PostDoc Configuration

Configuration of PostDoc employees is currently limited to Payroll Managers and requires additional application security. Please contact ETSC to request a profile update if your department chooses to manage PostDoc timecards in Kronos.

Currently, using Kronos for PostDoc employees is optional as leave information is not communicated between Kronos and PPS. Kronos can be used to help manage compliance with UCSB policies for PostDoc employees.

However, once UCPath has been implemented, using Kronos will be required for PostDoc employees as their unique accrual configuration will be supported. You can choose to either start using Kronos with your PostDoc employees now, at some point between now and UCPath Go-Live, or at UCPath Go-Live. Your choice may depend on your area’s hiring schedule or quantity of PostDocs.

Configuration options are available in Kronos for full-time and part-time PostDoc employees to aid in managing leave balances during their appointment.

- Full-time configuration is reserved for employees that have a 100% appointment in PPS for one calendar year.
- Part-time configuration is reserved for any other combination:
  - 100% appointment for less than one year
  - One-year appointment at less than 100%
  - Appointment less than one year at less than 100%

Full-Time PostDoc Accrual Functionality:

For Paid Time Off, the following accrual activity will happen automatically:

- 192 hours (24 days) of Paid Time Off will be granted on the appointment start date and annually thereafter.
- Existing balances expire annually and cannot be carried over.
- The maximum balance is limited to 192 hours. Even with a manual update, the balance cannot go over 192 hours during the year.
- Takings must be in 8-hour increments (full days).
- No negative balances allowed.

For Sick, the following accrual activity will happen automatically:

- 96 hours (12 days) Sick will be granted on the appointment start date and annually thereafter.
- Existing balances do not expire and can be carried over.
- No balance limit is enforced as sick leave can accumulate.
- Takings must be in 8-hour increments (full days).
- No negative balances allowed.
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Full-Time PostDoc Employee Configuration:

Make the following employee configuration changes in People Editor:

1. **Person** tab > **Accruals & Leave**: Review Accrual Profile assigned and update if needed. Accrual Profile should be **PX Full-Time** with a Start Date that matches their appointment start date and End Date set to ‘Forever’.
2. **Person** tab > **Person’s Dates**: Update PostDoc Appt Start date to be the start of the PostDoc appointment. If the date is not the same as their Hire Date, enter the desired date in the Override Date column.
3. **Job Assignment** tab > **Timekeeper**: Review Pay Rule assigned and update if needed. The Pay Rule should be either **PX PostDoc** or **PX PostDoc NE** depending on PPS title code.
4. **Job Assignment** tab > **Employee Role**: Update the Pay Code “Edit” Profile selecting **PX Employee**.
5. Click **Save** to complete any changes.
6. If you are starting the PostDoc employee in Kronos at any point past the first day of their appointment year, you will need to load their existing balances for Paid Time Off (PTO) and Sick. Perform the following steps to reset accrual balances in Kronos.
   a. Locate employee in QuickFind.
   b. Highlight employee, click on the Accruals icon, and select **Reset Accrual Balances**.
   c. In the dialog box, select effective date for the starting balance, Accrual Code (Paid Time Off or Sick), and balance in hours in Vested Amount field.
   d. Click **Apply** to complete the balance reset.
   e. Repeat the process for each accrual balance.
   f. Select **Group Edit Results** widget from related panes and validate that the reset was successful.

Part-Time PostDoc Accrual Functionality:

There will be no automatic accrual earnings activity. The employee will have Paid Time Off (PTO) and Sick accrual buckets that will be managed manually by the department’s payroll manager.

Kronos will manage balance policies during the appointment. The employee is expected to record leave in “full” day increments based on their appointment and will not be able to overdraw their balances.

Part-Time PostDoc Employee Configuration:

Make the following employee configuration changes in People Editor:

1. **Person** tab > **Accruals & Leave**: Review Accrual Profile assigned and update if needed. Accrual Profile should be **PX Part-Time** with a Start Date and End Date that matches their appointment start and end.
2. **Person** tab > **Person’s Dates**: Update PostDoc Appt Start date to be the start of the PostDoc appointment. If the date is not the same as their Hire Date, enter the desired date in the Override Date column.
3. **Job Assignment** tab > **Timekeeper**: Review Pay Rule assigned and update if needed. The Pay Rule should be either **PX PostDoc** or **PX PostDoc NE** depending on PPS title code.
4. **Job Assignment** tab > **Employee Role**: Update the Pay Code “Edit” Profile selecting PX Employee.
5. Click **Save** to complete any changes.
6. Perform the following steps to calculate starting accrual balances for Kronos.
   a. Calculate the amount of PTO and Sick leave the employee qualifies for based on the appointment percentage and length. Adjust the calculated balances by any leave taken if starting the PostDoc in Kronos in the middle of their appointment.
   b. Reset the PTO and Sick balance using the calculated amounts effective the start date of the appointment.
   c. At the end of the appointment, reset the PTO and Sick balances to zero if the appointment is not renewed. If the appointment is renewed, repeat steps 1 and 2 based on new calculated amounts with the new appointment start date.
7. Perform the following steps to reset accrual balances in Kronos.
   a. Locate employee in QuickFind.
   b. Highlight employee and click on the Accruals icon and select Reset Accrual Balances.
   c. In the dialog box, select effective date for the starting balance, Accrual Code (Paid Time Off or Sick), and balance in hours in Vested Amount field.
   d. Click Apply to complete the balance reset.
   e. Repeat process for each accrual balance.
   f. Select Group Edit Results widget from related panes and validate that the reset was successful.