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Subject: [Gc-sio-dept-ap-contacts-l] UCPath - academic transaction priorities
Date: Monday, June 1, 2020 9:33:28 AM

Hi All,

Below please find my suggested priority list for your academic transactions.

Academic Transaction Priority List for Departments (applies to all academic populations)

June

1. Conversion cleanup for newly discovered issues, Reports To, etc.
2. Terminations with May or June effective dates
3. Extending end dates that end 6/30 (transaction must be approved by 6/29) or putting employees on Short Work Break
4. Ensure June funding is correct
 - Process Direct Retros for May if something was incorrect.
 - Ensure all your positions have default funding – there will be a list to help with this
 - Whatever funding is in place in June will be rolled over to the next fiscal year based on the fiscal year-end funding rollover process which is currently set to run on 6/28/2020. *This process does not work if any future dated (e.g. 7/1) salary changes have been entered for an employee, hence the need to wait and enter those in July to save the departments a new fund entry. A quick reference guide will be published this week regarding the fiscal year-end process.*
5. Creating new positions for new appointees and processing the hire templates
6. Terminating faculty administrative positions for faculty who are stepping down on 6/30 (dept chairs, directors, etc.); processing concurrent hires/stipends for their replacements.

July

1. Academic review actions – merits, promotions, off-scale increases, series change, etc.; remove any BOS components that were due to end in June (I have noted Navon, Iversen, Chakraborty, Cimini—Julia please confirm)
2. GCCP – delete negotiated compensation row if not continuing as participant; add new negotiated compensation row, if applicable, for 2020-21
3. Summer Salary (summer research requires new position and concurrent hire; admin and teaching are simpler flat-rate additional pay transactions)
4. Leaves: Process new leaves and process return from leave for individuals returning 7/1
5. Sabbatical credit review and adjustments – on 7/1, the spring quarter credit should have been added systematically; corrections can be submitted using the Manage Accruals process
6. Other leave balance adjustments as necessary (e.g. Acad Coord sick leave, Postdoc PTO, etc.)
7. Funding for FY 2021, if changes are necessary after rollover process

Kelly