

Financial: Direct Retro (PETs)

Purpose

Updates to position funding for previous pay periods

Decision Points

1. UCB Initiator
2. UCB Approver(s)

Templates

- Direct Retro
- Salary Cap/MCOP Worksheet

Data needed for transactions

	Direct Retro	Salary Cap/ MCOP Worksheet
With Validation	<ul style="list-style-type: none"> • Chart fields: <ul style="list-style-type: none"> ○ Dept ID ○ Fund ○ Program ○ Chartfield1 (optional) ○ Chartfield2 (optional) ○ Project (optional) ○ PC Business unit (optional) ○ PC Activity (optional) • New earnings amount • Reason code 	<ul style="list-style-type: none"> • Chart fields: <ul style="list-style-type: none"> ○ Dept ID ○ Fund ○ Program ○ Chartfield1 (optional) ○ Chartfield2 (optional) ○ Project (optional) ○ PC Business unit (optional) ○ PC Activity (optional) • One of these required: <ul style="list-style-type: none"> ▪ Earnings ▪ Percent of Pay ▪ Percent of Effort
Freeform Entry (no validation)	<ul style="list-style-type: none"> • Initiator Comments • Questionnaire 	

For the Direct Retro template, approvers cannot edit any of the fields completed by the initiator.

Have a question about UCPATH? Email us at ucpathberkeleyinfo@lists.berkeley.edu

Guiding Principles

Sponsor Alignment

- Develop efficiency in end-to-end business process
- Use UCPath delivered functionality
- Minimize additional cost
- Eliminate double data entry

Diverse Campus Stakeholders

- Involve both academics and staff (at multiple levels)
- Maintain a customer focus

Disciplined Process

- Ensure implementation focus
- Use UCPath delivered templates and approval workflow
- Document decisions for clarity and commitment

Openness to Change

- Maintain enterprise-wide perspective
- Be open to process and role changes
- Be transparent with communications