

## Job Aid: Postdoc Job Setup - Payroll Components

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### Postdoc Payroll Components Overview

The guidelines in this document outline expected UCPath setups for various Postdoc scenarios.

Postdocs are generally appointed at 1.0 FTE (100%), either in a single Postdoc job code (Postdoc-Employee, Fellow or Paid Direct) or in a combination of Postdoc job codes that add up to 1.0 FTE.

The University may grant an exception to the full-time appointment expectation, upon written request of the Postdoc and written concurrence of the supervisor, when the Postdoc is unable to make a full-time commitment for reasons of health, family responsibilities or employment external to the University.

The appointment, Comp Rate Code, Comp Frequency and FTE setup used for Postdocs depends on whether the individual has a single job or multiple paying jobs.

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### Single Job: Postdoc-Employee

#### Exempt Postdoc-Employee

The individual has a Postdoc-Employee job (Job Code 003252 Postdoc-Employee or 003256 Intrm Postdoc Scholar-Employee) with FLSA status of **Exempt**.

Example: Postdoc-Employee (Job Code: 003252) with 4 years experience paid \$63,036/year (the experience-based rate for Level 4/Grade L4 as of 2/1/2021). Use the following setup in UCPath:

Job	Annual Rate	Job Code	Comp Rate Code	Comp Rate	Comp Freq	FTE	(Monthly) Comp Rate	Job Comp Freq	Sal Admin Plan	Grade	Pay Group
Job A	\$63,036	003252	UCANNL	\$63,036	A	1.0000	\$5,253.00	UC_FY	T023	L4	_AC, _M7, _M8, _M9

- Comp Rate is the same as the annual rate, Monthly Compensation Rate is 1/12 of the annual rate
- FTE is applied when calculating monthly compensation rates for Comp Rate code **UCANNL**
- Do not add JED. The earnings code of **REG** (or equivalent) will be set based on the derived pay group:
  - **\_AC** for U.S. citizens, permanent residents and resident aliens for tax reporting purposes
  - Pay Group will differ for nonresident aliens for tax reporting purposes, depending on Income Code

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### Non-Exempt Postdoc-Employee

The individual has a Postdoc-Employee job with FLSA status of **Non-Exempt**.

Example: Postdoc-Employee Non-Exempt (Job Code: 003255) with less than 1 year experience, in a 50% appointment at \$26.13 per hour (experience-based rate for Level 0/Grade L0 as of 2/7/2021). Use the following setup in UCPath:

Job	Hourly Rate	Job Code	Comp Rate Code	Comp Rate	Comp Freq	FTE	(Hourly) Comp Rate	Job Comp Freq	Sal Admin Plan	Grade	Pay Group
Job A	\$26.13	003255	UCHRLY	\$26.13	H	0.5000	\$26.13	H	T23N	L0	_B7

- Non-exempt hourly employees are paid on a bi-weekly schedule
- Do not add JED. The earnings code of **REG** will be set based on the derived pay group:
  - **\_B7** for US citizens, permanent residents and resident aliens for tax reporting purposes
  - Pay group will differ for nonresident aliens for tax reporting purposes, depending on Income Code

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### Single Job: Postdoc-Fellow or Paid Direct

#### Postdoc-Fellow

When the individual has a Postdoc-Fellow job (Job Code: 003253), use **UCFELL** for the Comp Rate code. The Comp Frequency Code will derive to **A**.

Example: Postdoc Fellow (Job Code: 003253) with 4 years experience has a fellowship for \$63,036/year. This rate matches the experience-based rate for Level 4/Grade L4. Use the following setup in UCPath:

Job	Annual Rate	Job Code	Comp Rate Code	Comp Rate	Comp Freq	FTE	(Monthly) Comp Rate	Job Comp Freq	Sal Admin Plan	Grade	Pay Group
Job A	\$63,036	003253	UCFELL	\$63,036	A	1.0000	\$5,253.00	UC_FY	T023	L4	_PF _M5

- Comp Rate is the same as the annual fellowship rate, Monthly Compensation Rate is 1/12 of the annual fellowship rate
- Do not add JED. The earnings code of **FEN** (non-taxable) or **FEL** (taxable) will be set based on the derived pay group:
  - **\_PF** for U.S. citizens, permanent residents and resident aliens for tax reporting purposes
  - **\_M5** for nonresident aliens for tax reporting purposes

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### Postdoc-Paid Direct

When the individual has a Postdoc-Paid Direct job (Job Code: 003254), use **UCPDPD** for the Comp Rate code. The Comp Frequency Code will derive to **A**.

Example: Postdoc-Paid Direct (Job Code: 003254) with 4 years experience is receiving direct support of \$70,000/year. This rate exceeds the experience-based rate for Level 4/Grade L4. Use the following setup in UCPath:

Job	Annual Rate	Job Code	Comp Rate Code	Comp Rate	Comp Freq	FTE	(Monthly) Comp Rate	Job Comp Freq	Sal Admin Plan	Grade	Pay Group
Job A	\$70,000	003254	UCPDPD	\$70,000	A	1.0000	\$5,833.33	UC_FY	T023	L4	_PD _P5

- Comp Rate is the same as the annual extramural funding, Monthly Compensation Rate is 1/12 of the annual funding
- Do not add JED. The earnings code of **PDE** will be set based on the derived pay group:
  - **\_PD** for U.S. citizens, permanent residents and resident aliens for tax reporting purposes
  - **\_P5** for nonresident aliens for tax reporting purposes

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### Multiple Jobs: Postdoc-Fellow or Paid Direct, plus Postdoc-Employee

The guidelines outlined below show the correct method for entering concurrent jobs with Postdoc-Fellow or Paid Direct, plus Postdoc-Employee job codes. This method ensures accurate recording of the the monthly rate of pay from external funding.

- The Postdoc-Employee supplement to bring the salary rate up to the UC experience-based rate should NOT be set up as Additional Pay. (Setting up the rate as Additional Pay may result in incorrect payments and display incomplete data on reports.)
  - The earn code **SPD** (Supplement – Post Doc) is used within Additional Pay to pay a temporary supplement in excess of the experience-based rate as outlined in Article 4, A-5, of the collective bargaining agreement.
- Combined FTE from all appointments should not exceed **1.0**. In cases where a funder stipulates that the Postdoc have 100% effort on the grant, it should be understood that this division of FTE is for payroll processing and accurate reporting of total effort for UC reporting purposes and that the Postdoc's effort is indeed 100% associated with the grant.

When a Postdoc-Fellow or Paid Direct's annual external funding rate is less than the UC experience-based rate, two jobs are needed:

- **Job A:** 003253 Postdoc-Fellow or 003254 Postdoc-Paid Direct
- **Job B:** 003252 Postdoc-Employee
  - FTE should accurately reflect the portion coming from the external vs. the UC employee pay
  - The combined FTE should add up to the Postdoc's total FTE (**1.0**) and should not exceed **1.0**
  - Use Comp Rate codes **UCFELM** or **UCPDMO**; the Comp Frequency Code will derive to **M**
  - FTE is NOT applied when calculating monthly compensation rates for **UCFELM** and **UCPDMO** Comp Rate codes

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### Postdoc-Fellow + Postdoc-Employee

- **Job A:** Postdoc-Fellow
- **Job B:** Supplement – Postdoc-Employee

Example: Postdoc-Fellow (003253) with 1 year of experience; fellowship is \$30,000/year. This is less than the experience-based rate for Level 1/Grade L1 (\$56,712). A supplement is needed. Use the following setup in UCPath:

Job	Annual Rate	Job Code	Comp Rate Code	Comp Rate	Comp Freq	FTE	(Monthly) Comp Rate	Job Comp Freq	Sal Admin Plan	Grade	Pay Group
<b>Job A</b>	\$30,000	003253	UCFELM	\$2,500.00	M	0.5289	\$2,500.00	UC_FY	T023	L1	_PF _M5
<b>Job B</b>	\$56,712	003252	UCANNL	\$56,712	A	0.4711	\$2,226.42	UC_FY	T023	L1	_AC _M7 _M8 _M9

- Do not add JED. The earnings codes will be set based on the derived Pay groups.
- **Job A** (Fellow) Monthly Compensation Rate is the same as the Comp Rate, which is 1/12 of the annual fellowship rate
- Combined FTE is **1.0**
  - FTE for **Job A** (003253 Postdoc-Fellow) = \$30,000 (the annual fellowship) ÷ \$56,712 (the Postdoc-Employee annual rate) = 0.5290
  - FTE for **Job B** (003252 Postdoc-Employee) = 1.00 - 0.5290 = 0.4710
  - Check to determine whether monthly earnings x 12 will equal at least the annual experience based minimum, and adjust as needed. For example, in this case, setting FTE of **Job B** to 0.4711 will ensure that the experience based minimum will be met; by updating **Job B** FTE to 0.4711, the FTE for **Job A** will need to be set to 0.5289 in order to not exceed a combined **1.0** FTE.
- Sum of Monthly Compensation Rates = \$2,500 + \$2226.42 = \$4,726.42; \$4726.42 x 12 = \$56,717.04

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### Postdoc-Paid Direct + Postdoc-Employee

- **Job A:** Postdoc-Paid Direct
- **Job B:** Postdoc-Employee – Supplement

Example: Postdoc-Paid Direct (003254) with 3 years experience; extramural funding is \$58,000/year. This is less than the experience-based rate for Level 3/Grade L3 (\$60,780). A supplement is needed. Use the following setup in UCPath:

Job	Annual Rate	Job Code	Comp Rate Code	Comp Rate	Comp Freq	FTE	(Monthly) Comp Rate	Job Comp Freq	Sal Admin Plan	Grade	Pay Group
<b>Job A</b>	\$58,000	003254	UCPDMO	\$4,833.33	M	0.9542	\$4,833.33	UC_FY	T023	L3	_PD _P5
<b>Job B</b>	\$60,780	003252	UCANNL	\$60,780	A	0.0458	\$231.98	UC_FY	T023	L3	_AC _M7 _M8 _M9

- Do not add JED. The earnings codes will be set based on the derived pay groups.
- **Job A** (Paid Direct) Monthly Compensation Rate is the same as the Comp Rate, which is 1/12 of the annual extramural funding (Paid Direct) rate
- Combined FTE is **1.0**
  - FTE for **Job A** (Postdoc-Paid Direct) = \$58,000 (the annual direct funding) ÷ \$60,780 (the Postdoc Employee annual rate) = 0.9543
  - FTE for **Job B** (003252 Postdoc-Employee) = 1.00 - 0.9543 = 0.0457
  - Check to determine whether monthly earnings x 12 will equal at least the annual experience based minimum, and adjust as needed. For example, in this case setting FTE of **Job B** to 0.0458 will ensure that the experience based minimum will be met; by updating **Job B** FTE to 0.0458, the FTE for **Job A** will need to be set to 0.9542 in order to not exceed a combined **1.0** FTE.
- Sum of Monthly Compensation Rates = \$4,833.33 + \$231.98 = \$5,065.31; \$5,065.31 x 12 = \$60,783.72



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### Anniversary Dates

The date entered in the Postdoc Anniversary Date field for a one-year appointment would be one year from the hire date.

In UCPath, the Postdoc Anniversary Date field is not linked to the expected end date field, so both dates can be different. Assuming there is no break in service, the Postdoc Anniversary Date is always tied to the original hire date, including for situations such as an Interlocation (BU) transfer, a change within the Postdoc title series such as Postdoc-Employee to Postdoc-Fellow or new grant/contract.

The anniversary date needs to be updated every year before it expires to ensure accruals are granted.

Example: If an appointee is hired under a Postdoc job with an effective date of February 1, 2021, for a one-year appointment, the date entered into the Postdoc Anniversary Date field is February 1, 2022. (Update the anniversary date to reflect February 1, 2023, prior to the accrual processing date for the February 1, 2022, paycheck date.)

### Leave Allocations

Leave balance allotments for Postdoc appointments are based on duration of appointment and not the FTE.

For all FLSA Exempt Postdocs, Paid Time Off and Sick Leave usage is recorded in full day increments (8 hours).

For FLSA Non-exempt Postdocs (Job Code: 003255 Postdoc-Employee Nex), Paid Time Off and Sick Leave usage is recorded to reflect the actual hours of leave taken.