



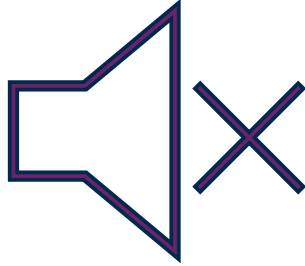
Academic Personnel Monthly Information Session

Presented by the Office of Academic Personnel

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February 24, 2026

Housekeeping



Please keep yourself muted during the presentation



Ask questions in chat



Please keep your camera on during the presentation



- **Faculty Salary Setting Process**
- **Appendix II Generator**
- **New Final Pay Process**

Faculty Salary Setting Process

The Appendix II Generator tool is designed to allow for the full download of all salary information and data points included in Appendix IIs, ensuring ease of access and consistency across departments.

A couple reminders to assist with this process:

- Departments can export FY25-26 final salary details to assist with the FY26-27 salary setting process.
- Faculty with **pending** advancement decisions
 - Department creates Appendix IIs for each salary scenario to be approved all at once by Dean
(Current and two most common advancement options: 1.0 step & 1.5 step)
- Calculating Above Scale Salaries
 - Above Scale salaries are not outlined on the salary scales; therefore, the salary must be calculated and manually entered in the Appendix II Generator.
 - Please note that the **First** Above Scale is a different calculation than **Further** Above Scale
 - The specific calculations for Health Sciences Compensation Plan members are outlined on the Academic Affairs website: <https://academicaffairs.ucdavis.edu/above-scale-merits-step-plus-system>

Faculty Salary Setting Timeline and Reminders

Timeline for salary review/approval process:

- **3/1/2026 - 5/15/2026:** Departments prepare/route Appendix IIs via Appendix II Generator
- **5/15/2026:** Appendix IIs due to Dean's Office – This includes all possible salary outcomes for pending advancements
- **6/5/2026:** Appendix IIs approved by Dean's Office - Ready for faculty/chair acknowledgement
- **7/1/2026:** Appendix IIs finalized for AP Processing – Appendix IIs that are acknowledged and marked “Final” by this date will be entered in UCPATH

Appendix II reminders and helpful processing information:

- Appendix IIs are only required for HCOMP faculty
- Please ensure Appendix IIs are in the “**Final**” status for UCPATH entry **by 7/1/2026**
- Appendix II Generator Training Manual (will be updated by end of week): <https://ucdavis.box.com/s/moptbeb9fcicetgy29svmzhfookmtn3d>
- Appendix II Generator Website (must be on VPN): <https://fsns.ucdmc.ucdavis.edu/>
- Mid-year salary changes require additional review and approval by the Dean
- APU changes should be addressed through the annual Compensation Plan submission process
- With the October range adjustment, a new Appendix II is only required for faculty that have a change in Total Annual Salary

Appendix II Generator Dashboards

<https://fsns.ucdmc.ucdavis.edu/>

Must be on the VPN to access the website



Appendix II Generator



MENU

- Manage Appendix IIs
- Dean's Office/AP
- Review Appendix IIs
- My Appendix IIs
- Sign Appendix IIs
- Manage System
- CRM

Dashboard Menus

Manage Appendix IIs:

Dept Admin will create/edit App IIs & route for Dean's Office

Dean's Office / AP:

Dean's Office will review/approve, AP will mark when entered in UCPath

Review Appendix IIs:

Dept Reviewer will select which approved App II to route to Faculty

My Appendix IIs:

Faculty Dashboard - to acknowledge App IIs and view history

Sign Appendix IIs:

Chair Dashboard - to complete Dept acknowledgement and finalize

Manage Appendix II Dashboard

Manage Appendix IIs



Select Fiscal Year:

Will default to the next FY on January 1st in preparation for processing new Appendix IIs for budget season.
You can change the drop down to other FYs if needed.

Selected Fiscal Year:

2026-27

Refresh Page

Data last refreshed:

03/06/2025 12:57 PM

Display 25

Show/Hide Columns

9 columns selected

Search

Reset Filters

Show Additional Filters

Process Selected

Export to Excel

Name	Department / Division	Appendix II Version	Salary Effective Date	Scale	Series 1	Series 2	Rank	Step	Total Annual Salary	Status	Entered in UC Path	Route	Action
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Last Name, First Name Dermatology

Last Name, First Name Dermatology

+


+

Click the “+” sign to add a new or add’l Appendix II for this faculty member

Faculty names preload from the live UCPath Department Roster

Creating an Appendix II Form for July 1st (slide 1 of 3)

Form Details

Version: 2 of 2
Fiscal Year:
*** Salary Effective Date:** 
*** Salary Scale Used:** 10/01/2025 - 09/30/2026

Employee Information

Name: Last Name, First Name
Employee ID: 123456789
Active UC Path Title: *As of today*
001732 - HS ASST CLIN PROF-HCOMP
Department / Division: Neurology

Appointment Information

* Is this a new appointment? No Yes

* Series 1: HSCP
* % Time: 100
* Rank: Assistant
* Step: 4.5


Series 2: - Select -
% Time: 0

% Total: 100 %

Annual Salary Rate Components

I have been informed by my chairperson that the salary recommended for me this fiscal year is as follows:

* Approved Base Scale (Salary Admin Plan/APU#): 4
* Total Full Salary (Base + Negotiated): \$243,764



Salary Effective Date:
Auto populates with 7/1/XX of current fiscal year until Dec 31st, then will auto populate with 7/1/XX of next fiscal year on Jan 1st.

You can also reference the salary scale being pulled.

Appointment Information:
Complete all areas in the yellow circle first.

See next slide for more...

Creating a New Appendix II Form (slide 2 of 3)

Annual Salary Rate Components

I have been informed by my chairperson that the salary recommended for me this fiscal year is as follows:

*The base scale that has been negotiated is

*Total Faculty Salary (Base + Negotiated):

Faculty Salary Components ↑↓	*Comp Rate Code ↑↓	*100% Annual Value ↑↓	Prorated Value at % Time (if < 100) ↑↓
Regular Pay (X)	UCHSX	\$152,100.00	
Increment	UCHD51	\$9,500.00	
Other Off Scale (campus split appts only)	<input type="text" value="N/A"/>	<input type="text" value="\$"/>	
Scale Pay (X')	UCHSP	\$98,900.00	
Total Base Salary		\$260,500.00	
Negotiated Pay Y	<input type="text" value="UCHSN (not firm)"/>	\$139,500.00	
Total Faculty Salary (Base + Negotiated)		\$400,000.00	

Administrative Appointment

Does this faculty member have an Administrative Appointment? No Yes

*Administrative Appointment Type:

*Administrative Appointment Type ↑↓	*Comp Rate Code ↑↓	*Annual Amount ↑↓	Details ↑↓
<input type="text" value="001010 ASSOC DEAN"/>	<input type="text" value="STP"/>	<input type="text" value="\$6,000"/>	<input type="text"/>

Total Annual Salary (Faculty + Administrative):

Select the **Scale (0-9)** and enter the **Total Faculty Salary (X+X'+Y)**

This information, along with the Appt information entered above, will calculate and auto-populate the salary information (unless Above Scale)

If <100%, prorated values will also populate to the right.

Administrative Appt:

If there is separate salary associated with administrative appointments, you can add here to see a Total Annual Salary (Faculty Salary + Admin)

Creating a New Appendix II Form (Slide 3 of 3)

Other areas on the Appendix II entry

Administrative Appointment

Does this faculty member have an Administrative Appointment? No Yes

VA Appointment

Does this faculty member have a VA Appointment? No Yes

*VA Fraction (8ths):

*VA Salary:

Note

500 characters remaining


Administrative Appointment:

If there is no Admin Appt, leave as “no”

VA Appointment:

If there is VA Appt with Salary information, enter it here. It **does not** get calculated into the UCDH Appendix II Total Faculty Salary, it is for reference only.

Notes:

Notes entered on the Appendix II form will be saved on the Dashboard  icon, you can edit/delete as well.

These notes are also viewable on the export to excel.

- Good to use if creating multiple versions per faculty when there is a pending action.
- The notes **do not** save on the Appendix II view if you open it to edit later.

“**Save Edits**” will save but leave you on the screen
“**Save Edits & Return...**” will save and return to your Dashboard

“**Cancel**” will leave the page without saving

Form Details

Version: 1 of 1 Fiscal Year: 2026-27 Salary Effective Date: 07/01/2026 Salary Scale: 10/01/2025 - 09/30/2026

Employee Information

Name: [REDACTED] Employee ID: [REDACTED] Department / Division: [REDACTED]

Appointment Information

Is this a new appointment? No
Series 1: HSCP % Time: 80 Rank: Assistant Step: 3
Series 2: % Time: 0
% Total: 80

Annual Salary Rate Components

I have been informed by my chairperson that the salary recommended for me this fiscal year is as follows:
Approved Base Scale (Salary Admin Plan/APU#): 6
Total Faculty Salary (Base + Negotiated): 478,450

Faculty Salary Components	Comp Rate Code	100% Annual Value	Prorated Value at % Time
Regular Pay	UCHSX	\$103,800.00	\$83,040.00
Increment	N/A		
Other Off Scale (campus split appts only)	N/A		
Scale Pay (X')	UCHSP	\$67,500.00	\$54,000.00
Total Base Salary		\$171,300.00	\$137,040.00
Negotiated Pay Y	UCHSN (not firm)	\$307,150.00	\$245,720.00
Total Faculty Salary (Base + Negotiated)		\$478,450.00	\$382,760.00

Appendix II PDF - Draft

Draft PDF highlights the areas that were entered or auto-populated.

I understand this salary is expressed as an annual rate and that it will be prorated if it is effective for a partial year, a reduced percentage of time due to leave status, or a reduced appointment.

If a change in the base scale is mandated by the University, I understand that the total base salary (X + X') will be modified automatically. Additional negotiated compensation (Y) will be decreased accordingly if available, result in no change to overall salary.







I understand that the receipt of this salary is governed by the Health Sciences Compensation Plan, University of California, Davis, Implementation Procedures and that I may file a grievance regarding the salary under the grievance measures outlined in Section V.C. of those Procedures.







This statement represents a record of my salary negotiations with my department chair. I understand that it is not a contract. (Section VII.D.1. of the Implementation Procedures). Finally, I understand that this salary is subject to approval of the Vice Provost – Academic Planning and Personnel upon recommendation of the Department Chair and the Dean.

Manage Appendix II Dashboard

-Action Icon Legend

Show/Hide Columns: 9 columns selected | Search: | Reset Filters | Show Additional Filters | Process Selected | Export to Excel

Name ↑	Department / Division ↑↓	Appendix II Version	Salary Effective Date	Scale	Series 1	Series 2	Rank	Step	Total Annual Salary	Status	Entered in UC Path	Route	Action
Last Name, First Name	Dermatology											<input type="checkbox"/>	+
		1 of 1		6	Clinical X		Assistant	3	\$350,000			<input type="checkbox"/>	     

					
Preview Appendix II	Edit Appendix II	View Transaction History	View Notes	Retract	Delete Appendix II
	Make changes before routing or after it's sent back for edits from the Dean	Tracks the who, what, when	Notes entered on Appendix II are saved here, not on the actual App II form	Retract any routed Appendix II prior to "final" and returns to your dashboard level as "retracted"	Delete Draft Appendix IIs

Manage Appendix II Dashboard

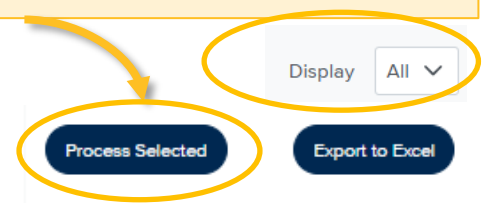
“Draft / Not Routed” Appendix IIs

Once you’ve entered your Appendix IIs, you should verify accuracy with the export to excel feature (Select all desired status filters and Display “all” before exporting). Then route Draft App IIs (or “retracted”, “Dean Rejected”) to the *Dean’s Office for review & approval (they may send back for edits)

**Note: Internal Medicine App IIs will first route to Division Reviewer, who will route to Dean’s Office or reject back to you for edits (“division rejected”)*

Process Selected:

To batch process, check all you’d like to route and then click “Process Selected”



Name ↑	Department / Division ↑↓	Appendix II Version	Salary Effective Date	Scale	Series 1	Series 2	Rank	Step	Total Annual Salary	Status	Entered in UC Path	Route	Action
Last Name, First Name		Medical Microbiology and Immunology											+
		1 of 2	07/01/2026	6	Regular Ladder Rank	Full	2.5	\$400,000	Draft / Not Routed	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
		2 of 2	07/01/2026	6	Regular Ladder Rank	Full	3	\$450,000	Draft / Not Routed	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Last Name, First Name		Medical Microbiology and Immunology											+



1 of 1

07/01/2026

6

Clinical X

Assistant

3

\$300,000

Draft / Not Routed

Department or Presentation Title 13



Basic Flow and Process after routing Drafts

- Dean will review and approve (or reject for edits)
- Appendix IIs move to Review Appendix II Dashboard
- Dept Reviewer routes the appropriate Appendix II to faculty
- Faculty acknowledges (or dept override can also occur if necessary)
- Chair acknowledges (or Dean if it's Chair Appendix II)
- Appendix II becomes **FINAL** (if new Appendix II is needed, route the new one and it will supersede the last final)

Appendix II Generator

- Live Demonstration:
 - Create an Appendix II
 - Settings to export last year's approved salaries to excel

New Final Pay Process

Beginning Monday, March 9, UCPATH will transition five pilot locations from using the E-078 Final Pay option to a new Final Pay Activity Guide for submitting Final Pay transactions. This change applies to both voluntary and involuntary terminations for represented and non-represented employees in staff and academic titles.

Important: Final pay will now be processed off-cycle.

UCPATH users impacted:

- Payroll transactors and approvers in campus service channels
- Academic Personnel payroll transactors and approvers
- Health Payroll transactors and approvers
- Central Payroll transactors and approvers

New Final Pay Process

What is not changing

- Department process for submitting terminations will not change.
- Departments should continue to submit termination requests in AggieService.
- Please upload the current Ecotime balance **and history** as an attachment to the AggieService case.
- For voluntary terminations, please upload the employee's resignation notice with the department's acknowledgement to the AggieService case.
- There are **no changes** to auto terminations (GSRs, TAs, Readers).

New Final Pay Process

What is changing

- The current process using the E-078 Final Pay option will be retired.
- Final Pay transactions will be submitted by the service channel through the Activity Guide workflow.
- Final Pay transactions can now be submitted after the termination transaction is submitted, without waiting for UCPath Center to approve the termination transaction.
- Summary and review pages will display all earnings, accruals, deductions, and additional pay included in the final paycheck, providing a clearer and more comprehensive view of Final Pay details.

New Final Pay Process

What is changing – impact on departments

Final Pay will be processed off-cycle

- Effective March 9th, all Academic titles will have final pay processed off-cycle.
- This means that if any employee's last day is mid-month, they will be paid on their last day worked* rather than the next monthly pay date.
- The employee's final pay will include their salary earnings for the last month worked and their terminal vacation payout (if eligible).

**assumes adequate time was allowed for termination and final pay processing.*

New Final Pay Process

Terminal Vacation (TRM) Payout

- The TRM estimate will be automatically calculated and available online.
- The TRM will be the current UCPATH vacation balance, minus any vacation takes reported in the Final Pay Activity Guide, plus any accruals for the last month worked.
- AP staff can no longer override the TRM balance and do not have an option to add comments to the final pay request.
- If there are discrepancies in the UCPATH vacation balance, these must be corrected before submitting the Final Pay Activity Guide.

New Final Pay Process

Medical Resident Terminal Vacation (MTV) Payout

- AP will continue to manually enter MTV payout when submitting the Final Pay Activity Guide.
- In future state, the Final Pay Activity Guide should be able automatically calculate the MTV payout.
- Impacted titles: Clinical Psychology Intern and Non-Physician Clinical Trainee.
- **Please note:** MTV does not rollover into vacation and must be paid out when an employee changes titles or leaves UC.

New Final Pay Process

What can the department do to facilitate a smooth final pay process?

- Review Ecotime leave usage history/absence balances on a regular basis.
- Run monthly or quarterly absence balance reports in Cognos and cross-reference those against Ecotime.
- Alert your AP analyst ASAP when a vacation balance discrepancy is found. (Please keep in mind that Ecotime reports in arrears, so there is usually a 1-month delay in posting to UCPATH.)
- Submit terminations in AggieService in a timely fashion. Ideally, within 1-month of termination date, but no later than two weeks before termination date.

Absence Balance Review - Cognos

Employee absence balances are updated in UCPATH once per month. For monthly paid employees, this occurs on the last day of the month. For biweekly paid employees, please reference [payroll-calendar-bw-2026.pdf | Powered by Box](#).

The following Cognos reports may be referenced to review UCPATH absence balances:

UCP-024 Latest Leave Accrual and Balances Audit Report

- Report is run per employee or per department.
- This report shows the employee's current Employment Service Months, Sick, and Vacation balances effective the last day of month. If you are reviewing mid-month, the balances will show as of the last day of the previous month.

Absence Balance Review - Cognos

UCP-372 Leave Accrual Summary Report

- Report can be run per employee or per department.
- This report shows Sick and Vacation balances effective for the date/s entered in the report.

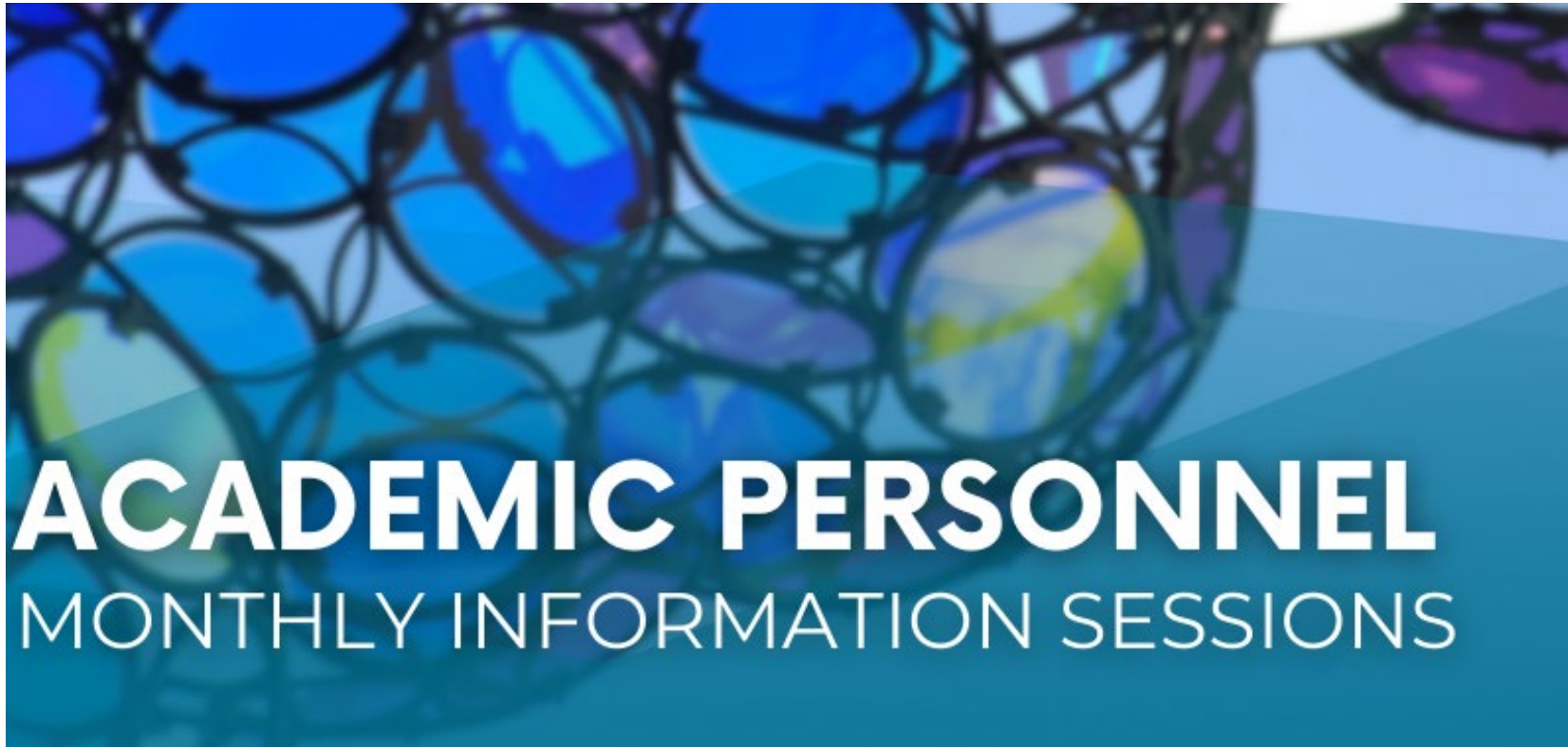
UCP-022 Leave Accrual and Balances Summary Report

- Report is run by employee.
- This report shows the employee's current Employment Service Months, Sick, and Vacation balances effective for the date/s entered in the report.

Questions



Upcoming Sessions



Thank you for your attendance today!!!