HOW TO MANAGE MULTI-LOCATION APPOINTMENTS

This job aid describes the system processes for managing multi-location appointments. This job aid covers the following processes:
- Inter-Location One-Time Payment (OTP)
- Multi-Location Appointments (MLA)

Overview – Inter-Location One-Time Payments

An Inter-Location One-Time Payment (OTP) is used for an employee who performs a job/task at UC San Diego (**Host** Location), but who is an employee at another UC Location (**Home** Location). These are generally for honoraria, campus-sponsored program reviews (not at home campus), concerts/creative works, Grand Rounds (HSCP), and other one-time by agreement payments.

Example: UC Irvine Professor Amanda receives an Honorarium of $500 from UC San Diego for a lecture. UC Irvine is the Home Location and UC San Diego is the Host Location. The payment is processed as one-time additional pay.

Policy (APM 666): Honoraria are negotiated amounts but should be reasonable and may not exceed the amounts noted below. No academic may receive honoraria totaling more than 10% of their annual salary and that is monitored by the home campus department. Home campus is to be notified PRIOR to the activity. State funds may not be used but, at UCSD, core funds may be used. Gifts, endowments, and other unrestricted funds may be used.

Approval Authority

EVC	$0 - $2,500 per event
Chancellor	$2501 - $5,000 per event
UCOP Provost/Executive VP for Academic Affairs	>$5,000 per event

Note: At UC San Diego, Academic Personnel will serve as the Host/Home Personnel Office for academic appointees. Campus Human Resources will serve as the Host/Home Personnel Office for staff titles.

Pre-Process - Inter-Location One-Time Payments
- Review the **Person Organizational Summary** page for the individual you are hiring to ensure you have a complete understanding of the employee's current status
- Review the *Template Transactions – Action Reason Codes and Descriptions* job aid on the UCPath Help Site for Transactional Users to ensure you utilize the correct reason code on your template transaction
- Review the *Payroll Processing Calendar* to ensure you submit your transactions in time for approval before the Employee Data Change deadline
- Remember, Additional Pay cannot be added on the hire template; the hire must be processed before Additional Pay can be added in PayPath and may be entered in advance of the intended pay period

System Steps: Inter-Location One-Time Payments

Use this process to enter a one-time payment for an employee who performs a job/task at UC San Diego (**Host** Location), but who is an employee at another UC Location (**Home** Location).

1. Prior to the event, the Host campus academic department begins the process by completing the **Intercampus One Time Payment Form (UPAY644C-T)**; the **Person Organizational Summary** page in UCPath should be used to complete the Home Campus information, except salary, which is not available on **Person Organizational Summary** and can be obtained by calling Home Department

   Note: UCPC's Job Aid for [Interlocation One-Time Additional Pay](#) refers to the UPAY644-T form which does not exist in the Forms Library. Per UCPC, the Multilocation Agreement form (UPAY 560-T) can be used for the one-time pay process and can be found in the UCPath Forms Library under the Human Resources section.

2. Host Department emails from to Host Personnel Office

3. Host Personnel Office analyzes form for completion and policy compliance, signs the forms, and sends it via email to Home Personnel Office

4. Home Personnel Office signs the form and returns it via email to the Host Department

5. Host Department creates a Position in UCPath using the appropriate temporary **Job Code**; refer to the form for the appropriate **Job Code**

   Note: Review **FLSA Status** between the employees existing job and the new one you are setting up and reconcile, if needed.

6. Assign funding to the new position using UC San Diego funding source(s)

   Note: HR initiator may need to partner with a funding initiator to coordinate entry of position funding

7. Hire employee into the new position using the Concurrent Hire template:
   - **FTE = 0**
   - Enter **Expected Job End Date** = last day of the pay period in which they will receive the one-time pay
   - Check the **End Job Automatically** checkbox

   Note: There is an **Additional Pay** tab on the hire templates, but as of the creation of this job aid, that tab is not working. Additionally, the form must be attached to the template. Finally, note in the template comments that this is a 0 **FTE** job and payment will be issued as Additional Pay after the Concurrent Hire is processed.

8. Once the hire is processed by UCPC (1-4 business days), set up the one-time additional pay in **PayPath:**
   - Choose **New Additional Pay** as the **Reason**
   - Enter the full amount to be paid as the **Pay Period Amount** and the **Goal Amount**

- Use the full month pay period as the **Effective Date** and **End Date** (e.g., 10/1 – 10/31) to avoid proration

  Note: You can review the UC San Diego Job Aid for *How to Submit One-Time and Recurring Additional Pay.* The pay will be distributed on the employee's next on-cycle pay date.

9. After the payment has been distributed to the employee, verify the employee has been terminated from the UC San Diego job

   Note: The Concurrent Hire and Additional Pay transactions must both be fully processed by the Employee Data Change Deadline in order for the employee to receive the pay on time. If you are not able to meet the deadline, you may need to extend the **Appointment End Date** so that the employee is not auto-terminated before the payment is received.

Next Steps

- You can review the status of your transaction on the **Transaction Status** page, once it has been approved or denied locally; you can also review UCPC comments and clone your transaction from this page
  - Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Transaction Status**
- You can review local approver comments on the **SS Smart HR Transactions** page
  - Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **SS Smart HR Transactions**

Overview – Multi-Location Appointments

A Multi-Location Appointment (MLA) occurs when an employee is simultaneously employed by two or more UC Locations. Multi-Location Appointments are generally short-term and occur when an employee is temporarily employed by a **Host** Location. Sometimes, multi-location appointments may be for a longer period. The campus where the employee holds his/her primary employment is the **Home** location. The campus that appoints the employee on an additional basis is the **Host** location. Examples:

- UC San Diego funds a UC Berkeley PostDoc for a quarter. UC San Diego is the **Host** Location and UC San Berkeley is the **Home** Location.
- UNEX appoints an Instructor for a one year that is currently employed by UCLA.
- An individual holds an Associate Professor position at UC Davis at .25 FTE as well as an Associate Professor position at UC San Diego at .50 FTE.

Policy: Academic appointment and review policies and processes must be followed in addition to processing of the MLA form. Compensation is determined based on the type and length of appointment.

Approval Authority: Approval authority will depend on the type and length of appointment.

Note: Long-term MLA appointments may also require an MOU depending on the type of appointment. At UC San Diego, Academic Personnel will coordinate with the appropriate office of Appointment Authority (Graduate Division, Office of Postdoctoral and Research Scholar Affairs, etc.) as necessary. Campus Human Resources will serve as the Host/Home Personnel Office for staff titles.

Pre-Process – Multi-Location Appointments

- Review the **Person Organizational Summary** page for the individual you are hiring to ensure you have a complete understanding of the employee's current status
- Review the *Template Transactions – Action Reason Codes and Descriptions* job aid on the UCPath Help Site for Transactional Users to ensure you utilize the correct reason code on your template transaction
- Review the *Payroll Processing Calendar* to ensure you submit your transaction in time for approval before the Employee Data Change deadline
- Remember, Additional Pay cannot be added on the hire template; the hire must be processed before Additional Pay can be added in PayPath and may be entered in advance of the intended pay period

System Steps: Multi-Location Appointment

1. The Host Department conducts the appropriate recruitment process, processes the academic personnel review file (as necessary), and offers the position to the candidate

2. Upon candidate acceptance and prior to the appointment start date, Host Department completes the **Multi-Location Agreement Form (UPAY560-T)**; the **Person Organizational Summary** page in UCPath should be used to complete the Home Campus information, except salary, which is not available on **Person Organizational Summary** and can be obtained by calling Home Department

3.	Host Department emails from to Host Personnel Office
4.	Host Personnel Office analyzes form for completion and policy compliance, signs the forms, and sends it via email to Home Personnel Office
5.	Home Personnel Office signs the form and returns it via email to the Host Department
6.	Host Department creates a Position in UCPath using the appropriate **Job Code** **Note:** Review **FLSA Status** between the employees existing job and the new one you are setting up and reconcile, if needed.
7.	Assign funding to the new position using UC San Diego funding source(s) **Note**: HR initiator may need to partner with a funding initiator to coordinate entry of position funding

8.	Hire employee into the new position using the Concurrent Hire template:
	  ▪ Enter at the appropriate **FTE**
	  ▪ Enter the appropriate compensation
	  ▪ Enter the **Expected Job End Date**
	  ▪ Check the **End Job Automatically** checkbox
	
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