



UC SANTA CRUZ

UCPath @ UCSC GLOSSARY

Disclaimer: The following glossary includes general terms in a form to introduce usage of those terms. Not all of these terms may be applicable to your division, unit, or department's business processes. This glossary does not take the place of training for UCPath or for business processes applicable to your campus, division, unit, and department.

Contents

TERM	5
Absence Management	5
Actuals Distribution	5
Ad-hoc Approver	5
Approval Workflow Engine	5
Approver	5
Batch Hire	5
Business Unit	5
Candidate Gateway	5
Checklist	5
Compensation Frequency	5
Contingent Worker	5
Correction (Correct History)	5
Data Distribution Operational Data Store	5
Department	6
Direct Retro Distribution	6
Effective Dating	6
Empl Class	6
Employee	6
Employee ID	6
Employee Self Service	6
Entitlement	6
Fair Labor Standards Act (FLSA)	6
Filled Position	6
Full Time Equivalent (FTE)	6
Home Location	6
Host Location	6
HR Templates	6
Incoming Location or Department	7
Incumbent	7
Initiator	7
Interlocation Coordinator	7

Interlocation Transfer	7
Intralocation Transfer	7
Involuntary Termination	7
Job Code	7
Job Data	7
Job Earnings Distribution	7
Labor Ledger	7
Life Event	7
Location	8
Manage Accruals Page	8
Manager Self Service	8
Multiple Head Count Positions	8
ODS	8
One Time Payment Request (Form)	8
Organizational Hierarchy Structure (Security Tree)	8
Outgoing Location or Department	8
Pay Confirm	8
Paygroup	8
Payroll Request (Form)	8
PayPath	9
Person of Interest	9
Person Organization Summary	9
Personal Data	9
Position	9
Position Control (Form)	9
Position Management	9
Position Pool	9
Push Back & Deny	10
Recurring Additional Pay	10
Reports To	10
Role Level Security	10
Row Level Security	10
Separation	10
Service Partnership Agreement	10
Single Head Count	10
Short Work Break (SWB)	10

Terminate	10
UCPath	10
UCPath Center	10
UCPath Inquiry	11
UCPath Portal	11
Vacant Position	11
Voluntary Termination	11
Workforce Administration	11
Workforce Job Summary	11
Work Location	11
Acronyms & Abbreviations	12

TERM	DEFINITION
Absence Management	Absence Management is a module in UCPATH that UC leave administrators will use to plan and manage absence events (including extended leaves) and calculate vacation and sick time. Absence management is UC's single system of record for all paid time off.
Actuals Distribution	PeopleSoft process that is run to marry payroll and funding information and that distributes payroll obligations across multiple funding sources.
Ad-hoc Approver	An individual in approval workflow selected to review and approve a transaction when a transaction requires a second approval. Adhoc approvers must be granted the approval role to be added as an adhoc approver.
Approval Workflow Engine	Approval Workflow Engine (AWE) systematically routes transactions in UCPATH to designated roles (e.g., HR initiator, HR approver(s)) for approval at UCSC. Once UCSC approvals are complete, transactions are either routed to UCPC for finalization or are finalized in UCPATH.
Approver	An individual in approval workflow responsible for reviewing and approving transactions prior to routing to the UCPATH Center or writing to the UCPATH System.
Batch Hire	The action in UCPATH of hiring groups of employees at one time. Batch hires may not be used for employees that have additional compensation or job earnings distribution (JED). Employees do not need to be identical to be eligible for a batch hire (they can have different effective dates, position numbers, compensation, etc.). The process will primarily be used when large groups of employees are hired at once. A batch hire is entered in UCPATH using an UCPATH template spreadsheet with appropriate data fields noted in the document. Once the spreadsheet is completed for all batch employees, the spreadsheet is able to be loaded into UCPATH.
Business Unit	Each UC campus and medical center is identified as a "Business Unit" which will be used to segregate campus information for reporting and system security access (also see Location). UCSC will be SCCMP.
Candidate Gateway	Part of Talent Acquisition Management (TAM) that allows outside applicants to view and enter information to apply to a position.
Checklist	An optional tool used to assist in completing transactions such as hire, termination, etc. UCSC has decided not to mandate the use of this tool.
Compensation Frequency	Compensation frequency determines when the employee receives their paycheck (e.g., biweekly, monthly, etc.).
Contingent Worker	An individual engaged by the university on a non-permanent basis to complete a specific function or task, who does not have an employee relationship with UCSC, and does not receive compensation through UCPATH. (e.g. volunteer, consultant)
Correction (Correct History)	A modification to historical information made by deleting or overwriting existing history with UCPATH that has already been entered, after which there will be no record of the prior information. UCSC will not have direct access to do this within the system and corrections will be managed via UCPATH Inquiry by the UCPATH Center.
Data Distribution Operational Data Store	<p>The UCPATH Data Distribution Operational Data Store (DDODS) extracts and delivers data from the UCPATH PeopleSoft Human Capital Management (HCM) system that has been requested and approved for distribution to UC locations for consumption in local data warehouses and other interfaces. The flow of data is uni-directional from UCPATH HCM to a UC location.</p> <p>The DDODS is a product, delivering not only the data, but also the code for building local operational data stores identical to the DDODS data model that will store the data delivered to UC locations and also a loader application that loads the delivered DDODS data files into the local operational data stores. The locations can then use the data to populate campus systems.</p>

TERM	DEFINITION
Department	The department (division/unit/department on campus) the position works in / for and the one that is responsible for the terms and conditions of employment. (It is not always the department that may fund the position.)
Direct Retro Distribution	Reallocation of funding sources after an expense has posted that does not involve a net change in dollars (i.e., accounting transfer on a salary or fringe expense that has been previously charged). PeopleSoft term for Transfer of Expense or Salary Cost Transfer.
Effective Dating	Used to maintain and view a complete chronological record of historical, current and future data. It is similar to the time period assumption in accounting which allows reporting of events based on a time period.
Empl Class	Equivalent to Appointment Type (e.g., Career, Limited, Floater, etc.) in PPS. Empl Class defines the type of employee and drives eligibility and other processes.
Employee	An individual who performs a service for the university and who is working under the direction and control of the university and its employees.
Employee ID	An employee ID number is the unique 8-digit identification number assigned to a UC employee upon hire.
Employee Self Service	Customized UCPath portal tool that provides employees direct access to update some of their personal information, such as, home address, emergency contact, direct deposit, W-4 (tax withholding allowance), benefits enrollment, etc.
Entitlement	The amount of paid-time off that an employee is entitled to take for each category of absence or each absence event, depending on the method of accrual. For example, an employee is entitled to 96 hours of sick time per year.
Fair Labor Standards Act (FLSA)	FLSA establishes requirements for employees' hours of work, wages, and premium overtime. There are two employee designations under the FLSA, exempt and nonexempt. In UCPath, an employee may only have one unified FLSA designation, regardless of how many individual jobs they have.
Filled Position	An active position which has an incumbent.
Full Time Equivalent (FTE)	FTE refers to percentage of time of the position that an incumbent will work as opposed to the percentage budgeted for a position. What is called permanent FTE in PPS is known as "budgeted FTE" in UCPath.
Home Location	Typically, the home location is where the employee was first employed at UC because they are already established in that system (PPS or UCPath) and the campus adding the concurrent job is the host location. When both campuses are using UCPath, the home location is defined by the primary job indicator within job data.
Host Location	The host location is the employee's concurrent job location. Both the home and host locations are responsible for paying the employee; however, UCPath Center is ultimately responsible for making sure that the employee receives one single paycheck.
HR Templates	HR Templates will be used to enter data and complete the following transactions: <ul style="list-style-type: none"> ● New Hires ● Rehires ● Concurrent jobs ● Intralocation Transfers ● Personal data ● Terminations

TERM	DEFINITION
Incoming Location or Department	When an employee leaves their job at a department and accepts a job at a different department or location. The new department or location is considered the incoming or receiving department. This is used in both intralocation and interlocation transfers.
Incumbent	An employee assigned to a position.
Initiator	Role in Approval Workflow (AWE) for an individual with the ability to initiate all transactions for departments for which they have row-level security. This ensures users only have access to data they are authorized to view, for example, data for their department.
Interlocation Coordinator	<p>All campuses and the UCPath Center should be directed to contact the Interlocation Coordinator (ILC) for questions regarding the interlocation process. The ILC is responsible for facilitating the interlocation concurrent jobs process for UCSC.</p> <p>This role will be a payroll function when the other campus is not in UCPath.</p> <p>If both campuses are in UCPath, SHR Talent Acquisition will be the ILC for staff employees and the Academic Personnel Office for academic employees.</p>
Interlocation Transfer	An interlocation transfer occurs when a UC employee leaves their job with one UC location in order to accept a job at another UC location without a break in service. An employee may transfer up, down or laterally when moving to the new UC location.
Intralocation Transfer	When a transfer occurs from one department to another department within UCSC.
Involuntary Termination	A termination initiated by UCSC (e.g., terminations for cause, indefinite layoffs, the end of a temporary appointment prior to the established end date, the death of an employee, etc.)
Job Code	<p>Job codes are used to define job titles and related classifications, including job families, FLSA, compensation rate ranges and steps, and EEO compliance categories.</p> <p>Job codes are different from positions. All employees will be assigned a job code per each applicable job; however positions can be tracked without an incumbent and are part of the position.</p> <p>For example, a job code may represent the administrative assistant title, and that job may have different administrative assistant positions, one in human resources and another in finance.</p> <p>Positions track details for a specific job in a specific department, location, union, and funding source regardless of whether an incumbent exists.</p>
Job Data	The specific details of an employee's job including basic compensation details stored in UCPath. These specific details of the employee's job are established as job data when the employee is hired, rehired, or transferred into a job in UCPath. While each employee's job data is unique, much of it is inherited from the position into which the employee was hired (e.g., the employee's department and job code will default from their position). Job data excludes other types of data stored in UCPath about the employee, like personal data and information about an employee's benefits and deductions.
Job Earnings Distribution	Used to distribute earnings by earnings code on the job record either by percentage or amount. (e.g., Employee-initiated Reduction In Time (ERIT), phased retirement). This is <i>not</i> related to funding distribution.
Labor Ledger	A process to load detailed payroll expense data (e.g. salary wages) into customized PeopleSoft tables in order to send data to locations for posting journals to the general ledger.
Life Event	A change in the status of the employee, such as birth of a child, death of a spouse, marriage or divorce related to Benefits.

TERM	DEFINITION
Location	<p>UCPath-specific umbrella term for campuses, health systems and other UC programs or organizations that will be transitioning to UCPath.</p> <p>Each of the 20 locations is identified in UCPath as a ‘business unit,’ which will be used to segregate information for reporting and system security access.</p> <p>UCSC is identified as “SCCMP”</p> <p>This is separate from the work location which is held at the position level. (See Work Location)</p>
Manage Accruals Page	<p>An online page within UCPath used to generate on-cycle payments related to hours</p> <p>SHR/Academic Divisions will complete this page in order to submit on-cycle payments not sent through CruzPay to UCPath Center for processing.</p>
Manager Self Service	<p>Manager Self Service (MSS) is a component which allows managers and supervisors access to some of their employee’s information. This will also drive access to employee performance appraisals through e-Performance for staff employees.</p>
Multiple Head Count Positions	<p>A position that can have more than one incumbent. Incumbents in a multiple headcount positions must share all position attributes (including department, job code, salary plan, grade, funding distribution), but they may have different compensation and percentages of time.</p> <p>The following types of employee types are eligible to be in one to many positions; casual/restricted students, graduate student researchers and UNEX instructors.</p>
ODS	<p>See Data Distribution Operational Data Store (DDODS)</p>
One Time Payment Request (Form)	<p>An online page within UCPath used to generate one-time flat payments.</p> <p>SHR/Academic Divisions will complete this page in order to send one time payments to UCPath Center for processing.</p> <p>(Note: ‘Form’ is interchangeable with ‘page’ in UCPath. The form is “electronic” and not paper.)</p>
Organizational Hierarchy Structure (Security Tree)	<p>The organizational structure within UCPath will be different than what is in PPS (which is modeled after the financial structure). In UCPath, this organizational structure is known as a “security tree.” The security tree drives access to many of the functions and access to information within the UCPath system.</p> <p>Note: The existing financial structure will remain in place within Banner</p>
Outgoing Location or Department	<p>The location or department where an employee is vacating their position. The existing department or location is considered the outgoing or originating department. This is used in both intra and interlocation transfers.</p>
Pay Confirm	<p>The process to confirm and process payroll in UCPath. Equivalent to pay compute in PPS.</p>
Paygroup	<p>Each employee must belong to a paygroup (e.g. 7B7 - Hourly Staff, 7AC - Exempt Academics) in UCPath. The paygroup defines FLSA rate calculations related to overtime, and the pay cycle an employee is paid on.</p>
Payroll Request (Form)	<p>Online page within UCPath used to generate final pay, off-cycle, and overpayment payroll requests. (E-078)</p> <p>SHR/Academic Divisions will complete this page in order to send final pay, off-cycle checks, or overpayment information to UCPath Center for processing.</p> <p>(Note: ‘Form’ is interchangeable with ‘page’ in UCPath. The form is “electronic” and not paper.)</p>

TERM	DEFINITION
PayPath	<p>An AWE-enabled page that allows initiators to update an employee’s position, job, and additional compensation information. Using PayPath, the initiator can make changes to these three components, either individually or together.</p> <p>PayPath must be used to update filled single-headcount positions and then cascades to the incumbent’s job record.</p> <p>PayPath cannot be used to update vacant positions or multiple-headcount positions.</p> <p>Entries within this page do not go through UCPATH Center for approval.</p>
Person of Interest	<p>An individual who does not perform services for the University but for whom there is a business need to track the individual in UCPATH. (e.g. Chancellors’ significant other)</p>
Person Organization Summary	<p>UCPATH page that allows the user to view the basic job details of any employee or contingent worker in the system (e.g. career hours, benefit hours, FLSA status, pay group, union code, FTE, primary job, department ID, employee type). Row-level security is not invoked on this page.</p> <p>Managers do not have access to this page. Access to this page is based on business need and typically for people with the Workforce Admin (WFA) inquiry or WFA initiator role.</p>
Personal Data	<p>An employee’s biographical data stored in UCPATH. Personal data includes a person’s name, address, etc. The type of personal data stored in UCPATH will vary based on the type of person and the requirements of their job.</p> <p>Personal data is entered at the time of hire and can be updated by the employee, SHR/AHR, or the UCPATH Center depending on the type of change.</p> <p>Managers can see some of this data for their direct reports through Manager Self Service (MSS).</p>
Position	<p>Represents a ‘box’ in UCSC’s organizational structure. A position can be filled if an employee currently occupies that position, or vacant if no employee currently holds that position. All employees at UCSC will occupy a position. Positions can either be a single headcount (can only hold one employee at a time) or multiple headcount (can hold multiple employees at a time).</p> <p>Positions track details for a specific job in a specific department, location, union, and funding source regardless of whether an incumbent exists.</p> <p>Funding and budgets are established in UCPATH at the position level.</p> <p>Positions can be active or inactive. Active positions can be hired into but inactive positions cannot be hired into. Positions are made inactive when they will no longer be used in the organization.</p>
Position Control (Form)	<p>A custom, AWE-enabled page that is used to create new positions and to update vacant positions. This will only be used for staff positions.</p> <p>Student & Academic positions will be created directly in the position management module and will not use the position control page (form).</p> <p>(Note: ‘Form’ is interchangeable with ‘page’ in UCPATH. The form is “electronic” and not paper.)</p>
Position Management	<p>Position management (PM) is a module within UCPATH that will be used to establish and track attributes of positions for a given business unit. (UCSC=SCCMP)</p>
Position Pool	<p>Position pool is a field stored within position that identifies federal or presidential work study.</p>

TERM	DEFINITION
Push Back & Deny	<p>If an approver decides that they cannot approve a transaction within approval workflow (AWE), they may either 'push back' the transaction or 'deny' it.</p> <ul style="list-style-type: none"> Pushing back a transaction returns the transaction to the previous approver with comments. This functionality can only be used by the second or third approver, it cannot be used by the first approver to push back to the initiator. Denying a transaction cancels it and the initiator must begin the transaction again.
Recurring Additional Pay	Any money paid to an employee that is in addition to their regular base compensation and paid over multiple pay periods (e.g. stipends, perquisites).
Reports To	<p>The position responsible for hiring, writing performance appraisals, etc. for another position.</p> <p>Managers who are assigned as 'Reports To' have access to their employees through manager self-service (MSS). This will also feed downstream systems such as LMS and CruzPay.</p>
Role Level Security	Security that drives what actions an individual can take in UCPATH. This includes inquiry (view) only or being able to complete transactions via AWE (initiate or approve).
Row Level Security	Security which drives the positions or employees a person can see in UCPATH. This security is based on the division, unit or department organizational security tree.
Separation	When an employee ends all jobs at UCSC and/or other UC locations and ends their employment relationship with the University of California. Since an employee may have one or more jobs, terminating a single job may or may not result in a separation from the University of California.
Service Partnership Agreement	<p>Service Partnership Agreements (SPA) outline the roles and responsibilities for both the UCPATH Center and the locations/partners regarding UCPATH.</p> <p>The SPA establishes:</p> <ul style="list-style-type: none"> How oversight and governance will be provided Methods used to measure quality and performance Commitments the UCPATH Center will provide to locations Working assumptions and service constraints Roles and responsibilities of all parties to set fundamental standards Feedback procedure that details the value placed on continual improvement and the process for locations to provide feedback on services received
Single Head Count	A position that can only have one incumbent.
Short Work Break (SWB)	The action of SWB can be used to stop pay for an employee in the system for a temporary period of time but allow them to remain on active status (e.g. furlough, student not working over summer).
Terminate	An action taken in UCPATH to end an employee's job, either voluntarily or involuntarily.
UCPATH	<p>All tools, systems, and technologies related to UCPATH.</p> <p>UCPATH includes:</p> <ul style="list-style-type: none"> PeopleSoft: Human Resource Management (HCM), TAM, ePerformance, Payroll Salesforce: Customer relationship management (case management/ticketing) software Other technologies that support delivery of human resources and payroll services to UC employees and management of employee and job data
UCPATH Center	<p>The shared services center responsible for responding to certain employee questions, finalizing certain HR transactions, administering benefits and payroll, and maintaining data in the system.</p> <p>The UCPATH Center is located in Riverside, CA and staffed from 8 a.m. to 5 p.m., Monday through Friday.</p>

TERM	DEFINITION
UCPath Inquiry	<p>An online inquiry opened in UCPath when UC employees and managers request help with certain actions:</p> <ul style="list-style-type: none"> • Able to open a case whenever there is an issue/request (24 hours a day, 7 days a week) • Able to submit a request on behalf of someone else • Able to attach supporting documents • Able to control the initial description of the issue/request • Information is collected in one place • Able to watch/track the problem or service request until it is resolved by the staff at the UCPath Center
UCPath Portal	<p>The ‘front door’ that employees and managers will use to access UCPath. Using the Portal, employees and managers can perform the following actions:</p> <ul style="list-style-type: none"> • View personal data • Submit personal data changes • Enroll in benefits • Complete their W-2 • Establish direct deposit • View pay history and accrual balances
Vacant Position	A position, active or inactive, that does not have an incumbent.
Voluntary Termination	A termination initiated by an employee (e.g., resignation, retirement, etc.)
Workforce Administration	<p>Workforce Administration (WFA) is a module in UCPath that manages an employee’s lifecycle.</p> <p>WFA allows users to track and manage job related data, including managing pay and compensation, benefit eligibility programs, position and employee data, payroll and tax data, and HR status.</p>
Workforce Job Summary	<p>UCPath page that allows the user to view specific job details or employment records (e.g. historic, active, terminated employee records), including compensation information.</p> <p>Managers do not have access to this page. Access to this page is based on business need and typically for people with the Workforce Admin (WFA) inquiry or WFA initiator role. Employees can be seen based on row-level security.</p>
Work Location	A field at the position level which indicates where a position is located (i.e. employee performs their job duties).

Acronyms & Abbreviations

Many acronyms or abbreviations are used in UCPath. The most commonly used acronyms follow below.

Abbreviation	Description
ACA	Affordable Care Act
AM	Absence Management
APO	Academic Personnel Office
AWE	Approval Workflow Engine
AYSO	At Your Service Online
BN	Benefits
CA	Commitment Accounting
CEMLI	Conversions, Extensions, Modifications, Localizations and Interfaces
DDODS	The UCPath Data Distribution Operational Data
ESS	Employee Self Service
FSPD	Future State Process Design
GL	General Ledger
IDM	Identify Management
ILC	Interlocation Coordinator
JED	Job Earnings Distribution
LMS	Learning Management System
MSS	Manager Self Service
ODS	Operational Data Store
OE	Open Enrollment
POI	Person of Interest
PY	Payroll
SCCMP	Santa Cruz Campus (Business Unit)
SHR	Staff Human Resources
SSO	Single Sign On
TAM	Talent Acquisition Management
TBH	Template Based Hire
UCPC	UCPath Center
WFA	WorkForce Administration