

Job Aid: Unit 18 Appointment Workload Averaging

This document provides steps to enter the averaged FTE for Unit 18 (IX) appointments into UCPATH, in accordance with the contractual obligation.

If a Unit 18 employee has a full-year* AY or FY appointment, and the location knows ahead of time that the appointment will have a variable workload percentage over the course of the year, then the averaging of appointment percentages over the academic or fiscal year is required for pay and benefits purposes in UCPATH.

- * For AY appointments, two consecutive semesters or three consecutive quarters (starting with the fall semester or quarter) are equivalent to a full-year appointment (one-year duration). For FY appointments, four consecutive quarters are equivalent to a one-year duration.

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Process Steps for Locations

- Upon the employee receiving a Unit 18 appointment with variable appointment percentages over the full fiscal or academic year, calculate the average FTE to be paid 9/12 (AY) or 12/12 (FY), and assign that FTE to the position in UCPath.
- The pay periods for an AY faculty appointee who is appointed for an entire academic year at a quarter campus are:

Quarter	Dates
Fall quarter	July 1 through October 31
Winter quarter	November 1 through February 28/29
Spring quarter	March 1 through June 30

- The pay periods for an AY faculty appointee who is appointed for an entire academic year at a semester campus are:

Semester	Dates
Fall semester	July 1 through December 31
Spring semester	January 1 through June 30

Example 1: AY Semester-Based (9/12)

Fall Semester Approved Appointment	Spring Semester Approved Appointment
<ul style="list-style-type: none"> • Pay Period Start Date: 7/1 • Pay Period End Date: 12/31 • Workload percentage: 67% 	<ul style="list-style-type: none"> • Pay Period Start Date: 1/1 • Pay Period End Date: 6/30 • Workload percentage: 100%

- For UCPath entry, the appointment workload percentages are averaged over the year
 - $67\% + 100\% = 167\% \div 2 \text{ semesters} = 83.50\%$ per semester
- **UCPath position and job entry will be entered as 83.5% for the pay period of July 1 through June 30**

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Example 2: AY Quarter-Based (9/12) Academic

Quarter	Pay Period Dates
Fall quarter approved appointment	<ul style="list-style-type: none">• Pay Period Start Date: 7/1• Pay Period End Date: 10/31• Workload percentage: 100%
Winter quarter approved appointment	<ul style="list-style-type: none">• Pay Period Start Date: 11/1• Pay Period End Date: 2/28• Workload percentage: 33%
Spring quarter approved appointment	<ul style="list-style-type: none">• Pay Period Start Date: 3/1• Pay Period End Date: 6/30• Workload percentage: 67%

- For UCPath entry, the appointment workload percentages are averaged over the year
 - $100\% + 33\% + 67\% = 200\% \div 3 \text{ quarters} = 66.67\%$ per quarter
- **UCPath position and job entry will be entered as 66.67% for the pay period of July 1 through June 30**

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Example 3: FY Quarter-Based (12/12)

Quarter	Pay Period Dates
Summer quarter approved appointment	<ul style="list-style-type: none"> • Pay Period Start Date: 7/1 • Pay Period End Date: 9/30 • Workload Percentage: 67%
Fall quarter approved appointment	<ul style="list-style-type: none"> • Pay Period Start Date: 10/1 • Pay Period End Date: 12/31 • Workload Percentage: 100%
Winter quarter approved appointment	<ul style="list-style-type: none"> • Pay Period Start Date: 1/1 • Expected End Date: 3/31 • Workload Percentage: 33%
Spring quarter approved appointment	<ul style="list-style-type: none"> • Pay Period Start Date: 4/1 • Pay Period End Date: 6/30 • Workload Percentage: 33%

- For UCPath entry, the appointment workload percentages are averaged over the year.
 - $67\% + 100\% + 33\% + 33\% = 233\% \div 4 \text{ quarters} = 58.25\%$ per quarter
- **UCPath position and job entry will be entered as 58.25% for the pay period of July 1 through June 30**

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Mid-Year Increases in Workload

- When mid-year supplemental workload is added, either in the home department or a secondary department, the original position and job are not modified. A second position and job are entered into UCPath to reflect the supplemental appointment using the following job codes as appropriate:
 - **001648** PRE-SIX YR APPT-TEMP SUPP
 - **001649** PRE-SIX YR APPT-TEMP SUPP-1/9
 - **001651** PRE-SIX YR APPT-TEMP SUPP-1/10
- The supplemental job may require averaging into another term if the total FTE will exceed 1.0 in the term of the supplemental job
 - Example: Lecturer's existing job: Fall 100%, Winter 67%, Spring 33%= average of 66.67%. UCPath position and job are at 66.67% for the period of 7/1-6/30
- Supplemental appointment of 67% in Spring. The supplemental appointment must be averaged across Winter and Spring quarters to prevent pay in excess of 100%. 67% averaged over 2 quarters= 33.33%
- **UCPath position and job entry will be entered as 33.33% for the pay period of January 1 through June 30 (1/9th pay dates for Winter and Spring quarters)**
- Retro or missed pay may occur if the changes are made retroactively. Benefits eligibility may also be impacted

Mid-Year Decreases in Workload

- When a decrease in workload occurs for a future term of an averaged appointment, the appointment must be re-averaged and the position and job must be retroactively adjusted in UCPath
- Example: Lecturer's existing job: Fall 100%, Winter 67%, Spring 33%= average of 67%. UCPath position and job are at 66.67% for the period of 7/1-6/30
- Winter quarter workload is reduced to 33%. The appointments must be re-averaged to 55.33 and the position and job in UCPath are adjusted to 55.33% retroactive to 7/1.
- **Note:** The re-averaging will result in an overpayment of any pay received in excess of 55.33% since July 1