Salary Cap/Multiple Components of Pay Worksheet

Ensure you have your phone or fob for the Duo Mobile multi-factor authentication
Introductions

Instructor

• Name
• UCI role
• UCPath role
• Functional experience
Course Agenda

1: Purpose of Salary Cap/MCOP Funding Worksheet

2: Salary Capped Funding

3: Health Sciences Salary Caps & Multiple Components of Pay
Key Objectives:

• Understand the Salary Cap/Multiple Components of Pay Worksheet

• Examine the difference between Salary Cap and MCOP NSTP worksheet

• Review Health Sciences Salary Caps & Multiple Components of Pay
LESSON 1

Purpose of Salary Cap / MCOP Funding Worksheet
In this lesson, we will:

- Why is the Salary Cap/MCOP Funding Worksheet needed
- How to access the Salary Cap/MCOP Funding Worksheet
Whenever a department creates a new position, funding has to be added to establish the account/fund to be used for the payroll expenses.

Many UCI employees are paid using funds the have salary caps (i.e., grant funds) and/or with multiple funding sources (i.e., NSTP or HCOMP).

The scenarios below trigger the use of the Salary Cap/MCOP Funding Worksheet.

- Entering an account/fund combination on the Funding Entry page that has a salary cap
- Entering multiple components of pay using multiple funding sources
To access the MCOP worksheet, you must navigate to the funding entry page. To do this, click on the Add a New Value Tab.

Please refer to funding entry training for additional information establishing position funding.
Funding Entry - Add a New Value tab

To enter new funding, update existing funding, or view existing funding information, enter the following on the Add a New Value tab:

- **Department** in which the position resides
- **Position Number**

**Note:** The Fiscal Year will default to the current period. If you wish to enter funding for a future period, this field must be updated here.
Funding Entry Data Elements

**Note:** Incumbent information is located in the Job Data Snapshot.

Review the Job Details tabs to view Job Data.

Initiators will be able to review Job details including EMPL ID, Effective Date, Job Code and Payroll status.

**Funding Effective Date** cannot pre-date hire date.

Pulls the data from the Salary Cap / MCOP Worksheet into the Funding Entry page.
Funding Entry – Enter KFS Account

Use the Earnings Distribution Section to enter the approved KFS Account/FUND that will pay for the compensation identified on the employees job data.

For employees that are receiving pay from multiple funding sources, percentage of pay by ERN code, Use the Earning Distro to allocate funding by ERN code.

Pulls the data from the Salary Cap / MCOP Worksheet into the Funding Entry page.
How to access the worksheet

The **Salary Cap/MCOP Funding Worksheet** link is located at the bottom of the Funding Entry page.

In order to access the worksheet, an incumbent must be hired into the position. Incumbent information is located within the **Job Data Snapshot**.
LESSON 2
Salary Capped Funding
In this lesson, we will:

- What are salary capped funds
- When do salary capped funds require the use of the worksheet
- How to setup the worksheet for salary capped funds

Lesson Objectives

1: Purpose of Salary Cap/MCOP Funding Worksheet

2: Salary Capped Funding

3: Health Sciences Salary Caps & Multiple Components of Pay
What is Salary Cap Funding

Many UCI employees are paid using funds the have salary caps.

- A custom effective-dated table that stores salary cap rates, fund and project attributes is available in UCPath.
  - The tables is effective-dated so that changes to salary cap rates over time can be tracked and applied.
  - The following types of funds are stored in this table: Federal, sponsored, state, general, restricted, sponsor name, award type, federal flow through, and other sponsor types.
  - Cap rates will be prorated based on Compensation Frequency of the employee (e.g. 9 over 12).
The Salary Cap/ MCOP Funding Worksheet is required when an employee is compensated with funds that have a salary cap and their compensation exceeds the amount allowed for the capped fund.
Salary Cap/MCOP Funding Worksheet

Select the Salary Cap/MCOP Funding Worksheet hyperlink on the bottom right of page to access the MCOP funding worksheet.

![Image of Salary Cap/MCOP Funding Worksheet]

UCI UCPath - Training
Components of the Worksheet

The worksheet has 3 different sections.

1. Compensation Data Snapshot
2. Default Funding Profile
3. Funding Distribution Worksheet
The Compensation Data Snapshot provides the employee’s monthly and annual compensation amount by earn code and percentage.

When accessing the MCOP worksheet, the compensation details are displayed at the top of the page. Initiators may also review FTE, compensation frequency, salary plan, salary grade and step.
**Default Funding Profile**

- **Default Funding Profile** section is set up to ensure that payroll expenses are charged to the correct KFS account/fund. Initiators have to indicate which account and fund will pay up to the cap and which will pay over the cap.

- **Effective Date** – indicates when the use of this funding should begin.
  - These dates can be in the future, though it is recommended to not plan too far in the future should the funding need to change.
Default Funding - Salary Cap

Scenario

Employee has a salary of $125,000. The KFS account used has a salary cap of $100,000.

The initiator will have to enter another account to cover the over the cap gap amount ($25,000).

Use the **OTC Indicator** to designate the Fund Source(s) that are to be charged when salary exceeds the Cap. There are no Earning Codes used to designate over-the-cap.

The **Distribution %** shows the percentage paid by earn code.
The Funding Distribution Worksheet section allows the initiator to identify the desired funding sources for employee payroll expenses.

- The **Begin Dates** and **End Dates** are specified to inform UCPath when the KFS Account should begin and end paying from the distribution line.
  - **Begin Date** should match the Effective Date in the Default Funding Profile section.
  - **End Date** should not go past the fiscal year end date of 6/30/YYYY.
- The **Percent of Pay** and **Percent of Effort** fields must sum to 100% for each line entered.

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Effort is the portion of time spent on a particular activity, expressed as a percentage of the individual's total activity for the institution. Total effort must equal 100%, no matter how many hours were worked.

Percent of effort isn't the same as distribution effort on the funding worksheet.

The funding worksheet percent of effort is derived from different logic than the funding entry page use by ERN code.
After entering the account information within the Funding Distribution section, select the Funding Distribution preview button to review all fund all funding data on within the position record.
Funding Preview

- The **Funding Distribution Preview** page displays a preview of all funding distributions, to verify the data is accurate and complete, and includes the applied caps and over the cap amounts.

- If there are no errors, click the **Submit to Funding Entry** button to move the funding entered on the worksheet to the Funding Entry page.
The worksheet pulls the information into the Funding Entry page. You must click **Save** in order to get the **Submit** button.

Funding from the worksheet is pulled into the Funding Entry page.

Enter comments and click the **Save** button. After the page is validated, the **Submit** button will appear.
All funding entry and updates trigger the Approval Workflow Engine (AWE).
After final approval of the funding entry or funding update, the system automatically sends an email notification to the department Initiator, which indicates the transaction is approved or denied.

![Email Notification Example]

From: [Email Address]
To: [Email Address]
Cc: [Email Address]
Subject: UCPATH Funding Entry Transaction Approved

Your request for a Funding Entry transaction for Department 802200 has been approved at all levels, and has been processed into the PeopleSoft database.

You can view this transaction at [Link]

This communication was sent via Oracle Workflow Technology. Please do not reply to this email.
LESSON 3
Health Sciences Salary
Capped Funding & Multiple Components of Pay
Lesson Objectives

In this topic we will:

1. Purpose of Salary Cap/MCOP Funding Worksheet
2. Salary Capped Funding
3. Health Sciences Salary Caps & Multiple Components of Pay

- Evaluate HCOMP Compensation Identifiers
- Review setting up compensation in Job Data
- Understand Job Earnings Distribution
Example of H-COMP Setup

College of Health Sciences has complex funding requirements due to the frequent use of Salary Caps & Multiple Components of Pay.

![Compensation Data Snapshot](image-url)
## CHOS X,Y&Z Pay Components

<table>
<thead>
<tr>
<th>Pay Component</th>
<th>Faculty Salary and Benefits</th>
<th>Non-Faculty Academic/Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional/Other</td>
<td>Includes all salary not included in the X, Y, and Z payments faculty salary.</td>
<td>Includes all non-base salary, such as shift differentials and overtime.</td>
</tr>
<tr>
<td>Base &amp; Negotiated</td>
<td>Includes X, X' and Y' components of faculty salary (Health Sciences Compensation Plan) as well as credits that impact base pay.</td>
<td>Includes regular salary and those salaries that are treated like regular pay as well as credits that impact base pay.</td>
</tr>
<tr>
<td>Faculty Bonuses/Incentives</td>
<td>Includes only the Z Payments of faculty salary (Health Sciences Compensation Plan)</td>
<td>N/A (exceptions for faculty who may also have multiple title codes where one may be a non-faculty academic or staff title code).</td>
</tr>
</tbody>
</table>
## COMP Rate Codes

<table>
<thead>
<tr>
<th>Comp Rate Code</th>
<th>Comp Rate Code Description</th>
<th>Earn Code</th>
<th>Earn Code Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCHSP</td>
<td>HSCP &quot;X Prime&quot; - Annual Rate</td>
<td>HSP</td>
<td>HSCP-Differential (X Prime)</td>
</tr>
<tr>
<td>UCHSX</td>
<td>HSCP &quot;X&quot; - Annual Rate</td>
<td>HSR</td>
<td>HSCP-Regular (X)</td>
</tr>
<tr>
<td>UCHSN</td>
<td>HSCP Negotiated [NOT FIRM]</td>
<td>HSN</td>
<td>HSCP-Negotiated (Y)</td>
</tr>
<tr>
<td>UCHSAP</td>
<td>HSCP Above Scale - X Prime</td>
<td>HSP</td>
<td>HSCP-Differential (X Prime)</td>
</tr>
<tr>
<td>UCHSAX</td>
<td>HSCP Above Scale - X</td>
<td>HSR</td>
<td>HSCP-Regular (X)</td>
</tr>
<tr>
<td>UCHSO1</td>
<td>HSCP Off Scale 1 (Eligible)</td>
<td>HOS</td>
<td>HSCP Off-Scale X Earnings</td>
</tr>
<tr>
<td>UCHSO2</td>
<td>HSCP Off Scale 2 (Ineligible)</td>
<td>HOS</td>
<td>HSCP Off-Scale X Earnings</td>
</tr>
<tr>
<td>UCHSO3</td>
<td>HSCP Off Scale 3 (Decrease)</td>
<td>HOS</td>
<td>HSCP Off-Scale X Earnings</td>
</tr>
<tr>
<td>UCHSY</td>
<td>HSCP Negotiated [FIRM]</td>
<td>HSN</td>
<td>HSCP-Negotiated (Y)</td>
</tr>
<tr>
<td>UCHSMA</td>
<td>HSCP Min Scale - Above Scale X</td>
<td>HSR</td>
<td>HSCP-Regular (X)</td>
</tr>
<tr>
<td>UCHSMP</td>
<td>HSCP Min Scale - X Prime</td>
<td>HSP</td>
<td>HSCP-Differential (X Prime)</td>
</tr>
<tr>
<td>UCHSMX</td>
<td>HSCP Min Scale - X</td>
<td>HSR</td>
<td>HSCP-Regular (X)</td>
</tr>
<tr>
<td>UCHMAP</td>
<td>HSCP Min - Above Scale X Prime</td>
<td>HSP</td>
<td>HSCP-Differential (X Prime)</td>
</tr>
</tbody>
</table>
The example below provides a detailed snapshot of a professor of health sciences compensation funding. As shown below, the professor is compensated by three different funds:

- X = HSR Regular Salaried
- HSP = Regular Salaried Differential (X Prime)
- HSN = Negotiated Salary (Additional Compensation)
When an employee is hired, the compensation is entered on the Job Data tab using one of the Smart HR templates.

- The Salary Plan, Salary Grade and Step populates the Job Compensation – Pay Components section.
- When manually entering this information, leave the Step blank.
Adding Comp Rate Codes

X and X Prime and both derived from the salary steps.

Adding a new row will allow the users to enter the COMP Rate code and COMP Rate Annual Percentage.

**Note:** When Adding Row, Rate Code Source will always read manual.
Job Earnings Distribution

Aggregate Comp Rate is derived based on the Compensation Rate Annual Amounts and FTE. This amount is the monthly amount the employee will receive for this compensation plan. This does not include additional pay, or pay from any other jobs.

Earnings Distribution Type “By Amount” is the Default

JED Earn Codes are derived from Comp Rate Codes.
The newly created job must be approved and processed by UCPC to activate the Salary Cap/MCOP Worksheet hyperlink.
H-COMP Default Funding Profile

**Default for OTC Indicator=No:** recommended to always enter a default account. Leave the Earn Code Blank, and then enter “No” for the OTC Indicator. Enter appropriate fund information. This will be the default for all rows that are NOT OTC, even when there is no Salary Cap.

**Default for OTC Indicator=Yes:** Leave the Earn Code blank, and entering “Yes” for the OTC indicator. Enter appropriate fund information. This will be the default for OTC Rows, if no others are specified.

**Default for specific Earn Code:** Enter Earn Code, set the OTC Indicator to Yes or No, as appropriate. Enter the funding information. Repeat for all Earn Codes as required.

Enter Distribution % for each row. For each Earn Code and OTC Indicator combination, the Distribution % must equal 100%.
Instructor Demo

Initiate New Position Funding Entry Request - MCOP

• Watch as your instructor demonstrates how to initiate a personal data change template transaction in UCPATH.
• Follow along using the UCPATH Help topic.
  • Open the UCPATH Help site and refer to the Initiate New Position Funding Entry Request - MCOP topic.
  • Launch the See It version of the topic.
• At the end of the demonstration, you will have the opportunity to practice this task.
User Productivity Kit Simulations (UPK) are available to provide users additional training demonstrations for your transactions.
Where to Get Help

• The **UCPath Help** site is your first level of support. Search for conceptual content, job aids or step-by-step instructions for UCPath tasks.

  • From the UCPath portal homepage, expand the **Help / FAQ** section on the left side of the page and then click the “**Location Users**” link to open the site. *An Adobe PDF version is available for users with screen readers.*

• If you’re experiencing issues, or have questions about transactions, please contact the **Employee Experience Center** at (949) 825-0500, or submit a ticket by visiting **UCPath.UCI.Edu**
Training End

Thank You!