Agenda

• Introductions

• Expectations

• General Reports Overview/Tips

• Key Reports
  • Employee Compensation
  • Record of Earnings
  • Distribution of Payroll Expense (DOPE)
  • Vacant Positions
  • Visa Monitoring
  • Extended Leave Monitoring
  • Short Work Break Monitoring
  • Jobs with Approaching End Dates
Departments are expected to regularly run UCPath reports to monitor employee data, job data, and pay.

What are the benefits of reviewing reports?

- Policy compliance
- Reduction of overpayments and off-cycle requests
- Fewer retroactive transactions and UCPath case submissions
- More time for fun other work.

Deans Offices should also actively engage with reports to check activity in their divisions and support their departments. Some examples:

- Monitor leave activity – you may need to know who is on sabbatical this quarter so you don’t invite them to serve on a committee
- Run the Employee Roster Report to ensure all new hires are in the system
- Run the Compensation Report to approved merits and promotions were entered (re-run after a range adjustment to verify range was applied)
- Pull quick rosters of divisional faculty and compensation
Business Analytics Hub

- [https://bah.ucsd.edu](https://bah.ucsd.edu)
- Make a bookmark
- HR/Payroll

Welcome to the Business Analytics Hub

The Business Analytics Hub (BAH) houses a centralized list of analytics and reports that use data from one or more Activity Hubs or created from sources such as Oracle Financials Cloud and UCPath, among others. On BAH, find analytics and reports listed by area, request access to view the data, suggest new or enhanced analytics reports and submit questions. Recommended browsers for BAH and posted reporting solutions are Chrome and Firefox.
Report Tabs

- Report Tabs
  - Human Resources Reports
  - Human Resources Reports (Restricted)
  - Payroll Accounting and Reconciliation
  - Payroll and Financial Reports (Restricted)
- In general, reports are listed alphabetically within each tab
- Click the Launch button to select a report to run
Login/Security

- Prompted to login at first report launched
  - Active Directory

- Be sure to have phone/dongle ready for Duo Login
- Note that UCPath access is carried over automatically.
  - If the consumer is not a UCPath transactor, or needs additional department data access, they must request that through the UCPath Reports Access Request form
- Row-level security in the Employee Activity Hub (Cognos Reports) is applied at the report’s View (package) level. If the View has a row-level security table applied to it, it is a secured view. Most of our UCPath Reports use secured Views, with the exception of the Payroll Accounting & Reconciliation report group (these use unsecured Views, providing full department data access)
Running Report

• If you see the following message, it’s just indicating that your results will be limited by the data you have access to see.
  • Just click the X to make the message go away
Running Report

- Most reports will have filter prompts
- When filter complete, click “Run” button at bottom to display report
Filter Tips - Required

- Required filters will have a *
Filter Tips – Employee Status

- Be sure to select the appropriate Employee Status
  - For active employees
    - Active
    - Paid Leave of Absence
    - Short Work Break
    - Unpaid Leave of Absence
  - Note that the order can change in different reports
Filter Tips – Search By

- Search defaults to “Starts with any of these keywords”
- Note that you may have to reduce the first characters to capture international alphabet
Filter Tips – Search By

- You might need to use “Contains any of these keywords”
Filter Tips – Search By Select

- Be sure to move the search result to the Choices column

- When filter complete, click “Run” to display report. The “Run” button is always at the bottom of the page.
• Click “Run” and the report defaults to displaying in HTML Format
It’s possible that the report will span beyond the screen size so be sure to note the scroll bars at the bottom of the display and to the right.
Report Display

- There also may be page navigation to display more data
Download to Excel Data

- To make the data more manageable, you can download to excel
  - Click on down arrow
  - Click Run Excel data
Download to Excel Data

- When the download is complete, an excel spreadsheet icon will appear at bottom of screen
  - Click to open report in Excel
Download to Excel Data

- Be sure to Enable Editing if prompted
- Defaults to saving in Download directory
- For security purposes, be mindful of what data you download and save on your computer.
Re-running reports

- If you want to run the same report again, click on the Arrow

- To run a different report, go back to https://bah.ucsd.edu
Reports
# Key Reports

This table reflects the bare minimum of what a department should review on a regular basis for managing academic employment and compensation. Link to table on APS website: [https://aps.ucsd.edu/compensation/acadcompreporting.html](https://aps.ucsd.edu/compensation/acadcompreporting.html)

<table>
<thead>
<tr>
<th>Report</th>
<th>How Running This Report Helps</th>
<th>Business Rules</th>
<th>Run Frequency Expectation</th>
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</table>
| Employee Compensation   | • Ensure all salary components (scale, MOS, BOS, GCCP, HSCP) are correct  
                           • Ensure total salary is as expected                                                                 | • The comp rate codes are programmed to apply certain benefits (e.g. covered comp), to be ranged or not, and more so it is imperative to enter them correctly.  
                           • Only one of each comp rate code can be used (e.g., cannot enter two UCOFF1 rows with the same effective date).  
                           • Tip: CMSI is added to existing market off-scale on the UCOFF1 comp rate code                                                                                                                                                                                                 | As needed                |
| Record of Earnings      | • Provides easy to read snapshot of an employee’s pay which helps with reconciliation  
                           • Quick verification of summer salary to ensure 3/9ths were not exceeded                                                                 | • Includes all cash compensation issued through UCPay  
                           • Does not include reimbursements issued outside of UCPay                                                                                                                                                                                                                                                                                      | As needed                |
| Distribution of Payroll Expense (DOPE) | • Catch and correct overpayments immediately  
                                           • Catch and correct missed pay immediately  
                                           • Catch CBR issues  
                                           • Catch and correct funding issues                                                                 | UC policy, BFB-IA-101, states that departments shall perform a monthly reconciliation of total salaries paid, as shown on the Distribution of Payroll Expense Report                                                                                                                                                                                                 | Monthly                   |
| Vacant Positions        | • Helps prevent the same position from being used for multiple employees. If it isn’t vacant, create or use a different position.  
                           • Identifies positions that you may want to inactivate                                                                 | • There should be only one incumbent assigned to a position.  
                           • Positions may be re-used for a previous employee (rehire) or for a new hire in the same title (funding, reports to, and other attributes may need to be updated)  
                           • Ensure that the salary plan and grade are updated prior to submitting the hire transaction.                                                                                                                                                                                                                                                   | As needed (especially peak hiring seasons) |
| Visa Monitoring         | • Ensure USCIS compliance  
                           • Support our international scholars                                                                 | • Visa updates are managed through the Glacier system and fed into UCPay  
                           • Use the report to know when to consult with the employee and IFSO regarding next steps.                                                                                                                                                                                                                                           | Monthly                   |
| Extended Absence Monitoring | • Reduces missed pay/off-cycles (e.g., forgetting to return someone from LWOP)  
                                • Avoid disruptions in disability payments                                                                 | The UCPC processes the job changes related to leaves. The job will remain in leave status until you enter an actual return from leave date.                                                                                                                                                                                                         | Monthly                   |
| Short Work Break Monitoring | • Reduces missed pay/off-cycles (e.g., failure to return someone to regular pay status)  
                                    • Ensures compliance with SWB matrix rules                                                                 | You may need to end the SWB and process a RWB to return the employee to pay status, extend the SWB as per the matrix rules, or terminate the job.                                                                                                                                                                                                       | Quarterly (or monthly)    |
| Jobs with Approaching End Dates | • Avoids overpayments  
                                • Avoids benefits disruptions  
                                • Avoids additional transactions caused if a record is missed in the range process                                                                 | Certain processes are impacted by that date such as Benefits, range adjustments, auto-termination. You may need to check the auto-term box, extend the date, or delete the date (e.g. prior to entering a promotion).                                                                                                                                                                  | Monthly                   |
Employee Compensation Report

- Human Resources Reports (Restricted) Tab
- Used For: Viewing compensation broken down into components
  - Be sure to filter by employee status to get active employees
  - Use other filters as needed
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<th>Department Code</th>
<th>Department</th>
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Employee Record of Earnings Detail

- Payroll and Financial Reports (Restricted)
- Required: Pay Check Date Range, Employee Name-ID
- Used For: Detailed analysis of pay by earnings type that span a date range you specify and details every type of cash compensation received by the employee
# Employee Record of Earnings

## Employee Data
- **Employee Name**
- **Employee ID**
- **Business Unit**
- **Location**
- **Department**
- **Job Title**
- **Job Code**
- **Pay Rate**

## Pay Check Data

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## Hours and Earnings Detail

### Earnings Type
- **Additional Camp Research**
- **Appointed S&F Plan - Additional**
- **Regular Pay**

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<th>Pay Period Start Date</th>
<th>Pay Period End Date</th>
<th>Hourly Rate</th>
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## Taxes

### Federal Tax Data
- **Pay Check Date**
- **Pay Period Start Date**
- **Pay Period End Date**
- **Federal Taxable Wages**
- **Federal Taxes**
- **State Taxable Wages**
- **State Taxes**
- **Total Taxes**

### State Tax Data
- **Pay Check Date**
- **Pay Period Start Date**
- **Pay Period End Date**
- **State Taxable Wages**
- **State Taxes**

### Total Paycheck Details
- **Pay Check Date**
- **Pay Period Start Date**
- **Pay Period End Date**
- **Total Paycheck**

*Note: Details for Pay Check Date: 04/28/2022*
Distribution of Payroll Expense (DOPE) Report

- Payroll Accounting and Reconciliation Tab
- Used For: Verification of pay and benefit costs and discovery of overpayments and missed pay. Also useful to compare to offer letters, AP Data, etc.
- Should be run by department on a monthly basis
- Required: Pay Period End Dates From and To

Note: More filters below…
Distribution of Payroll Expense (DOPE) Report

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</table>

- Note the scroll bars and page navigation.
Vacant Positions

- Human Resources Reports Tab
- Required: Vice Chancellor code
- Used For: Allows department to ensure a vacant position is available for hire or rehire. Useful for ensuring only one appointee is assigned to a particular position. If it isn’t vacant, don’t use it.

Vacant Positions Report

Identify vacant positions, see positions which are vacant, as a result of turnover or have not yet been filled.
# Vacant Positions

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*Note the scroll bars and page navigation*
Visa Monitoring Report

- Human Resources Reports (Restricted) Tab
- Used For: Determining upcoming Visa end dates that will require termination or other measures. Can be used pre-emptively to ensure there are no employment issues moving forward for employees who are not citizens or permanent residents.
| Employee Name/Position | Department | Employee Status | Job Code | Job Code Description | Union Code | Union | FTE | Employee Citizenship Status | Employee Visa Permit Status Current | Employee Visa Permit Status Expected | Employee Visa Permit Status EX Current | Employee Visa Permit Status EX Expected | Employee Visa Status EX Current | Employee Visa Status EX Expected | Employee Visa Status EX Expected Date | Employee Visa Status EX Expected Date | Last Separation Date | Job End Date |
|-----------------------|------------|----------------|----------|---------------------|------------|-------|-----|----------------------------|-------------------------------------|-------------------------------------|-----------------------------------|------------------------------------|-----------------------------------|-------------------------------------|-------------------------------------|-----------------------------------|------------------|
| Active                | POLITICAL SCIENCE | Academic Faculty | 001200 | ASSOC PROF-A | A6 | Academic San Diego | 9.5000 | US Permanent Resident | USA | F1 Student | Permanent Resident | Granted | 06/30/2023 | 06/30/2023 |
| Active                | MATHEMATICS | Academic Faculty | 001305 | VIS ASSIST PROF | B2 | Non-Represented | 1.0000 | RJ Resident Tax Purpose | USA | F1 Permanent Resident | Permanent Resident | Granted | 06/30/2022 | 06/30/2023 |
| Active                | LINGUISTICS | Academic Faculty | 001500 | LECT, MISCELLANEOUS/PART TIME | D5 | Non-Represented | 0.0000 | US Permanent Resident | USA | F1 Permanent Resident | Permanent Resident | Granted | 06/30/2022 | 06/30/2022 |
| Active                | LINGUISTICS | Academic Faculty | 001600 | LECT-CONTINUING | D5 | Non-Represented | 1.0000 | US Permanent Resident | USA | F1 Permanent Resident | Permanent Resident | Granted | 06/30/2018 | 06/30/2018 |
| Active                | BIOENGINEERING | Academic Faculty | 001800 | ASSIST PROF-A | A6 | Academic San Diego | 9.0000 | US Permanent Resident | USA | F1 Permanent Resident | Permanent Resident | Granted | 06/30/2021 | 06/30/2021 |
| Active                | LINGUISTICS | Academic Faculty | 001900 | LECT, MISCELLANEOUS/PART TIME | D5 | Non-Represented | 0.0000 | US Permanent Resident | USA | F1 Permanent Resident | Permanent Resident | Granted | 06/30/2012 | 06/30/2012 |
| Active                | LINGUISTICS | Academic Faculty | 002000 | LECT-CONTINUING | D5 | Non-Represented | 0.7500 | US Permanent Resident | USA | F1 Permanent Resident | Permanent Resident | Granted | 06/30/2022 | 06/30/2022 |
| Active                | NEUROBIOLOGY | Academic Faculty | 002100 | ASSIST PROF-A | A6 | Academic San Diego | 1.0000 | RJ Resident Tax | USA | O1 Jobs of Exceptional Ability | Permanent Resident | Granted | 06/30/2023 | 06/30/2023 |
Extended Leave Monitoring

• Human Resources Reports (Restricted) Tab
• Required:
• Used For: Monitoring employees currently on extended leave and ensuring actual end date transactions have been entered timely.

Extended Leave Monitoring Report (HR Restricted tab)

This report will identify all employees that are on Extended Leave.

View Details
### Extended Leave Monitoring

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Extended Leave Transaction Number</th>
<th>Extended Leave Start Date</th>
<th>Expected End Date</th>
<th>Actual End Date</th>
<th>Job Action Reason / Leave</th>
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Short Work Break Monitoring

- Human Resources Reports Tab
- Used For: Viewing employees who are between active periods of service. Shows who has a break in active status for payroll purposes. **Must be monitored very carefully as it can impact benefits billing to employee who do not designate they would like to cancel benefits.**
## Short Work Break Monitoring

### Short Work Break Monitoring Report - WIP

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- **Note the scroll bars and page navigation**
Jobs with Approaching End Dates

- Human Resources Reports Tab
- Used for: Determining when a job should stop paying the employee and avoiding overpayment situations

This report is a risk mitigation tool which will help prevent payroll over-payments.
## Jobs with Approaching End Dates

### Jobs with Approaching End Dates Report

| Employee Name | Employee ID | Business Unit Code | Employee Record | Position Number | Vice Chancellor Code | Vice Chancellor | Department Code | Department | Job Code | Job Code Description | Employee Status | Employee Class Code | Employee Class | FTE | Job Expected End Date | Probation Status Code | Probation End Date | Location Use Code | Location Use Type | Job Automatically End Flag | Terminated Override Flag | Reports To Employee ID | Reports To Position Number | Reports To Position Status | Reports To Employee Status Code | Reports To Employee Status | Reports To Employee Status Code | Reports To Employee Status | Days Remaining Until End Date | Date Criteria | Class Status Code | Employee Status Code |
|---------------|-------------|--------------------|-----------------|-----------------|--------------------|-------------------|-----------------|-------------|----------|---------------------|----------------|----------------------|----------------|-----|---------------------|----------------------|----------------|-------------------|----------------|-----------------|-----------------------|----------------|----------------|------------------|
| SDMMP 0       | 00644710    | VCJA               | 060022          | 01630           | ELECT & COMPUTER ENGY | Active            | Academic | 9   | 0.3500  | 06/30/2022 | N      | N                        | N                   | Lin, Bill         | 10374379          | 2                        | 40051708       | A                  | 50                      | With 60 Days       | 103942482                 | 0            | 60                      | 10374379          | 2                        | 40051708       | A                  | 50                      | With 60 Days       | 103942482                 |
| SDMMP 1       | 00726311    | VCJA               | 060024          | 019132          | COMMUNICATION       | Active            | Academic | 9   | 1.0000  | 06/30/2022 | N      | Y                        | N                   | Goldfarb, Brian D | 10376872          | 1                        | 40051708       | A                  | 50                      | With 60 Days       | 103942482                 | 0            | 60                      | 10376872          | 1                        | 40051708       | A                  | 50                      | With 60 Days       | 103942482                 |
| SDMMP 1       | 00817529    | VCJA               | 060018          | 009800          | DIRECTOR            | Active            | Academic | 9   | 0.0000  | 06/30/2022 | N      | N                        | N                   | Frascio, Christina | 10369996          | 0                        | 40051708       | A                  | 50                      | With 60 Days       | 103942482                 | 0            | 60                      | 10369996          | 0                        | 40051708       | A                  | 50                      | With 60 Days       | 103942482                 |
| SDMMP 0       | 00793555    | VCJA               | 060024          | 009160          | COMMUNICATION       | Active            | Academic | 9   | 1.0000  | 06/30/2022 | N      | N                        | N                   | Goldfarb, Brian D | 10376872          | 1                        | 40051708       | A                  | 50                      | With 60 Days       | 103942482                 | 0            | 60                      | 10376872          | 1                        | 40051708       | A                  | 50                      | With 60 Days       | 103942482                 |
| SDMMP 0       | 00643261    | VCJA               | 060019          | 009160          | ANALYTICAL WRITING PROGRAM | Active            | Academic | 9   | 1.0000  | 06/30/2022 | N      | N                        | N                   | Barts, Holy Jean  | 10367241          | 1                        | 40051708       | A                  | 50                      | With 60 Days       | 103942482                 | 0            | 60                      | 10367241          | 1                        | 40051708       | A                  | 50                      | With 60 Days       | 103942482                 |
| SDMMP 1       | 00801802    | VCJA               | 060028          | 009160          | MUSICOLOGY          | Active            | Academic | 9   | 0.0000  | 06/30/2022 | N      | N                        | N                   | Frascio, Christina | 10369996          | 0                        | 40051708       | A                  | 50                      | With 60 Days       | 103942482                 | 0            | 60                      | 10369996          | 0                        | 40051708       | A                  | 50                      | With 60 Days       | 103942482                 |
| SDMMP 0       | 00752858    | VCJA               | 060024          | 009160          | VISUAL ARTS        | Active            | Academic | 9   | 1.0000  | 06/30/2022 | N      | N                        | N                   | Dominguez, Richardo | 10367705          | 1                        | 40051708       | A                  | 50                      | With 60 Days       | 103942482                 | 0            | 60                      | 10367705          | 1                        | 40051708       | A                  | 50                      | With 60 Days       | 103942482                 |
| SDMMP 0       | 00713872    | VCJA               | 060013          | 009160          | MATHS              | Active            | Academic | 9   | 1.0000  | 06/30/2022 | N      | N                        | N                   | Muhammad, James    | 10350036          | 0                        | 40051708       | A                  | 50                      | With 60 Days       | 103942482                 | 0            | 60                      | 10350036          | 0                        | 40051708       | A                  | 50                      | With 60 Days       | 103942482                 |
| SDMMP 1       | 00801299    | VCJA               | 060034          | 009160          | CHEMISTRY & BIOTECHNOLOGY | Active            | Academic | 9   | 0.5000  | 06/30/2022 | N      | Y                        | N                   | Gessain, Vassula    | 10372179          | 1                        | 40051708       | A                  | 50                      | With 60 Days       | 103942482                 | 0            | 60                      | 10372179          | 1                        | 40051708       | A                  | 50                      | With 60 Days       | 103942482                 |

*Note: The scroll bars and page navigation are present.*