS/Earn Code
3. Pending requires further action – you will need to select Y for Permanently Budgeted positions and No for positions that aren't Permanently Budgeted.

YES	NO	PENDING
• Permanently Budgeted • Coaches • Assistant Professors • HSR, HSN, HSP	• BC26 • Restricted, Limited, Contract employees • Students • Certain Advancement Positions	• Exception basis only if units have questions or concerns • Future employees • Onboarded employees that have yet to earn a paycheck and shouldn't show up in Staffing

1. Why are we changing the existing Staffing process?
   In UC Path, the concept of indefinite end dates and DOS codes ASP, COA do not exist.

2. How has the big picture of Staffing changed?

| *Information from Payroll / Personnel System (PPS)* | ✚ | Regular/Group/Stipend Provisions | ═ | FTE & $ | ✖ |
| FOM\|UCPath Supporting Organizational Excellence | ✚ | Regular/Group/Stipend Provisions | ═ | FTE & $ | ✔ |

3. Does this mean Provisions remains the same?
   The current process for Provisions remains the same. Currently, the only change will be the requirement to create Provisions for BC26 to show up in Staffing.

4. Are Provisions related to "Active Freeze" in Position Data Management training?
   From our current understanding, no. If an employee leaves, a Provision will still need to be created in order to balance Staffing.

5. Why is 12/5/17 the last day to make data entries in PPS and why must we balance?
   A snapshot of PPS will be taken for purposes of transitioning to UC Path. Changes made on 12/5/17 will take effect in time for the PPS snapshot. From our current understanding, this will data will also be used for the traditional December quarterly Staffing deadline.

6. How will we know who should show up in Staffing if employees currently fall under COA or ASP DOS codes?
   During the initial upload, units will be prompted to manually select Budgeted Positions in UCRFS. Employees that were once automatically selected due to eliminated codes will need to be manually selected as Budgeted Positions. ASP end dates are no longer applicable in UC Path.

7. Where can we find out more information regarding UCPath?
   Visit http://fomucpath.ucr.edu/ for more information.

8. When do I change "Pending" to "Yes"?
   The choice of Pending is the exception to the rule and is not a default state. Once an employee begins to earn a paycheck, the Budgeted Position should be changed from Pending to Yes.

9. Is there a blackout for Shared Services to process requests that affect Employee ID, FTE, FAU, Job Code, Position Code, or Earn Codes? In other words, will a blackout be required at year end?
   With the exception of hires and separations, there will be a blackout for any changes that may trigger a reset of a Budgeted Position to Pending. During the transition period, anticipate a blackout period for Quarterly Staffing given that the nightly update process may disturb efforts to balance.

10. Are there instances when employees are not considered Budgeted Positions?
    The same guidelines determine who is considered permanently budgeted. For example, Advancement contract employees still cannot be permanently budgeted. Certain professors here on visa will need a Provision and cannot be permanently budgeted. From our understanding, there are currently no changes being made to costing reports.

11. What actions should occur for an employee that arrives January 1, 2018?
    Notify the budget office of employees that have future start dates. Note that any central allocations will occur after the start date. For centrally funded positions beginning 7/1/18, an incremental perm only BEA will still be processed as in previous years.

If you have a different understanding of the above or have additional questions regarding Staffing, email budgetoffice@ucr.edu so Matthew Hull, Susana Salazar, & Lorissa Zavala are able to view the question.