

Announcements:

- Employee Planning changes for 2020-21 planning season:** The UCPATH job codes and Composite Benefit Rates (CBRs) are now appearing in Employee Planning. They will be available for planning after the UPlan annual maintenance in August. Although the new job codes and benefits accounts now appear on the forms, **you should continue planning on the old Title Codes and benefit accounts for the remainder of the current planning season.** To understand the changes that are coming for the next planning season, visit [the UPlan website](#) or read about the new accounts below.

All references to forms and accounts below are in the context of the Employee Planning Individual Forms. The same accounts are included in the changes made to the Multi-Employee Forms and TBH Empl Forms.

Employee Planning changes for 2020-21 planning season:

- NEW: The CBR account is called “Benefits %”**
 - The account is read-only on the Empl Sal&Ben Level form.
 - The account is updated nightly from UCPATH. The nightly rate is brought into the Forecast, and will soon be brought into the Plan.
 - For employees in the Faculty Tenure, Faculty Non-Tenured, Management, and Academic and Staff General CBR groups, you will see [the UPlan Planning Rate](#) in the Individual Employee Sal&Ben Level form. The planning rate is slightly lower than the real CBR charged to the department to account for [the VLA credit](#) to the department when the employee takes vacation.
 - For HCOMP-eligible employees, the Benefits % includes the 1.25% Faculty childbearing/childrearing assessment.
 - The Base&Neg Benefits % and Adj, Addtl Benefits % and Adj, and Fac Bon&Incv (BYZ) Benefits % and Adj accounts are going away. Between now and UPlan annual maintenance in August, you will see the current year Forecast populated with actuals in these old accounts from July through April in the PPS Title Codes. May and June will have actuals populated in “Benefits %” in the UCPATH Job Codes. The old accounts will be removed from the form during the annual maintenance in August.

Account	2019-20												2020-21	2021-22				
	Forecast												Plan	Plan				
	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YearTotal	Working	YearTotal	Working	YearTotal					
17477: COMM SPEC 3																		
Inital Base&Neg Salary	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	98,167	99,706	1%		
Global Assumptions %																		
Override Global %																		
Salary Level Override	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	82,017	82			
New Base&Neg Salary	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	98,483	99,788			
Addtl Salary																		
Fac Bon&Incv BYZ																		
Ending Total Salary	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	8,233	98,483	99,788			
Base&Neg Benefits (%)	41.77%	42.24%	42.24%	17%	42.62%	42.62%		41.58%	41.58%	41.58%	41.58%	41.58%	41.58%	41.58%	42.62%			
Addtl Benefits (%)																		
Fac Bon&Incv (BYZ) Benefits (%)																		
Benefits (%)																		
Base&Neg Benefits Adj (%)																		
Addtl Benefits Adj (%)																		
Fac Bon&Incv (BYZ) Benefits Adj (%)																		
Benefits Adj (%)																		
Base&Neg Benefits (\$)	3,439	3,478	3,478	1,400	3,509	3,509		3,423	3,423	3,423	3,423	3,423	3,423	38,747	42,530			
Addtl Benefits (\$)																		
Fac Bon&Incv (BYZ) Benefits (\$)																		
Benefits (\$)																		
Benefit \$ Totals	3,439	3,478	3,478	1,400	3,509	3,509		3,423	3,423	3,423	3,423	3,423	3,423	38,747	42,530			
1007477: COMM SPEC 3																		
Inital Base&Neg Salary																		
Global Assumptions %																		
Override Global %																		
Salary Level Override																		
New Base&Neg Salary																		
Addtl Salary																		
Fac Bon&Incv BYZ																		
Ending Total Salary																		
Benefits (%)														43%	43%	43%		
Benefits Adj (%)																		
Benefits (\$)																		
Benefit \$ Totals																		

- NEW: Modify the “Benefits %” using “Benefits Adj (%)”**
 - The account is writable on the Empl Sal&Ben Level form. It will override the Benefits % account if there is a value in the cell, and calculates on the “New Base&Neg Salary” account.

- **NEW: Benefits (\$)**

- The account is read-only on the Empl Sal&Ben Level form. The account is the result of either the “Benefits %” or “Benefits Adj (%)” multiplied by the “New Base&Neg Salary”. Since a benefits subtotal account already exists (see below), this account will be removed from the form during annual maintenance in August.

Task - Search Individual Empl Task Instructions

Empl Sal&Ben Level Empl Distr Pct Empl Distr Sal \$ Empl Distr Ben \$ Empl Summary

		2019-20	2020-21	2021-22
		Forecast	Plan	Plan
		Working	Working	Working
		▷ YearTotal	▷ YearTotal	▷ YearTotal
T7477: COMM SPEC 3	Initial Base&Neg Salary	98,167	99,706	
	Global Assumptions %		1%	
	Override Global %			
	Global Assumptions Impact \$		82	
	Salary Level Override	82,017		
	New Base&Neg Salary	98,483	99,788	
	Addtl Salary			
	Fac Bon&Incv BYZ			
	Ending Total Salary	98,483	99,788	
	Base&Neg Benefits (%)	41.58%	42.62%	
	Addtl Benefits (%)			
	Fac Bon&Incv (BYZ) Benefits (%)			
	Benefits (%)			
	Base&Neg Benefits Adj (%)			
	Addtl Benefits Adj (%)			
	Fac Bon&Incv (BYZ) Benefits Adj (%)			
	Benefits Adj (%)			
	Base&Neg Benefits (\$)	38,747	42,530	
	Addtl Benefits (\$)			
	Fac Bon&Incv (BYZ) Benefits (\$)			
	Benefits (\$)			
	Benefit \$ Totals	38,747	42,530	
J007477: COMM SPEC 3	Initial Base&Neg Salary			
	Global Assumptions %			
	Override Global %			
	Global Assumptions Impact \$			
	Salary Level Override			
	New Base&Neg Salary			
	Addtl Salary			
	Fac Bon&Incv BYZ			
	Ending Total Salary			
	Benefits (%)	43%		
	Benefits Adj (%)			
	Benefits (\$)			
	Benefit \$ Totals			

- **UPDATE: Benefit \$ Totals**

- The account existed prior to the enhancement, is read-only, and is a subtotal of Base&Neg Benefits (\$), Addtl Benefits (\$), Fac Bon&Incv (BYZ) Benefits (\$) and now, Benefits (\$). Since the Base&Neg, Addtl, and Fac Bon&Incv benefit accounts are going away, this account will only reflect Benefits (\$) going forward for the UCPATH Job Code.

- **UPDATE: UCPATH Job Codes appear in addition to PPS Title Codes**

- The UCPATH Job Codes are six digits and appear alongside the PPS Title Codes for each employee. In UPlan, the Job Codes are identical to the title codes except with 'J00' prefixed instead of "T". Any % effort planned on the PPS Title Code in the “Base&Neg Dist (%), Addtl Dist (%), or Fac Bon&Incv (BYZ) Ben Dist (%)” accounts will be mapped to the UCPATH Job Code during annual maintenance in August.
- PPS Title Codes will be removed from the form during annual maintenance in August.

- **NEW: Ben Dist (\$)**
 - The account is read-only on the Empl Distr Ben \$ form.
 - For open months, the account is the result of “Base&Neg Ben Dist (\$)” + “Addtl Ben Dist (\$)” + “Fac Bon&Incv (BYZ) Ben Dist (\$)”.
 - For actual months, the account is the lump sum total found in the UCPath Labor Ledger for that Employee-Job Code combination. In UCPath, the ERN code is no longer included in Payroll actuals, therefore benefit \$ cannot be discernable by “Base&Neg”, “Addtl/Other”, and “Fac Bon&Incv (BYZ)”.
- **Faculty Portfolio Integration in UPlan:** With the implementation of UCPath on June 1, 2020, UCSF will retire the Faculty Portfolio Projection tool. The nightly FP Feed to UPlan was turned off in General and Employee Planning, and all FP forms were removed from the Task List.

Bug Fixes & Enhancements:

- Reference the [UPlan Enhancements](#) page for a complete list of enhancements relevant to the last fiscal year.

Known Issues:

- **Compensation Detail by DFP Form Report showing incorrect Benefit \$ Totals:** Due to the blending of PPS and UCPath actuals and forecast in the current year closed and open months, the Compensation Detail by DFP Report may show incorrect data. Results will show correctly after the annual maintenance in August is complete.

			2019-20							2020-21		2021-22	
			Forecast							Plan		Plan	
			Working							Working		Working	
			Dec	Jan	Feb	Mar	Apr	May	Jun	YearTotal	YearTotal	YearTotal	
Faculty_Academic_Salary	T1728: ASST ADJ PROF-HCOMP						1,250	317	317	1,883	4,180	4,180	
	T1728: ASST ADJ PROF-HCOMP						1,250	317	317	1,883	4,180	4,180	
	Total All TitleCode						1,250	317	317	1,883	4,180	4,180	
Faculty_Academic_Benefits	T1728: ASST ADJ PROF-HCOMP						577	143	143	863	1,848	1,434	
	T1728: ASST ADJ PROF-HCOMP						577	143	143	863	1,848	1,434	
	Total All TitleCode						577	143	143	863	1,848	1,434	
Non-Faculty_Academic_Salary	T3300: SPECIALIST			8,725		8,725	8,725	8,725	34,900		107,318	110,000	
	T3300: SPECIALIST			8,725		8,725	8,725	8,725	34,900		107,318	110,000	
	Total All Employee			8,725		8,725	8,725	8,725	34,900		107,318	110,000	
Non-Faculty_Academic_Benefits	T3300: SPECIALIST					8,725	8,725	17,450			107,318	110,000	
	T3300: SPECIALIST					8,725	8,725	17,450			107,318	110,000	
	Total All Employee					8,725	8,725	17,450			107,318	110,000	
Staff_Salary	T7399: PROJECT POLICY ANL 4				8,868		8,868	8,868	35,473		106,420	109,612	
	T6206: RSCH ADM 3				1,117		1,399	1,466	819	3,684	10,707	11,135	
	T6207: RSCH ADM 4				1,117		1,117	1,117	4,468	13,403	13,805	13,805	
	T6206: RSCH ADM 3				1,117		1,399	1,466	819	3,684	10,707	11,135	
	T6207: RSCH ADM 4				1,117		1,117	1,117	4,468	13,403	13,805	13,805	
	T7399: PROJECT POLICY ANL 4				8,868		8,868	8,868	35,473		106,420	109,612	
	Total All TitleCode				9,985		11,364	11,451	10,894	49,624	139,559	138,656	
Staff_Benefits	T7399: PROJECT POLICY ANL 4				5,243		5,243	4,017	18,530		47,037	49,106	
	T6206: RSCH ADM 3				656		516	664	371	1,550	4,732	4,988	
	T6207: RSCH ADM 4				656		548	506	506	2,216	5,924	6,184	
	T6206: RSCH ADM 3				656		516	664	371	1,550	4,732	4,988	
	T6207: RSCH ADM 4				656		548	506	506	2,216	5,924	6,184	
	T7399: PROJECT POLICY ANL 4				5,243		5,243	4,017	18,530		47,037	49,106	
	Total All TitleCode				5,899		6,306	5,187	4,894	22,287	57,694	60,278	

- Reference the [UPlan Known Issues](#) page on our website for a complete list of unresolved issues. As known issues are resolved, they will be announced under “Bug Fixes & Enhancements.”