

Academic Payroll Transaction Matrix v. 7/2019

This document is specific to business process **ONLY** and does not grant exception to policy for any given process.
Additional approval may be necessary.

Action	Service Center NOT authorized to key	Pre-approval required before keying	Key and retain documentation for post-audit	Pre-Approved Actions		Post-Audit Actions (Keyed without prior approval)	
				What is required to be submitted for pre-approval?	Who is responsible?	Retain these documents as official office of record	Who is responsible?
BSE New Ladder Rank Appointment		X		<ul style="list-style-type: none"> Approved Ladder Rank appointment in Advance Keying Instructions or Faculty Salary Calculator (FSC) 	<ul style="list-style-type: none"> Generalist send all required documents to VPAA 		
BSE Temporary Assignment (non-Ladder Rank)		X		<ul style="list-style-type: none"> Chair's memo requesting temporary assignment Faculty acknowledgement of awareness that support is temporary Keying Instructions or FSC 	<ul style="list-style-type: none"> Generalist send all required documents to VPAA 		
BSE Change due to renewal, merit or promotion		X		<ul style="list-style-type: none"> Packet Approved through Advance Keying Instructions 	<ul style="list-style-type: none"> Generalist send Keying Instructions to VPAA 		
BSE Early termination of temporary assignment		X		<ul style="list-style-type: none"> Keying Instructions or FSC Faculty acknowledgement of awareness that temp FTE is ending 	<ul style="list-style-type: none"> Generalist send all required documents to VPAA 		

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BSE End Temporary Assignment			See comments in Post-Audit Actions			<ul style="list-style-type: none"> Notification of termination of temporary FTE via e-mail or PeopleConnect Keying Instructions or FSC 	<ul style="list-style-type: none"> Generalist send Keying Instructions or FSC to VPAA
Appointment Brand New Faculty (Not in PPS)		X		<ul style="list-style-type: none"> Packet Approved through Advance Approved Search or Search Waiver 	<ul style="list-style-type: none"> Department prepare Faculty Salary Calculator (FSC) TSU key into PPS using FSC 		
Appointment WOS Faculty		X		<ul style="list-style-type: none"> Packet Approved through Advance 	<ul style="list-style-type: none"> Generalist request DPA information from Department and transmit keying information to Transaction Services Unit (TSU) TSU key appointment into PPS 		
Appointment Non-Faculty Academic		X		<ul style="list-style-type: none"> Packet Approved through Advance Approved Search waiver or SPR 	<ul style="list-style-type: none"> Generalist request funding information from Department and transmit keying information to Transaction Services Unit (TSU) TSU key appointment into PPS 		

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Appointment, Change in Series Faculty (Already in PPS)		X		<ul style="list-style-type: none"> • Packet Approved through Advance • Approved Search waiver or SPR 	<ul style="list-style-type: none"> • Department key changes into MPM or prepare FSW upon approval • Generalist review keying instruction report or FSW and forward to TSU • TSU key appointment into PPS 		
Appointment New Joint		X		<ul style="list-style-type: none"> • Chair's memo requesting joint appointment signed by Chairs of home and joint department • Dean's Office approval 	<ul style="list-style-type: none"> • Send request to Dean's Office of appropriate school for approval • Generalist receive approved request, request DPA information from Jt. Department and transmit keying information to TSU • TSU key appointment into PPS 		
Appointment Transfer		X		<ul style="list-style-type: none"> • Chair's memo requesting department transfer signed by Chairs of previous and proposed home departments • Dean's Office approval 	<ul style="list-style-type: none"> • Send request to Dean's Office of appropriate school for approval • Generalist receives approved request; requests DPA information from new home department and transmit keying information to TSU • TSU key appointment into PPS 		

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Appointment Multi-location	X			<ul style="list-style-type: none"> Multi-location appointment form 	<ul style="list-style-type: none"> Department/HRSS submit multi-location appointment form to Dean's Office Dean's Office sends to VPAA for approval VPAA routes to employee's home campus for processing 		
Advancement Faculty (merit/promotion)		X		<ul style="list-style-type: none"> Packet Approved through Advance 	<ul style="list-style-type: none"> Department key changes into MPM upon approval Generalist review keying instruction report and forward to TSU TSU to key action into PPS 		
Advancement Non-Faculty Academic (merit/promotion)		X		<ul style="list-style-type: none"> Packet Approved through Advance 	<ul style="list-style-type: none"> Department prepare FCW upon approval Generalist review FCW and forward to TSU TSU to key action into PPS 		
Funding Changes Faculty (non-BSE related)			X			<ul style="list-style-type: none"> Department must obtain and keep e-mail funding confirmation for inter-Department/school support 	<ul style="list-style-type: none"> Department key changes into MPM Generalist review keying instruction report and forward to TSU TSU key changes into PPS using keying instruction report

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Renewal of Appointment Senate Faculty including WOS, no BSE extension			X			<ul style="list-style-type: none"> • Annual Compensation letter • Joint Department approval as applicable • Inter-Department/school funding use approval as applicable (DEPARTMENT obtains and keeps) 	<ul style="list-style-type: none"> • Department key changes into MPM • Generalist review keying instruction report and forward to TSU • TSU key from MPM keying instruction report • Department request and retain all necessary approvals • Service Center retain annual comp letters

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Renewal of Appointment Non-Senate Faculty including WOS; no BSE extension; NFA			X*	*Search waiver must be submitted and approved through new end date prior to renewal if position was not searched		<ul style="list-style-type: none"> • APM 137 letter, if needed • Joint Department approval as applicable • Inter-department/school funding use approval as applicable • OPTIONAL: List of faculty being renewed from Department Chair 	<ul style="list-style-type: none"> • For faculty, Department key changes into MPM • For NFA, Department prepare FCW • Generalist review keying instruction report or FCW and forward to TSU • TSU key from keying instruction report or FCW • Department request and retain all necessary approvals • Service Center retain APM 137 letters
Renewal of Appointment Any faculty who were ineligible for 10/1/11 merit-based range adj				Check to see if faculty had an action that would make them eligible - otherwise follow renewal		<ul style="list-style-type: none"> • Service Center retains annual compensation letter or APM 137 letter • Joint Department approval as applicable • Inter-department/school funding use approval as applicable 	<ul style="list-style-type: none"> • Department prepare FSW • Generalist review FSW • TSU key from FSW • Department request and retain all necessary approvals

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Annual Renegotiation SOM/SOD/SON: Increase OR decrease at 10% or less			X*	*See renewal of appointment		<ul style="list-style-type: none"> For decrease in salary: employee request or acknowledgement 	<ul style="list-style-type: none"> Department key changes into MPM Generalist review keying instruction report and forward to TSU TSU key into PPS from keying instruction report
Annual Renegotiation SOP: Increase OR decrease at 10% or less		X		<ul style="list-style-type: none"> Chair's e-mail (or Department manager e-mail for any increase or decrease in "Y" or "Z" For decrease in salary: employee request or acknowledgement 	<ul style="list-style-type: none"> Dept. Manager sends e-mail to Dean's Office with a copy to dept. Chair regarding any changes in "Y" or "Z" salary Dean's Office sends file with all changes in "Y" highlighted to Dean w/ a copy to the Assoc. Dean. Dean reviews and concurs with the changes. Dean's Office sends approval e-mail to Dept. and Service Center Mgr. Department key changes into MPM upon Dean's Office approval Generalist review keying instruction report and forward to TSU TSU key into PPS from keying instruction report 		

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Over 10% Annual Renegotiation For SOM/SOD/SON : increase > 10%. For SOP follow annual renegotiation.		X		<ul style="list-style-type: none"> Chair's memo 	<ul style="list-style-type: none"> Department draft and Department Chair signs memo Generalist sends memo to Dean's Office for final approval Department key changes into MPM upon Dean's Office approval Generalist review keying instruction report and forward to TSU TSU key into PPS from keying instruction report 		
Mid-Year Renegotiation All Schools: Mid-year salary renegotiation up or down (Y salary only).		X		<ul style="list-style-type: none"> Chair's memo 	<ul style="list-style-type: none"> Department draft and Department Chair signs memo Generalist send memo to Dean's Office Dean's Office sends to VPAA for final approval Department key changes into MPM upon VPAA approval Generalist review keying instruction report and forward to TSU TSU key into PPS from keying instruction report 		

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Layoff/Involuntary Reduction In Time Non-Senate Faculty, Non-Faculty Academic		X		<ul style="list-style-type: none"> • APM 145 Notification draft for Dean's Office vetting • If reducing from 100% to 51% or greater, signed comp plan statement • If reducing to less than 50%, use scale 0 	<ul style="list-style-type: none"> • Department/Service Center draft layoff/reduction in time notice • Generalist send draft to Dean's Office for vetting • Department Chair sign notice and Service Center issue to Employee <ul style="list-style-type: none"> ○ For reduction in time: Department key into MPM upon DO approval and Generalist reviews keying report ○ For layoff, Generalist instruct TSU on keying • TSU key from keying instruction report • Service Center retain layoff notification 		

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Change in Appointment Effort-Voluntary Non-senate faculty and non-faculty academics			X			<ul style="list-style-type: none"> Employee request or acknowledgement If reducing from 100% to 51% or greater, signed comp plan statement If switching into comp plan membership, signed comp plan statement 	<ul style="list-style-type: none"> Department key change into MPM Generalist review keying instruction report and forward to TSU TSU key from keying instruction report
Change in Appointment Effort-Voluntary Senate faculty (Increase or Decrease)		X		<ul style="list-style-type: none"> Request from employee documenting reason (health or family care reasons) with Chair concurrence Comp plan statement (if applicable) 	<ul style="list-style-type: none"> Employee request Chair approval Chair concurrence Service Center route to VPAA for approval Department key change into MPM upon approval Generalist review keying instruction report and forward to TSU TSU key from keying instruction report 		

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Change in Pay Status for Faculty WOS w/o step, to Paid within a series: WOS w/o step (includes faculty paid by staff title) to paid, step 1, same rank (includes Instructor)		X		<ul style="list-style-type: none"> • Abridged packet approved through Advance • If entering comp plan, signed comp plan statement uploaded into Advance • Search waiver or SPR 	<ul style="list-style-type: none"> • Department key changes into MPM upon receiving approval from Advance • Generalist review keying instruction report and forward to TSU • TSU to key action into PPS 		
Change in Pay Status for Faculty WOS paid by affiliate to Paid by UCSF within a series: WOS w/ step paid by affiliate to paid status, same rank and series			X			<ul style="list-style-type: none"> • If entering comp plan, signed comp plan statement from employee 	<ul style="list-style-type: none"> • Department submit request through PeopleConnect • Generalist review and forward to TSU • TSU key into PPS
Change in Pay Status for Faculty Paid to WOS w/o step within a series: Paid (non-senate) to WOS w/o step (non-senate, same rank)		X		<ul style="list-style-type: none"> • Abridged packet approved through Advance 	<ul style="list-style-type: none"> • Department key changes into MPM upon receiving approval from Advance • Generalist review keying instruction report and forward to TSU • TSU to key action into PPS 		

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Change in Pay Status for Faculty Paid to WOS paid by affiliate, within a series: Paid (all series) to WOS w/ step, paid by affiliate, same rank			X			<ul style="list-style-type: none"> Employee's acknowledgement 	<ul style="list-style-type: none"> Department submit request through SR Generalist review and forward to TSU TSU key into PPS
Change in Pay Status for Recall Paid, to Recall WOS			X			<ul style="list-style-type: none"> Employee's request, or acknowledgement from paid appointment 	<ul style="list-style-type: none"> Department submit request through PeopleConnect Generalist review and forward to TSU TSU key into PPS
Change in Pay Status for Recall WOS, to Recall Paid			X			<ul style="list-style-type: none"> If entering comp plan, signed comp plan statement Recall salary worksheet 	<ul style="list-style-type: none"> Department submit request through PeopleConnect Generalist review and forward to TSU TSU key into PPS
Change in Pay Status for Visiting Faculty and Visiting NFA: WOS to paid		X		<ul style="list-style-type: none"> Chair's memo 	<ul style="list-style-type: none"> Chair draft and sign memo (Service Center can assist) Service Center routes to Dean's Office of appropriate School for approval TSU key into OPTRS upon approval 		

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Change in Pay Status for Visiting Faculty and Visiting NFA: Paid to WOS						<ul style="list-style-type: none"> Employee's request/ acknowledgement 	<ul style="list-style-type: none"> Department submit request through PeopleConnect Generalist review and forward to TSU TSU key into PPS
Change in Pay Status for NFA WOS to paid WOS to paid step 1, same series and rank (includes Junior rank)		X		<ul style="list-style-type: none"> Appointment packet (reference letters <u>not</u> required) approved through Advance Search waiver or SPR 	<ul style="list-style-type: none"> Department submit request through PeopleConnect Generalist review and forward to TSU TSU to key into PPS 		
Change in Pay Status for NFA Paid to WOS Paid to WOS, same series and rank (WOS specialists are not allowed unless on a visa)		X		<ul style="list-style-type: none"> Abridged packet approved through Advance 	<ul style="list-style-type: none"> Department submit request through PeopleConnect Generalist review and forward to TSU TSU to key into PPS 		
Separations Voluntary (non-BSE)			X			<ul style="list-style-type: none"> Employee notification of resignation 	<ul style="list-style-type: none"> Department notify Generalist via PeopleConnect Generalist instruct TSU on keying TSU key into PPS

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Separations Voluntary (w/ BSE)	X						<ul style="list-style-type: none"> • Department notify Generalist via PeopleConnect • Generalist instruct TSU on keying • TSU key into PPS • Generalist send Keying Instructions or FSC to VPAA
Retirement Ladder Rank	X					<ul style="list-style-type: none"> • Employee notice of retirement 	<ul style="list-style-type: none"> • Department notify Generalist via PeopleConnect • Generalist instruct TSU on keying • TSU key into PPS • Generalist send Keying Instructions or FSC to VPAA
Retirement In Residence and Clinical X			X			<ul style="list-style-type: none"> • Notice of retirement from employee 	<ul style="list-style-type: none"> • Department notify Generalist via PeopleConnect • Generalist instruct TSU on keying (including emeritus appointment) • TSU key into PPS • If BSE, Generalist send keying instructions to VPAA

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Retirement Non-Senate Faculty			X			<ul style="list-style-type: none"> • Notice of retirement from employee 	<ul style="list-style-type: none"> • Department notify Generalist via PeopleConnect • Generalist instruct TSU on keying • TSU key into PPS
Retirement Non-Faculty Academic			X			<ul style="list-style-type: none"> • Notice of retirement from employee 	<ul style="list-style-type: none"> • Department notify Generalist via PeopleConnect • Generalist instruct TSU on keying • TSU key into PPS
Recall Appointments Initial (not to exceed 43%)		X		<ul style="list-style-type: none"> • Packet approved through Advance • Recall Salary Worksheet, signed by the Chair and uploaded into Advance packet 	<ul style="list-style-type: none"> • Department Chair signs Recall Salary Worksheet • VPAA Office review and approve • Department prepare FSC upon approval • Generalist review FSC and forward to TSU • TSU key appointment into PPS 		

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Recall Appointments Renewal (not to exceed 43%)			X			<ul style="list-style-type: none"> • Comp plan statement (if applicable) 	<ul style="list-style-type: none"> • Department prepare FSC upon approval • Generalist review FSC and forward to TSU • TSU key appointment into PPS
Emeritus Appointment Senate Faculty			X			<ul style="list-style-type: none"> • Key into PPS at time of retirement (within 120 days) <i>Automatic conferral</i> 	<ul style="list-style-type: none"> • Generalist instruct TSU on keying • TSU key into PPS
Emeritus Appointment Non-Senate		X		<ul style="list-style-type: none"> • Packet approved through Advance 	<ul style="list-style-type: none"> • Generalist receive approval through Advance, request DPA information from Department and transmit keying information to TSU • TSU key appointment into PPS 		
One-Time Payment		X		<ul style="list-style-type: none"> • PeopleConnect 	<ul style="list-style-type: none"> • Department submit 		

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BYK, BYZ, BYN (SoD, SoN)				request • One-time payment form	request through PeopleConnect • Generalist, DO review as needed. DO approves. • TSU key upon approval		
One-Time Payment BYK, BYZ, BYN (SoM, SoP)			X				<ul style="list-style-type: none"> • Department submit request through PeopleConnect • Generalist review • TSU key into OPTRS using one-time payment form
One-Time Payment HON > \$1500		X		<ul style="list-style-type: none"> • One-Time payment form 	<ul style="list-style-type: none"> • Department/HRSS submit one-time payment form to VPAA for approval • TSU key into OPTRS upon approval 		
One-Time Payment HON not exceeding \$1500			X			<ul style="list-style-type: none"> • Backup documentation 	<ul style="list-style-type: none"> • TSU key into OPTRS

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One Time Payment NON-UC HON not exceeding \$1500	X				<ul style="list-style-type: none"> Department/HRSS sends payment request to accounting via Bearbuy or check request 		
One Time Payment NON-UC HON > \$1500	X			<ul style="list-style-type: none"> HON exception request form (for NON-UC Employees) 	<ul style="list-style-type: none"> Department/HRSS submits HON exception request form to VPAA for approval VPAA sends approved form back to Department/HRSS Departments/HRSS forward HON exception request form with check request to accounting OR upload HON exception request into Bearbuy and route to accounting 		
Multi-location One Time Payment HON any \$ amount	X			<ul style="list-style-type: none"> Multi-location one-time payment form 	<ul style="list-style-type: none"> Department/HRSS submit multi-location one time payment form to VPAA for approval VPAA routes to employee's home campus for processing 		

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Multi-location One Time Payment “Other Payments” any \$ amount	X			<ul style="list-style-type: none"> Multi-location one-time payment form 	<ul style="list-style-type: none"> Department/HR Ssubmit multi-location one time payment form to Dean’s Office Dean’s Office sends to VPAA for approval VPAA routes to employee’s home campus for processing 		
STP/ST1 Payments		X		<ul style="list-style-type: none"> Chair’s letter requesting STP with justification <p><i>Note: Chair/ORU Director STP is initiated by Dean’s Office</i></p>	<ul style="list-style-type: none"> Department submit request through PeopleConnect, attaching chair’s letter Generalist review and submit to Dean’s Office for approval Department/service center key STP/ST1 into MPM upon approval Generalist review keying instruction report TSU keys using keying instruction report 		

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Scheduled Other Comp (BYN, BYZ)			X				<ul style="list-style-type: none"> • Department key additional comp into MPM • Generalist review keying instruction report • TSU key BYN into PPS from keying instruction report • Dean's Office review compliance report
Leave Sabbatical – Senate Faculty	X			<ul style="list-style-type: none"> • Sabbatical Leave request in Advance • Sabbatical Calculation Worksheet attached in Advance 	<ul style="list-style-type: none"> • Generalist receives approval through Advance • TSU keys into PPS 		
Leave Professional Development – In Residence and Clin X	X			<ul style="list-style-type: none"> • Sabbatical Leave request in Advance • Sabbatical Calculation Worksheet attached in Advance 	<ul style="list-style-type: none"> • Generalist receives approval through Advance • TSU keys into PPS 		
Leave Maternity – Faculty	X			<ul style="list-style-type: none"> • Leave Form 	<ul style="list-style-type: none"> • Generalist submit leave form to VPAA • Payroll to key into PPS upon approval from VPAA 		
Leave Maternity – NFA		X		<ul style="list-style-type: none"> • Leave Form 	<ul style="list-style-type: none"> • Generalist submit leave form to VPAA • TSU key into PPS upon approval from VPAA 		

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Leave FMLA – Faculty	X			<ul style="list-style-type: none"> Leave Form 	<ul style="list-style-type: none"> Generalist submit leave form to VPAA TSU keys into PPS upon approval from VPAA 		
Leave FMLA – NFA		X		<ul style="list-style-type: none"> Leave Form 	<ul style="list-style-type: none"> Generalist submit leave form to VPAA TSU key into PPS upon approval from VPAA 		
Leave Others	X**	X**		<ul style="list-style-type: none"> Leave Form 	<ul style="list-style-type: none"> Generalist submit leave form to VPAA TSU key into PPS upon approval from VPAA 		
FHA (w/out exception; SOM, SOP, SOD)			X			<ul style="list-style-type: none"> Payback provision agreement signed by faculty member* One-time payment form <p>*For amounts greater than \$50k</p>	<ul style="list-style-type: none"> Department submit request through PeopleConnect Generalist review TSU key into OPTRS using one-time payment form
FHA (w/out exception for SON or payments using Dean's Office funds for all Schools)		X		<ul style="list-style-type: none"> Payback provision agreement signed by faculty member* One-time payment form <p>*For amounts greater than \$50k</p>	<ul style="list-style-type: none"> Department submits request through PeopleConnect, attaching one time pay form, provision agreement & chair letter HRSS review and submit to Dean's Office for approval TSU key into PPS upon approval from Dean's Office 		

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FHA (w/ exception, All Schools)		X		<ul style="list-style-type: none"> VPAA Exception Approval Letter Payback provision agreement signed by faculty member* One-time payment form <p>*For amounts greater than \$50k</p>	<ul style="list-style-type: none"> Department submits request through PeopleConnect, attaching one time pay form, provision agreement* & chair letter HRSS review and submit to Dean's Office for approval Dean's Office route to VPAA for approval VPAA route to HRSS for keying <p>*For amounts greater than \$50k</p>		