UCPath Help for Locations

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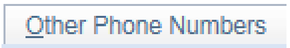
Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMNAV105JA_WhereDoI_D1Rev01.pdf) to open the **UCPath Navigation** job aid in a new web browser window/tab.

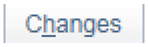
Using Grids

In grids, fields appear as columns similar to those on a spreadsheet. Fields in a grid belong to one table in your database. Grids enable you to visually distinguish those rows of data at a glance and to add, edit, and view multiple occurrences of data for a group of fields on a page.

In this topic, you look at grids used for setting up an emergency contact.

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > Personal Relationships > **Emergency Contact**.

Step	Action
1.	Enter the desired information into the **Last Name** field. For this example, enter **Sutherland**.
2.	Click the **Search** button. 
3.	A dashed underline indicates availability of a mouseover popup page. Point to the **Megan Sutherland** link.
4.	When the **Mouseover Popup Event** is enabled (**My Personalizations**) additional information about a subject that is dash-underlined appears in a popup window when you hover over the subject. The popup window disappears when you move the mouse.
5.	The **Other Phone Numbers** page in the **Emergency Contact** component contains a grid area. Click the **Other Phone Numbers** tab. 

Step	Action
6.	On some pages, you may want the fields to repeat in order to enter multiple rows of data. Grids look similar to a spreadsheet with column headings, rows, and cells. The cells are equivalent to fields. Fields within a grid may be represented as edit boxes, drop-down list boxes, check boxes, and radio or prompt buttons.
7.	Rows of data in grids always share the same high-level keys. For example, for the **Other Phone Numbers** page, you can have multiple rows for the different phone types. If you have multiple rows, each of these rows has the same **Person ID** as the key field. If you insert a new row, the system automatically copies the shared key data into the new row.
8.	Instead of using a traditional scrollbar to scroll through the rows of data in a grid, UCPath uses navigation buttons and hyperlinks. Most often, you will find these buttons and hyperlinks in the navigation header for each area, with the exception of the **Insert Row** and **Delete Row** buttons.
9.	Use the **Find** link to find a specific row of data.
10.	Use the **View All** link to display all rows of data on a page. When this feature is enabled, the link changes to read **View 1**, so that you can return to the original setting.
11.	The **First** link takes you to the first row of data.
12.	Use the **Previous Row** arrow to navigate to the previous row of data.
13.	The number range for the rows shows the number of rows you are currently viewing.
14.	Use the **Next Row** arrow to navigate to the next row of data.
15.	The **Last** link takes you to the last row of data.
16.	The **Add Row** button inserts a new row of data.
17.	The **Delete Row** button deletes the current row of data.
18.	Another type of grid is a tabbed grid. These grids provide a means of viewing multiple columns of information without having a horizontal scroll to view them. For this example, we navigated to the **Compensation** page in the **Job Data** component for you (notice the navigation path at the top of the page). You can see a tabbed grid section labeled **Pay Components**. You select a tab to view the additional columns. Click the **Changes** tab. 
19.	Notice that different columns appear for the newly selected tab. Click the **Amounts** tab. 

Step	Action
20.	To add data on this page, you must use **Correct History**. Click the **Correct History** button. Correct History
21.	To add a new row of data to a grid, you click the **Add Row** button to insert a row just below the row you are on. Each time you add a new row, you are actually adding a new row of data to the database table. Click the **Add a new row** button. +
22.	A new row is now available. Notice that the number system for the rows in the grid navigation header now shows 1-3 of 3.
23.	If you want to delete a row, click the **Delete Row** button. Click the **Delete row** button. −
24.	The system displays a confirmation message asking if you want to proceed with the deletion. It also reminds you that the row will not be deleted from the database until a save occurs; however, the row is automatically removed from the grid. Click the **OK** button. OK
25.	You may also encounter grids that can be collapsed or expanded. By clicking the right pointing arrow in front of the grid heading, you can expand a grid that is hidden from view or collapsed. Click the **Expand section** button. ▶
26.	You can collapse the grid by clicking the down arrow in front of the grid heading. Click the **Collapse section** button. ▼
27.	You have successfully used UCPath's grid area navigation structure with multiple rows of data. **End of Procedure.**

Job Aid: UCPath Search Options

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMNAV105JA_SearchOptions_D1Rev00.pdf) to open the **UCPath Search Options** job aid in a new web browser window/tab.

Using Search Pages

There are two types of search pages: **Basic Search** and **Advanced Search**. When you select most pages or components in UCPath, the system displays a **Find an Existing Value** tab where you can search for the records you want to display. On this tab you can toggle between the basic search and advanced search functionality.

The **Basic Search** page enables you to search by only one field at a time, and then only using the **begins with** operator. To designate the search field, if more than one is available, select the desired field from the **Search by** list of values, enter your search criteria and then click the **Search** button to display the results.

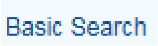
On the **Advanced Search** page you can search using multiple fields and using a variety of search operators.

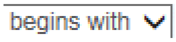
Some search criteria fields also provide a list of valid values for a field. You can use the **Lookup** button to search for specific search criteria.

UCPath also supports three wildcard features when searching for data in character fields.

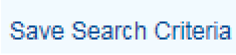
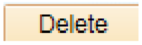
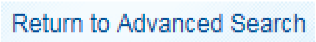
This topic describes how to effectively use search pages.

Step	Action
1.	In this scenario, navigate to the **Modify a Person** search page. Click the **PeopleSoft Menu** link. 
2.	Click the **Workforce Administration** link. 
3.	Click the **Personal Information** link. 
4.	Use the **Expand** button to expand the navigation area. Click the **Expand** button. 
5.	Click the **Modify a Person** link.

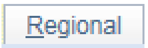
Step	Action
6.	To collapse the navigation area, click the **Collapse** button. 
7.	When you select a page or component, the system usually defaults to the **Advanced Search** page on the **Find an Existing Value** tab. You know this is the **Advanced Search** page because the **Basic Search** link appears at the bottom of the page so that you can switch to that search method. Also, the appearance of multiple search fields indicates this is the **Advanced Search** page. You also can click the **Add a New Value** tab to add a new record instead of searching. Let's first look at the **Basic Search**.
8.	Click the **Basic Search** link.  Basic Search
9.	You can use only one search criteria field for a basic search. **Empl ID** is the default field for the **Personal Information** component, but additional fields are available in the list of values. Click the button to the right of the **Search by** field.  Empl ID
10.	In general, a **Basic Search** page offers most of the fields shown on the **Advanced Search** page. The **Search by** list enables you to select different search keys to search against the database. You also can enter full or partial values for the key field. For this example, you need to locate an employee's whose last name is Tsilimparis. You may not know the proper spelling of Tsilimparis, but you know it begins with "tsi".
11.	Click the **Last Name** list item.  Last Name
12.	Enter the desired information into the **begins with** field. For this example, enter **tsi**.
13.	Click the **Search** button.  Search
14.	The **Search Results** show all rows matching your search criteria. In this case, these are all the employees whose last name begins with "tsi". You are looking for Blake Tsilimparis.
15.	You can sort by **First Name** to quickly find Blake. Click the **First Name** column header.  First Name

Step	Action
16.	Notice that the values in the first column in the list appear as links. Click the link to display the details for any person in the list. Click the **10005201** link. 
17.	If you want to search for data for another employee, click the **Return to Search** button at the bottom of the page. Click the scroll bar.
18.	Click the **Return to Search** button. 
19.	The system returns you to the **Basic Search** page with the criteria from the previous search displayed. Let's switch to the **Advanced Search** page. Click the **Advanced Search** link. 
20.	The system returns you to the **Advanced Search** page with the criteria from the previous search displayed. To search again with new criteria, use the **Clear** button to refresh the page. Click the **Clear** button. 
21.	The **Advanced Search** page contains several fields to search for your data. The options enable you to narrow your search by entering values in more than one field.
22.	Click the **Search** button. 
23.	UCPath prompts you that you must enter at least one search criteria. Click the **OK** button. 
24.	Click the button to the right of the **Empl ID Search Operators** field. 
25.	You can use the search operators to specify search criteria. The default operator searches for records that begin with your search criteria, but you may want to use other operators to find the desired records.

Step	Action
26.	Click in the **Empl ID** field.
27.	In this example you will enter part of an employee ID number. Enter the desired information into the **EmplID** field. For this example, enter **10000**.
28.	Click the **Search** button. Search
29.	The search function retrieves up to 300 entries from the database displaying the results in groups of 100 in the **Search Results** grid.
30.	You can sort the results using any heading in the **Search Results** grid. To sort ascending by **Last Name**, click the **Last Name** column header. Last Name
31.	To sort descending, click the **Last Name** column header again. Last Name
32.	You can use the scroll bar to scroll though the currently displayed list of search results. Click the scroll bar.
33.	Click the **Show next rows** button to display the next 100 results. ▶
34.	You also can use the **First** and **Last** links to move from the first entries to the last entries in the **Search Results** grid. To return to the first 100 entries, click the **Show previous rows** button. ◀
35.	To search using new criteria, click the **Clear** button. Clear
36.	Click in the **Last Name** field.
37.	Enter the desired information into the **Last Name** field. For this example, enter **Williams**.
38.	Click the **Search** button. Search

Step	Action
39.	If the search criteria you selected is something you think you may use frequently, you can save the specifics of the search. Click the **Save Search Criteria** link. 
40.	Click in the **Name of Search** field. 
41.	Enter the desired information into the **Name of Search** field. For this example, enter **Williams**.
42.	Click the **Save** button. 
43.	Click the **Return to Advanced Search** link. 
44.	Click the **Clear** button. 
45.	Click the button to the right of the **Use Saved Search** field. 
46.	Click the **Williams** list item. 
47.	The **Search Results** grid contains only employees with the last name Williams. When you no longer need a saved search, click the **Delete Saved Search** link. 
48.	Select the saved criteria. In this example, only your Williams criteria exist and it is already selected. Click the **Delete** button. 
49.	Click the **Return to Advanced Search** link. 
50.	Click the **Clear** button to erase the previous search criteria. 

Step	Action
51.	It is better to narrow your search if the results display too many rows to effectively review. In this example, enter a partial employee ID. Click in the **Empl ID** field. 
52.	Enter the desired information into the **Empl ID** field. For this example, enter **1000**.
53.	Click the **Search** button. 
54.	The **Search Results** grid contains 300 entries. You are looking for Christine Johnson. To narrow your search enter part of her last name. Click the **Last Name** column header. 
55.	Enter the desired information into the **Last Name** field. For this example, enter **John**.
56.	Click the **Search** button. 
57.	The results decreases to 54 entries... much easier to find the employee. Notice in the **Advanced Search** results, all values in the results grid are links. You can click anywhere on the row to display the details for a record. Click the **Christine Johnson** link. 
58.	Click the **Return to Search** button. 
59.	Click the **Clear** button. 
60.	If you know the full value, enter it in the **Search Criteria**. In this example you have the exact ID for Christine Johnson. Click in the **Empl ID** field. 
61.	Enter the desired information into the **Empl ID** field. For this example, enter **10000593**.

Step	Action
62.	When you click **Search**, UCPath takes you directly to the employee's personal data page. Click the **Search** button. 
63.	Some fields provide a **Lookup** button to help you select criteria. Go to the **Regional** page to learn how to use this feature. Click the **Regional** tab. 
64.	The **Ethnic Group** field uses a **Lookup** (magnifying glass) button to provide a list of valid values for the field and also restrict the values entered into the field. Click the **Look up Ethnic Group** button. 
65.	On the **Look Up Ethnic Group** page you can search for a value by using the **Search Operators** and entering all or part of a value in a search field.
66.	Click in the **Ethnic Group** field. 
67.	Enter the desired information into the **Ethnic Group** field. For this example, enter **oth**.
68.	Click the **Look Up** button. 
69.	Select the correct value from the **Search Results** grid. Click the **OTHERSPA** list item. 
70.	Click the **Return to Search** button. 
71.	You do not want to save your change. Click the **No** button. 
72.	Click the **Clear** button. 

Step	Action
73.	UCPath applications support three wildcard features when searching for data in character fields. These wildcards can be helpful in finding the exact information you want to process. The table below displays the supported standard wildcard features: the percent sign to match one or more characters, the underscore to match any single character and the back slash as an escape character (meaning it doesn't treat the next character as a wildcard).
74.	For example, suppose you are looking for a specific employee but can't remember his ID. You know that the ID begins with "1" and contains the numbers "149". You can use the % wildcard to locate the employee. Click in the **Empl ID** field.
75.	Enter the desired information into the **Empl ID** field. For this example, enter **1%149**.
76.	Click the **Search** button. Search
77.	There are 19 employees who match this criteria.
78.	Click the **Clear** button. Clear
79.	You have successfully searched for data using **Basic Search** and **Advanced Search** pages, the **Lookup** button and wildcards. **End of Procedure.**

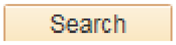
Search for Employees Using Search Match

Use this task to access the **Search/Match** page to search for specific employees in UCPath.

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > **Search for People**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	In the **Search Type** field, select the **Person** option. Click the button to the right of the **Search Type** field. ⌄

Step	Action
2.	Click the **Person** list item.  Person
3.	Click the **Search** button.  Search
4.	In the **Search Results** list, select the **Custom Search for UCPath** option to open the search template. Click the **Custom Search for UCPath** list item.  Custom Search for UCPath
5.	In the **Search Result Code** field, select the **PSHR_GENERAL** option. Click the **Look up Search Result Code** button.
6.	Click the **General Core HR Results** list item.  General Core HR Results
7.	You must enter search criteria to enable the **Search** button.
8.	Click in the **First Name Search** field.
9.	Enter the desired information into the **First Name Search** field. For this example, enter **Megan**.
10.	Click in the **Last Name Search** field.
11.	Enter the desired information into the **Last Name Search** field. For this example, enter **Sutherland**.
12.	Click in the **Gender** field.
13.	Enter the desired information into the **Gender** field. For this example, enter **F**.
14.	Click the **Search** button.  Search
15.	The **Search Results** page displays a list of employees that match the search criteria.
16.	The **Show all columns** button displays the information from all three **Search Results** tabs on one page.
17.	The **Carry ID** button captures the person's ID and carries it to the ID search field on any other pages to which you navigate. If you want to "forget" the person ID, click the **Carry ID Reset** button on the search criteria page.

Step	Action
18.	The **Return to Search Criteria** link closes the search results and starts a new search.
19.	Click the **Results2** tab to review additional information. Click the **Results2** tab. 
20.	Review the information on the **Results2** tab. Click the **Additional Information** tab. 
21.	This tab provides access to the **Person Organizational Summary** page. Click the **Person Organizational Summary** link. 
22.	The **Person Organizational Summary** page provides detailed information about the employees job or assignment at UC.
23.	You have searched for employees using the **Search/Match** page. **End of Procedure.**

Job Aid: UCPath Workcenter

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMNAV105JA_UCPath%20Workcenter_D1Rev00.pdf) to open the **UCPath Workcenter** job aid in a new web browser window/tab.

Job Aid: UCPath Basics and Navigation

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMNAV105JA_UCPathBasicsNav_D1Rev00.pdf) to open the **UCPath Basics and Navigation** job aid in a new web browser window/tab.

Using Update Display

The **Update/Display** action type enables you to access current and future effective-dated rows in the database. Specifically, you can:

- Insert, change and delete future rows of data.
- View current and future rows of data.

You also use this action type to access tables that are not effective-dated.

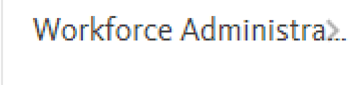
Step	Action
1.	UCPath uses many different types of elements to organize information on pages and to enable you to enter data, including data-entry, functional and data processing elements. **Update/Display** retrieves only current and future rows. You can change future rows but not current rows. You also can add a new current row. Begin by navigating to the **Volunteer Activities** page. Click the **PeopleSoft Menu** link. 
2.	Click the **Workforce Administration** link. 
3.	Click the **Personal Information** link. 
4.	Click the **Biographical** link. 
5.	Click the **Volunteer Activities** link. 
6.	When accessing component pages that are not effective-dated, the default page action is **Update/Display**. Notice that the search page for **Volunteer Activities** does not provide choices for any actions.
7.	In this example, one of your psychiatry employees has been volunteering at the LA Downtown Women's Center. She ended her volunteer service on September 1, 2017. You must update this job-related volunteer information. Click in the **Empl ID** field. 
8.	Enter the desired information into the **Empl ID** field. For this example, enter **10070630**.
9.	Click the **Search** button. 

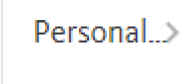
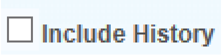
Step	Action
10.	The **Volunteer Activities** page for the employee appears. You must enter the end date for this activity. Click in the **End Date** field. 
11.	Enter the desired information into the **End Date** field. For this example, enter **09/01/17**.
12.	Click the **Save** button. 
13.	You have successfully updated the information for this employee and committed the data to the UCPath tables. **End of Procedure.**

Using Include History

The **Update/Display All** action type is used primarily for viewing data within an effective-dated table. However, you can use this action type to update certain categories of existing data in the database. By selecting the **Include History** page action, you are able to:

- View history, current and future rows of data.
- Change future rows.
- Insert future rows.
- Delete future rows.

Step	Action
1.	UCPath's effective-dating logic enables you to maintain an accurate history of information in the database. Effective-dating allows you to store historical data (see changes in your data over time). Begin by navigating to the **Dependent Information** page. Click the **PeopleSoft Menu** link. 
2.	Click the **Workforce Administration** link. 

Step	Action
3.	Click the **Personal Information** link. 
4.	Click the **Personal Relationships** link. 
5.	Click the **Dependent Information** link. 
6.	When you navigate to the search page of an effective-dated page, the available page actions appear below the final search field. In this example for **Dependent Information**, the **Include History** and **Correct History** page actions are available. If you want to view all data row categories, but insert or change future rows only, the appropriate page action is **Include History**. This option opens the component page in **Update/Display All** mode. Click in the **Empl ID** field. 
7.	Enter the desired information into the **Empl ID** field. For this example, enter **10000060**.
8.	Click the **Include History** option. 
9.	Click the **Search** button. 
10.	In this scenario, view the dependent addresses. Click the **Address** tab. 
11.	Notice that the page displays the first of two rows, indicating that there is an additional row of data for this record. In this example, the employee's dependent John has two rows because he changed his address. Click the **Show next row** button. 

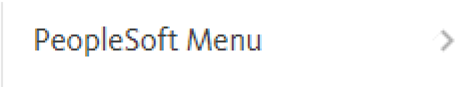
Step	Action
12.	Notice that John's address used to be the same address as the employee.
13.	Click the **View All** link to display all rows of data on the page at the same time. 
14.	Notice that both addresses are now visible. To return to the most recent row and show only one row at a time, click the **View 1** link. 
15.	John is planning a move to a campus apartment. A future row of data must be inserted to reflect this new information. Click the **Add a new row** button. 
16.	Notice that **1 of 3** now appears in the grid header. When you insert a new row into an effective-dated table, the data from the current row is copied to the new row. This way, you can make any necessary changes for the new row without wiping out data that you don't need to change.
17.	When you insert a new row, the effective date defaults to the current system date, but you can override it if necessary. Click in the **Effective Date** field. 08/31/2017
18.	Enter the desired information into the **Effective Date** field. For this example, enter **09/01/2017**.
19.	The next change to make for this future row is the new address for the dependent. Click the **Edit Address** button. 
20.	Enter the desired information into the **Address 1** field. For this example, enter **108B Falkirk Bldg**.
21.	Enter the desired information into the **Address 2** field. For this example, enter **Lindin Street**.
22.	Click the **OK** button. 
23.	Click the **Save** button. 
24.	You have successfully displayed data using the **Include History** action type and added a future effective-dated row of data. **End of Procedure.**

Using Correct History

The **Correction** action type can be very effective if it is used appropriately. Likewise, if abused, it can be detrimental to data integrity within UCPath. By selecting its associated page action, **Correct History**, you are able to:

- View history, current and future rows.
- Change history, current and future rows.
- Insert history, current and future rows.

The **Correction** action is not accessible to all users within your organization. Implementation team members and other experts are the only people with access to this action type. The purpose of the **Correction** action type is to correct mistakes in the system.

Step	Action
1.	The types of actions that you can perform on rows of data depend on the data row type. When you retrieve, modify or insert rows in a table, the **Correct History** action applies specific rules based on the effective date. **Correct History** retrieves all rows and allows you to change or correct any row and insert new rows regardless of the effective date or sequence number. This option is available only to users with the proper permission. In this scenario, an employee has minor surgery scheduled for September 1. His leave of absence was entered in UCPath on August 31. His surgery has been postponed and the employee is working September 1. Delete his September 1 leave of absence record in the **Job Data** page.
2.	Click the **PeopleSoft Menu** link. 
3.	Click the **Workforce Administration** link. 
4.	Click the **Job Information** link. 
5.	Click the **Job Data** link. 

Step	Action
6.	Click in the **Empl ID** field.
7.	Enter the desired information into the **Empl ID** field. For this example, enter **10000004**.
8.	To delete the September 1 leave of absence row, choose the **Correct History** action from the search page or select the action after you have navigated to the component pages. You know you want to be in **Correction** mode, so select **Correct History** here. Click the **Correct History** option. ☐
9.	Click the **Search** button. Search
10.	The **Work Location** page appears. Notice you are on the first of six rows of data - the most recent row of data. Notice that the **Effective Date** is 09/01/2017 and the **Action** is **Paid Leave of Absence**. This is the incorrect row that should be deleted.
11.	Use the delete button to remove the row. Click the **Delete row 1** button. ⊟
12.	A confirmation message appears. Notice that you must click save to complete the change. Click the **OK** button. OK
13.	Notice that first of five rows now appears, indicating that one row has been removed.
14.	To commit these corrections to the database, you must save. Click the scroll bar.
15.	As the confirmation message indicated, the delete occurs when the transaction is saved. Click the **Save** button. Save
16.	You have successfully used the **Correct History** page to perform a correction. You can change or delete records without regard to effective-dating or row categories. **End of Procedure.**

Job Aid: Work in Multiple UCPath Windows

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMNAV105JA_MultipleWindows_D1Rev00.pdf) to open the **Work in Multiple UCPath Windows** job aid in a new web browser window/tab.

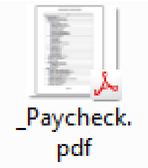
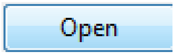
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
1.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
2.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
3.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
4.	Click the button to the right of the **Category** field. 
5.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.

Step	Action
6.	Click in the **Subject** field.
7.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
8.	Click in the **Description** field.
9.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
10.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
11.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
12.	Click in the **Best Contact Phone Number** field.
13.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
14.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
15.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
16.	Click the **Add Attachment** link. 
17.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
18.	For this example, click the **_Paycheck.pdf** list item. 
19.	Click the **Open** button. 
20.	The file name appears in the **Attachments** box.
21.	Click the **Submit** button.
22.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.

Step	Action
23.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
24.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
25.	Click the scroll bar.
26.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
27.	Click the scroll bar.
28.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
29.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

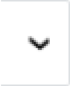
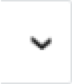
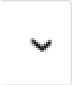
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
1.	Click the **Ask UCPath Center** button. 
2.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.

Step	Action
3.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
4.	UCPath returned one result. Click the scroll bar.
5.	Click the **Create an Inquiry** link. 
6.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
7.	Click the button to the right of the **Requested By** field. 
8.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
9.	Click the button to the right of the **Topic** field. 
10.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
11.	Click the button to the right of the **Category** field. 
12.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
13.	Click in the **Subject** field.

Step	Action
14.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
15.	Click the scroll bar.
16.	Click in the **Description** field.
17.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
18.	In this example, the full **Description** was completed on your behalf.
19.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
20.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
21.	Click the **Submit Inquiry** button. 
22.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
23.	The submitter's name appears.
24.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

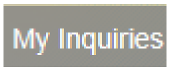
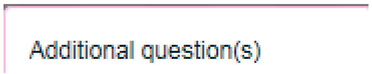
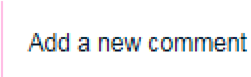
Reopen Closed UCPath Center Case

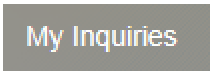
Use this task to reopen a closed inquiry via the UCPath website.

A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
1.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
2.	Click the **My Closed Inquiries** link. 
3.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
4.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
5.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
6.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
7.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
8.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.

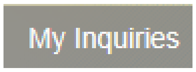
Step	Action
9.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
10.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
11.	Click the scroll bar.
12.	Notice the comment now appears in the **Case Comments** section.
13.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
14.	Return to the top of the page. Click the scroll bar.
15.	Click the **My Inquiries** link. 
16.	The new inquiry appears in the **My Open Inquires** list.
17.	You have reopened a closed inquiry. **End of Procedure.**

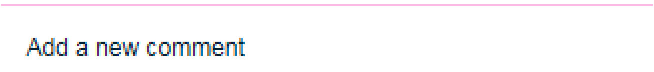
Monitor UCPath Center Cases

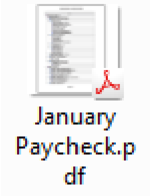
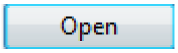
Use this task to review the status of an existing inquiry via the UCPath website.

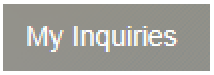
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
1.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link.  My Inquiries
2.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
3.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
4.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
5.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link.  Date/Time Opened ▲
6.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again..  Date/Time Opened ▼
7.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link.  00180573

Step	Action
8.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field. Add a new comment
9.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
10.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
11.	Click the **Submit comment to the UCPath Center** button. Submit comment to the UCPath Center
12.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
13.	Click the scroll bar.
14.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. View All
15.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▼
16.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
17.	To return to the case details, click the **00180573** link. 00180573
18.	Click the scroll bar.

Step	Action
19.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
20.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
21.	Click the **Open** button. 
22.	A message confirms the file was uploaded. Click the **Done** button. 
23.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
24.	You can view all attachments in a list. Click the **View All** link. 
25.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 
26.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 

Step	Action
27.	Click the **00180573** link.  00180573
28.	Click the scroll bar.
29.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
30.	Click the **Email** link.  Sandbox: UCPath Center: Inquir.
31.	Review the email information as you scroll down the page. Click the scroll bar.
32.	Review the email from the UCPath Center. Click the scroll bar.
33.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
34.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
35.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
36.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
37.	Click the **00180567** link.  00180567
38.	Click the scroll bar.
39.	Notice the **Status** is **Closed/Resolved**.
40.	Click the scroll bar.

Step	Action
41.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
42.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMNAV106: UCPath Reports and Processes

Run a Report or Process

Use this task to run a report or process in UCPath.

In this scenario you will run a Workforce Administration report, but the basic steps for running any report or process are the same.

Navigation: PeopleSoft Menu > Workforce Administration > Workforce Reports > **Employee Turnover Analysis**.

Step	Action
1.	Use the **Find an Existing Value** tab to search for and select an existing **Run Control ID**. If search results return no matching values, select the **Add a New Value** tab. Click the **Add a New Value** tab. 
2.	Click in the **Run Control ID** field. 
3.	Reach out to your supervisor or manager for information about **Run Control ID** standards that may exist in your area. Enter the desired information into the **Run Control ID** field. For this example, enter **WFARPT**.
4.	After you create a **Run Control ID**, you cannot delete it. Click the **Add** button. 

Step	Action
5.	Enter the parameters for your report or process. This report requests a data range. If you leave the date fields blank, the report captures information from 01/01/1900 (the default conversion date used by UCPath) through today's date. Click in the **From Date** field. 
6.	Enter the desired information into the **From Date** field. For this example, enter **01/01/16**.
7.	Click in the **Thru Date** field. 
8.	Enter the desired information into the **Thru Date** field. For this example, enter **01/01/17**.
9.	Click the **Run** button. 
10.	Use the **Process Scheduler Request** page to define the **Server Name**, when and how often to run the report or process. You also can review and change the format of the report output.
11.	The **Server Name** must be selected the first time you run a report or process. Click the button to the right of the **Server Name** field. 
12.	Click the **PSUNX** list item. 
13.	In this example, you will run the report immediately. If you want to run the report during non-peak hours, update the **Run Date** and **Run Time** fields. If you want to run the report or process on a recurring basis, select the time interval from the **Recurrence** list.
14.	The default output type and format automatically appear. To change the type of output, select a new option from the **Type** list. To change the output format, select a new option from the **Format** list.
15.	Click the **OK** button. 
16.	UCPath automatically assign a **Process Instance** number to identify each report or process request. Click the **Process Monitor** link to review the status while the report is running. 

Step	Action
17.	Refresh the page every fifteen seconds until the **Run Status** for your job is **Success**, **No Success** or **Error**. Click the **Refresh** button. 
18.	Verify the **Run Status** is **Success** and the **Distribution Status** is **Posted**. The **Distribution Status** displays **N/A** if no output is expected. Contact your supervisor if the **Run Status** is **No Success** or **Error**.
19.	Click the **Detail** link to review the details of the report or process. 
20.	Click the **View Log/Trace** link. 
21.	Process reports and output logs appear in the **File List** group box. Report filenames generally end with .PDF, .XLS, or .CSV. Use the file with the .log extension to review the number of rows processed and any errors the system encountered.
22.	To display the report click the **per010_99112.PDF** link. 
23.	A second browser window or tab displays the report. After reviewing the information you can save the report as a PDF or print the report. Close the browser window when you finish reviewing the report.
24.	Use the **Report Manager** page as an alternate method for reviewing reports. To access the **Report Manager** page, click the **Main Menu** menu. 
25.	Click the **Reporting Tools** menu. 
26.	Click the **Report Manager** menu. 
27.	The **List** tab displays the reports to which you have access. Use the **Administration** tab to view the report. Click the **Administration** tab. 

Step	Action
28.	Use the **Administration** page to view the report results or associated log or message file detail. The output appears in another browser window. Click the **Employee Turnover Analysis** link.  Employee Turnover Analysis
29.	After reviewing the information you can save or print the report. Close the browser window when you finish reviewing the report to return to the **Report Manager** page.
30.	You can delete a report or multiple reports from the **Report List** if you no longer need access to them. You can individually select reports in the list or click the **Select All** option below the list. After you select reports for removal, click the **Delete** button at the bottom on the page.
31.	You have run a report in UCPath. **End of Procedure.**

Submit Case to UCPath Center

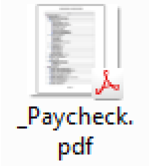
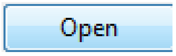
Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
32.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link.  Submit An Inquiry
33.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 

Step	Action
34.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. Payroll
35.	Click the button to the right of the **Category** field. 
36.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
37.	Click in the **Subject** field.
38.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
39.	Click in the **Description** field.
40.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
41.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
42.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
43.	Click in the **Best Contact Phone Number** field.
44.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
45.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
46.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
47.	Click the **Add Attachment** link. Add Attachment
48.	Navigate to the document you want to attach. In this example, the document is located on the desktop.

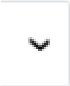
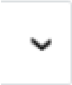
Step	Action
49.	For this example, click the **_Paycheck.pdf** list item. 
50.	Click the **Open** button. 
51.	The file name appears in the **Attachments** box.
52.	Click the **Submit** button.
53.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
54.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
55.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
56.	Click the scroll bar.
57.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
58.	Click the scroll bar.
59.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
60.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

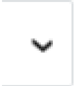
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
61.	Click the **Ask UCPath Center** button. 
62.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
63.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
64.	UCPath returned one result. Click the scroll bar.
65.	Click the **Create an Inquiry** link. 
66.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
67.	Click the button to the right of the **Requested By** field. 
68.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
69.	Click the button to the right of the **Topic** field. 
70.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.

Step	Action
71.	Click the button to the right of the **Category** field. 
72.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
73.	Click in the **Subject** field.
74.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
75.	Click the scroll bar.
76.	Click in the **Description** field.
77.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
78.	In this example, the full **Description** was completed on your behalf.
79.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
80.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
81.	Click the **Submit Inquiry** button. 
82.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
83.	The submitter's name appears.
84.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

Reopen Closed UCPath Center Case

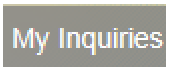
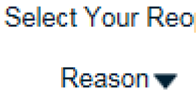
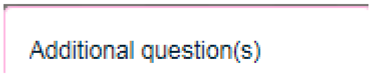
Use this task to reopen a closed inquiry via the UCPath website.

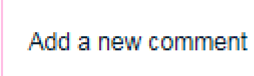
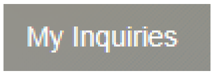
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:

Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
85.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
86.	Click the **My Closed Inquiries** link. 
87.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
88.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
89.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
90.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.

Step	Action
91.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
92.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
93.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
94.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
95.	Click the scroll bar.
96.	Notice the comment now appears in the **Case Comments** section.
97.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
98.	Return to the top of the page. Click the scroll bar.
99.	Click the **My Inquiries** link. 
100.	The new inquiry appears in the **My Open Inquires** list.
101.	You have reopened a closed inquiry. **End of Procedure.**

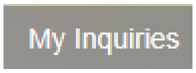
Monitor UCPath Center Cases

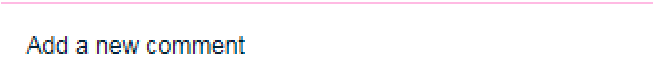
Use this task to review the status of an existing inquiry via the UCPath website.

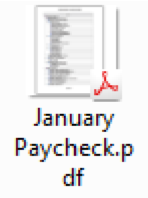
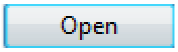
Dashboard Navigation:
Ask UCPath Center
or

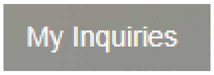
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
102.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
103.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
104.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
105.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
106.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 
107.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 

Step	Action
108.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 00180573
109.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field. Add a new comment
110.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
111.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
112.	Click the **Submit comment to the UCPath Center** button. Submit comment to the UCPath Center
113.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
114.	Click the scroll bar.
115.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. View All
116.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▼
117.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.

Step	Action
118.	To return to the case details, click the **00180573** link.  00180573
119.	Click the scroll bar.
120.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link.  Upload Files
121.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item.  January Paycheck.pdf
122.	Click the **Open** button.  Open
123.	A message confirms the file was uploaded. Click the **Done** button.  Done
124.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
125.	You can view all attachments in a list. Click the **View All** link.  View All
126.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 

Step	Action
127.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. ▼
128.	Click the **00180573** link.  00180573
129.	Click the scroll bar.
130.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
131.	Click the **Email** link.  Sandbox: UCPath Center: Inquir.
132.	Review the email information as you scroll down the page. Click the scroll bar.
133.	Review the email from the UCPath Center. Click the scroll bar.
134.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
135.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
136.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
137.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**

Step	Action
138.	Click the **00180567** link.  00180567
139.	Click the scroll bar.
140.	Notice the **Status** is **Closed/Resolved**.
141.	Click the scroll bar.
142.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link.
143.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMNAV108: UCPath Cognos Reports

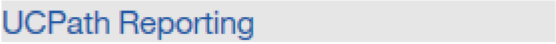
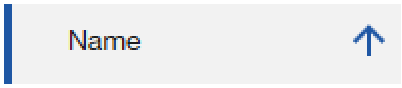
Search for Cognos Report

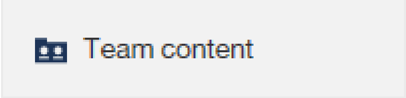
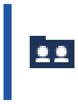
Use this task to search for Cognos Reports.

Navigation: Quicklinks > **Cognos Reports**

Step	Action
1.	You can find reports in Cognos by searching with keywords or by browsing the folders. Let's begin with the keyword search.
2.	Click the **Search** button.
3.	If you previously saved searches, they appear in the **Search** area. In this example, no saved searches appear.
4.	Click in the **Search** field.
5.	Enter the desired information into the **Search** field. For this example, enter **leave**.
6.	As you type Cognos displays objects that have the keyword in the title. You can pick an object from the list or press **Enter** to complete the search. For this example, press **[Enter]**.

Step	Action
7.	In this example 35 items match the keyword search. You can scroll through the list to find a report that meets your needs.
8.	Notice there are two different icons in the results list. The icon for the first item in the list indicates it is a report. Also notice that the path to the report appears below the report name.
9.	The icon for the sixth item in this list indicates it is a shortcut to a report. Shortcuts might be reports you run frequently and saved to your **My content** folder.
10.	If the search returns a large list, you may want to filter the results. Click the **Type** button.
11.	In the filter area you can specify the type of objects to include in the search results. For this example, click the **Reports** option. Reports ☐
12.	Cognos automatically applies the filter option. Notice the results list now has 32 items instead of 35 items.
13.	You also can specify the date the object was last modified. For this example, click the **Past Month** option. Past Month ○
14.	The second filter returned no results. You can clear the filter options to return to the original search results. Click the **Clear all** link. Clear all
15.	You can save search criteria for future use. Click the **Save search** button.
16.	A confirmation message appears. This search appears in the **Search** area the next time you start a key word search. Click the **Close** button. ✕

Step	Action
17.	Now let's try browsing the folders to find a report. Click the **Team content** button.
18.	The **Team content** folder contains folders and reports available throughout UC. Remember that your Cognos security may not grant access to all reports. Your list may be different than the example shown here. For this example, click the **UCPath Reporting** link. UCPath Reporting
19.	Continue to drill down until you find the report you must run. For this example, click the **Absence Management Reports** link. Absence Management Reports
20.	There are two report shortcuts in the **Absence Management Reports** folder. The default display sorts the results in alphabetical order. Click the **Sort by** button. ↑↓
21.	Notice the default sort is by name in ascending order, so the shortcut for report R-341 appears above R-372. You can change to descending order or sort by modified date instead. For this example, click the **Name** menu. Name ↑
22.	The sort is now in descending order by name, so the **R-372** report shortcut is at the top of the list.
23.	You can use the breadcrumbs to navigate up the folder hierarchy. Click the **Previous** button. ←
24.	You have moved up one level to the **UCPath Reporting** folder. Notice the sort order has been retained; the results are in descending order by name.
25.	You also can click within the breadcrumbs to jump to a specific level or to the top folder. For this example, click the **Folder** button.

Step	Action
26.	Cognos displays the list of folders within the navigation path. In this example the only folder higher than **UCPath Reporting** folder is the **Team content** folder. Click the **Team content** option. 
27.	You are now at the top level folder. Click the **Team content** button to close the folder navigation pane. 
28.	You have searched with key words and you have browsed the **Team content** folder. **End of Procedure.**

Job Aid: Cognos Toolbars

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMNAV108JA_CognosToolbars_D1Rev00.pdf) to open the **Cognos Toolbars** job aid in a new web browser window/tab.

Job Aid: Cognos Browser Settings Internet Explorer

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMNAV108JA_CognosBrowserSettings_InternetExplorer_D1Rev00.pdf) to open the **Cognos Browser Settings - Internet Explorer** job aid in a new web browser window/tab.

Job Aid: Cognos Browser Settings Google Chrome

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMNAV108JA_CognosBrowserSettings_GoogleChrome_D1Rev00.pdf) to open the **Cognos Browser Settings - Google Chrome** job aid in a new web browser window/tab.

Job Aid: Cognos Browser Settings Mozilla Firefox

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMNAV108JA_CognosBrowserSettings_MozillaFirefox_D1Rev00.pdf) to open the **Cognos Browser Settings - Mozilla Firefox** job aid in a new web browser window/tab.

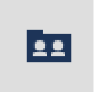
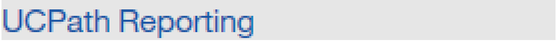
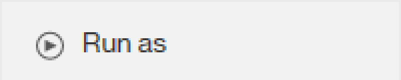
Job Aid: Cognos Browser Settings Safari for Mac

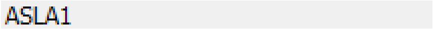
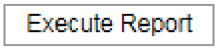
Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMNAV108JA_CognosBrowserSettings_SafariMac_D1Rev00.pdf) to open the **Cognos Browser Settings - Safari for Mac** job aid in a new web browser window/tab.

Run Cognos Report

Use this task to run a Cognos report.

Navigation: Quicklinks > Cognos Reports

Step	Action
1.	Start by finding the report or shortcut. For this example, click the **Team content** button. 
2.	For this example, click the **UCPath Reporting** link. 
3.	For this example, click the **Workforce Administration Reports** link. 
4.	You can resize the navigation pane if you cannot see the full titles in the list. For this example, the pane will be resized for you.
5.	You can click a report or shortcut title to run the report in the default format, but you also can use the **More** menu.
6.	For this example, click the **More** button for the **R-103** report. 
7.	Click the **Run as** menu to choose the output format. 
8.	The default output format is usually HTML. You may prefer Excel, PDF or CSV depending on what you want to do with the report results. For this example, do not make any changes.
9.	Click the **Run** button. 
10.	If the report has parameters, the prompts appear. You must enter values for any parameter that displays an orange asterisk (*) next to the field. There are no required parameters for this report, but let's specify a business unit.
11.	Click the button to the right of the **Business Unit(s)** field. 

Step	Action
12.	For this example, click the **ASLA1** list item.  ASLA1
13.	Click the **Execute Report** button.  Execute Report
14.	A message indicates the report is running. You can click the **Select a delivery method** link if you want to save or print the output, but you also can choose these options when the report results appear.
15.	The report results appear. The run date and time, as well as the report parameters, appear at the top of the report.
16.	Use the scroll bars, as well as links at the bottom of the page, to navigate through the report results.
17.	After the report results appear, you can change the output format. Click the **Run as** button.
18.	You can choose a different output format. If you click the **Reset prompts and run** option, the parameters are cleared and you will be prompted to enter parameters again.
19.	For this example, click the **Run PDF** menu to display these results in the PDF format.  Run PDF
20.	The PDF format appears. You can print or save the results. For this example, click the **Save** button.
21.	Select the location where you want to save the report results. For this example, click the **Downloads** tree item.  Downloads
22.	Click in the **File name** field.  disp.pdf
23.	Enter the desired information into the **File name** field. For this example, enter **R-103**.

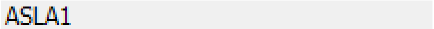
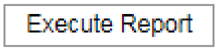
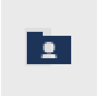
Step	Action
24.	Click the **Save** button. 
25.	Click the **Home** button. 
26.	Notice the report appears in the **Recent** list on your Cognos home page. You can also find this report on the **Recent** list on the **Navigation** menu.
27.	Click the **Welcome** button. 
28.	Notice the report results are still open in your Cognos session. The results were not closed when you clicked the **Home** button. You can use this to toggle between multiple reports. For this example, click the **Close** button. 
29.	Click the **Welcome** link to return to the home page. 
30.	You have run a Cognos report. **End of Procedure.**

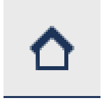
Save Report View

Use this task to save a report with the parameters you specified.

Navigation: Quicklinks > **Cognos Reports**

Step	Action
1.	Start by navigating to the report you want to run. For this example, click the **R-103** report on the **Recent** list. 
2.	If the report has parameters, the prompts appear. You must enter values for any parameter that displays an orange asterisk (*) next to the field. There are no required parameters for this report, but let's specify a business unit.

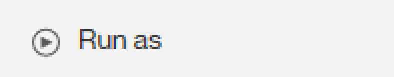
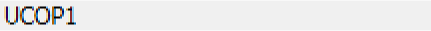
Step	Action
3.	Click the button to the right of the **Business Unit(s)** field. 
4.	For this example, click the **ASLA1** list item.  ASLA1
5.	Click the **Execute Report** button. 
6.	A message indicates the report is running.
7.	The report results appear. The run date and time, as well as the report parameters, appear at the top of the report.
8.	To save the report output with the selected search parameters, click the **Add this report** button. 
9.	Click the **Save report as report view...** menu. 
10.	The **Save as report view** dialog box appears. You can specify a name for the report and where to save it. Click in the **Name** field.  Report View of R-103 Jobs with Approaching End Date ×
11.	The default name begins with **Report View of** and then includes the full report name. You can modify the name to fit your needs. In this example the name will be changed for you.
12.	Select a location where you want to save the report view. The **Select My Folders** link saves the report view in your **My content** folder. You cannot save a report view to the **Team content** folder. Click the **Select My Folders** link. 
13.	Click the **OK** button. 
14.	To verify the report view was saved, click the **My content** button. 

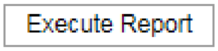
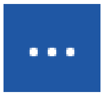
Step	Action
15.	The report view appears in the **My content** folder.
16.	Click the **Home** button. 
17.	You have saved a report with the parameters you specified. **End of Procedure.**

Subscribe to Cognos Report

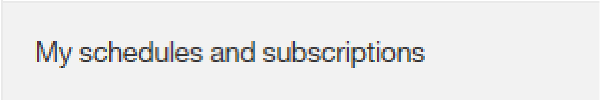
Use this task to create a subscription for a Cognos report.

Navigation: Quicklinks > **Cognos Reports**

Step	Action
1.	Start by navigating to the report you want to run. For this example, click the **More** button for the **R-103** report in the **Recent** list. •••
2.	Click the **Run as** menu to choose the output format. 
3.	The default output format is usually HTML. You may prefer Excel, PDF or CSV depending on what you want to do with the report results. For this example, click the **PDF** option. 
4.	Click the **Run** button. 
5.	If the report has parameters, the prompts appear. You must enter values for any parameter that displays an orange asterisk (*) next to the field. There are no required parameters for this report, but let's specify a business unit.
6.	Click the button to the right of the **Business Unit(s)** field. 
7.	For this example, click the **UCOP1** list item. 

Step	Action
8.	Click the **Execute Report** button. 
9.	The report results appear. The run date and time, as well as the report parameters, appear at the top of the report.
10.	To create a subscription for this report, click the **More** button. 
11.	Click the **Subscribe** menu. 
12.	In the **Subscribe** pane you can define the days of the week, time of day, format and delivery option for this report subscription.
13.	The day and time default to the current day and time. For this example, click the **M** button to run this report every Monday. 
14.	For this example, click the **W** button to clear the Wednesday option. 
15.	Click in the **Time** field. 
16.	Enter the time the report should run on the selected day(s). For this example, double-click the **Hour** field. 
17.	Enter the desired information into the **Hour** field. For this example, enter **8**.
18.	For this example, double-click the **Minute** field. 
19.	Enter the desired information into the **Minute** field. For this example, enter **30**.
20.	For this example, double-click the **AM/PM** field. 
21.	Enter the desired information into the **AM/PM** field. For this example, enter **AM**.

Step	Action
22.	Click outside the **Time** field to update the field. For this example, click the **Time** field label. Time
23.	You can also specify the report output format for the subscription. Click the **Format** button. ›
24.	The default format is usually HTML. For this example, click the **PDF** option. ☐
25.	Click the **HTML** option to remove that format. ☑
26.	Click the **Done** button. Done
27.	Click the **Save** button to see other delivery options. ›
28.	You can choose to receive the report via email or automatically printed. For this example, do not change the delivery option. Click the **Done** button. Done
29.	Click the **Prompts** button to see the parameters settings. ›
30.	Review the parameters that were used to run this report. The same parameters will be used in the subscription. Click the **Back** button. ‹
31.	Click the **Create** button. Create

Step	Action
32.	A confirmation message appears. Click the **Close** button. ✕
33.	To see your subscription, click the **Person** button. 
34.	Click the **My schedules and subscriptions** menu.  My schedules and subscriptions
35.	In this example, two subscriptions are enabled. The list of subscriptions, including report names, appear at the bottom of the page.
36.	Click the **Home** button. 
37.	You have created a subscription for a Cognos report. **End of Procedure.**

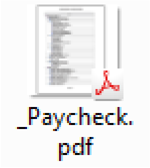
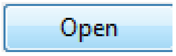
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
38.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
39.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
40.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
41.	Click the button to the right of the **Category** field. 
42.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
43.	Click in the **Subject** field.
44.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
45.	Click in the **Description** field.
46.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
47.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
48.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
49.	Click in the **Best Contact Phone Number** field.
50.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
51.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.

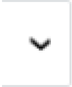
Step	Action
52.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
53.	Click the **Add Attachment** link. 
54.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
55.	For this example, click the **_Paycheck.pdf** list item. 
56.	Click the **Open** button. 
57.	The file name appears in the **Attachments** box.
58.	Click the **Submit** button.
59.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
60.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
61.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
62.	Click the scroll bar.
63.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
64.	Click the scroll bar.
65.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
66.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

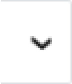
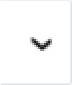
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
67.	Click the **Ask UCPath Center** button. 
68.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
69.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
70.	UCPath returned one result. Click the scroll bar.
71.	Click the **Create an Inquiry** link. 
72.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
73.	Click the button to the right of the **Requested By** field. 

Step	Action
74.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
75.	Click the button to the right of the **Topic** field. 
76.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
77.	Click the button to the right of the **Category** field. 
78.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
79.	Click in the **Subject** field.
80.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
81.	Click the scroll bar.
82.	Click in the **Description** field.
83.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
84.	In this example, the full **Description** was completed on your behalf.
85.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
86.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
87.	Click the **Submit Inquiry** button. 
88.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
89.	The submitter's name appears.

Step	Action
90.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

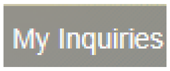
Reopen Closed UCPath Center Case

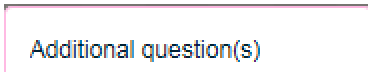
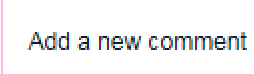
Use this task to reopen a closed inquiry via the UCPath website.

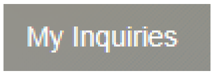
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
91.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
92.	Click the **My Closed Inquiries** link. 
93.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
94.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 

Step	Action
95.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item.  Additional question(s)
96.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
97.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field.  Add a new comment
98.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
99.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center
100.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
101.	Click the scroll bar.
102.	Notice the comment now appears in the **Case Comments** section.
103.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
104.	Return to the top of the page. Click the scroll bar.

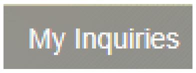
Step	Action
105.	Click the **My Inquiries** link. 
106.	The new inquiry appears in the **My Open Inquires** list.
107.	You have reopened a closed inquiry. **End of Procedure.**

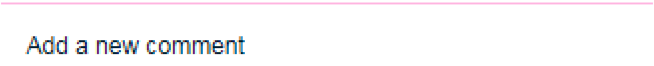
Monitor UCPath Center Cases

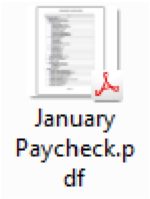
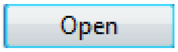
Use this task to review the status of an existing inquiry via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
108.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
109.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
110.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.

Step	Action
111.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
112.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. Date/Time Opened ▲
113.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. Date/Time Opened ▼
114.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 00180573
115.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field. Add a new comment
116.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
117.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
118.	Click the **Submit comment to the UCPath Center** button. Submit comment to the UCPath Center
119.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
120.	Click the scroll bar.

Step	Action
121.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. 
122.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. 
123.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
124.	To return to the case details, click the **00180573** link. 
125.	Click the scroll bar.
126.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
127.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
128.	Click the **Open** button. 
129.	A message confirms the file was uploaded. Click the **Done** button. 
130.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.

Step	Action
131.	You can view all attachments in a list. Click the **View All** link. View All
132.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. ▼
133.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. ▼
134.	Click the **00180573** link. 00180573
135.	Click the scroll bar.
136.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
137.	Click the **Email** link. Sandbox: UCPath Center: Inquir.
138.	Review the email information as you scroll down the page. Click the scroll bar.
139.	Review the email from the UCPath Center. Click the scroll bar.
140.	Click the case number to return to the details of the case. Click the **00180573** link. 00180573
141.	To review closed inquiries, click the **My Inquiries** link. My Inquiries

Step	Action
142.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
143.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
144.	Click the **00180567** link.  00180567
145.	Click the scroll bar.
146.	Notice the **Status** is **Closed/Resolved**.
147.	Click the scroll bar.
148.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
149.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMNAV310: AWE Overview and Approvals

Approve Accrual Adjustment Transaction

Use this task to approve an employee accrual adjustment transaction.

Navigation:
To open a transaction that is pending approval, navigate to your **Worklist** in UCPath and click the appropriate transaction link.
or
Click the transaction link in the system-generated email notification.

Step	Action
1.	The **Manage Accrual** page displays detail for the pending accrual adjustment transaction. As you review a transaction in UCPath, refer to your local business process, which may include specific approval guidelines.
2.	The system displays the initiator's User ID and name, and the date and time the transaction was submitted.
3.	The initiator can enter an accrual adjustment transaction for only one department and one employee class combination at a time. In this example, if an adjustment is also necessary for an employee in the same department, but with an Empl Class of Faculty, a separate transaction is required.
4.	The **Adjustment/Payout** tab displays the employee ID and name of the employee for which the adjustment is being entered. It also displays adjustment details, including the date or date range, the adjustment type and earnings code, and the hours/credits.
5.	The initiator can indicate whether the adjustment should count toward FMLA (Family Medical Leave Act), CFRA (California Family Rights Act), or PDLL (Pregnancy Disability Leave Law) usage. The initiator can select a value only when **Adjustments/Payout/Take** field value is **Take**. The field defaults to **N** (No). Additional options are: **A-FMLA**, **B-CFRA**, **C-PDLL**, **D-FMLA/CFRA**, **E-FMLA/PDLL** and **Y-Yes**. In this example, the value is the default of **N** (No), because the initiator did not enter a **Take** value.
6.	If necessary, scroll right to display additional fields and page options.
7.	Review the **Comments** field. Initiators are required to enter comments for all updates made using this page.
8.	Each approver is assigned to a specific workflow approval level. Some transactions require only one level of approval, while others require multiple levels. In this example, the transaction requires multiple levels of approval and the first approval is pending. The Approver 1 level can approve or deny transactions, but cannot push back a transaction. The Approver 2 and 3 levels can approve, pushback to a previous approver (not the initiator) or deny transactions.

Step	Action
9.	After you review the transaction details, you can approve, push back (if applicable) or deny the transaction. Comments are required when you push back or deny a transaction. In this example, you will approve the transaction.
10.	When you are ready to approve the transaction, click the **Approve** button. 
11.	After you approve a transaction, the page no longer displays the approval action buttons. The approval status monitor (**ManageAccruals Stage 10** section in this example) remains at the bottom of the page. This section displays the approval workflow details, including completed and pending approvals.
12.	You have approved an accrual adjustment transaction. **End of Procedure.**

Approve Direct Retro Transaction

Use this task to approve a direct retro transaction.

Navigation:
To open a transaction that is pending approval, navigate to your **Worklist** in UCPath and click the appropriate transaction link.
or
Click the transaction link in the system-generated email notification.

Step	Action
1.	Click the **Transaction** link.
2.	The system displays a standard warning message. Click the **OK** button. 
3.	The **Review Retro Distribution** component displays detail for the retro distribution transaction. As you review a transaction in UCPath, refer to your local business process, which may include specific approval guidelines.
4.	If necessary, scroll right to display the number of pay earnings selected in this direct retro transaction.

Step	Action
5.	Notice that in this example, there are three separate pay earnings rows to review. The system displays the first row of data. Use the **View All** functionality to review all transactions or the **Show next row** and **Show previous row** buttons to navigate between rows.
6.	Click the **View All** link to display all rows. 
7.	Scroll down to display each pay earrings distribution change.
8.	When you are finished reviewing all rows, scroll to the bottom of the page.
9.	Review the **Requester Comments** and **Reason Code** fields, and then look for attachments and questionnaire data.
10.	If necessary, enter your comments in the approval section. Click in the **Comment** field. 
11.	Enter the desired information into the **Comment** field.
12.	When you are ready to approve the transaction, click the **Approve** button. 
13.	If there are no errors, the system displays **Approved** in the **Request Status** field.
14.	You have approved a direct retro transaction. **End of Procedure.**

Approve ePerformance Document

Use this task to approve an ePerformance document.

Approval levels are defined in UCPath and are based on local business practices.

Navigation: PeopleSoft Menu > Workforce Development > Performance Management > **Approve Documents**

Note: Managers can also perform document approvals by navigating to Performance WorkCenter > Manager Self Service > **Approve Perform/Develop Docs**

Step	Action
1.	Use the **Select Transactions to Approve** page to search for documents that are pending your approval. In this example, the **Document Type** defaults to **UCANNUAL**. Use this to search for annual performance evaluation documents.
2.	Click the **Search** button. Search
3.	UCPath displays documents pending your approval for the selected document type.
4.	Select the check box for each document you want to approve. For this example, click the check box for Evan Sut. ☐
5.	Click the scroll bar.
6.	Approve or deny the document. For this example, click the **Approve** button. Approve
7.	UCPath displays a confirmation message. Click the **Yes** button. Yes
8.	The document for Evan Sut no longer appears in the list of documents pending approval. **Note:** A manager may have both the ePerformance HR administrator role and the Manager role. If this is the case and the template for the document has the ManagerToAdmin approval definition ID attached, then the document remains in manager's approval queue waiting for administrator approval. If the manager approves the document a second time, then both approvals are processed and the document no longer appears in the manager's approval queue.
9.	If you have not reviewed the document yet, click the **Name** link to open the evaluation document before you approve it. For this example, review a document before you approve it.
10.	For this example, click the **Don Chidi** link. Don Chidi
11.	Use the **Approve Document** page to approve or deny the document, provide approval comments, and view and add approvers as needed.

Step	Action
12.	Review high-level document details, such as the document type and rating. Use the **Performance Document Details** link to open the document for your review.
13.	The **Evaluation Approval Chain** section displays the current approval status. For this example, the document is in the **Pending** status.
14.	The **Evaluation Approval Chain** section also displays the approval routing and approver names. In some cases, multiple approvers may be required. To view the names of approvers, click the **Multiple Approvers** link. Use the **[+]** button to add additional approvers, if needed.
15.	Click the **Performance Document Details** link to review the document.  Performance Document Details
16.	Review the manager document, which includes inputs from the manager and the employee. When your review is complete, return to the **Approve Document** page.
17.	Click the scroll bar.
18.	Click the **Return to Performance Document Approval** link.  Return to Performance Document Approval
19.	Review the multiple approvers. Click the **Multiple Approvers** link.  Multiple Approvers
20.	Review the list of approvers. Click the **Close** button.  x
21.	Add comments about your approval or denial of the document. Click in the **Comment** field.
22.	Enter the desired information into the field. For this example, enter **I agree with the evaluation results.**.
23.	Click the **Approve** button.  Approve
24.	UCPath displays a confirmation message.
25.	Click the **Close** button.  Close

Step	Action
26.	The **Approve Document** page displays the new approval status of **Approved**. The document is now available for review as a historical document.
27.	You have successfully approved an ePerformance document. **End of Procedure.**

Approve Extended Leave of Absence Request

Use this task to approve a leave of absence request.

Begin the process by accessing the **Administer Extended Absence** page.

Navigation: PeopleSoft Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > UC Customizations > **Administer Extended Absence**

Note: You can also begin the process from your **Worklist**.

Step	Action
1.	Use the **Administer Extended Absence** page to review extended absence requests according to the **Search Criteria** entered in the header section. The default **Search Criteria** is set to **Show Requests by Status** of **Pending**. This status displays all requests that are in the following **Workflow Status**: • Submitted • Apprvl Prc • Sub Cancel • App Cancel
2.	You can narrow the search results by entering additional **Search Criteria**. In this example, enter the **Employee ID**. Click in the **Employee ID** field. 
3.	Enter the desired information into the **Employee ID** field. For this example, enter **10001031**.
4.	Click the **Search** button. 
5.	The updated search results appear in the **Administer Extended Absence** section.
6.	Use the **Transaction Number** link to display and review the extended absence request details.
7.	Click each tab to review the details of the extended absence request.

Step	Action
8.	Click the scroll bar.
9.	The **Approve**, **PushBack** and **Deny** buttons are available only for extended absence requests in the following statuses: • Submitted • Apprvl Prc • Sub Cancel • App Cancel The **PushBack** button is available only for Approver 2 and 3.
10.	Use the **Approve** button to display and approve the extended absence request. (The absence request is not approved by clicking this **Approve** button. A separate **Approve** button is used within the extended absence request details page.)
11.	If available, use the **PushBack** button to push the extended absence request back to the previous Approver for correction. (The absence request is not pushed back by clicking this **PushBack** button. A separate **PushBack** button is used within the extended absence request details page.)
12.	Use the **Deny** button to deny the extended absence request. If the request is denied it is no longer available for update. (The absence request is not denied by clicking this **Deny** button. A separate **Deny** button is used within the extended absence request details page.)
13.	This example provides a review of the fields in the extended absence request details page and demonstrates how to approve the extended absence request. Click the **Approve** button. 
14.	The extended absence request details page appears so you can review the details of the request.
15.	Review any existing extended absence requests in the **Extended Absence Summary** section. In this example, the employee does not have any existing extended absence requests.
16.	Review the extended absence request details in the **Administer Extended Absence** section. Review all the fields on each tab.
17.	Click the scroll bar.
18.	The **Notes** link and the **Approve** button appear only when the **Extended Absence Details** tab is selected.
19.	Review the absence request notes to gain an understanding of the request history. Click the **Notes** link. 

Step	Action
20.	The **Request History** section displays the notes entered at each stage of the absence request. Notes are required when the absence request is entered by the Initiator and any time it is updated by an Initiator or Approver (including deny, push back or cancel). For approval, a note is optional.
21.	Click the **Cancel** button. 
22.	When you are ready to approve the request, click the **Approve** button. 
23.	A confirmation message appears. Click the **Yes** button. 
24.	Click the scroll bar.
25.	The workflow information appears and displays the request as **Approved**.
26.	You have approved a leave of absence request. **End of Procedure.**

Approve Final Pay Transaction

Use this task to approve a final pay transaction.

Navigation:
To open a transaction that is pending approval, navigate to your **Worklist** in UCPath and click the appropriate transaction link.
or
Click the transaction link in the system-generated email notification.

Step	Action
1.	Click the **Transaction** link.
2.	The **Earnings** page of the **Payroll Request** component appears. This page displays details for the final pay request. As you review a transaction in UCPath, refer to your local business process, which may include specific approval guidelines.

Step	Action
3.	Notice that below the data entry fields, the system displays the initiator's employee ID, name, and the date and time the transaction was submitted. Be sure to review any detail listed in the **Initiator Comments** field before you begin your review. The transaction initiator uses this field to include information that is useful during the approval process. Also, verify whether the initiator attached one or more supporting documents. To view an attachment, click the **View Attachment** button. In this example, supporting documents are not attached.
4.	The transaction header displays the transaction ID number, and the employee's name, employee ID and employee record number. The header indicates whether the final pay request is an off cycle request.
5.	The **New Payroll Requests** section provides details regarding the final pay request, including the earnings code and payment amount.
6.	The **Current Payroll Requests** section provides details regarding the employee's current additional payments. In this example, the employee's only current request is the pending request awaiting approval.
7.	In this example, there is only one row of data as indicated by the 1 of 1 value. Be sure to verify whether there are multiple rows to review and approve. If there are multiple rows, use the **View All** link to display all rows of data on a page. When this feature is enabled, the link changes to read **View 1**, so that you can return to the original setting.
8.	Continue to review the details on the **Deduction** and **Leave** pages to review any final pay deduction and final pay leave data the initiator entered.
9.	If necessary, scroll down to display additional fields and page options. Click the scroll bar.
10.	As the approver, you can upload one or more documents to this transaction if necessary.
11.	Each approver is assigned to a specific workflow approval level. Some transactions require only one level of approval, while others require multiple levels. In this example, the transaction requires multiple levels of approval, and the first approval is pending. The Approver 1 level can approve or deny transactions, but cannot push back a transaction. The Approver 2 and 3 levels can approve, pushback to a previous approver (not the initiator) or deny transactions.

Step	Action
12.	After you review the transaction details, you can approve, push back (if applicable) or deny the transaction. If necessary, you can click the **Return to Search** button to return to the search page to search for another transaction. Comments are required when you push back or deny a transaction.
13.	When you are ready to approve the transaction, click the **Approve** button. 
14.	After you approve a transaction, the transaction page no longer displays the approval action buttons. The approval status monitor (the **Payroll Request** section in this example) remains at the bottom of the page. This section displays the Location approval workflow details, including completed and pending approvals.
15.	The **Approval Status** field displays **Pending** until final approval. Upon final approval, this field displays **Approved**.
16.	You have approved a final pay transaction. **End of Procedure.**

Approve HR Template Transaction

Use this task to approve an HR template transaction.

Navigation:
To open a transaction that is pending approval, navigate to your **Worklist** in UCPath and click the appropriate transaction link.
or
Click the transaction link in the system-generated email notification.

Step	Action
1.	The **Transaction Details** page displays summary information about the transaction. As you review a transaction in UCPath, refer to your local business process, which may include specific approval guidelines.
2.	The **Name** field displays the name of the employee whose record must be reviewed.
3.	The **Action** field identifies the transaction type, which is the Hire (**HIR**) template in this example.
4.	The **Initiator Comment** field includes any notes the initiator entered, which are directed to the Location Approver.

Step	Action
5.	The system displays the **Requester ID** and name of the user who submitted the transaction for approval. The system also displays the date and time it was submitted.
6.	The approval status monitor section (**HIRE** section in this example) at the bottom of the page indicates the transaction's current AWE approval status.
7.	When you are ready to review the template transaction details, click the **Name** link. For this example, click the **Jose Merced** link. 
8.	The **Smart HR Transactions** page displays key information about the transaction. Review all fields to ensure data input is complete and accurate.
9.	Click the **Continue** button to review the transaction details. 
10.	The template transaction appears. In this example, a full hire, the template includes four pages you must review. Review all pages to ensure data input is complete and accurate.
11.	Click the **Employee Experience** tab. 
12.	When you are finished reviewing all template pages, click the **Cancel** button to close the template and return to the **SS Smart HR Transactions** page. 
13.	After you review the transactions details, you can approve or deny the transaction. If you deny the transaction, the initiator must enter a new transaction if the transaction must still be pushed through and processed. Also, if you deny a transaction, you must use the **Approver Comment** field to enter the reason for denial so that the initiator understands your action.
14.	For this example, click the **Approve** button. 

Step	Action
15.	After you approve a template transaction, the **Approve** and **Deny** buttons no longer appear and the **Transaction Status** at the top of the page changes from **Pending** to **Approved**. The approval status monitor section (**HIRE** section in this example) remains at the bottom of the page to display the Location approval workflow. After final approval at the Location, the template transaction moves to the **Manage Transactions** page for processing into UCPath by UCPC WFA Production.
16.	You have approved an HR template transaction. **End of Procedure.**

Approve Job Opening

Use this task to approve a job opening.

After a job opening is created, saved and submitted, approval is required. Job openings that require approval are routed via AWE to the first approver in the chain of approvals.

As an approver, you have the option to:

- **Approve** the job opening. It is then routed to the next approver. If all approvals are complete, it sets the job opening status to Open.
- **Deny** the job opening. It sets the job opening status to Closed and sends notification to the hiring manager.
- **Push back** the job opening. It sends notification to the previous approvers that the job offer has been pushed back and it requires updates/changes. The first approver cannot push back the job offer.

Navigation: PeopleSoft Menu > Recruiting > **Pending Approvals**

Step	Action
1.	At UC, locations can select the process to follow for approvals. **Process 1**: Use standard AWE (Approval Workflow Engine) processing, which routes the job opening for approvals to the roles identified in the job opening, starting with the hiring manager. No set up is required. **Process 2**: Use a custom approval process that routes the job opening for approvals to individuals that have been set up and identified in approval levels, for example, Approver 1, Approver 2 and Approver 3. This process requires set up of a custom table identifying the approval levels first prior to initiating the **Pending Approvals** task. For this example, the approval process uses standard AWE and is routed to the hiring manager first in the approval chain.
2.	Use the **Pending Approvals** page to review and take action on job openings that require your approval.
3.	You can approve or deny job openings directly from the **Pending Approvals** page by marking the **Select** check box for the job opening(s) you want to approve or deny and then selecting the action from the **Select** drop down list and clicking the **Go** button.
4.	You can also perform the approval action from the **Approvals** tab on the **Job Opening** page. This allows you to review the job opening details first prior to taking action on the job opening.
5.	Access the job opening. Click the **Job Approval:TRAINING DEV MGR 1** link.  Job Approval:TRAINING DEV MGR 1
6.	Use the **Job Opening** page and its associated tabs to review the job opening information.
7.	Click the **Approvals** tab.  Approvals
8.	The **Job Approvals** section includes a graphical representation of the approval sequence for the job opening.
9.	Notice that the hiring manager is the first approver in the approval chain. This indicates that standard AWE approval processing is being used.
10.	A **Push Back** button displays after the first approval is completed. In this example, the button does not display since the first approval is still pending. Instead of the first approver using the push back option, the deny option can be used instead.
11.	Use the **Insert Approver [+]** button to add additional approvers or reviewers to the approval chain. For this example, no other approvers are needed.

Step	Action
12.	Review the list of multiple approvers. Click the **Multiple Approvers** link.  Multiple Approvers
13.	Only one of the multiple approvers is required to approve the job opening and then it is routed to the next box in the approval chain. If there are no other boxes in the approval chain, the status of the job opening is changed from Pending to Open.
14.	Review the list of additional approvers. Close the box when your review is complete. Click the **Close** button.  Close
15.	Use the **Approve** button to approve the job opening and route it to the next approver, if one is shown. Use the **Deny** button to reject the job opening and set its status to Closed.
16.	For this example, click the **Approve** button.  Approve
17.	The approval box representing you in the approval chain changes from **Pending** to **Approved** and the job opening is routed to the next approver in the approval chain. The box for the next approver changes from **Not Routed** to **Pending.**
18.	Click the **Pending Approvals** menu.  Pending Approvals
19.	The job opening no longer displays in the list of pending approvals. Perform additional approvers as needed. In this example, no other approvals are required.
20.	You have successfully approved a job opening. **End of Procedure.**

Approve One-Time Payment Request

Use this task to approve a one-time payment request.

Navigation:
To open a transaction that is pending approval, navigate to your **Worklist** in UCPath and click the appropriate transaction link.
or
Click the transaction link in the system-generated email notification.

Step	Action
1.	The **One-Time Payments** page displays details for the pending payment. As you review a transaction in UCPath, refer to your local business process, which may include specific approval guidelines.
2.	The system displays the **Requester ID** and **Name** of the user who submitted the transaction for approval. The system also displays the date and time it was submitted. Be sure to review any detail listed in the **Initiator Comment** field before you begin your review. Initiators use this field to include information that may be useful during the approval process. In this example, the initiator did not enter any comments.
3.	The transaction header displays the T**ransaction ID** number, the employee's **Name**, the **Employee ID** number and the **Empl Record** number.
4.	If the initiator edited ChartField values, the **Do you want to override the ChartField values?** check box is selected and the **ChartField Detail** section displays override details. In this example, the requester did not override the default ChartField values.
5.	The **New One Time Payments** section provides details regarding the payment request, including the earnings code and payment amount.
6.	The **Current One Time Payments** section provides details regarding the employee's current additional payments. In this example, the only additional pay for the employee is the pending payment awaiting approval.
7.	In this example, there is only one row of data as indicated by the 1 of 1 value. Be sure to verify whether there are multiple rows to review and approve. If there are multiple rows, use the **View All** link to display all rows of data on a page. When this feature is enabled, the link changes to read **View 1**, so that you can return to the original setting.
8.	Each approver is assigned to a specific workflow approval level. Some transactions require only one level of approval, while others require multiple levels. In this example, the transaction requires multiple levels of approval and the first approval is pending. The Approver 1 level can approve or deny transactions, but cannot push back a transaction. The Approver 2 and 3 levels can approve, pushback to a previous approver (not the initiator) or deny transactions.
9.	After you review the transaction details, you can approve, push back (if applicable) or deny the transaction. If necessary, you can click the **Return** button to return to the search page to search for another transaction. Comments are required if you push back or deny a transaction.

Step	Action
10.	When you are ready to approve the transaction, click the **Approve** button. 
11.	After you approve a transaction, the transaction page no longer displays the approval action buttons. The approval status monitor (the **One Time Pay** section in this example) remains at the bottom of the page. This section displays the approval workflow details, including completed and pending approvals.
12.	The **Approval Status** field displays **Pending** until final approval. Upon final approval, this field displays **Approved**.
13.	You have approved an one-time payment request. **End of Procedure.**

Approve PayPath Transaction

Use this task to approve a PayPath transaction.

Navigation:
To open a transaction that is pending approval, navigate to your **Worklist** in UCPath and click the appropriate transaction link.
or
Click the transaction link in the system-generated email notification.

Step	Action
1.	The **PayPath Actions** component is comprised of three pages. It is a one-stop location that allows a Location initiator to enter position, job, compensation and recurring additional pay data for existing employees in UCPath. As you review a transaction in UCPath, refer to your local business process, which may include specific approval guidelines.
2.	The employee's name, **Empl ID** and **Empl Record** number appear at the top of all tabs within the PayPath component.
3.	If applicable, the **Position Data** page displays any updates to a single-incumbent position. In this example, the location initiator did not enter requested updates to the position data.
4.	Click the **Job Data** tab. 

Step	Action
5.	The **Job Data** page displays one or more requested changes to an employee's job data. Updates the initiator entered appear in blue.
6.	The **Effective Date** represents the "as of" date of the employee's job **Action** (in this case, **Pay Rate Change**). The **Effective Sequence** field identifies the number of entries for the same **Effective Date**; 0 for the first entry, 1 for the second entry, 2 for the third entry and so forth.
7.	Review the **Action** and **Action Reason** field to determine the requested update. In this example, the initiator submitted a **Pay Rate Change** request with the reason of **Equity**.
8.	Initiators can enter multiple transactions with the same effective date on the **Job Data** page. Be sure to verify whether there are multiple rows of data on the page. In this example, there is only one job data update as indicated by 1 of 1 in the **Job Data** region. If there are multiple rows, the system displays the first row of data. Use the **View All** functionality to review all transactions or the **Show next row** and **Show previous row** buttons to navigate between rows.
9.	Notice that there are links to UCPath view-only pages, which may help with your review, including a link to the **Workforce Job Summary** page and the **Person Organizational Summary** page.
10.	If necessary, scroll down to display additional fields and page options.
11.	In this example, the initiator updated the **Step** and **Comp Rate** fields.
12.	This page displays fields based on whether the individual is a staff employee or an academic employee. For example, unique fields for a staff employee include those related to probation, while academic employees have dates such as post docs anniversary date and academic duration of appointment. In this example, the individual is a staff employee.
13.	You must review all pages in the component before you approve a PayPath transaction. The approval action buttons are available only on the **Additional Pay Data** page. Click the **Additional Pay Data** link.  Additional Pay Data
14.	The **Additional Pay Data** page displays additional pay request details, if applicable. In this example, there is no additional pay set up for the employee. Initiators user this page to enter new additional pay requests.
15.	If necessary, scroll down to display additional fields and page options.

Step	Action
16.	The system displays the initiator's User ID. Be sure to review any detail listed in the **Initiator's Comments** field before you take action. Initiators use this field to include information that may be useful during the approval process. In this example, the initiator did not enter any comments.
17.	Each approver is assigned to a specific workflow approval level. Some transactions require only one level of approval, while others require multiple levels. In this example, the transaction requires multiple levels of approval and the first approval is pending. The Approver 1 level can approve or deny transactions, but cannot push back a transaction. The Approver 2 and 3 levels can approve, pushback to a previous approver (not the initiator) or deny transactions.
18.	After you review the transaction details, you can approve, push back (if applicable) or deny the transaction. Comments are required when you push back or deny a transaction.
19.	When you are ready to approve the transaction, click the **Approve** button. 
20.	After you approve a transaction, the page no longer displays the approval action buttons. The approval status monitor (the **PayPath Staff** section in this example) remains at the bottom of the page. This section displays the approval workflow details, including completed and pending approvals. Upon final approval, the **Request Status** and **Record Status** fields will display **Saved to Database**.
21.	You have approved a PayPath transaction. **End of Procedure.**

Approve Person of Interest Transaction

Use this task to approve a Person of Interest (POI) transaction.

Navigation:
To open a transaction that is pending approval, navigate to your **Worklist** in UCPath and click the appropriate transaction link.
or
Click the transaction link in the system-generated email notification.

Step	Action
1.	Click the **Search** button. 
2.	The **Add Person of Interest** component is comprised of three pages. As you review a transaction in UCPath, refer to your local business process, which may include specific approval guidelines.
3.	Below the transaction data entry fields, the system displays the employee ID and name of the user who submitted the transaction for approval, and the date and time the request was submitted. The system also displays the system-generated transaction ID number and the workflow status.
4.	Be sure to review any detail listed in the **Comment** field before you begin your review. The transaction initiator uses this field to include information that is useful during the approval process. For this example, there are no initiator comments.
5.	**The Biographical Details** page displays the individual's name, Alternate ID, and gender.
6.	If necessary, scroll down to display additional fields and page options.
7.	Click the **Contact Information** link. 
8.	The **Contact Information** page displays the individual's address, phone and email address details.
9.	Click the **POI Data** tab. 
10.	The **POI Data** page displays the individual's person of interest type and the specific department (if applicable) to which they are associated. Each location has their own **Person of Interest Type** values. For example, Potential Hire-Academic, Potential Hire-Staff, External Compliance/Auditor, and so forth.
11.	The **Security Data** section displays the business unit to which the individual can be granted security access (potentially building access, system access, or both).
12.	The **Person of Interest History** section displays the individual's planned exit date.
13.	Navigate to the **Biographical Details** page (the first page of the component) to access the approval action options. Click the **Biographical Details** link. 
14.	After you review the transactions details, you can approve or deny the transaction. Comments are required when you deny a transaction. Click the **Approve** button. 
15.	After you approve the request, the system assigns the individual a unique system ID and sends a notification to the location initiator.

Step	Action
16.	You have approved a POI transaction. **End of Procedure.**

Approve Person Profile Update Transaction

Use this task to approve a person profile transaction.

Navigation: PeopleSoft Menu > Manager Self Service > **Review Transactions**

Step	Action
1.	Use the **Review Transactions** page to access person profile update transactions submitted for your review. You can filter transactions by approval process, as in this example.
2.	Click the **Approve/Deny** link for the transaction you want to review. 
3.	The **Approve Profiles** page appears, which includes a section for each type of profile update the employee entered that requires your approval. In this example, the employee added a new license, so the page displays the **Changed Licenses and Certifications** section. 
4.	The system displays the appropriate page, which corresponds to the update (**View Licenses and Certifications** in this example). Review the profile update details.
5.	When you are finished reviewing the profile update details, click the **Cancel** button to return to the **Approve Profiles** page. 
6.	Each approver is assigned to a specific workflow approval level. Some transactions require only one level of approval, while others require multiple levels. In this example, the transaction requires multiple levels of approval and the first approval is pending. The Approver 1 level can approve or deny transactions, but cannot push back a transaction. The Approver 2 and 3 levels can approve, push back to a previous approver (not the initiator) or deny transactions.

Step	Action
7.	After you review the transaction details, you can approve, push back (if applicable) or deny the transaction. You can also enter comments, which are required if you are denying or pushing back the transaction.
8.	When you are ready to approve the transaction, click the **Approve** button. 
9.	If there are no errors, the system displays the **Approval Confirmation** page. Click the **OK** button. 
10.	After you approve a transaction, the transaction page no longer displays the approval action buttons. The approval status monitor (the **Person Profile** section in this example) remains at the bottom of the page. This section displays the approval workflow details, including completed and pending approvals.
11.	You have approved a person profile transaction. **End of Procedure.**

Approve Position Control Request

Use this task to approve a position control request.

Navigation:
To open a transaction that is pending approval, navigate to your **Worklist** in UCPath and click the appropriate transaction link.
or
Click the transaction link in the system-generated email notification.

Step	Action
1.	The **Approve Position Request** page displays details for the pending position control request. As you review a transaction in UCPath, refer to your local business process, which may include specific approval guidelines.
2.	The **Transaction Information** section displays the system-generated transaction ID number, approval status and the initiator's ID.
3.	The **Position Control Information** section displays the position details entered by the initiator. In this example, the request is for a new position. The **Position Number** field value defaults to **NEW**. Upon final approval, the system automatically assigns the new position the next available position number.

Step	Action
4.	If necessary, scroll down to display additional fields and page functions.
5.	Notice that below the transaction data entry fields, there is a **Supporting Documents** link. The initiator can attach one or more supporting documents to the transaction. Click the link to display the **Supporting Documents** page to verify whether there are attachments.
6.	If there is one or more supporting documents, click the corresponding **View** icon to display the attachment you want to view. The system opens the document in a separate browser tab. When you are finished viewing the attachment, close the separate tab.
7.	Click the **OK** button to return to the **Approve Position Request** page. 
8.	Each approver is assigned to a specific workflow approval level. Some transactions require only one level of approval, while others require multiple levels. In this example, the transaction requires multiple levels of approval and the first approval is pending. The Approver 1 level can approve or deny position control requests, or push back to the initiator. The Approver 2 and 3 levels can approve, pushback to a previous approver (not the initiator) or deny transactions.
9.	After you review the transaction details, you can approve, push back (if applicable) or deny the transaction. Comments are required when you push back or deny a transaction.
10.	When you are ready to approve the transaction, click the **Approve** button. 
11.	After you approve a transaction, the transaction page no longer displays the approval action buttons. The approval status monitor (the **Position Control** section in this example) remains at the bottom of the page. This section displays the approval workflow details, including completed and pending approvals.
12.	If necessary, scroll up to display additional fields and page functions.
13.	Upon final approval, the **Approval Status** field displays **Approved**. In this example, not all approvals are complete, therefore the status is **Pending**.
14.	You have approved a position control request. **End of Procedure.**

Approve Position Funding Request

Use this task to approve a funding entry request for a new or vacant position.

Navigation:
To open a transaction that is pending approval, navigate to your **Worklist** in UCPath and click the appropriate transaction link.
or
Click the transaction link in the system-generated email notification.

Step	Action
1.	The **Funding Entry** page displays details for the pending position funding. As you review a transaction in UCPath, refer to your local business process, which may include specific approval guidelines.
2.	Notice that below the transaction data entry fields, there is a **Justification document** section. If the initiator attached a justification document, the filename is displayed to the right of the field label and the **View Attachment** button is active. This example does not have an attached justification document.
3.	If necessary for your review, click the **Budget Distribution Details** link to display the **Budget Distribution** component in a separate browser tab and view the data input.
4.	If the position has a single incumbent attached to a capped fund, the system displays the **Salary Cap/MCOP Funding Worksheet** link to the right of the **Budget Distribution Details** link. Click the link to display the **Salary Cap/MCOP Worksheet** page in a separate browser tab and view the data input. In this example, the fund is a non-capped/non-MCOP fund, so the link is not present.
5.	Be sure to review any notes in the **Initiator Comment** field. The transaction initiator uses this field to include information that is useful during the approval process. In this example, there are no comments.
6.	If necessary, as the approver, you can upload one or more documents to this transaction. You must first expand the **Approver document upload** section to display the upload functions.
7.	Review the funding entry details, including the header information, the effective date and the earnings distribution row(s).
8.	The header information includes the system-generated request ID number, the initiator's employee ID (**Requested by** field) and the date the transaction was submitted. It also includes the **Set ID** (UC location, which is the UCLA Campus in this example), the fiscal year, and budget begin and end dates.

Step	Action
9.	In this example, the **Job Data Snapshot** section includes incumbent details, indicating this position is currently filled or partially filled. If this section is blank, it indicates the position is currently vacant.
10.	If necessary, scroll down to display additional fields and page functions.
11.	Each approver is assigned to a specific workflow approval level. Some transactions require only one level of approval, while others require multiple levels. In this example, the transaction requires multiple levels of approval and the first approval is pending. The Approver 1 level can approve or deny transactions, but cannot push back a transaction. The Approver 2 and 3 levels can approve, pushback to a previous approver (not the initiator) or deny transactions.
12.	If necessary scroll right to display additional fields and page functions.
13.	Review all funding entry details before taking action.
14.	If the **Initiator Comments** indicated approval is required for a newly entered historical row, click the **Include History** button to see all rows.
15.	After you review the transaction details, you can approve, push back (if applicable) or deny the transaction. Comments are required when you push back or deny a transaction.
16.	When you are ready to approve the transaction, click the **Approve** button. 
17.	After you approve a transaction, the page no longer displays the approval action buttons. The approval status monitor remains at the bottom of the page. This section displays the approval workflow details, including completed and pending approvals. Upon final approval, the **Request Status** and **Record Status** fields will display **Saved to Database**.
18.	You have approved a position funding request. **End of Procedure.**

Approve Recurring Additional Pay Transaction

Use this task to approve a recurring additional pay request.

Navigation:
To open a transaction that is pending approval, navigate to your **Worklist** in UCPath and click the appropriate transaction link.

or
Click the transaction link in the system-generated email notification.

Step	Action
1.	The **Self Service Additional Pay** page displays details for the pending request. As you review a transaction in UCPath, refer to your local business process, which may include specific approval guidelines.
2.	The transaction header displays the transaction ID number, and the employee's name, employee ID and employee record number.
3.	The **Additional Pay** section provides details regarding the payment request, including the earnings code and payment amount.
4.	If the employee has one or more existing recurring payments set up in UCPath, the system displays the **Current One Time Payments** section, which provides details. In this example, the employee does not currently have any scheduled recurring payments.
5.	Notice that in this example, there is only one row of data as indicated by the 1 of 1 value. Be sure to verify whether there are multiple rows you must review and approve. If there are multiple rows, use the **View All** link to display all rows of data on a page. When this feature is enabled, the link changes to read **View 1**, so that you can return to the original setting. You can also use the next and previous buttons to navigate between rows.
6.	If necessary, scroll down to display additional fields and page options.
7.	The **Initiator Comments** field displays comments entered by the initiator, if applicable. In this example, the initiator did not enter any comments.
8.	Each approver is assigned to a specific workflow approval level. Some transactions require only one level of approval, while others require multiple levels. In this example, the transaction requires multiple levels of approval and the first approval is pending. The Approver 1 level can approve or deny transactions, but cannot push back a transaction. The Approver 2 and 3 levels can approve, push back to a previous approver (not the initiator) or deny transactions.
9.	After you review the transaction detail, you can approve, push back (if applicable) or deny the transaction. Comments are required when you push back or deny a transaction.

Step	Action
10.	When you are ready to approve the transaction, click the **Approve** button. 
11.	After you approve a transaction, the transaction page no longer displays the approval action buttons. The approval status monitor (the **Additional Pay Stage** section in this example) remains at the bottom of the page. This section displays the Location approval workflow details, including completed and pending approvals.
12.	You have approved a recurring additional pay request. **End of Procedure.**

Create Delegation Request

Use this task to create a delegation request.

Navigation: PeopleSoft Menu > HCM Home > Self Service > **Manage Delegation**

Step	Action
1.	Click the **Create Delegation Request** link. 
2.	The system displays the **Enter Dates** page. Click in the **From Date** field.  05/10/2017
3.	Enter the desired information into the **To Date** field. The date defaults to the system date (today's date), but you can update it as necessary).
4.	Delegations can be made for a specific timeframe or can be open ended. Click in the **To Date** field. 
5.	Enter the desired information into the **To Date** field.
6.	Click the **Next** button. 

Step	Action
7.	The system displays the **Select Transactions** page. You can delegate one or multiple transactions to another approver in a single delegation request, and you can also set up multiple delegation requests. For example, you can delegate all employee compensation related transactions to one proxy and all other transactions to another proxy. If necessary, scroll down to display additional list items.
8.	In this example, you will delegate all transactions to another approver. Click the **Select All** link. 
9.	Click the **Next** button. 
10.	The system displays the **Select Proxy by Name** page. Search for and select the individual to which you are delegating authority. Click in the **Last Name** field. 
11.	Enter the desired information into the **Last Name** field.
12.	Click in the **First Name** field. 
13.	Enter the desired information into the **First Name** field.
14.	Click the **Search** button. 
15.	The **Choose Delegate** section displays the user(s) that match the search criteria you entered. Click to select the individual to whom you want to delegate approval. 
16.	Click the **Next** button. 
17.	The system displays the **Delegation Detail** page. If necessary, scroll down to display additional fields and page options.
18.	Click the **Submit** button. 

Step	Action
19.	If there are no errors, the **Create Delegation Request** page displays a confirmation that you successfully submitted the request. Click the **OK** button. 
20.	Notice that the system displays the **Review My Proxies** link on this page. This indicates you currently have one or more delegated proxies assigned for UCPath transaction approvals. After you submit a delegation request, the system sends the proxy approver an e-mail notification. To perform the task or tasks, the user identified as the proxy must accept the delegation request. After your proxy accepts the request, the delegation remains until the end date is reached or until you revoke the delegation. If you must revoke the delegation request prior to the end date you entered on the request, refer to *Revoke Delegation Request* for additional information.
21.	You have created a delegation request. **End of Procedure.**

Revoke Delegation Request

Use this task to revoke a delegation request.

Navigation: PeopleSoft Menu > Self Service > **Manage Delegation**

Step	Action
1.	Click the **Review My Proxies** link. 
2.	The system displays the **My Proxies** page, which lists your existing delegation requests. If necessary, refine the list by selecting an option from the **Show Requests by Status** drop-down list and clicking the **Refresh** button. Valid options are: **Accepted**, **Ended**, **Rejected**, **Revoked** and **Submitted**.
3.	If necessary, scroll down to display additional page options.
4.	Select the check box for each delegation request that you want to revoke, or click the **Select All** link to select all listed delegation requests. 

Step	Action
5.	Click the **Revoke** button. 
6.	The system displays the **Revoke Delegation Request** page. You have the option to cancel by clicking the **No - Cancel** button, which returns you to the main **Manage Delegation** page. To revoke the selected delegation requests, click the **Yes - Continue** button. 
7.	If there are no errors, the **Revoke Delegation Request** page displays a confirmation that you successfully revoked the request(s). Click the **OK** button. 
8.	You have revoked a delegation request. **End of Procedure.**

Reassign Transaction to Different User

Use this task to reassign a pending transaction to an alternate approver.

Navigation:
To open a transaction that is pending approval, navigate to your **Worklist** in UCPath and click the appropriate transaction link.
or
Click the transaction link in the system-generated email notification.

Step	Action
1.	The **Worklist** link is always available from the navigation pane on the left side of the Portal. In addition to the worklist item, if your user profile is set up so that you receive automated email notifications from UCPath, you can access the transaction from a link in the corresponding email message sent to your UC email address.
2.	The **From** column displays the transaction initiator's name; this is not the name of the employee whose data must be added or updated.
3.	If necessary, scroll right to display additional worklist details. Click the scroll bar.

Step	Action
4.	Use the **Reassign** function to assign the selected task to another user. Click the **Reassign** button. 
5.	Click in the **User ID** field. 
6.	Enter the desired information into the **User ID** field.
7.	Click in the **Comment** field. 
8.	In the **Comment** field, enter a comment to describe/explain the reassignment. The comment becomes a part of the transaction.
9.	Click the **OK** button. 
10.	When you return to your **Worklist**, the transaction is no longer listed.
11.	You have reassigned a pending transaction to an alternate approver. **End of Procedure.**

Add Ad Hoc Approver or Reviewer to Transaction

Use this task to add an ad hoc approver or reviewer to a transaction's approval workflow.

Navigation:
To open a transaction that is pending approval, navigate to your **Worklist** in UCPath and click the appropriate transaction link.
or
Click the transaction link in the system-generated email notification.

Step	Action
1.	You can insert an ad hoc approver/reviewer into an AWE path at any point where there is an **Insert Approver** button. Click the **Insert Approver** button. ⊞
2.	Enter the individual's user ID here, or use the lookup to search for the **User ID**. Only those with the appropriate approver role and correct security can be inserted as approvers and reviewers.

Step	Action
3.	Click in the **User ID** field. 
4.	Enter the desired information into the **User ID** field.
5.	An ad hoc **Approver** must complete their review and click an action before the approval can proceed. An ad hoc **Reviewer** can review the specific transaction's details, but cannot take action on it. The routing of the transaction will continue regardless of whether the ad hoc reviewer accesses and views the transaction.
6.	Click the **Insert** button. 
7.	After you assign an ad hoc reviewer or approver to the approval workflow, the system displays their name in the approval path at the bottom of transaction page with a status of **Not Routed**. After you take approval action, the system routes the transaction to the ad hoc approver or reviewer. If necessary, you can remove the inserted reviewer/approver before you take action. To remove, click the **Delete** (red minus sign) button to the right of the **Not Routed** status.
8.	After you take AWE action on the transaction, the system updates the ad hoc reviewer or approver's status to **Pending**. The system automatically sends the individual an email notification that the transaction is pending their review/approval, and the transaction also appears in the user's worklist.
9.	You have added an ad hoc approver or reviewer to a transaction's approval workflow. **End of Procedure.**

View Template Transaction Status - SS Smart HR Transactions Page

Use this task to view the status of a template transaction within Approval Workflow Engine (AWE).

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **SS Smart HR Transactions**

Step	Action
1.	Use the **SS Smart HR Transaction Status** page to search for Smart HR Template transactions that have been submitted. You can view all transactions within your business unit; this page is not restricted by department security. Enter search criteria in one or more search fields. You can also leave all fields blank to display the 300 most recent transactions entered within your business unit. You can then sort through the search results to locate the transaction you want to view.
2.	In this example, enter an employee ID. Click in the **Empl ID** field.
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10000248**.
4.	Click the **Search** button. Search
5.	The **Transaction Details** page displays summary information about the transaction.
6.	The **Transaction Status** indicates the current status of the template transaction in AWE.
7.	The **Name** field display's the name of the person or employee on the template transaction. Click the **Name** link to review the template transactions details. If you need to review the template transaction details, click the **Name** link. This example does not review the template transaction details. For more information on reviewing and approving an HR template transaction, refer to *Approve HR Template Transaction*.
8.	The **Type of Hire** field identifies whether the person is an employee or contract worker.
9.	The **Start Date** is the effective date of the template transaction.
10.	The **Action** is the action code for the template transaction. In this example, **RET** is the retirement template.
11.	The **Initiator Comment** field is used by the Template Initiator to communicate information to the Template Approver.
12.	The **Requester ID** field displays the employee ID and name of the Template Initiator. The **Requested** field displays the date and time the template transaction was submitted to AWE.
13.	Click the **Expand** button. ▶

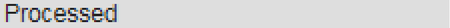
Step	Action
14.	The **Campus approvers** section shows where the template transaction is within AWE, who approved the transaction and the date and time the transaction was approved.
15.	You have viewed the status of a template transaction within AWE. **End of Procedure.**

View Template Transaction Status - Transaction Status Page

Use this task to view the status of **Smart HR Template** transactions that have completed Location approval workflow (AWE) and have moved into UCPC WFA Production's queue. This page displays template transactions that are pending or that have been processed or cancelled by WFA Production. You can view all transactions submitted within the department(s) to which you have access.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Transaction Status**

Step	Action
1.	Use the **Transaction Status** page to view the status of template transactions as well as other summary transaction information. The default filters are set to **All** with a **Start Date From** that is 10 days prior to the current date and a **To** date that is 10 days after the current date.
2.	The **Download** button allows you to export the template transaction grid information into an Excel spreadsheet, including any comments entered by WFA Production.
3.	The **Transaction Status** grid displays the transactions that match the filters.
4.	The **Template** column identifies the template that was initiated.
5.	The **Effective Date** column identifies the effective date entered on the template.
6.	The values you might see in the **Transaction Status** column include: • **Requested:** Transaction was submitted but not yet processed by WFA Production. • **Completed:** Transaction was processed by WFA Production. • **Hired/Added:** New hire was processed by WFA Production. • **Cancel:** Transaction was cancelled by WFA Production. • **Denied:** Transaction was denied by Location Approver.
7.	The **Person ID** column identifies the employee associated with the template transaction. This column displays **NEW** for hire transactions that are pending or cancelled.
8.	The **Empl Record** column identifies the employee job record to which the template applies.

Step	Action
9.	The **Action** column displays the action code for the template.
10.	The **Clone** button appears for template transactions that are cancelled by WFA Production.
11.	The **Business Unit** column identifies the employee's business unit.
12.	The **Name** columns identify the employee associated with the template transaction.
13.	For this example, update the **HR Review Status** to display all **Cancelled** template transactions. Click the button to the right of the **HR Review Status** field. 
14.	Click the **Cancelled** list item. 
15.	Click the **Refresh** button. 
16.	The filter displays only one template transaction that has been cancelled within the dates indicated.
17.	Click the scroll bar.
18.	In some cases, WFA Production may need to cancel a template transaction. When a transaction in cancelled, WFA Production enters a comment to explain why the transaction was cancelled. Template Initiators can **View Comments** and, if needed, **Clone** the transaction to resubmit it with necessary corrections.
19.	The **View Email Text** column displays a **View** link if WFA Production sent an email to the Location Template Initiator about a template transaction. Click the **View** link to review the email text.
20.	Click the scroll bar.
21.	For the next example, update the **HR Review Status** to display **Processed** template transactions. Click the button to the right of the **HR Review Status** field. 
22.	Click the **Processed** list item. 
23.	Click the **Refresh** button. 
24.	The filter displays all the template transactions that have been processed by WFA Production. This filter allows you to quickly view the new UCPath Employee ID (**Person ID**) for a new hire.
25.	Click the scroll bar.

Step	Action
26.	Be cautious using the **Delete Selected Transactions** button. If you select the check box for a transaction and then click this button, the transaction will be deleted from the system. If the transaction has not been processed, it is deleted from WFA Production's queue and cannot be retrieved.
27.	You have viewed the status of **Smart HR Template** transactions. **End of Procedure.**

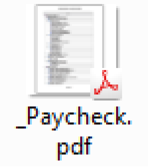
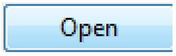
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
28.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
29.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
30.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
31.	Click the button to the right of the **Category** field. 

Step	Action
32.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
33.	Click in the **Subject** field.
34.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
35.	Click in the **Description** field.
36.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
37.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
38.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
39.	Click in the **Best Contact Phone Number** field.
40.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
41.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
42.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
43.	Click the **Add Attachment** link.  Add Attachment
44.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
45.	For this example, click the **_Paycheck.pdf** list item. 
46.	Click the **Open** button.  Open
47.	The file name appears in the **Attachments** box.

Step	Action
48.	Click the **Submit** button.
49.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
50.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
51.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
52.	Click the scroll bar.
53.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
54.	Click the scroll bar.
55.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
56.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

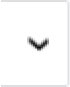
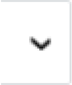
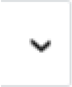
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
57.	Click the **Ask UCPath Center** button. 

Step	Action
58.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
59.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
60.	UCPath returned one result. Click the scroll bar.
61.	Click the **Create an Inquiry** link.  Create an Inquiry
62.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
63.	Click the button to the right of the **Requested By** field. 
64.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
65.	Click the button to the right of the **Topic** field. 
66.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
67.	Click the button to the right of the **Category** field. 

Step	Action
68.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
69.	Click in the **Subject** field.
70.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
71.	Click the scroll bar.
72.	Click in the **Description** field.
73.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
74.	In this example, the full **Description** was completed on your behalf.
75.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
76.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
77.	Click the **Submit Inquiry** button. 
78.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
79.	The submitter's name appears.
80.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

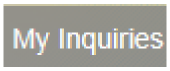
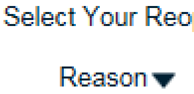
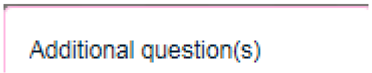
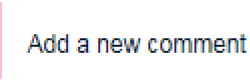
Reopen Closed UCPath Center Case

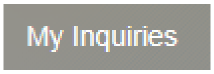
Use this task to reopen a closed inquiry via the UCPath website.

A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
81.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
82.	Click the **My Closed Inquiries** link. 
83.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
84.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
85.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
86.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
87.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 

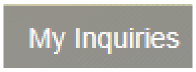
Step	Action
88.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
89.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
90.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
91.	Click the scroll bar.
92.	Notice the comment now appears in the **Case Comments** section.
93.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
94.	Return to the top of the page. Click the scroll bar.
95.	Click the **My Inquiries** link. 
96.	The new inquiry appears in the **My Open Inquires** list.
97.	You have reopened a closed inquiry. **End of Procedure.**

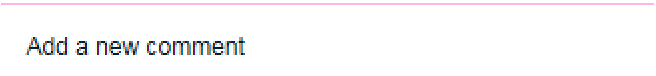
Monitor UCPath Center Cases

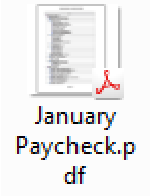
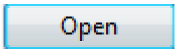
Use this task to review the status of an existing inquiry via the UCPath website.

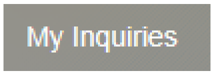
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
98.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
99.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
100.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
101.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
102.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 
103.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 
104.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 

Step	Action
105.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field.  Add a new comment
106.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
107.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
108.	Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center
109.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
110.	Click the scroll bar.
111.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link.  View All
112.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▾
113.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
114.	To return to the case details, click the **00180573** link.  00180573
115.	Click the scroll bar.

Step	Action
116.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
117.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
118.	Click the **Open** button. 
119.	A message confirms the file was uploaded. Click the **Done** button. 
120.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
121.	You can view all attachments in a list. Click the **View All** link. 
122.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 
123.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 

Step	Action
124.	Click the **00180573** link. 
125.	Click the scroll bar.
126.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
127.	Click the **Email** link. 
128.	Review the email information as you scroll down the page. Click the scroll bar.
129.	Review the email from the UCPath Center. Click the scroll bar.
130.	Click the case number to return to the details of the case. Click the **00180573** link. 
131.	To review closed inquiries, click the **My Inquiries** link. 
132.	Click the **My Closed Inquiries** tab. 
133.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
134.	Click the **00180567** link. 
135.	Click the scroll bar.
136.	Notice the **Status** is **Closed/Resolved**.
137.	Click the scroll bar.

Step	Action
138.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. ⌂
139.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMNAV320: AWE Administration

Reassign Transaction Workflow

Use this task to reassign a pending transaction to an alternate approver.

Navigation: PeopleSoft Menu > Enterprise Components > Approvals > Approvals > **Monitor Approvals**

Step	Action
1.	Use the **Monitor Approvals** page to search for approval processes and reassign one or more transactions. Enter search criteria in one or more of the search fields.
2.	Click in the **Approval Process** field. 
3.	In the **Approval Process** field, enter the approval type or use the lookup to search for and select it.
4.	Click the button to the right of the **Header Status** field. ⌄
5.	From the **Header Status** drop-down list, select the appropriate transaction status.  Pending
6.	Click the **Search** button.  Search

Step	Action
7.	This example shows search results for a specific approval process, Position Control requests. However, if you leave the **Approval Process** field blank when you perform a search, the **Search Results** section displays a separate subsection for each approval process that has transactions, which match your search criteria. For example, if you search for all pending transactions for a specific approver, the search results may include Position Control requests, PayPath transactions and HR template transactions. Each **Search Results** subsection includes fields that are unique to the specific approval process. You can filter the search results within a subsection by specifying field values and clicking the **Filter** button.
8.	In the **Search Results** grid, click the unlabeled check box next to each transaction you want to reassign. ☐
9.	Click the button to the right of the **Approver** field. ⌄
10.	In the **Approver** field, select the name of the approver to whom the approval transaction is assigned. Ignacio Perro
11.	Click in the **Comments** field.
12.	In the **Comment** field, enter a comment to describe/explain the reassignment. The comment becomes a part of the transaction. Enter the desired information into the **Comments** field.
13.	Click in the **Reassign To** field.
14.	In the **Reassign To** field, enter the Empl ID of the person to whom you want to reassign approval transactions.
15.	The **Allow Self-Approval** and **Allow Auto Approval** functions are not currently used at UC; do not select either check box.
16.	Click the **Reassign** button. Reassign
17.	Click the **OK** button. OK

Step	Action
18.	You have reassigned a pending transaction to an alternate approver. **End of Procedure.**

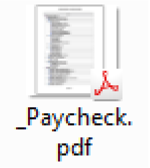
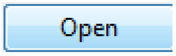
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
19.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
20.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
21.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
22.	Click the button to the right of the **Category** field. 
23.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
24.	Click in the **Subject** field.

Step	Action
25.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
26.	Click in the **Description** field.
27.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
28.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
29.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
30.	Click in the **Best Contact Phone Number** field.
31.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
32.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
33.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
34.	Click the **Add Attachment** link. 
35.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
36.	For this example, click the **_Paycheck.pdf** list item. 
37.	Click the **Open** button. 
38.	The file name appears in the **Attachments** box.
39.	Click the **Submit** button.
40.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
41.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.

Step	Action
42.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
43.	Click the scroll bar.
44.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
45.	Click the scroll bar.
46.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
47.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

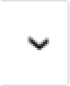
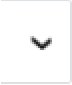
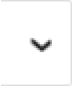
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
48.	Click the **Ask UCPath Center** button. 
49.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.

Step	Action
50.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
51.	UCPath returned one result. Click the scroll bar.
52.	Click the **Create an Inquiry** link. 
53.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
54.	Click the button to the right of the **Requested By** field. 
55.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
56.	Click the button to the right of the **Topic** field. 
57.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
58.	Click the button to the right of the **Category** field. 
59.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
60.	Click in the **Subject** field.

Step	Action
61.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
62.	Click the scroll bar.
63.	Click in the **Description** field.
64.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
65.	In this example, the full **Description** was completed on your behalf.
66.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
67.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
68.	Click the **Submit Inquiry** button. 
69.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
70.	The submitter's name appears.
71.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

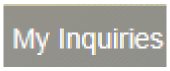
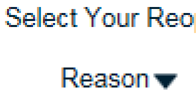
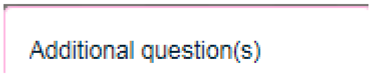
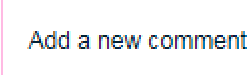
Reopen Closed UCPath Center Case

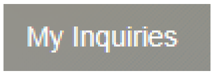
Use this task to reopen a closed inquiry via the UCPath website.

A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
72.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
73.	Click the **My Closed Inquiries** link. 
74.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
75.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
76.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
77.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
78.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
79.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.

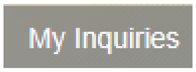
Step	Action
80.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
81.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button.
82.	Click the scroll bar.
83.	Notice the comment now appears in the **Case Comments** section.
84.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
85.	Return to the top of the page. Click the scroll bar.
86.	Click the **My Inquiries** link. 
87.	The new inquiry appears in the **My Open Inquires** list.
88.	You have reopened a closed inquiry. **End of Procedure.**

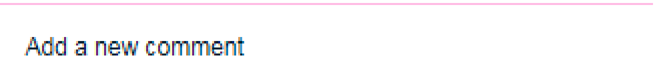
Monitor UCPath Center Cases

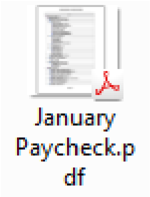
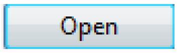
Use this task to review the status of an existing inquiry via the UCPath website.

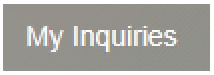
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
89.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
90.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
91.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
92.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
93.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 
94.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 
95.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 

Step	Action
96.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field.  Add a new comment
97.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
98.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
99.	Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center
100.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
101.	Click the scroll bar.
102.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link.  View All
103.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▾
104.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
105.	To return to the case details, click the **00180573** link.  00180573
106.	Click the scroll bar.

Step	Action
107.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
108.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
109.	Click the **Open** button. 
110.	A message confirms the file was uploaded. Click the **Done** button. 
111.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
112.	You can view all attachments in a list. Click the **View All** link. 
113.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 
114.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 

Step	Action
115.	Click the **00180573** link.  00180573
116.	Click the scroll bar.
117.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
118.	Click the **Email** link.  Sandbox: UCPath Center: Inquir.
119.	Review the email information as you scroll down the page. Click the scroll bar.
120.	Review the email from the UCPath Center. Click the scroll bar.
121.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
122.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
123.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
124.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
125.	Click the **00180567** link.  00180567
126.	Click the scroll bar.
127.	Notice the **Status** is **Closed/Resolved**.
128.	Click the scroll bar.

Step	Action
129.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
130.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

Absence Management

PHCMABM100: Absence Management Overview

Job Aid: UCPath Location Absence Management Navigation

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMABM100JA_ABMNavLoc_D1Rev00.pdf) to open the **UCPath Location Absence Management Navigation** job aid in a new web browser window/tab.

PHCMABML195: Absence Management Inquiry

View Extended Absence Trans History Component

Use this task to view extended absence requests for a specific employee within your business unit.

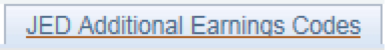
Each time an extended absence request is updated in UCPath, a new row is inserted into the **Extended Absence Trans History** component. This row includes the UCPath **User ID** for the initiator and a date and time stamp so you can identify who made the change and when. Use the **Extended Absence Trans History** component for inquiry, research and audit purposes.

The **Extended Absence Trans History** component does not display the UCPath approval workflow routing and does not allow viewing of leave-related documents attached to the leave request.

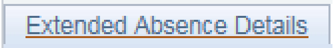
Navigation: PeopleSoft Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > UC Customizations > **Extended Absence Trans History**

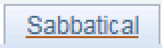
Step	Action
1.	Use the **Search Criteria** to access an employee's leave request(s). Search by **Empl ID**, extended leave request **Transaction ID**, the employee's full **Name** and/or **Last Name**. The **Transaction ID** is a unique number assigned by UCPath to an extended leave request upon the leave request creation. Enter the desired information into the **Empl ID** field. For this example, enter **10002457**.
2.	Click the **Search** button. 
3.	The **Extended Absence Trans History** page appears. This employee has one extended absence request. If the employee has more than one extended absence request, you must select which request to view from the **Search Results** list. The **Extended Absence Trans History** page consists of many tabs with additional leave details. Begin by reviewing the first tab, **Extended Absence Details**. Click the **Extended Absence Details** tab. 
4.	The **Extended Absence Details** page displays one leave request and a row for each update that has occurred for the leave request. Each row displays a date and time stamp, and the UCPath **User ID** for the person who updated the leave request. If there is more than one row, the top row is the oldest update and the bottom row is the newest update. This example has only one row. You cannot change the sort order of the rows on this page or on any page in the **Extended Absence Trans History** component.
5.	The **Start Date** and **Expected Return Date** of the leave request appear on each row.
6.	The **Actual Return Date** on the leave request is entered by UC Locations after the employee returns to work. This column must be entered for Workers' Compensation leaves in order for the employee to use sick and vacation time accrued while the employee is on leave. Note that this example does not include a date in the **Actual Return Date** column. Either the employee is still on leave or the date has not be entered by the Location.
7.	The **Leave** column displays the type of leave.
8.	The **FMLA/CFRA/PDLL Leave** column is generally populated if the leave is FMLA, CFRA or PDLL related and unpaid. This example is for Post Doc Parental Leave, which is not FMLA, CFRA or PDLL related, so the column is blank.
9.	Scroll to the right side of the page to see additional columns. Click the scroll bar.

Step	Action
10.	The **Paid/Unpaid** column indicates whether the leave is an **Unpaid-Block**, **Paid-Block** or **Intermittent/Reduce Schedule** leave. **Unpaid-Block** and **Paid-Block** refer to a block of time. This example shows that the leave is for an unpaid block of time.
11.	The **Action** column indicates the possible action code that will be entered into the **Job Data** page by the UCPath Center WFA Production team when the request is approved and finalized. Note that the UCPC WFA Production team may determine that a different **Action** code is required in the **Job Data** page. Also note that not all leave requests result in an entry into the **Job Data** page. For example, intermittent leaves are not entered into the **Job Data** page.
12.	The **Action Reason** column indicates the possible action reason code that will be entered into the **Job Data** page by the UCPC WFA Production team when the request is approved and finalized. Note that the UCPC WFA Production team may determine that a different **Action Reason** code is required in the **Job Data** page.
13.	The **Last Date Worked** column indicates the last day that the employee worked prior to the leave start. UCPC WFA Production refers to this date to determine the date to enter on the **Last Date Worked** field in the **Job Data** page. UCPC Benefits Billing (also referred to as Direct Billing) uses the employee's last date at work to complete the *UC Statements to the Disability Vendor* form for applicable leaves.
14.	If the **FMLA/CFRA/PDLL Adjustable Hours** column is greater than zero when the leave request is approved, UCPath automatically creates an FMLA, CFRA and/or PDLL balance adjustment for the employee. You can see the adjusted hours balances for FMLA, CFRA and PDLL on the **Admin Review Absence Balance** page <u>after</u> Absence Management Post-Payroll processes are complete <u>for the employee's pay cycle</u>. This column is intended for use with **Unpaid-Block** requests. It is <u>not</u> used with **Paid-Block** or **Intermittent/Reduce Schedule** leaves. This example leave is not an FMLA, CFRA and/or PDLL leave, so this column is blank. Use the **Manage Accruals** page to report FMLA, CFRA and/or PDLL use for intermittent FMLA, CFRA and/or PDLL leaves. Refer to the *PHCMABML201 Employee Accrual Adjustments* course for more information regarding the **Manage Accruals** page and other manage accruals processing options.
15.	The **Status** column displays the approval workflow engine (AWE) workflow status for the extended absence request. Possible AWE workflow statuses are **App Cancel**, **Approved**, **Apprvl Prc**, **Cancelled**, **Denied**, **Push Back**, **Saved**, **Sub Cancel** and **Submitted**. Refer to the *PHCMABML195 Absence Management Inquiry* course for more information regarding the AWE workflow statuses.
16.	The **Notes** column displays the required explanatory comments. Notes are required when a leave request is changed, denied, cancelled or pushed back.
17.	Scroll to the left side of the page. Click the scroll bar.

Step	Action
18.	Now review the **JED Additional Earnings Codes** tab. **JED** stands for job earnings distribution. Click the **JED Additional Earnings Codes** tab.  JED Additional Earnings Codes
19.	The first several columns on the tab are the same as the previous tab.
20.	Scroll to the right side of the page to see the **JED Additional Earnings Codes** information. Click the scroll bar.
21.	Note that not all leave requests use the **JED Additional Earnings Codes** tab, so this page may not contain data for all leave requests.
22.	The **Earnings Code 1**, **2**, **3** and **4** columns display the earning codes for UCPC WFA Production to enter into the **Job Earnings Distribution** page for the employee. The **Job Earnings Distribution** page is located in the **Job Data** component. This example shows **Earnings Code 1** populated with the **REG** earnings code, and **Earnings Code 2** populated with the **LNP** earnings code.
23.	The **Percent 1**, **2**, **3** and **4** columns display the percentages for the associated **Earnings Code** values. UCPC WFA Production enters this data into the **Job Earnings Distribution** page for the employee. The sum of the percentages must equal 100%. This example shows **Percent 1** at **75.00** and **Percent 2** at **25.00**.
24.	Scroll back to the left side of the page. Click the scroll bar.
25.	Click the **Show All Columns** button to expand all tabs and see all pages at once. If you use this feature, you must scroll right/left to see all data on the expanded page. When in expanded view, click this button again to return to the tabbed view. Click the **Show all columns** button.
26.	Click again to collapse the expanded view and see the tabs. Click the **Show tabs** button.
27.	Now search for a workers' compensation leave request to review the details on other tabs. Click the **Return to Search** button.  Return to Search

Step	Action
28.	Click the **Clear** button. 
29.	Enter the desired information into the **Empl ID** field. For this example, enter **10002746**.
30.	Click the **Search** button. 
31.	The **Search Results** displays the extended leave requests created for the specified employee for your UC Location for the last two years. It also displays the leave request approval workflow **Status**. This employee has two leave requests; one saved and one approved. For this example, click anywhere on the first row to display the leave request.
32.	The **Extended Absence Details** tab appears on the **Extended Absence Trans History** page. Click the **Workers' Compensation** tab. 
33.	The **Workers' Compensation** page appears. Notice the leave type in the **Leave** column. The first several columns on the tab are the same as the first tab. Remember the newest row appears at the bottom of the list.
34.	Scroll to the right side of the page to see the columns related to workers' compensation. Click the scroll bar.
35.	The **Workers' Compensation** page contains six percent columns. The sum of the percent fields must equal 100% for the applicable rows. Note that not all leave requests use the **Workers' Compensation** tab, so this page may not contain data for all leave requests. This example leave request contains multiple rows. This means many actions and/or changes have occurred for the leave request.
36.	The **REG Percent** column tracks the distribution for regular pay, if applicable. This column is not applicable for this leave request, so the column is blank.
37.	The **ESL Percent** column applies to extended sick leave (ESL). This is the percent of the leave that is paid under extended sick leave. This amount should not exceed a total of 80%. Notice in this example that the **ESL Percent** was changed from **37%** to **80%**.

Step	Action
38.	The **WCS Percent** column is used for Safety Member employees who may be eligible to stay on UC pay but do not pay taxes. Locations enter the appropriate JED distribution for the percent of the leave that is paid with the earnings code **WCS**. This example does not have a **WCS Percent**, so this column is blank.
39.	The **WCN Percent** column is used for partially-paid workers' compensation leaves. Locations provide the appropriate JED distribution for the percent of the leave that is unpaid with the earnings code **WCN**. This example does not have a **WCN Percent,** so this column is blank.
40.	The **WCP Percent** column is used for partially-paid workers' compensation leaves. Locations enter the appropriate JED distribution for the percent of the leave that is paid using the earnings code **WCP**. Note that the **WCP Percent** was changed from **63%** to **20%**.
41.	The **WCR Percent** column reduces an employee's paycheck by the amount of Temporary Disability they receive from Sedgwick. This example does not have a **WCR Percent**, so this column is blank.
42.	The **Contingency Fund Flag**, if selected, informs the UCPC WFA Production team to take action to place the employee on the Health Contingency Fund. If eligible, UC covers the full cost of medical premiums for the employee. This action normally occurs after an employee has exhausted all ESL and is placed on an unpaid leave of absence. This example does not use the **Contingency Fund Flag**, so the check box is not selected.
43.	Scroll back to the left side of the page. Click the scroll bar.
44.	Click the **Extended Absence Details** tab. 
45.	Scroll to the right side of the page. Click the scroll bar.
46.	This leave request shows a good example of leave request **Notes**. Remember that notes are required when a leave request is changed, denied, cancelled or pushed back. Scroll back to the left side of the page.
47.	Scroll back to the left side of the page. Click the scroll bar.
48.	Now review a sabbatical leave request. Click the **Return to Search** button. 

Step	Action
49.	Click the **Clear** button. 
50.	Enter the desired information into the **Empl ID** field. For this example, enter **10006131**.
51.	Click the **Search** button. 
52.	The **Search Results** displays the extended leave requests created for the specified employee for your UC Location for the last two years. For this example, click anywhere on the first row.
53.	Click the **Sabbatical** tab. 
54.	Notice the leave type in the **Leave** column. The first several columns on the tab are the same as the first tab. Remember the newest row appears at the bottom of the list.
55.	Scroll to the right side of the page to see the columns related to sabbatical. Click the scroll bar.
56.	Note that not all leave requests use the **Sabbatical** tab, so this page may not contain data for all leave requests.
57.	The **Sabbatical Credits Used** column displays the sabbatical credits to be used for the leave. This amount is entered as a positive number on the **Request Extended Absence** and **Administer Extended Absence** pages. After the leave is approved, the employee's sabbatical credits are automatically loaded into the **Manage Accruals** page. You can see adjusted sabbatical credits on the **Admin Review Absence Balance** page after Absence Management Post-Payroll processes complete for the employee's pay cycle, if the sabbatical credit balance is a whole number. If the sabbatical credit balance is not a whole number, sabbatical credit balances do not appear on the **Admin Review Absence Balance** page.
58.	The **SAB Percent** column displays the percent of sabbatical leave. **SAB** stands for **Sabbatical**. This example does not have a sabbatical percent, so this column is blank.
59.	The **SLS Percent** column displays the Dean's Supplement, which is subject to Location approval. **SLS** stands for **Sabbatical Leave Supplement**. This example does not have a sabbatical leave supplement percent, so this column is blank.
60.	The **SLL Percent** column displays the percent of the leave with no pay. **SLL** stands for **Leave No Pay**. This example does not have a leave no pay percent, so this column is blank.

Step	Action
61.	Scroll back to the left side of the page. Click the scroll bar.
62.	Now review a leave request for an academic employee. Click the **Return to Search** button. 
63.	Click the **Clear** button. 
64.	This example searches for an extended leave request using the % sign as a wildcard. Enter the desired information into the **Empl ID** field. For this example, enter **%4230**.
65.	Click the **Search** button. 
66.	The **Search Results** displays the extended leave requests created for the specified employee for your UC Location in UCPath. For this example, click anywhere on the second line.
67.	Scroll to the right side of the page. Click the scroll bar.
68.	Click the **Pay Period Dates for AY Academics** tab. 
69.	Not all leave requests use the **Pay Period Dates for AY Academics** tab, so this page may not contain data for specific leave requests.
70.	The **Pay Period Begin Date** column is the effective date of the leave that is keyed into **Job Data** by UCPC WFA with the **Paid Leave of Absence** or the **Unpaid Leave of Absence** action code.
71.	The **Pay Period End Date** column is entered as the end date of the leave.
72.	The **Pay Period Return Date** column indicates when the employee returns to work for payroll purposes. This is the date generally keyed into **Job Data** by UCPC WFA with the **Return from Leave** action code.
73.	Scroll back to the left side of the page. Click the scroll bar.

Step	Action
74.	Now review a leave request for an employee with multiple jobs to review the last tab, **Job Overrides**. Click the **Return to Search** button. 
75.	Click the **Clear** button. 
76.	Enter the desired information into the **Empl ID** field. For this example, enter **10010011**.
77.	Click the **Search** button. 
78.	This employee has only one leave request with multiple updates. Scroll to the right side of the page. Click the scroll bar.
79.	Click the **Job Overrides** tab. 
80.	Not all leave requests use the **Job Overrides** tab, so this page may not contain data for specific leave requests.
81.	The **Exclude Jobs** column identifies the employee's assignments excluded from the leave of absence. For example, an employee with multiple jobs may have one or more jobs excluded from the leave of absence, as shown in this example. The **0** and **2 Employment Record Numbers** are excluded from the leave. Note that this page does not show the employment record numbers that apply to the leave. **Employment Record Numbers** may be a job, a contingent worker instance or a person of interest instance for this employee ID. Be sure to review the **Job Data** component to determine which job(s) are included in the leave request. The **Exclude Jobs** column is used by UCPC WFA Production team. This column is not used in the absence management accrual calculation process.
82.	If the employee's primary job is excluded from the leave, the **Job Override for Approval** column identifies the job employment record to be used to specify the approver for the leave of absence request. Typically, the request is sent to the department approver for the primary HR job for approval. In the example on this page, the primary job, which is employment record **0**, is excluded from the leave, but the **0** job is entered in the **Job Override for Approval** field so the request still routes to the department approver for the **Empl Record 0** job.

Step	Action
83.	Scroll back to the left side of the page. Click the scroll bar.
84.	Click the **Return to Search** button. 
85.	Click the **Clear** button. 
86.	You have viewed an extended absence request in the **Extended Absence Trans History** component. **End of Procedure.**

View Employee Absence Balance Data

Use this task to review employee leave balances in UCPath.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Admin - Review Absence Balance**

Note: This page also may be available in Workcenter depending on your security access.

Step	Action
1.	This simulation reviews a variety of leave accrual examples. This first example is a staff employee with vacation and sick leave accruals.
2.	Click in the **Empl ID** field.
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10006512**.
4.	Click the **Search** button. 
5.	The **Admin - Review Absence Balance** page displays the leave accrual balances for Alex as of 01/31/2018.
6.	You can change the leave accrual balance period by changing the **As of Date**. Click the **Look up As of Date** button.

Step	Action
7.	UCPath displays leave accrual periods for the employee. Select the appropriate date. For this example, click the **12/31/2017** list item. 12/31/2017
8.	UCPath displays Alex's leave accrual balances as of 12/31/2017. First review the **Current Balance** section on this page.
9.	The **Leave** column displays the employee's leave accrual types for the period. Alex has **Vacation** and **Sick** leave accrual types. Note that **Service Months** shows the employee's months of service for leave accrual tier purposes. **Service Months** do not correspond to service credit for retirement purposes.
10.	The **Beginning Balance** column displays the leave accrual balances at the start of the selected period.
11.	The **Taken** column displays the leave accrual balances taken during the period.
12.	The **Earned** column displays the leave accrual earned during the period.
13.	The **Adjustments** column displays the leave accruals adjusted during the period. The **Adjustments** column is also used to initially store leave hours converted from PPS/PeopleSoft onto UCPath.
14.	The **Ending Balance** column displays the ending leave accrual balances for the period.
15.	The **Accrual Max** column displays the leave accrual maximum for the leave accrual type.
16.	The **Accrual For Pay Period By Appointment** section displays the leave accrual factors for each of the employee's appointments (UC jobs).
17.	Each row in this section represents one appointment for the period. This employee has one row, so this employee has one appointment for the period.
18.	The **Pay Period Hours** column displays the hours in the period that are eligible for leave accruals for each appointment.
19.	Multiply the **Pay Period Hours** by the **Vacation Factor** to determine the **Vacation Accrued** for the period. In this example, 168 x .057692 equals 9.692256. Multiply the **Pay Period Hours** by the **Sick Factor** to determine the **Sick Accrued** for the period. The **Sick Accrued** and **Vacation Accrued** results are rounded up and appear in the **Earned** column in the **Current Balance** section.

Step	Action
20.	Read the disclaimers in each section on this page. Balances reflect what has been processed to date for the **As of Date**. Note that FMLA, CFRA and/or PDLL balances appear on this page when the employee is on a Paid or Intermittent FMLA, CFRA and/or PDLL leave.
21.	Return to the most recent period for this employee. Click the **Look up As of Date** button.
22.	Select the appropriate date. For this example, click the **01/31/2018** list item. 
23.	Balances as of 01/31/2018 now appear. Let's review another leave accrual example.
24.	Click the **Return to Search** button. 
25.	Click the **Clear** button. 
26.	The next example shows **Sabbatical Leave** accruals.
27.	Click in the **Empl ID** field. 
28.	Enter the desired information into the **Empl ID** field. For this example, enter **10006514**.
29.	Click the **Search** button. 
30.	The **Admin - Review Absence Balance** page displays an employee with **Sabbatical Leave**.
31.	The **0** in the **Earned** column seems to indicate that the employee has not earned any sabbatical credits for the period. That assumption is incorrect. Sabbatical credits do not appear on this page until the credits are a whole number.
32.	Let's review another leave accrual example: a Post Doctoral employee. Click the **Return to Search** button. 

Step	Action
33.	Click the **Clear** button. 
34.	Click in the **Empl ID** field. 
35.	Enter the desired information into the **Empl ID** field. For this example, enter **10007003**.
36.	Click the **Search** button. 
37.	UCPath displays **Post Doc PTO** and **Post Doc Sick** leave accrual balances as of 01/31/2018.
38.	**Post Doc PTO** and **Post Doc Sick** leave accruals are front-loaded (awarded) to the employee for the entire anniversary year at the start of each anniversary year. This means that Post Doc employees do not earn leave hours monthly or on a quadri-cycle. The front-load leave accrual amount is prorated for the anniversary year based on the employee's **Expected End Date** on the **Job Data** page. Unused Post Doc PTO does not carry over to the next accrual year. Unused Post Doc Sick does carry over to the next accrual year.
39.	Let's review another leave accrual example: an employee who is reaching their leave accrual maximum. Click the **Return to Search** button. 
40.	Click the **Clear** button. 
41.	Enter the desired information into the **Empl ID** field. For this example, enter **10007049**.
42.	Click the **Search** button. 
43.	UCPath displays leave accrual balances for Mays Sweet as of 01/31/2018.
44.	Note that there is an additional column in the **Current Balance** section. The **Approaching Max** column appears when an employee is approaching or has reached the leave accrual maximum for a leave accrual type. In this example, the **Y** indicates Mays will soon reach the **Vacation** accrual maximum.

Step	Action
45.	Let's look at another example: an employee who has no leave accrual balances. Click the **Return to Search** button. 
46.	Click the **Clear** button. 
47.	Enter the desired information into the **Empl ID** field. For this example, enter **10006511**.
48.	Click the **Search** button. 
49.	The page appears for Reynaldo Madrigal. Note the text in red font states that there are no absence balances for Reynaldo for the selected period. Remember that changing the **As of Date** may display balances for other periods.
50.	Click the **Return to Search** button. 
51.	Click the **Clear** button. 
52.	You have reviewed leave accrual balances for an employee. **End of Procedure.**

Job Aid: Career & Benefits Elig Hrs INQ Page for Locations

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMABML195JA_CareerandBenefitsEligHrsforLocations_D1Rev00.pdf) to open the **Career & Benefit Elig Hrs INQ Page for Locations** job aid in a new web browser window/tab.

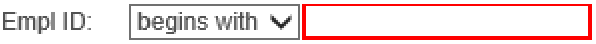
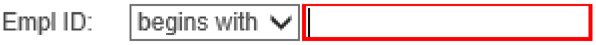
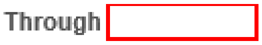
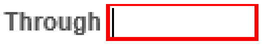
View Career and Benefits Elig Hrs INQ

Use this task to view the **Career and Benefits Elig Hrs INQ** component.

This is a custom, view-only, effective-dated component that stores leave accrual and benefit eligibility hours for employees. This component is generally created and populated by the custom **E-303** batch process, which runs each pay period after payroll is confirmed and collects employee pay earnings that have been configured for inclusion on this page from confirmed, reversed and adjusted paychecks.

UCPath Center Absence Management (ABM) team manually inserts effective-dated rows and effective-sequenced rows on the **Career & Benefits Elig Hrs ADD** page to update and override system-derived data. Manual updates occur on the **Career & Benefits Elig Hrs ADD** page when UC employees transfer or rehire into a UCPath location from a non-UCPath location. All data manually or systematically inserted into the **Career & Benefits Elig Hrs ADD** page displays on the **Career & Benefits Elig Hrs INQ** page.

Navigation: PeopleSoft Menu > Global Payroll & Absence Mgmt > Payee Data > **Career & Benefits Elig Hrs INQ**

Step	Action
1.	Click in the **Empl ID** field. 
2.	Enter the desired information into the **Empl ID** field. For this example, enter **10002323**. 
3.	Click the **Search** button. 
4.	Enter the desired information into the **From** field. For this example, enter **01012015**. 
5.	Click in the **Through** field. 
6.	Enter the desired information into the **Through** field. For this example, enter **01012017**. 
7.	Click the **Refresh** button. 
8.	The **Career & Benefits Elig Hrs INQ** page appears. The **GP_PAYE** process, which calculates and finalizes (confirms) absence management accruals, uses the applicable adjusted hours column when calculating accruals.
9.	Refer to the *Career & Benefits Elig Hrs INQ Page for Locations* job aid for a detailed explanation of each column. Click the horizontal scroll bar to review all columns.
10.	Return to the search page to view another employee. Click the **Return to Search** button. 

Step	Action
11.	Use the **Clear** button to clear the previous search criteria and search for the next employee. Click the **Clear** button. 
12.	You have reviewed the **Career and Benefits Elig Hrs INQ** component. Refer to the *Career & Benefits Elig Hrs INQ Page for Locations* job aid for more information. **End of Procedure.**

Job Aid: Earn Code to Absence Mapping

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMABM105JA_EarnCode_AbsenceMapping_D1Rev00.pdf) to open the **Earn Code to Absence Mapping** job aid in a new web browser window/tab.

View Manage Accruals

Use this task to view the **Manage Accruals** component. Use the **Manage Accruals** component to view location-entered leave accrual takes, payouts, adjustments, including for catastrophic leave and sabbatical credits.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Manage Accruals**

Step	Action
1.	Enter search criteria and click **Search** to search for the appropriate transaction. You can also leave the search fields blank to display all transactions to which you have access. In this example, you will search by **Department** and **Empl Class**. Click in the **Department** field. 
2.	Enter the desired information into the **Department** field.
3.	Click in the **Employee Classification** field. 
4.	Enter the desired information into the **Employee Classification** field.
5.	Click the **Search** button. 

Step	Action
6.	The **Search Results** section displays the transactions that match the search criteria you entered. If no transactions match the search criteria, the system displays a message that 0 results were retrieved. If only one match is found, the system displays the transaction detail on the **Manage Accrual** page. In this example, two transactions match the criteria entered. Click the appropriate **Transaction ID** link to display its detail on the **Manage Accrual** page. 
7.	The **Manage Accrual** page displays the transaction detail. The header information includes the **Transaction ID** number, **Department** number and **Employee Class**.
8.	For this example, the **Adjustment/Payout** tab displays a catastrophic leave donation details, including the employee's Empl ID, name, and record number. Donation details also include the donation date or date range.
9.	**Earn Code** field values are appropriately mapped to **Absence Element** field values, so the **Absence Element** field values defaults automatically.
10.	The **Hours/Credits** field indicates the number of hours being adjusted, taken, paid out, donated or received. The **FMLA/CFRA/PDLL** check box, if selected, reduces the employee's available **FMLA, CFRA** and/or **PDLL** eligible hours balance.
11.	If necessary, scroll right to display additional fields and page options.
12.	Comments are often required and provide transaction explanation.
13.	If necessary, scroll left to display additional fields and page functions.
14.	Notice that below the transaction data entry fields, the system displays the employee ID and name of the user who initiated the transaction. The system also displays the date and time the transaction was submitted.
15.	The approval status monitor (**Manage Accruals Stage 10** section in this example) displays the approval workflow details, including completed and pending approvals. You can expand the section to view the detailed AWE workflow if necessary.
16.	To begin a search for another **Manage Accrual** transaction, click the **Return to Search** button. 
17.	You have viewed the **Manage Accruals** component. Use the **Manage Accruals** component to view location-entered leave accrual takes, payouts, adjustments, including for catastrophic leave and sabbatical credits. **End of Procedure.**

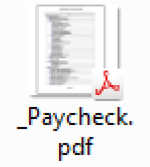
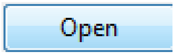
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
18.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
19.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
20.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
21.	Click the button to the right of the **Category** field. 
22.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
23.	Click in the **Subject** field.
24.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
25.	Click in the **Description** field.

Step	Action
26.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
27.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
28.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
29.	Click in the **Best Contact Phone Number** field.
30.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
31.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
32.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
33.	Click the **Add Attachment** link.  Add Attachment
34.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
35.	For this example, click the **_Paycheck.pdf** list item. 
36.	Click the **Open** button. 
37.	The file name appears in the **Attachments** box.
38.	Click the **Submit** button.
39.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
40.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
41.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
42.	Click the scroll bar.

Step	Action
43.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
44.	Click the scroll bar.
45.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
46.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

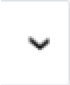
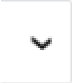
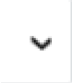
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
47.	Click the **Ask UCPath Center** button. 
48.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
49.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.

Step	Action
50.	UCPath returned one result. Click the scroll bar.
51.	Click the **Create an Inquiry** link. 
52.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
53.	Click the button to the right of the **Requested By** field. 
54.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
55.	Click the button to the right of the **Topic** field. 
56.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
57.	Click the button to the right of the **Category** field. 
58.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
59.	Click in the **Subject** field.
60.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
61.	Click the scroll bar.
62.	Click in the **Description** field.

Step	Action
63.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
64.	In this example, the full **Description** was completed on your behalf.
65.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
66.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
67.	Click the **Submit Inquiry** button. 
68.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
69.	The submitter's name appears.
70.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

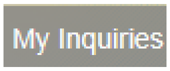
Reopen Closed UCPath Center Case

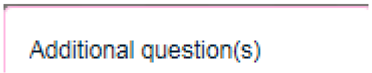
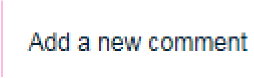
Use this task to reopen a closed inquiry via the UCPath website.

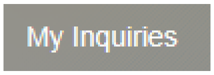
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
71.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 

Step	Action
72.	Click the **My Closed Inquiries** link.  My Closed Inquiries
73.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link.  00180567
74.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button.  Select Your Reopen Reason
75.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item.  Additional question(s)
76.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
77.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field.  Add a new comment
78.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
79.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center

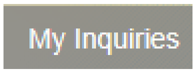
Step	Action
80.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
81.	Click the scroll bar.
82.	Notice the comment now appears in the **Case Comments** section.
83.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
84.	Return to the top of the page. Click the scroll bar.
85.	Click the **My Inquiries** link. 
86.	The new inquiry appears in the **My Open Inquires** list.
87.	You have reopened a closed inquiry. **End of Procedure.**

Monitor UCPath Center Cases

Use this task to review the status of an existing inquiry via the UCPath website.

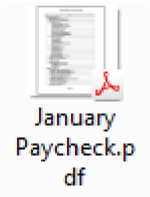
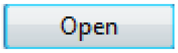
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

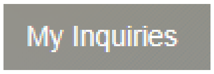
Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
88.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 

Step	Action
89.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
90.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
91.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
92.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link.  Date/Time Opened ▲
93.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again..  Date/Time Opened ▼
94.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link.  00180573
95.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field.  Add a new comment
96.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.

Step	Action
97.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
98.	Click the **Submit comment to the UCPath Center** button. Submit comment to the UCPath Center
99.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
100.	Click the scroll bar.
101.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. View All
102.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▾
103.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
104.	To return to the case details, click the **00180573** link. 00180573
105.	Click the scroll bar.
106.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. Upload Files

Step	Action
107.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
108.	Click the **Open** button. 
109.	A message confirms the file was uploaded. Click the **Done** button. 
110.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
111.	You can view all attachments in a list. Click the **View All** link. 
112.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 
113.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 
114.	Click the **00180573** link. 
115.	Click the scroll bar.

Step	Action
116.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
117.	Click the **Email** link.  Sandbox: UCPath Center: Inquir.
118.	Review the email information as you scroll down the page. Click the scroll bar.
119.	Review the email from the UCPath Center. Click the scroll bar.
120.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
121.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
122.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
123.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
124.	Click the **00180567** link.  00180567
125.	Click the scroll bar.
126.	Notice the **Status** is **Closed/Resolved**.
127.	Click the scroll bar.

Step	Action
128.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. ⌂
129.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMABML200: Extended Leaves of Absence

View Benefits Summary

Use this task to view historic, current and future-dated benefits for an employee, and to view the last paycheck benefit deductions for an employee.

Navigation: PeopleSoft Menu > Benefits > Review Employee Benefits > **Benefits Summary**

Step	Action
1.	Start on the **Benefits Summary Search** page. Click in the **Empl ID** field.
2.	Enter the desired information into the **Empl ID** field. For this example, enter **10000458**.
3.	Click the **Search** button. Search
4.	The **Benefit Enrollment Summary** page appears. Note that this component contains two pages: **Benefit Enrollment Summary** and **Benefit Deduction Summary**. When you enter the page, the current system date appears in the **Benefits As of** field.
5.	You can change the date in the **Benefits As of** field to a historic date or a future date to see historic or future-dated benefit data. For this example, change the date to a historic date. Click the **Choose a date** button. 📅

Step	Action
6.	Click the button to the right of the month field. 
7.	For this example, click the **January** list item. 
8.	For this example, click **1**. 
9.	Click the **Refresh** button. 
10.	The employee's benefits as of January 1, 2017 appear.
11.	The type of benefit appears in the **Plan Type** column. Each row on this page is a separate benefit plan.
12.	The plan **Coverage Election** is **Waive**, **Elect** or **Terminate**.
13.	The **Benefit Plan** and benefit plan **Description** appear for elected benefit plans.
14.	The coverage description for the coverage code or participation level, as well as the **Coverage Begin** or **End** date appear.
15.	The **Employee Monthly Cost** and the **Total Monthly Cost** appear for the applicable benefit. The **Total Monthly Cost** consists of the employee monthly cost and UC's monthly contribution. <u>Note that benefit rates for future dates do not display on the page; instead, current rates display for future dates</u>.
16.	Location Leave Administrators click the **Print Summary and Election Form** button and provides the forms to the employee. These forms should be provided to employees going on an unpaid leave of absence.
17.	Location Leave Administrators select the **Election Form Provided to EE** check box when when forms are provided to the employee.
18.	If necessary, use the scroll bar to review addtional rows on the page. For this example, the page will be reset to the upper left corner.
19.	Now review the second page in the component. Click the **Benefit Deduction Summary** tab. 
20.	The **Benefit Deduction Summary** page appears. This page shows the last paycheck deduction for each benefit. The **Pay Period End** column shows the applicable pay period in which the last deduction occurred for each benefit.

Step	Action
21.	Note that this page breaks down the benefit deductions and costs by employee and employer. The **Class** column indicates whether the benefit cost is employee or employer. **After-Tax** and **Before Tax** indicate employee deductions. **Nontaxable Benefits** and **Nontaxable Before-tax Benefits** indicate employer benefit costs. Employer benefit costs do not come out of the employee's pocket. **Taxable** in the **Class** column indicates imputed income, which means the employee's taxable gross earnings increase by the **Taxable** amount of the benefit. This example does not show a **Taxable** benefit row.
22.	Click the **Return to Search** button. 
23.	Click the **Clear** button to clear the search criteria and search for another employee. 
24.	You have reviewed benefits and the last paycheck benefit deductions for an employee. **End of Procedure.**

Submit Medical Leave of Absence Request

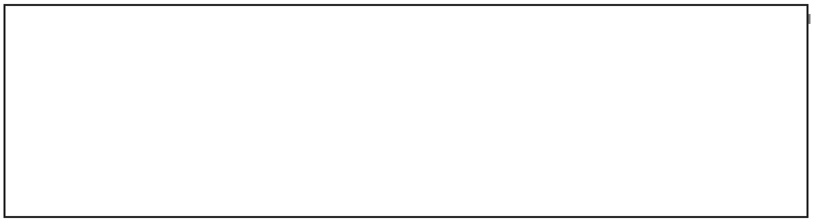
Use this task to submit a leave of absence request in UCPath. This example demonstrates a medical leave concurrent with a FML leave.

Navigation: PeopleSoft Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > UC Customizations > **Request Extended Absence**

Step	Action
1.	Use the **Find an Existing Value** page to search for the applicable employee. Enter search criteria in one or more of the search fields.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10000107**.
4.	Click the **Search** button. 
5.	Use the **Request Extended Absence** page to enter the details for the leave request.

Step	Action
6.	If the leave is FMLA-related you must verify the employee's eligibility for FMLA before submitting the request. Review the **FMLA/CFRA Eligibility** and **FMLA/CFRA/PDLL Balances & Takes** sections.
7.	The UCPath system automatically selects the **Eligible for FMLA?** and **Eligible for CFRA?** check boxes if the employee is eligible for FMLA and CFRA.
8.	Use the **Extended Absence Summary** section to review the existing leave requests for the employee. This section stores up to two years of leave requests and displays three leaves at a time. Use the grid navigation buttons to view additional leaves. Use the tabs to view additional information related to the leave.
9.	Use the **New Extended Absence Request** section to enter the details of the new leave request. This example demonstrates the entry of a medical FMLA leave request.
10.	Enter the date the leave of absence begins. Click in the **Start Date** field. 
11.	Enter the desired information into the **Start Date** field. For this example, enter **7/1/2018**.
12.	Enter the date the employee is expected to return from leave. Click in the **Expected Return Date** field. 
13.	Enter the desired information into the **Expected Return Date** field. For this example, enter **7/15/2018**.
14.	Press **[Tab]** to open the leave fields for entry.
15.	Click the button to the right of the **Leave** field. 
16.	Select the appropriate leave type. For this example, click the **Medical Leave*** list item.  Medical Leave*

Step	Action
17.	A warning message appears. FMLA/CFRA/PDLL can be tracked within the same leave. An additional leave does not need to be entered. Click the **OK** button. 
18.	If the leave is related to FMLA, CFRA or PDLL, select the appropriate option from the drop-down list. If the leave is not related to FMLA, CFRA or PDLL, leave this field blank. For this example, the leave is related to FMLA. Click the button to the right of the **FMLA/CFRA/PDLL Leave** field. 
19.	Select the appropriate FMLA, CFRA or PDLL option. For this example, click the **Employee's SHC-FMLA** list item. 
20.	Click the button to the right of the **Paid/Unpaid** field. 
21.	Select the appropriate pay option. For this example, click the **Paid-Block** list item. 
22.	Click the scroll bar.
23.	Enter the last date the employee was physically at work. This date must be equal or prior to the **Start Date** of the leave. This is a required field. Click in the **Last Date Worked** field. 
24.	Enter the desired information into the **Last Date Worked** field. For this example, enter **6/28/2018**.
25.	A note is required for every leave request. Click the **Notes** link. 

Step	Action
26.	Click in the **Requester Notes** field. 
27.	Enter the desired information into the **Requester Notes** field. For this example, enter **Employee approved for paid medical FMLA leave.**.
28.	Click the **OK** button. 
29.	Click the **Submit** button. 
30.	A confirmation message appears. Click the **OK** button. 
31.	Click the scroll bar.
32.	The leave request is **Submitted** for approval and appears at the top of the **Extended Absence Summary** section.
33.	You have submitted a medical leave of absence request in UCPath. **End of Procedure.**

Submit Multi-Row Leave of Absence Request

Use this task to submit a multi-row leave of absence request in UCPath. This example demonstrates a medical leave where the first part of the leave is paid and the second part is unpaid.

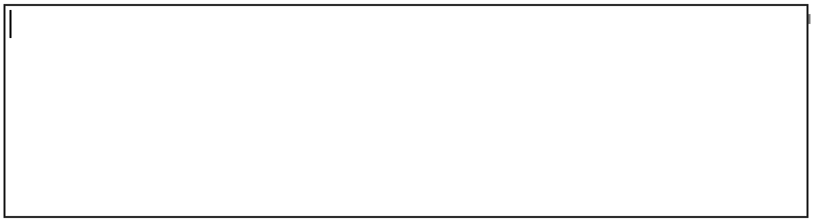
Navigation: PeopleSoft Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > UC Customizations > **Request Extended Absence**

Step	Action
1.	Use the **Find an Existing Value** page to search for the applicable employee. Enter search criteria in one or more of the search fields.

Step	Action
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10000338**.
4.	Click the **Search** button. 
5.	Use the **Request Extended Absence** page to enter the details for the leave request.
6.	If the leave is FMLA-related you must verify the employee's eligibility for FMLA before submitting the request. Review the **FMLA/CFRA Eligibility** and **FMLA/CFRA/PDLL Balances & Takes** sections.
7.	The UCPath system automatically selects the **Eligible for FMLA?** and **Eligible for CFRA?** check boxes if the employee is eligible for FMLA and CFRA.
8.	Use the **Extended Absence Summary** section to review the existing leave requests for the employee. This section stores up to two years of leave requests and displays three leaves at a time. Use the grid navigation buttons to view additional leaves. Use the tabs to view additional information related to the leave.
9.	Use the **New Extended Absence Request** section to enter the details of the new leave request(s). Remember, this example demonstrates the entry of a Medical FMLA-related leave. One request is entered for the timeframe that the leave is paid and another request is entered for the unpaid timeframe.
10.	Enter the date the leave of absence begins. Click in the **Start Date** field. 
11.	Enter the desired information into the **Start Date** field. For this example, enter **7/1/2018**.
12.	Enter the date the employee is expected to return from leave. Because this is a leave with multiple leave types, enter the date the employee is expected to end this particular leave type. Click in the **Expected Return Date** field. 
13.	Enter the desired information into the **Expected Return Date** field. For this example, enter **7/15/2018**.

Step	Action
14.	Press **[Tab]** to open the leave fields for entry.
15.	Click the button to the right of the **Leave** field. 
16.	Select the appropriate leave type. For this example, click the **Medical Leave*** list item.  Medical Leave*
17.	A warning message appears. Click the **OK** button.  OK
18.	If the leave is related to FMLA, CFRA or PDLL, select the appropriate option from the drop-down list. If the leave is not related to FMLA, CFRA or PDLL, leave this field blank. For this example, the leave is related to FMLA. Click the button to the right of the **FMLA/CFRA/PDLL Leave** field. 
19.	Select the appropriate FMLA, CFRA or PDLL option. For this example, click the **Employee's SHC-FMLA** list item.  Employee's SHC-FMLA
20.	Click the button to the right of the **Paid/Unpaid** field. 
21.	Select the appropriate pay option. For this example, click the **Paid-Block** list item.  Paid-Block
22.	Click the scroll bar.
23.	Enter the last date the employee was physically at work. This date must be equal or prior to the **Start Date** of the leave. This is a required field. Click in the **Last Date Worked** field. 
24.	Enter the desired information into the **Last Date Worked** field. For this example, enter **6/29/2018**.

Step	Action
25.	A note is required for every leave request. Click the **Notes** link. Notes
26.	Click in the **Requester Notes** field.
27.	Enter the desired information into the **Requester Notes** field. For this example, enter **Approved paid medical FMLA.**.
28.	Click the **OK** button. OK
29.	Click the **Add a new row** button to enter the next leave request. +
30.	Enter a separate request for the unpaid timeframe. The **Start Date** of the second request must be the same date as the **Expected Return Date** of the first request. This ensures no break in the employee's leave of absence.
31.	Click in the **Start Date** field.
32.	Enter the desired information into the **Start Date** field. For this example, enter **7/15/2018**.
33.	Click in the **Expected Return Date** field.
34.	Enter the desired information into the **Expected Return Date** field. For this example, enter **7/31/2018**.
35.	Press **[Tab]**.
36.	Click the button to the right of the **Leave** field. ⌄
37.	Select the appropriate leave type. For this example, click the **Medical Leave*** list item. Medical Leave*

Step	Action
38.	A warning message appears. Click the **OK** button. 
39.	If the leave is related to FMLA, CFRA or PDLL, select the appropriate option from the drop-down list. If the leave is not related to FMLA, CFRA or PDLL, leave this field blank. For this example, the leave is related to FMLA. Click the button to the right of the **FMLA/CFRA/PDLL Leave** field. 
40.	Select the appropriate FMLA, CFRA or PDLL option. For this example, click the **Employee's SHC-FMLA** list item. 
41.	Click the button to the right of the **Paid/Unpaid** field. 
42.	Select the appropriate pay option. For this example, click the **Unpaid-Block** list item. 
43.	Click in the **Last Date Worked** field. 
44.	Enter the desired information into the **Last Date Worked** field. For this example, enter **6/29/2018**.
45.	Click the scroll bar.
46.	Click the **Notes** link for the second leave request. 
47.	Click in the **Requester Notes** field. 
48.	Enter the desired information into the **Requester Notes** field. For this example, enter **Approved unpaid medical FMLA.**.

Step	Action
49.	Click the **OK** button. 
50.	Click the **Submit** button for the first leave request. 
51.	A confirmation message appears. Click the **OK** button. 
52.	The leave request is **Submitted** for approval and appears at the top of the **Extended Absence Summary** section.
53.	Click the **Submit** button for the second leave request. 
54.	A confirmation message appears. Click the **OK** button. 
55.	The leave request is **Submitted** for approval and appears at the top of the **Extended Absence Summary** section.
56.	Click the scroll bar.
57.	You have submitted a multi-row medical leave of absence request in UCPath. **End of Procedure.**

Submit Workers' Compensation Leave of Absence Request

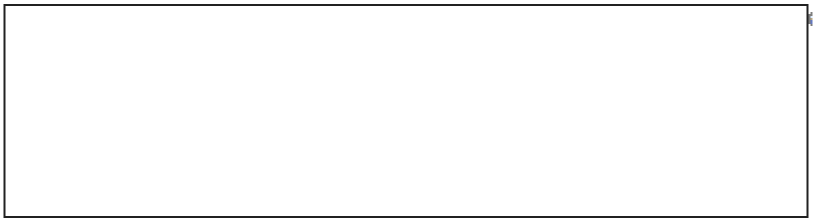
Use this task to submit a multi-row workers' compensation leave of absence request in UCPath. This example demonstrates a workers' compensation leave where the leave type changes and the leave moves from paid to unpaid.

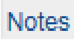
Navigation: PeopleSoft Menu > Global Payroll & Absence Management > Payee Data > Maintain Absences > **Request Extended Absence**

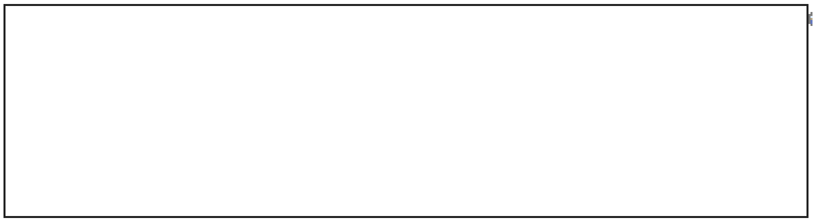
Step	Action
1.	Use the **Find an Existing Value** page to search for the applicable employee. Enter search criteria in one or more of the search fields.

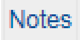
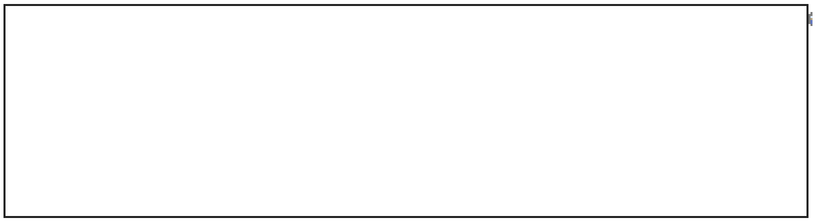
Step	Action
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10000108**.
4.	Click the **Search** button. 
5.	Use the **Request Extended Absence** page to enter the details for the leave request.
6.	If the leave is FMLA, CFRA or PDLL you must verify the employee's eligibility for FMLA before submitting the request. Review the **FMLA/CFRA Eligibility** and **FMLA/CFRA/PDLL Balances & Takes** sections.
7.	The UCPath system automatically selects the **Eligible for FMLA?** and **Eligible for CFRA?** check boxes if the employee is eligible for FMLA and CFRA.
8.	Use the **Extended Absence Summary** section to review the existing leave requests for the employee. This section stores up to two years of leave requests and displays three leaves at a time. Use the grid navigation buttons to view additional leaves. Use the tabs to view additional information related to the leave.
9.	Use the **New Extended Absence Request** section to enter the details of the leave request(s). Remember, this example demonstrates the entry of a workers' compensation leave using multiple requests (rows) because the leave type changes and because the leave changes from paid to unpaid. It is likely that you do not know the dates for the additional leave requests, in which case the leaves can be entered later when the dates are known.
10.	Enter the date the leave of absence begins. Click in the **Start Date** field. 
11.	Enter the desired information into the **Start Date** field. For this example, enter **7/1/2018**.
12.	Enter the date the employee is expected to return from this leave. Click in the **Expected Return Date** field. 
13.	Enter the desired information into the **Expected Return Date** field. For this example, enter **7/6/2018**.

Step	Action
14.	Press **[Tab]** to open the leave fields for entry.
15.	Currently, the **Workers' Compensation** tab does not appear. After the workers' compensation **Leave** type is selected, the tab appears.
16.	Click the button to the right of the **Leave** field.
17.	Select the appropriate leave type. Click the scroll bar.
18.	For this example, click the **Workers' Comp*** list item.  Workers' Comp*
19.	A warning message appears. Click the **OK** button. 
20.	When you select a workers' compensation related **Leave** type, the **Workers' Compensation** tab appears. If needed, select this tab to split earnings between specific workers' compensation earn codes. For example 80% REG (regular pay) and 20% WCP (workers' compensation paid).
21.	If the leave is related to FMLA, CFRA or PDLL, select the appropriate option from the drop-down list. If the leave is not related to FMLA, CFRA or PDLL, leave this field blank. For this example, the leave is related to FMLA. Click the button to the right of the **FMLA/CFRA/PDLL Leave** field.
22.	Select the appropriate FMLA, CFRA or PDLL option. For this example, click the **Employee's SHC-FMLA** list item.  Employee's SHC-FMLA
23.	Click the button to the right of the **Paid/Unpaid** field.
24.	Select the appropriate pay option. For this example, click the **Paid-Block** list item.  Paid-Block
25.	Click the scroll bar.

Step	Action
26.	Enter the last date the employee was physically at work. This date must be equal or prior to the **Start Date** of the leave. This is a required field. Click in the **Last Date Worked** field. 
27.	Enter the desired information into the **Last Date Worked** field. For this example, enter **6/29/2018**.
28.	A note is required for every leave request. Click the **Notes** link. 
29.	Click in the **Requester Notes** field. 
30.	Enter the desired information into the **Requester Notes** field. For this example, enter **Employee approved for paid workers' comp FMLA.**.
31.	Click the **OK** button. 
32.	Click the **Add a new row** button to enter the next leave request. 
33.	Click the scroll bar.
34.	Enter a separate request when the **Leave** type changes. The **Start Date** of the second request must be the same date as the **Expected Return Date** of the first request. This ensures no break in their leave of absence.
35.	Click in the **Start Date** field. 
36.	Enter the desired information into the **Start Date** field. For this example, enter **7/6/2018**.
37.	Click in the **Expected Return Date** field. 
38.	Enter the desired information into the **Expected Return Date** field. For this example, enter **7/19/2018**.
39.	Press **[Tab]**.

Step	Action
40.	Click the button to the right of the **Leave** field. 
41.	Select the appropriate leave type. Click the scroll bar.
42.	For this example, click the **Workers' Comp ESL*** list item. 
43.	A warning message appears. Click the **OK** button. 
44.	Click the button to the right of the **FMLA/CFRA/PDLL Leave** field. 
45.	Select the appropriate FMLA, CFRA or PDLL option. For this example, click the **Employee's SHC-FMLA** list item. 
46.	Click the button to the right of the **Paid/Unpaid** field. 
47.	Select the appropriate pay option. For this example, click the **Paid-Block** list item. 
48.	Click the scroll bar.
49.	Click in the **Last Date Worked** field. 
50.	Enter the desired information into the **Last Date Worked** field. For this example, enter **6/29/2018**.
51.	Click the **Notes** link for the second leave request. 

Step	Action
52.	Click in the **Requester Notes** field. 
53.	Enter the desired information into the **Requester Notes** field. For this example, enter **Employee approved for paid ESL workers' comp FMLA.**.
54.	Click the **OK** button. 
55.	Click the **Add a new row** button. 
56.	Click the scroll bar.
57.	The **Start Date** of the third request must be the same date as the **Expected Return Date** of the second request. This ensures no break in the employee's leave of absence. Click in the **Start Date** field. 
58.	Enter the desired information into the **Start Date** field. For this example, enter **7/19/2018**.
59.	Click in the **Expected Return Date** field. 
60.	Enter the desired information into the **Expected Return Date** field. For this example, enter **7/27/2018**.
61.	Press **[Tab]**.
62.	Click the button to the right of the **Leave** field. 
63.	Select the appropriate leave type. Click the scroll bar.
64.	For this example, click the **Workers' Comp*** list item. 

Step	Action
65.	A warning message appears. Click the **OK** button. 
66.	Click the button to the right of the **FMLA/CFRA/PDLL Leave** field. 
67.	Select the appropriate FMLA, CFRA or PDLL option. For this example, click the **Employee's SHC-FMLA** list item. 
68.	Click the button to the right of the **Paid/Unpaid** field. 
69.	Select the appropriate pay option. For this example, click the **Unpaid-Block** list item. 
70.	Click the scroll bar.
71.	Click in the **Last Date Worked** field. 
72.	Enter the desired information into the **Last Date Worked** field. For this example, enter **6/29/2018**.
73.	Click the **Notes** link for the third request. 
74.	Click in the **Requester Notes** field. 
75.	Enter the desired information into the **Requester Notes** field. For this example, enter **Employee approved for unpaid workers' comp FMLA.**.
76.	Click the **OK** button. 
77.	Click the **Submit** button for the first leave request. 

Step	Action
78.	A confirmation message appears. Click the **OK** button. 
79.	The leave request is **Submitted** for approval and appears at the top of the **Extended Absence Summary** section.
80.	Click the **Submit** button for the second leave request. 
81.	A confirmation message appears. Click the **OK** button. 
82.	The leave request is **Submitted** for approval and appears at the top of the **Extended Absence Summary** section.
83.	Click the **Submit** button for the last leave request. 
84.	A confirmation message appears. Click the **OK** button. 
85.	The leave request is **Submitted** for approval and appears at the top of the **Extended Absence Summary** section.
86.	Click the scroll bar.
87.	You have submitted a multi-row workers' compensation leave of absence request. **End of Procedure.**

Submit Full Sabbatical Leave of Absence Request

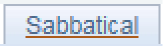
Use this task to submit a full sabbatical leave of absence request in UCPath.

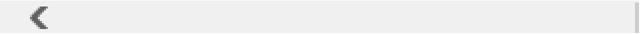
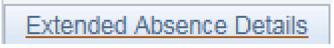
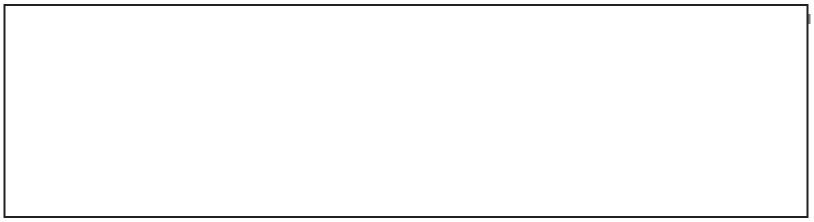
Navigation: PeopleSoft Menu > Global Payroll & Absence Management > Payee Data > Maintain Absences > **Request Extended Absence**

Step	Action
1.	Use the **Find an Existing Value** page to search for the applicable employee. Enter search criteria in one or more of the search fields.

Step	Action
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10010014**.
4.	Click the **Search** button.  Search
5.	Use the **Request Extended Absence** page to enter the details for the leave request. Remember, this example demonstrates the entry of a sabbatical leave. Before you begin entry of the leave details, you should review the employee's absence balances, specifically the sabbatical leave credits.
6.	Click the **Review Absence Balance** link.  Review Absence Balance
7.	Review the employee's **Sabbatical Leave** credits to ensure they have enough credits to cover the leave. In this example, the employee has **10.00** credits.
8.	Click the **Return to Extended Absence** link.  Return to Extended Absence
9.	Use the **Extended Absence Summary** section to review the existing leave requests for the employee. This section stores up to two years of leave requests and displays three leaves at a time. Use the grid navigation buttons to view additional leaves. Use the tabs to view additional information related to the leave.
10.	Use the **New Extended Absence Request** section to enter the details of the new leave request.
11.	The **Pay Period Dates for AY Academics** tab appears for academic year academic employees. Separate dates must be entered on this tab for AY academics. The dates entered are used as the leave start and return dates in **Job Data** instead of the **Start Date** and **Actual Return Date** fields.
12.	The **Start Date** is still a required field. Enter the start date of the leave. Click in the **Start Date** field. 
13.	Enter the desired information into the **Start Date** field. For this example, enter **7/1/2018**.

Step	Action
14.	Enter the date the employee is expected to return from this leave. Click in the **Expected Return Date** field. 
15.	Enter the desired information into the **Expected Return Date** field. For this example, enter **11/1/2018**.
16.	For sabbatical leaves, enter the **Actual Return Date**. This date must match the **Expected Return Date**. UCPC WFA Production will enter two **Job Data** rows for sabbatical leaves; one row for the **Sabbatical Leave** and one row for the **Return from Leave** using the **Actual Return Date** for the effective date of the return. Remember, for AY academics, the **Pay Period Begin** and **End** dates are used as the effective dates/service dates in **Job Data** instead of the **Start Date** and **Actual Return Date** fields. Click in the **Actual Return Date** field. 
17.	Enter the desired information into the **Actual Return Date** field. For this example, enter **11/1/2018**.
18.	Click the button to the right of the **Leave** field. 
19.	Select the appropriate sabbatical leave option. Use "Full Pay" for sabbatical leaves that are 100%. For this example, click the **Faculty Sabbatical-Full Pay** list item.  Faculty Sabbatical-Full Pay
20.	Click the button to the right of the **Paid/Unpaid** field. 
21.	Select the appropriate pay option. For this example, click the **Paid-Block** list item.  Paid-Block
22.	Enter the last date the employee was physically at work. This date must be equal or prior to the **Start Date** (or **Pay Period Begin Date**) of the leave. This is a required field. Click in the **Last Date Worked** field. 

Step	Action
23.	Enter the desired information into the **Last Date Worked** field. For this example, enter **6/29/2018**.
24.	Click the **Pay Period Dates for AY Academics** tab. 
25.	Click the scroll bar.
26.	Three additional date fields appear after you select the **Pay Period Dates for AY Academics** tab. There are considered the service dates for AY academics. These dates are used by UCPC WFA Production instead of the leave begin (**Start Date**) and end (**Actual Return Date**) dates when the leave is entered into the employee's **Job Data**.
27.	Click in the **Pay Period Begin Date** field. 
28.	Enter the desired information into the **Pay Period Begin Date** field. For this example, enter **9/24/2018**.
29.	Click in the **Pay Period End Date** field. 
30.	Enter the desired information into the **Pay Period End Date** field. For this example, enter **12/14/2018**.
31.	Click in the **Pay Period Return Date** field. 
32.	Enter the desired information into the **Pay Period Return Date** field. For this example, enter **11/2/2018**.
33.	Click the scroll bar.
34.	Click the **Sabbatical** tab. 
35.	Click the scroll bar.
36.	Four additional fields appear after you click the **Sabbatical** tab.
37.	Enter the number of sabbatical credits the employee is using for this leave. Click in the **Sabbatical Credits Used** field. 
38.	Enter the desired information into the **Sabbatical Credits Used** field. For this example, enter **5**. **Note:** Do not enter a negative number.

Step	Action
39.	The other three fields are used when the employee is going on partial sabbatical leave. If the employee is going on full pay 100% sabbatical, no distribution is needed.
40.	Click the scroll bar. 
41.	Click the **Extended Absence Details** tab to display the **Notes** link and **Submit** button at the end of the row. 
42.	Click the scroll bar.
43.	A note is required for every leave request. Click the **Notes** link. 
44.	Click in the **Requester Notes** field. 
45.	Enter the desired information into the **Requester Notes** field. For this example, enter **Approved for fall quarter 2018 paid sabbatical.**.
46.	Click the **OK** button. 
47.	Click the **Submit** button. 
48.	A confirmation message appears. Click the **OK** button. 
49.	The leave request is **Submitted** for approval and appears at the top of the **Extended Absence Summary** section.
50.	Click the scroll bar.
51.	You have submitted a full sabbatical leave of absence request in UCPath. **End of Procedure.**

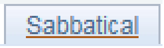
Submit Partial Sabbatical Leave of Absence Request

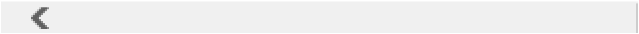
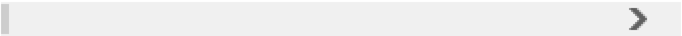
Use this task to submit a partial sabbatical leave of absence request in UCPath.

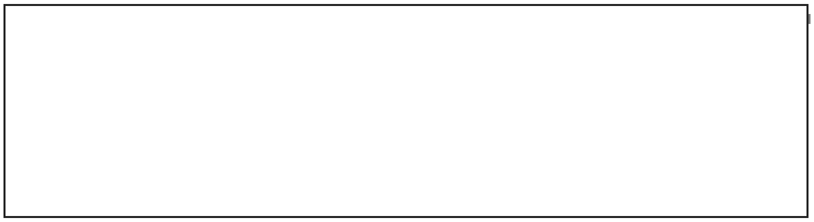
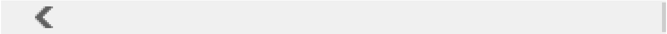
Navigation: PeopleSoft Menu > Global Payroll & Absence Management > Payee Data > Maintain Absences > **Request Extended Absence**

Step	Action
1.	Use the **Find an Existing Value** page to search for the applicable employee. Enter search criteria in one or more of the search fields.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10010014**.
4.	Click the **Search** button. 
5.	Use the **Request Extended Absence** page to enter the details for the leave request. Remember, this example demonstrates the entry of a partial sabbatical leave. Before you begin entry of the leave details, you should review the employee's absence balances, specifically the sabbatical leave credits.
6.	Click the **Review Absence Balance** link. 
7.	Review the employee's **Sabbatical Leave** credits to ensure they have enough credits to cover the leave. In this example, the employee has **10.00** credits.
8.	Click the **Return to Extended Absence** link. 
9.	Use the **Extended Absence Summary** section to review the existing leave requests for the employee. This section stores up to two years of leave requests and displays three leaves at a time. Use the grid navigation buttons to view additional leaves. Use the tabs to view additional information related to the leave.
10.	Use the **New Extended Absence Request** section to enter the details of the new leave request.
11.	The **Pay Period Dates for AY Academics** tab appears for academic year academic employees. Separate dates must be entered on this tab for AY academics. The dates entered are used as the leave start and return dates in **Job Data** instead of the **Start Date** and **Actual Return Date** fields.

Step	Action
12.	The **Start Date** is still a required field. Enter the start date of the leave. Click in the **Start Date** field. 
13.	Enter the desired information into the **Start Date** field. For this example, enter **7/1/2018**.
14.	Enter the date the employee is expected to return from this leave. Click in the **Expected Return Date** field. 
15.	Enter the desired information into the **Expected Return Date** field. For this example, enter **11/1/2018**.
16.	For sabbatical leaves, enter the **Actual Return Date**. This date must match the **Expected Return Date**. UCPC WFA Production will enter two **Job Data** rows for sabbatical leaves; one row for the **Sabbatical Leave** and one row for the **Return from Leave** using the **Actual Return Date** for the effective date of the return. Remember, for AY academics, the **Pay Period Begin** and **End** dates are used as the effective dates/service dates in **Job Data** instead of the **Start Date** and **Actual Return Date** fields. Click in the **Actual Return Date** field. 
17.	Enter the desired information into the **Actual Return Date** field. For this example, enter **11/1/2018**.
18.	Click the button to the right of the **Leave** field. 
19.	Select the appropriate sabbatical leave option. Use "Part Pay" for sabbatical leaves that are partial sabbatical. For this example, click the **Faculty Sabbatical-Part Pay** list item.  Faculty Sabbatical-Part Pay
20.	Click the button to the right of the **Paid/Unpaid** field. 

Step	Action
21.	Select the appropriate pay option. For this example, click the **Paid-Block** list item. 
22.	Enter the last date the employee was physically at work. This date must be equal or prior to the **Start Date** (or **Pay Period Begin Date**) of the leave. This is a required field. Click in the **Last Date Worked** field. 
23.	Enter the desired information into the **Last Date Worked** field. For this example, enter **6/29/2018**.
24.	Click the **Pay Period Dates for AY Academics** tab. 
25.	Click the scroll bar.
26.	Three additional date fields appear after you select the **Pay Period Dates for AY Academics** tab. There are considered the service dates for AY academics. These dates are used by UCPC WFA Production instead of the leave begin (**Start Date**) and end (**Actual Return Date**) dates when the leave is entered into the employee's **Job Data**.
27.	Click in the **Pay Period Begin Date** field. 
28.	Enter the desired information into the **Pay Period Begin Date** field. For this example, enter **9/24/2018**.
29.	Click in the **Pay Period End Date** field. 
30.	Enter the desired information into the **Pay Period End Date** field. For this example, enter **12/14/2018**.
31.	Click in the **Pay Period Return Date** field. 
32.	Enter the desired information into the **Pay Period Return Date** field. For this example, enter **11/2/2018**.
33.	Click the scroll bar.
34.	Click the **Sabbatical** tab. 
35.	Click the scroll bar.

Step	Action
36.	Four additional fields appear after you click the **Sabbatical** tab.
37.	Enter the number of sabbatical credits the employee is using for this leave. Click in the **Sabbatical Credits Used** field. 
38.	Enter the desired information into the **Sabbatical Credits Used** field. For this example, enter **5**. **Note:** Do not enter a negative number.
39.	Use the other three fields to indicate the percent the leave is to be distributed. The total **Sabbatical** entries in the three fields must equal 100%. For this example, a partial sabbatical, enter **Sabbatical Percent** to be paid of **67%** and **Leave No Pay Percent** as **33%**.
40.	The **Sabbatical Percent** is the percent the employee is paid for sabbatical leave. Click in the **Sabbatical Percent** field. 
41.	Enter the desired information into the **Sabbatical Percent** field. For this example, enter **67**.
42.	The **Sabbatical Leave Supplement Percent** is the percent the employee is paid for supplemental sabbatical leave.
43.	The **Leave No Pay Percent** is the percent the employee is not paid during their sabbatical leave. Click in the **Leave No Pay Percent** field. 
44.	Enter the desired information into the **Leave No Pay Percent** field. For this example, enter **33**.
45.	Click the scroll bar. 
46.	Click the **Extended Absence Details** tab to display the **Notes** link and **Submit** button at the end of the row. 
47.	Click the scroll bar. 

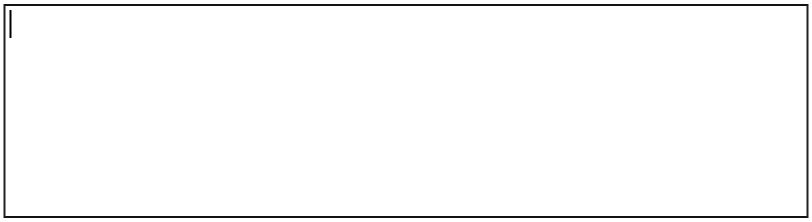
Step	Action
48.	A note is required for every leave request. Click the **Notes** link. 
49.	Click in the **Requester Notes** field. 
50.	Enter the desired information into the **Requester Notes** field. For this example, enter **Approved for fall quarter 2018 partial sabbatical (67%).**.
51.	Click the **OK** button. 
52.	Click the **Submit** button. 
53.	A confirmation message appears. Click the **OK** button. 
54.	The leave request is **Submitted** for approval and appears at the top of the **Extended Absence Summary** section.
55.	Click the scroll bar. 
56.	You have submitted a partial sabbatical leave of absence request in UCPath. **End of Procedure.**

Extend Existing Leave of Absence

Use this task to extend an approved leave of absence. In this example, a bereavement leave must be extended.

Navigation: PeopleSoft Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > UC Customizations > **Administer Extended Absence**

Step	Action
1.	Use the **Administer Extended Absence** page to search for existing leave requests. Enter search criteria in the header, then click the **Search** button.
2.	Only approved requests can be edited. Click the button to the right of the **Show Requests by Status** field. 
3.	Click the **Approved** list item. 
4.	If you know the employee's ID, it is the quickest way to locate their leave request. Click in the **Employee ID** field. 
5.	Enter the desired information into the **Employee ID** field. For this example, enter **10000005**.
6.	Click the **Search** button. 
7.	The requests that meet the search criteria appear in the **Administer Extended Absence** section. For this example, the request for **Joan Miner** must be extended.
8.	Click the scroll bar.
9.	Click the **Edit** button. 
10.	The leave request appears in the **Administer Extended Absence** section and the leave fields are open for editing.
11.	Enter the new **Expected Return Date** to extend the leave. Click in the **Expected Return Date** field. 
12.	Enter the desired information into the **Expected Return Date** field. For this example, enter **4/4/2018**.
13.	Click the scroll bar.
14.	You must enter **Notes** any time you enter or update a leave request. Click the **Notes** link. 

Step	Action
15.	Click in the **Requester Notes** field. 
16.	Enter the desired information into the **Requester Notes** field. For this example, enter **Extended bereavement to 4/4/18.**.
17.	Click the **OK** button. 
18.	Click the **Submit** button. 
19.	A confirmation message appears. Click the **Yes** button. 
20.	A second confirmation message appears. Click the **OK** button. 
21.	Click the scroll bar.
22.	You have extended an approved leave of absence. **End of Procedure.**

Extend Leave of Absence with New Leave Type

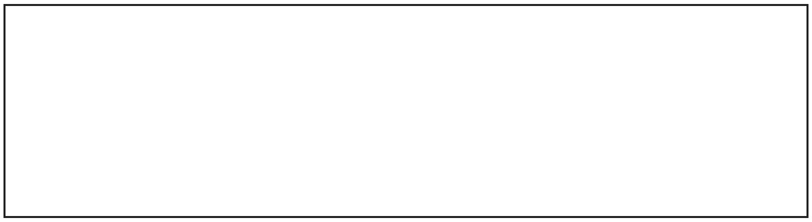
Use this task to extend a leave of absence with a new leave type. In this example, the employee is moving from Pregnancy Disability to Parental Bonding. Because this is a change in leave type, a new leave must be entered.

Navigation: PeopleSoft Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > UC Customizations > **Administer Extended Absence**

Step	Action
1.	Use the **Administer Extended Absence** page to search for existing leave requests. Enter search criteria in the header, then click the **Search** button.

Step	Action
2.	Only approved requests can be extended. Click the button to the right of the **Show Requests by Status** field.
3.	Click the **Approved** list item. 
4.	If you know the employee's ID, it is the quickest way to locate their leave request. Click in the **Employee ID** field.
5.	Enter the desired information into the **Employee ID** field. For this example, enter **10000017**.
6.	Click the **Search** button. 
7.	Review the existing approved leaves for the employee. You can see that the employee was on **Paid Pregnancy Disability** from **2/10/2018** to **2/24/2018**, then moved to **Unpaid Pregnancy Disability** from **2/24/2018** to **4/9/2018**. The employee is now extending their leave with **Parental Bonding** starting **4/9/2018**. A new leave must be entered because the leave type must change.
8.	Navigate to the **Request Extended Absence** page. Click the **UC Customizations** menu.
9.	Click the **Request Extended Absence** menu. 
10.	Click in the **Empl ID** field.
11.	Enter the desired information into the **Empl ID** field. For this example, enter **10000077**.
12.	Click the **Search** button. 
13.	The existing leaves appear in the **Extended Absence Summary** section.
14.	Enter the new leave in the **New Extended Absence Request** section.

Step	Action
15.	The **Start Date** of the new request must match the **Expected Return Date** of the last request. This ensures there is no break in the leave. Click in the **Start Date** field.
16.	Enter the desired information into the **Start Date** field. For this example, enter **4/9/18**.
17.	Click in the **Expected Return Date** field.
18.	Enter the desired information into the **Expected Return Date** field. For this example, enter **4/20/2018**.
19.	Press **[Tab]**.
20.	Additional fields become available. Click the button to the right of the **Leave** field.
21.	Select the appropriate **Leave** type. For this example, click the **Parental Bonding*** list item. 
22.	A warning message appears. Click the **OK** button. 
23.	Click the button to the right of the **FMLA/CFRA/PDLL Leave** field.
24.	Select the appropriate FMLA, CFRA or PDLL option. For this example, click the **Parental Bonding-FMLA** list item. 
25.	Click the button to the right of the **Paid/Unpaid** field.
26.	Select the appropriate pay option. For this example, click the **Unpaid-Block** list item. 
27.	Click the scroll bar.

Step	Action
28.	Enter the last date the employee was physically at work. This date should be the same date entered on the original leave, in this case **02/09/2018**. This is a required field. Click in the **Last Date Worked** field. 
29.	Enter the desired information into the **Last Date Worked** field. For this example, enter **2/9/18**.
30.	You must enter **Notes** any time you enter or update a leave request. Click the **Notes** link. 
31.	Click in the **Requester Notes** field. 
32.	Enter the desired information into the **Requester Notes** field. For this example, enter **Parental Bonding leave approved.**.
33.	Click the **OK** button. 
34.	Click the **Submit** button. 
35.	A confirmation message appears. Click the **Yes** button. 
36.	A second message appears. Click the **OK** button. 
37.	Click the scroll bar.
38.	You have extended a leave of absence with a new leave type. **End of Procedure.**

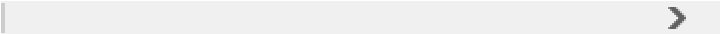
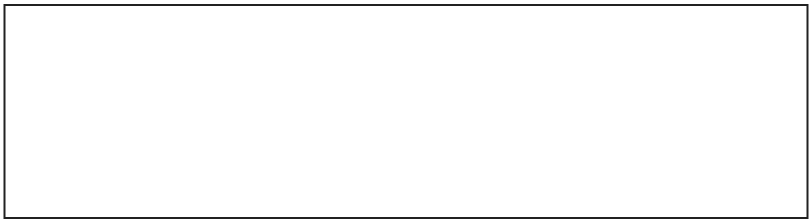
Cancel an Approved Leave of Absence

Use this task to cancel an approved leave of absence. Use this process when the leave has already been approved and processed into **Job Data** by UCPC WFA Production.

When UCPC WFA Production receives the cancel request, they will delete the leave row from **Job Data**.

Navigation: PeopleSoft Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > UC Customizations > **Administer Extended Absence**

Step	Action
1.	Use the **Administer Extended Absence** page to search for existing leave requests. Enter search criteria in the header, then click the **Search** button.
2.	Only approved requests can be cancelled. Click the button to the right of the **Show Requests by Status** field.
3.	Click the **Approved** list item. 
4.	If you know the employee's ID, it is the quickest way to locate their leave request. Click in the **Employee ID** field.
5.	Enter the desired information into the **Employee ID** field. For this example, enter **10001479**.
6.	Click the **Search** button. 
7.	The requests that meet the search criteria appear in the **Administer Extended Absence** section. For this example, the request for **Flynn Perman** must be cancelled.
8.	Click the scroll bar.
9.	Click the **Cancel** button. 
10.	The leave request appears in the **Administer Extended Absence** section.

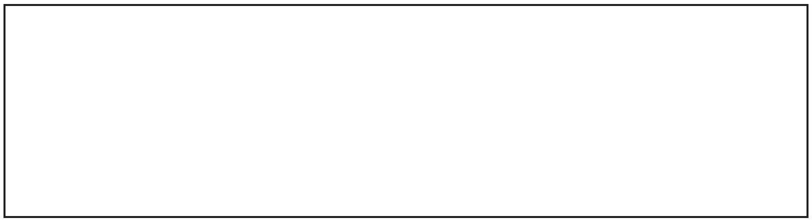
Step	Action
11.	Click the scroll bar. 
12.	You must enter **Notes** any time you enter or update a leave request. Click the **Notes** link. 
13.	Enter a note about the cancellation. Include information about accrual adjustments that need to occur as a result of the cancellation. Click in the **Requester Notes** field. 
14.	Enter the desired information into the **Requester Notes** field. For this example, enter **Employee did not take the personal leave. Vacation balances need to be adjusted.**.
15.	Click the **OK** button. 
16.	Click the **Submit** button. 
17.	A confirmation message appears. Click the **OK** button. 
18.	Click the scroll bar.
19.	You have cancelled an approved leave of absence. **End of Procedure.**

Return from Leave of Absence

Use this task to enter a request to return an employee from leave of absence.

Navigation: PeopleSoft Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > UC Customizations > **Administer Extended Absence**

Step	Action
1.	Use the **Administer Extended Absence** page to search for the leave request. Enter search criteria in the header, then click the **Search** button.
2.	Only approved requests can be updated to return an employee from leave. Click the button to the right of the **Show Requests by Status** field. 
3.	Click the **Approved** list item. 
4.	If you know the employee's ID, it is the quickest way to locate their leave request. Click in the **Employee ID** field. 
5.	Enter the desired information into the **Employee ID** field. For this example, enter **10000107**.
6.	Click the **Search** button. 
7.	The requests that meet the search criteria appear in the **Administer Extended Absence** section. For this example, the request for **LeaAnn Morge** must be updated to return the employee from leave.
8.	Click the scroll bar.
9.	Click the **Edit** button. 
10.	The leave request appears in the **Administer Extended Absence** section.
11.	Enter the date the employee returned to work. Click in the **Actual Return Date** field. 
12.	Enter the desired information into the **Actual Return Date** field. For this example, enter **7/10/2018**.
13.	Click the scroll bar.
14.	You must enter **Notes** any time you enter or update a leave request. Click the **Notes** link. 

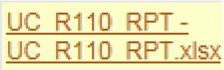
Step	Action
15.	Click in the **Requester Notes** field. 
16.	Enter the desired information into the **Requester Notes** field. For this example, enter **Employee returned from leave on 7/10/2018**.
17.	Click the **OK** button. 
18.	Click the **Submit** button. 
19.	A confirmation message appears. Click the **OK** button. 
20.	Click the scroll bar.
21.	You have entered a request to return an employee from leave of absence. **End of Procedure.**

Review Leave Monitoring Report

Use this task to access and review the **Leave Monitoring Report** in UCPath.

Navigation: PeopleSoft Menu > Reporting Tools > **Report Manager**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Reports are accessed using the **Report Manager** page. The reports listed have already been generated and are ready for you to review.
2.	Click the **UC_R110_RPT.xlsx** link, which is the **Leave Monitoring Report** provided in Excel format. UC_R110_RPT - UC_R110_RPT.xlsx

Step	Action
3.	Click the **UC_R110_RPT.xlsx** link to open the report in Excel.  UC_R110_RPT.xlsx
4.	Click the **Open** list item.  Open The file won't be saved automatically.
5.	Click the **Maximize** button.
6.	The **Leave Monitoring** report displays only departments and employees for which you have security access. This report lists employees on leave of absence as recorded in **Job Data**. This report includes leave type and begin/end dates, and is sorted by upcoming end date.
7.	Click the scroll bar to view additional rows.
8.	Click the scroll bar to view additional columns.
9.	Click the scroll bar.
10.	Click the **Close** button.
11.	You have reviewed the **Leave Monitoring Report** in UCPath. **End of Procedure.**

View Employee Absence Balance Data

Use this task to review employee leave balances in UCPath.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Admin - Review Absence Balance**

Note: This page also may be available in Workcenter depending on your security access.

Step	Action
12.	This simulation reviews a variety of leave accrual examples. This first example is a staff employee with vacation and sick leave accruals.

Step	Action
13.	Click in the **Empl ID** field. 
14.	Enter the desired information into the **Empl ID** field. For this example, enter **10006512**.
15.	Click the **Search** button. 
16.	The **Admin - Review Absence Balance** page displays the leave accrual balances for Alex as of 01/31/2018.
17.	You can change the leave accrual balance period by changing the **As of Date**. Click the **Look up As of Date** button. 🔍
18.	UCPath displays leave accrual periods for the employee. Select the appropriate date. For this example, click the **12/31/2017** list item. 
19.	UCPath displays Alex's leave accrual balances as of 12/31/2017. First review the **Current Balance** section on this page.
20.	The **Leave** column displays the employee's leave accrual types for the period. Alex has **Vacation** and **Sick** leave accrual types. Note that **Service Months** shows the employee's months of service for leave accrual tier purposes. **Service Months** do not correspond to service credit for retirement purposes.
21.	The **Beginning Balance** column displays the leave accrual balances at the start of the selected period.
22.	The **Taken** column displays the leave accrual balances taken during the period.
23.	The **Earned** column displays the leave accrual earned during the period.
24.	The **Adjustments** column displays the leave accruals adjusted during the period. The **Adjustments** column is also used to initially store leave hours converted from PPS/PeopleSoft onto UCPath.
25.	The **Ending Balance** column displays the ending leave accrual balances for the period.
26.	The **Accrual Max** column displays the leave accrual maximum for the leave accrual type.
27.	The **Accrual For Pay Period By Appointment** section displays the leave accrual factors for each of the employee's appointments (UC jobs).

Step	Action
28.	Each row in this section represents one appointment for the period. This employee has one row, so this employee has one appointment for the period.
29.	The **Pay Period Hours** column displays the hours in the period that are eligible for leave accruals for each appointment.
30.	Multiply the **Pay Period Hours** by the **Vacation Factor** to determine the **Vacation Accrued** for the period. In this example, 168 x .057692 equals 9.692256. Multiply the **Pay Period Hours** by the **Sick Factor** to determine the **Sick Accrued** for the period. The **Sick Accrued** and **Vacation Accrued** results are rounded up and appear in the **Earned** column in the **Current Balance** section.
31.	Read the disclaimers in each section on this page. Balances reflect what has been processed to date for the **As of Date**. Note that FMLA, CFRA and/or PDLL balances appear on this page when the employee is on a Paid or Intermittent FMLA, CFRA and/or PDLL leave.
32.	Return to the most recent period for this employee. Click the **Look up As of Date** button. 🔍
33.	Select the appropriate date. For this example, click the **01/31/2018** list item. 01/31/2018
34.	Balances as of 01/31/2018 now appear. Let's review another leave accrual example.
35.	Click the **Return to Search** button. Return to Search
36.	Click the **Clear** button. Clear
37.	The next example shows **Sabbatical Leave** accruals.
38.	Click in the **Empl ID** field.
39.	Enter the desired information into the **Empl ID** field. For this example, enter **10006514**.
40.	Click the **Search** button. Search

Step	Action
41.	The **Admin - Review Absence Balance** page displays an employee with **Sabbatical Leave**.
42.	The **0** in the **Earned** column seems to indicate that the employee has not earned any sabbatical credits for the period. That assumption is incorrect. Sabbatical credits do not appear on this page until the credits are a whole number.
43.	Let's review another leave accrual example: a Post Doctoral employee. Click the **Return to Search** button. 
44.	Click the **Clear** button. 
45.	Click in the **Empl ID** field. 
46.	Enter the desired information into the **Empl ID** field. For this example, enter **10007003**.
47.	Click the **Search** button. 
48.	UCPath displays **Post Doc PTO** and **Post Doc Sick** leave accrual balances as of 01/31/2018.
49.	**Post Doc PTO** and **Post Doc Sick** leave accruals are front-loaded (awarded) to the employee for the entire anniversary year at the start of each anniversary year. This means that Post Doc employees do not earn leave hours monthly or on a quadri-cycle. The front-load leave accrual amount is prorated for the anniversary year based on the employee's **Expected End Date** on the **Job Data** page. Unused Post Doc PTO does not carry over to the next accrual year. Unused Post Doc Sick does carry over to the next accrual year.
50.	Let's review another leave accrual example: an employee who is reaching their leave accrual maximum. Click the **Return to Search** button. 
51.	Click the **Clear** button. 
52.	Enter the desired information into the **Empl ID** field. For this example, enter **10007049**.

Step	Action
53.	Click the **Search** button. 
54.	UCPath displays leave accrual balances for Mays Sweet as of 01/31/2018.
55.	Note that there is an additional column in the **Current Balance** section. The **Approaching Max** column appears when an employee is approaching or has reached the leave accrual maximum for a leave accrual type. In this example, the **Y** indicates Mays will soon reach the **Vacation** accrual maximum.
56.	Let's look at another example: an employee who has no leave accrual balances. Click the **Return to Search** button. 
57.	Click the **Clear** button. 
58.	Enter the desired information into the **Empl ID** field. For this example, enter **10006511**.
59.	Click the **Search** button. 
60.	The page appears for Reynaldo Madrigal. Note the text in red font states that there are no absence balances for Reynaldo for the selected period. Remember that changing the **As of Date** may display balances for other periods.
61.	Click the **Return to Search** button. 
62.	Click the **Clear** button. 
63.	You have reviewed leave accrual balances for an employee. **End of Procedure.**

Job Aid: Career & Benefits Elig Hrs ADD/INQ Pages

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMABM292JA_CareerandBenefitsEligHrs_D1Rev00.pdf) to open the **Career & Benefit Elig Hrs ADD/INQ** Pages job aid in a new web browser window/tab.

Job Aid: Extended Absence Request Leaves and Description

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMABML200JA_AbsenceRequ est_LeaveDescriptions_D1Rev00.pdf) to open the **Extended Absence Request Leaves and Description** job aid in a new web browser window/tab.

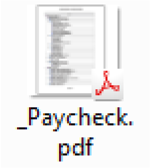
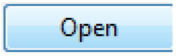
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
64.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
65.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
66.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
67.	Click the button to the right of the **Category** field. 
68.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
69.	Click in the **Subject** field.
70.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.

Step	Action
71.	Click in the **Description** field.
72.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
73.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
74.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
75.	Click in the **Best Contact Phone Number** field.
76.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
77.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
78.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
79.	Click the **Add Attachment** link. 
80.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
81.	For this example, click the **_Paycheck.pdf** list item. 
82.	Click the **Open** button. 
83.	The file name appears in the **Attachments** box.
84.	Click the **Submit** button.
85.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
86.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
87.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.

Step	Action
88.	Click the scroll bar.
89.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
90.	Click the scroll bar.
91.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
92.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

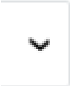
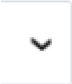
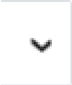
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
93.	Click the **Ask UCPath Center** button. 
94.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
95.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.

Step	Action
96.	UCPath returned one result. Click the scroll bar.
97.	Click the **Create an Inquiry** link. 
98.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
99.	Click the button to the right of the **Requested By** field. 
100.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
101.	Click the button to the right of the **Topic** field. 
102.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
103.	Click the button to the right of the **Category** field. 
104.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
105.	Click in the **Subject** field.
106.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
107.	Click the scroll bar.
108.	Click in the **Description** field.

Step	Action
109.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
110.	In this example, the full **Description** was completed on your behalf.
111.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
112.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
113.	Click the **Submit Inquiry** button. 
114.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
115.	The submitter's name appears.
116.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

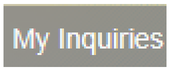
Reopen Closed UCPath Center Case

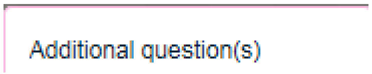
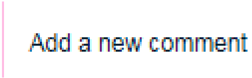
Use this task to reopen a closed inquiry via the UCPath website.

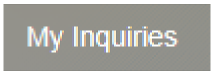
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
117.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 

Step	Action
118.	Click the **My Closed Inquiries** link. 
119.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
120.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
121.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
122.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
123.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
124.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
125.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 

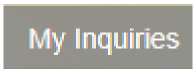
Step	Action
126.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
127.	Click the scroll bar.
128.	Notice the comment now appears in the **Case Comments** section.
129.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
130.	Return to the top of the page. Click the scroll bar.
131.	Click the **My Inquiries** link. 
132.	The new inquiry appears in the **My Open Inquires** list.
133.	You have reopened a closed inquiry. **End of Procedure.**

Monitor UCPath Center Cases

Use this task to review the status of an existing inquiry via the UCPath website.

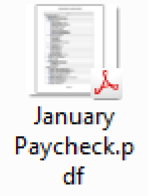
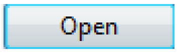
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

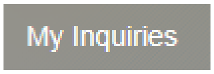
Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
134.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 

Step	Action
135.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
136.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
137.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
138.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link.  Date/Time Opened ▲
139.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again..  Date/Time Opened ▼
140.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link.  00180573
141.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field.  Add a new comment
142.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.

Step	Action
143.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
144.	Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center
145.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
146.	Click the scroll bar.
147.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link.  View All
148.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▾
149.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
150.	To return to the case details, click the **00180573** link.  00180573
151.	Click the scroll bar.
152.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link.  Upload Files

Step	Action
153.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
154.	Click the **Open** button. 
155.	A message confirms the file was uploaded. Click the **Done** button. 
156.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
157.	You can view all attachments in a list. Click the **View All** link. 
158.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 
159.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 
160.	Click the **00180573** link. 
161.	Click the scroll bar.

Step	Action
162.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
163.	Click the **Email** link.  Sandbox: UCPath Center: Inquir.
164.	Review the email information as you scroll down the page. Click the scroll bar.
165.	Review the email from the UCPath Center. Click the scroll bar.
166.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
167.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
168.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
169.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
170.	Click the **00180567** link.  00180567
171.	Click the scroll bar.
172.	Notice the **Status** is **Closed/Resolved**.
173.	Click the scroll bar.

Step	Action
174.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link.
175.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMABML201: Employee Accrual Adjustments

View Employee Absence Balance Data

Use this task to review employee leave balances in UCPath.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Admin - Review Absence Balance**

Note: This page also may be available in Workcenter depending on your security access.

Step	Action
176.	This simulation reviews a variety of leave accrual examples. This first example is a staff employee with vacation and sick leave accruals.
177.	Click in the **Empl ID** field.
178.	Enter the desired information into the **Empl ID** field. For this example, enter **10006512**.
179.	Click the **Search** button. Search
180.	The **Admin - Review Absence Balance** page displays the leave accrual balances for Alex as of 01/31/2018.
181.	You can change the leave accrual balance period by changing the **As of Date**. Click the **Look up As of Date** button.
182.	UCPath displays leave accrual periods for the employee. Select the appropriate date. For this example, click the **12/31/2017** list item. 12/31/2017

Step	Action
183.	UCPath displays Alex's leave accrual balances as of 12/31/2017. First review the **Current Balance** section on this page.
184.	The **Leave** column displays the employee's leave accrual types for the period. Alex has **Vacation** and **Sick** leave accrual types. Note that **Service Months** shows the employee's months of service for leave accrual tier purposes. **Service Months** do <u>not</u> correspond to service credit for retirement purposes.
185.	The **Beginning Balance** column displays the leave accrual balances at the start of the selected period.
186.	The **Taken** column displays the leave accrual balances taken during the period.
187.	The **Earned** column displays the leave accrual earned during the period.
188.	The **Adjustments** column displays the leave accruals adjusted during the period. The **Adjustments** column is also used to initially store leave hours converted from PPS/PeopleSoft onto UCPath.
189.	The **Ending Balance** column displays the ending leave accrual balances for the period.
190.	The **Accrual Max** column displays the leave accrual maximum for the leave accrual type.
191.	The **Accrual For Pay Period By Appointment** section displays the leave accrual factors for each of the employee's appointments (UC jobs).
192.	Each row in this section represents one appointment for the period. This employee has one row, so this employee has one appointment for the period.
193.	The **Pay Period Hours** column displays the hours in the period that are eligible for leave accruals for each appointment.
194.	Multiply the **Pay Period Hours** by the **Vacation Factor** to determine the **Vacation Accrued** for the period. In this example, 168 x .057692 equals 9.692256. Multiply the **Pay Period Hours** by the **Sick Factor** to determine the **Sick Accrued** for the period. The **Sick Accrued** and **Vacation Accrued** results are rounded up and appear in the **Earned** column in the **Current Balance** section.
195.	Read the disclaimers in each section on this page. Balances reflect what has been <u>processed to date</u> for the **As of Date**. Note that FMLA, CFRA and/or PDLL balances appear on this page when the employee is on a <u>Paid or Intermittent</u> FMLA, CFRA and/or PDLL leave.

Step	Action
196.	Return to the most recent period for this employee. Click the **Look up As of Date** button.
197.	Select the appropriate date. For this example, click the **01/31/2018** list item. 01/31/2018
198.	Balances as of 01/31/2018 now appear. Let's review another leave accrual example.
199.	Click the **Return to Search** button. 
200.	Click the **Clear** button. 
201.	The next example shows **Sabbatical Leave** accruals.
202.	Click in the **Empl ID** field.
203.	Enter the desired information into the **Empl ID** field. For this example, enter **10006514**.
204.	Click the **Search** button. 
205.	The **Admin - Review Absence Balance** page displays an employee with **Sabbatical Leave**.
206.	The **0** in the **Earned** column seems to indicate that the employee has not earned any sabbatical credits for the period. That assumption is incorrect. Sabbatical credits do not appear on this page until the credits are a whole number.
207.	Let's review another leave accrual example: a Post Doctoral employee. Click the **Return to Search** button. 
208.	Click the **Clear** button. 
209.	Click in the **Empl ID** field.

Step	Action
210.	Enter the desired information into the **Empl ID** field. For this example, enter **10007003**.
211.	Click the **Search** button. Search
212.	UCPath displays **Post Doc PTO** and **Post Doc Sick** leave accrual balances as of 01/31/2018.
213.	**Post Doc PTO** and **Post Doc Sick** leave accruals are front-loaded (awarded) to the employee for the entire anniversary year at the start of each anniversary year. This means that Post Doc employees do not earn leave hours monthly or on a quadri-cycle. The front-load leave accrual amount is prorated for the anniversary year based on the employee's **Expected End Date** on the **Job Data** page. Unused Post Doc PTO does not carry over to the next accrual year. Unused Post Doc Sick does carry over to the next accrual year.
214.	Let's review another leave accrual example: an employee who is reaching their leave accrual maximum. Click the **Return to Search** button. Return to Search
215.	Click the **Clear** button. Clear
216.	Enter the desired information into the **Empl ID** field. For this example, enter **10007049**.
217.	Click the **Search** button. Search
218.	UCPath displays leave accrual balances for Mays Sweet as of 01/31/2018.
219.	Note that there is an additional column in the **Current Balance** section. The **Approaching Max** column appears when an employee is approaching or has reached the leave accrual maximum for a leave accrual type. In this example, the **Y** indicates Mays will soon reach the **Vacation** accrual maximum.
220.	Let's look at another example: an employee who has no leave accrual balances. Click the **Return to Search** button. Return to Search
221.	Click the **Clear** button. Clear

Step	Action
222.	Enter the desired information into the **Empl ID** field. For this example, enter **10006511**.
223.	Click the **Search** button. Search
224.	The page appears for Reynaldo Madrigal. Note the text in red font states that there are no absence balances for Reynaldo for the selected period. Remember that changing the **As of Date** may display balances for other periods.
225.	Click the **Return to Search** button. Return to Search
226.	Click the **Clear** button. Clear
227.	You have reviewed leave accrual balances for an employee. **End of Procedure.**

Job Aid: Earn Code to Absence Mapping

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMABM105JA_EarnCode_AbsenceMapping_D1Rev00.pdf) to open the **Earn Code to Absence Mapping** job aid in a new web browser window/tab.

Enter Accrual Adjustment

Use this task to enter an accrual adjustment transaction.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Manage Accruals**

Note: This page also may be available in Workcenter depending on your security access.

Step	Action
1.	When you navigate to the **Manage Accruals** page, the system displays the **Find an Existing Value** tab, which you use to search for existing accrual adjustments. Click the **Add a New Value** tab to begin entering the data for a new accrual adjustment Add a New Value
2.	Enter the desired information into the **Department** field.

Step	Action
3.	Click in the **Employee Classification** field.
4.	Enter the desired information into the **Employee Classification** field.
5.	Click the **Add** button.  Add
6.	Enter the desired information into the **Empl ID** field.
7.	Click in the **Begin Date** field.
8.	Enter the desired information into the **Begin Date** field.
9.	Click in the **End Date** field.
10.	Enter the desired information into the **End Date** field.
11.	Click the button to the right of the **Adjustment/ Payout/ Take** field.
12.	Select the appropriate option for the adjustment you are entering.  Payout
13.	Click in the **Earn Code** field.
14.	Enter the desired information into the **Earn Code** field.
15.	Click in the **Absence Element** field.
16.	Click the **Look up Absence Element** button.
17.	**Earn Code** field values are appropriately mapped to **Absence Element** field values. Therefore, when you enter an earnings code, only valid **Absence Element** values for the selected earnings code appear in the lookup. Click to select the appropriate **Absence Element** list item.  Regular Comp Time Payout
18.	Click in the **Hours/ Credits** field.
19.	Enter the desired information into the **Hours/ Credits** field.

Step	Action
20.	If you enter an **Adjustment/Payout/Take** field value of **Take** for a leave accrual adjustment, you can select the appropriate **FMLA/CFRA /PDLL USAGE?** value to indicate the adjustment should count toward the employee's FMLA (Family Medical Leave Act), CFRA (California Family Rights Act), or PDLL (Pregnancy Disability Leave Law) entitlement usage. The field defaults to **N** (No). Additional options are: • **A-FMLA:** Updates only the FMLA entitlement balance. • **B-CFRA:** Updates only the CFRA entitlement balance. • **C-PDLL:** Updates only the PDLL entitlement balance. • **D-FMLA/CFRA:** Updates both the FMLA and CFRA entitlement balances. • **E-FMLA/PDLL:** Updates both the FMLA and PDLL entitlement balances. • **Y-Yes:** Updates the applicable FMLA entitlement balance. Note that there is no difference between the **A** value and the **Y** value.
21.	Click in the **Comments** field. 
22.	Comments are required. In the **Comments** field, enter the appropriate detail related to the adjustment you are entering. You can enter up to 80 characters.
23.	If a funding accounting unit (FAU) override is necessary, use the **Chart Field Detail** tab to enter the details.
24.	If necessary, scroll right to display additional fields and page values.
25.	You can enter multiple rows on this page. Remember that the additional employee(s) for whom you want to enter an adjustment, must be in the same department and empl class you entered when you started the transaction. To insert a new row, click the **Add a new row** button. 
26.	When you are finished entering accrual adjustment details on this page, click the **Save** button. 
27.	If there are no errors, the **Requester** field displays your Empl ID and name. The **Requested** field displays the date and time you saved the transaction. The **Transaction ID** field at the top left, displays a unique, system-generated transaction number.

Step	Action
28.	You must click **Submit** to prompt the AWE approval workflow for this transaction. If you navigate away from the page without clicking **Submit**, you can search for your saved transaction using the **Manage Accruals** search page. Click the **Submit** button. 
29.	You have entered an accrual adjustment transaction. **End of Procedure.**

Job Aid:Complete the Text File Template for Manage Accruals Upload

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMABM201JA_CompletingtheTextFileTemplate_Rev02.pdf) to open the **Complete the Text File Template for Manage Accruals Upload** job aid in a new web browser window/tab.

Upload E-084 File

Use this task to upload an E-084 file. The I181 template used for this type of upload is located on the **UCPath Location Support** SharePoint site: https://sp.ucop.edu/sites/ucpc/UCPathLocationSupport/UCPathTemplates (https://sp.ucop.edu/sites/ucpc/UCPathLocationSupport/UCPathTemplates)

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Self Service Transaction Links**

Note: This page also may be available in Workcenter depending on your security access.

Step	Action
1.	Click the **Upload E-084 File** link. 
2.	Use the **Find an Existing Value** tab to search for and select an existing run control ID. If search results return no matching values, use the **Add a New Value** tab to enter a new one. Enter the desired information into the **Run Control ID** field.
3.	Click the **Add** button. 

Step	Action
4.	The system displays the **Upload E-084** page controls for uploading an attachment. Click the **Add Attachment** button. 
5.	The system displays the **File Attachment** window. Click the **Browse** button. 
6.	The **Choose File to Upload** window appears. Use this window to search for and select the file you want to upload. LACMP_I181_HRSONLY_051017 5/10/2017 11:10 AM Text Docu
7.	Click the **Open** button. 
8.	The **File Attachment** window appears, which displays the selected file path. Click the **Upload** button. 
9.	The **Message** dialog box appears, which indicates the file was successfully attached. Click the **OK** button. 
10.	After you successfully add the attachment, the system renames the file to include your user ID.
11.	If necessary, use the **View Attachment** button to verify the file you attached. Use the **Delete Attachment** button to delete the attachment.
12.	When you are ready to upload the file, click the **Run** button. 
13.	The system displays the **Process Scheduler Request** page. Click the **OK** button. 

Step	Action
14.	UCPath automatically assign a **Process Instance** number to identify the process request. Click the **Process Monitor** link to review the upload status process. After the data successfully loads the to the **Manage Accrual** page, the system initiates approval workflow.
15.	You have uploaded an E-084 file. **End of Procedure.**

Review Manage Accrual Transactions

Use this transaction to review manage accrual transactions using the custom, view-only **Manage Accrual Transactions** page.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Manage Accrual Transactions**

Note: This page also may be available in Workcenter depending on your security access.

Step	Action
1.	To access and view one or more existing transactions, begin the search from the **Find an Existing Value** tab on the **Manage Accrual Trans History** search page. The search page defaults to the **Basic Search** fields, but you can click the **Advanced Search** link to display additional search fields and advanced search functions. This example shows the steps for performing a basic search.
2.	Click the button to the right of the **Search by** field. ⌄
3.	Select the appropriate list item. 
4.	Enter the desired information into the **begins with** field.
5.	Click the **Search** button. 
6.	The **Manage Accrual Transactions** page appears. If necessary, use the horizontal and vertical scroll bars to review all fields on the page.

Step	Action
7.	The header displays the unique **Transaction ID**, the **Department**, and the **Employee Class**. If the transaction is related to an extended absence, the **Extended Absence Transaction No.** field displays the UCPath absence request ID. An initiator can enter an accrual adjustment transaction for only one department and one employee class combination.
8.	The **Adjustment/Payout** tab displays the employee ID(s) and name(s) of the employee for which one or more adjustments is being entered. It also displays adjustment details, including the date or date range, the adjustment type and earnings code, and the hours/credits.
9.	When **Adjustments/Payout/Take** field value is **Take**, and if for a leave accrual adjustment, the initiator can indicate whether the adjustment should count toward FMLA (Family Medical Leave Act), CFRA (California Family Rights Act), or PDLL (Pregnancy Disability Leave Law) entitlement usage. The field defaults to **N (No)**. Additional options are: • **A-FMLA:** Updates only the FMLA entitlement balance. • **B-CFRA:** Updates only the CFRA entitlement balance. • **C-PDLL:** Updates only the PDLL entitlement balance. • **D-FMLA/CFRA:** Updates both the FMLA and CFRA entitlement balances. • **E-FMLA/PDLL:** Updates both the FMLA and PDLL entitlement balances. • **Y-Yes:** Updates the applicable FMLA entitlement balance. Note that there is no difference between the **A** value and the **Y** value.
10.	If necessary, scroll right to display additional fields and page options.
11.	The initiator is required to enter comments to include the appropriate detail related to the adjustment.
12.	If necessary, scroll left to display additional fields and page functions.
13.	The system displays the initiator's User ID and name, and the date and time the transaction was submitted.
14.	When you are finished reviewing the transaction, click the **Return to Search** button. 
15.	You have reviewed how to access the **Manage Accrual Transactions** page. **End of Procedure.**

Enter Catastrophic Leave Donation

Use this task to enter a catastrophic leave donation transaction for employees in the same department and employee class.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Manage Accruals**

Note: This page also may be available in Workcenter depending on your security access.

Step	Action
1.	When you navigate to the **Manage Accruals** page, the system displays the **Find an Existing Value** tab, which you use to search for existing leave donations. Click the **Add a New Value** tab to begin the steps for entering a new leave donation. Add a New Value
2.	Enter the desired information into the **Department** field.
3.	Click in the **Employee Classification** field.
4.	Enter the desired information into the **Employee Classification** field.
5.	Click the **Add** button. Add
6.	Remember that each transaction contains leave donation types for a specific department and employee class. Therefore, the employee list is restricted to only those employees matching the values you entered on the **Add a New Value** page. Enter the desired information into the **Empl ID** field.
7.	Click in the **Begin Date** field.
8.	Transactions are effective on the date submitted and balances are updated in the next post pay confirm processing. In the **Begin Date** field enter the first day of the pay period in which the donation is submitted. This can be a monthly or bi-weekly period based on the employee's pay schedule. Enter the desired information into the **Begin Date** field.
9.	Click in the **End Date** field.
10.	Enter the last day of the pay period in which the donation occurs. This can be a monthly or bi-weekly period based on the employee's pay schedule. Enter the desired information into the **End Date** field.
11.	Click the button to the right of the **Adjustment/ Payout/ Take** field.

Step	Action
12.	For catastrophic leave donations, always select **Adjustment**. Click the **Adjustment** list item. 
13.	Click in the **Earn Code** field. 
14.	**Earn Code** values and their system descriptions for catastrophic leave donation transactions are: • **CBB** - Donate Cat Leave Bal to Bank • **CBE** - Donat Cat Leav Bal to Employee • **CDB** - Cat Leave Donation to Bank • **CDE** - Cat Leave Donation to Employee • **CRB** - Cat Leave Received from Bank • **CRE** - Cat Leave Received from Employ Enter the desired information into the **Earn Code** field.
15.	**Earn Code** field values are appropriately mapped to **Absence Element** field values. This means that when you enter an earnings code for a catastrophic leave donation, if applicable, the **Absence Element** field values defaults.
16.	Click in the **Hours/ Credits** field. 
17.	Enter the desired information into the **Hours/ Credits** field as a positive amount.
18.	Click in the **Comments** field. 
19.	Comments are required. In the **Comments** field, enter the appropriate detail related to the adjustment you are entering. You can enter up to 80 characters.
20.	To insert a new row on which you can enter another leave donation for an employee in the same department and employee class, click the **Add a new row** button. 
21.	as a positive amount
22.	as a positive amount
23.	as a positive amount
24.	When are you finished entering all leave donation details, click the **Save** button. 

Step	Action
25.	If there are no errors, the **Requester** field displays your Empl ID and name. The **Requested** field displays the date and time you saved the transaction. The **Transaction ID** field at the top left, displays a unique, system-generated transaction number. Note that when you save this page, the system automatically sorts the rows in numeric order by **Empl ID** (first column).
26.	You must click **Submit** to prompt the AWE approval workflow for this transaction. If you navigate away from the page without clicking **Submit**, you can search for it using the **Manage Accruals** search page. Click the **Submit** button. 
27.	You have entered a catastrophic leave donation. **End of Procedure.**

View Existing Catastrophic Leave Donation

Use this task to view an existing catastrophic leave donation transaction.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Manage Accruals**

Note: This page also may be available in Workcenter depending on your security access.

Step	Action
1.	To search for the appropriate transaction, enter search criteria and click **Search**. You can also leave the search fields blank to display all transactions to which you have access. In this example, you will search by **Department** and **Empl Class**. Click in the **Department** field. 
2.	Enter the desired information into the **Department** field.
3.	Click in the **Employee Classification** field. 
4.	Enter the desired information into the **Employee Classification** field.

Step	Action
5.	Click the **Search** button. 
6.	The **Search Results** section displays the transactions that match the search criteria you entered. If no transactions match the search criteria, the system displays a message that 0 results were retrieved. If only one match is found, the system displays the transaction detail on the **Manage Accrual** page. In this example, two transactions match the criteria entered. Click the appropriate **Transaction ID** link to display its detail on the **Manage Accrual** page. 
7.	The **Manage Accrual** page displays the transaction detail. The header information includes the **Transaction ID** number, **Department** number and **Employee Class**.
8.	The **Adjustment/Payout** tab displays the donation details, including the employee's Empl ID, name, and record number. Donation details also include the donation date or date range.
9.	For a catastrophic leave donation, the **Adjustment/Payout/Take** field value is always **Adjustment**. **Earn Code** values and their system descriptions for catastrophic leave donation transactions include: • **CBB** - Donate Cat Leave Bal to Bank • **CBE** - Donat Cat Leav Bal to Employee • **CDB** - Cat Leave Donation to Bank • **CDE** - Cat Leave Donation to Employee • **CRB** - Cat Leave Received from Bank • **CRE** - Cat Leave Received from Employ **Earn Code** field values are appropriately mapped to **Absence Element** field values. This means that when a Location initiator enters an earnings code for a catastrophic leave donation, if applicable, the **Absence Element** field values defaults.
10.	The **Hours/Credits** field indicates the number of hours being donated or received. The **FMLA/CFRA/PDLL** field is used for other types of accrual adjustments made using this page; it does not apply to catastrophic leave donation transactions.
11.	If necessary, scroll right to display additional fields and page options.
12.	Comments are required when a Location initiator enters a catastrophic leave donation.

Step	Action
13.	If necessary, scroll left to display additional fields and page functions.
14.	Notice that below the transaction data entry fields, the system displays the employee ID and name of the user who initiated the transaction. The system also displays the date and time the transaction was submitted.
15.	The approval status monitor (**Manage Accruals Stage 10** section in this example) displays the approval workflow details, including completed and pending approvals. You can expand the section to view the detailed AWE workflow if necessary.
16.	To begin a search for another catastrophic leave donation, click the **Return to Search** button. 
17.	You have viewed an existing catastrophic leave donation transaction. **End of Procedure.**

Job Aid: Career & Benefits Elig Hrs INQ Page for Locations

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMABML195JA_CareerandBenefitsEligHrsforLocations_D1Rev00.pdf) to open the **Career & Benefit Elig Hrs INQ Page for Locations** job aid in a new web browser window/tab.

Submit Case to UCPath Center

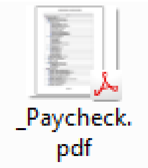
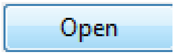
Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
18.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 

Step	Action
19.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
20.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.  Payroll
21.	Click the button to the right of the **Category** field. 
22.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
23.	Click in the **Subject** field.
24.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
25.	Click in the **Description** field.
26.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
27.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
28.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
29.	Click in the **Best Contact Phone Number** field.
30.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
31.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
32.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
33.	Click the **Add Attachment** link.  Add Attachment

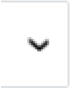
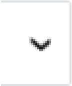
Step	Action
34.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
35.	For this example, click the **_Paycheck.pdf** list item. 
36.	Click the **Open** button. 
37.	The file name appears in the **Attachments** box.
38.	Click the **Submit** button.
39.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
40.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
41.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
42.	Click the scroll bar.
43.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
44.	Click the scroll bar.
45.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
46.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

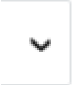
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
47.	Click the **Ask UCPath Center** button. 
48.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
49.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
50.	UCPath returned one result. Click the scroll bar.
51.	Click the **Create an Inquiry** link. 
52.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
53.	Click the button to the right of the **Requested By** field. 
54.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
55.	Click the button to the right of the **Topic** field. 

Step	Action
56.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
57.	Click the button to the right of the **Category** field. 
58.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
59.	Click in the **Subject** field.
60.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
61.	Click the scroll bar.
62.	Click in the **Description** field.
63.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
64.	In this example, the full **Description** was completed on your behalf.
65.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
66.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
67.	Click the **Submit Inquiry** button. 
68.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
69.	The submitter's name appears.
70.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

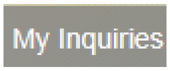
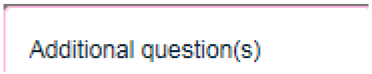
Reopen Closed UCPath Center Case

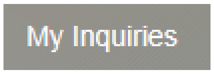
Use this task to reopen a closed inquiry via the UCPath website.

A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
71.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link.  My Inquiries
72.	Click the **My Closed Inquiries** link.  My Closed Inquiries
73.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link.  00180567
74.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button.  Select Your Reopen Reason ▼
75.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item.  Additional question(s)

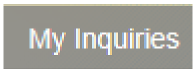
Step	Action
76.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
77.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
78.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
79.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
80.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
81.	Click the scroll bar.
82.	Notice the comment now appears in the **Case Comments** section.
83.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
84.	Return to the top of the page. Click the scroll bar.
85.	Click the **My Inquiries** link. 
86.	The new inquiry appears in the **My Open Inquires** list.
87.	You have reopened a closed inquiry. **End of Procedure.**

Monitor UCPath Center Cases

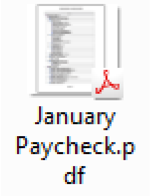
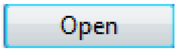
Use this task to review the status of an existing inquiry via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
88.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
89.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
90.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
91.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
92.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 

Step	Action
93.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 
94.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 
95.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field. 
96.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
97.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
98.	Click the **Submit comment to the UCPath Center** button. 
99.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
100.	Click the scroll bar.
101.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. 

Step	Action
102.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. 
103.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
104.	To return to the case details, click the **00180573** link. 
105.	Click the scroll bar.
106.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
107.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
108.	Click the **Open** button. 
109.	A message confirms the file was uploaded. Click the **Done** button. 
110.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
111.	You can view all attachments in a list. Click the **View All** link. 

Step	Action
112.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. ▼
113.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. ▼
114.	Click the **00180573** link. 00180573
115.	Click the scroll bar.
116.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
117.	Click the **Email** link. Sandbox: UCPath Center: Inquir.
118.	Review the email information as you scroll down the page. Click the scroll bar.
119.	Review the email from the UCPath Center. Click the scroll bar.
120.	Click the case number to return to the details of the case. Click the **00180573** link. 00180573
121.	To review closed inquiries, click the **My Inquiries** link. My Inquiries
122.	Click the **My Closed Inquiries** tab. My Closed Inquiries

Step	Action
123.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
124.	Click the **00180567** link. 00180567
125.	Click the scroll bar.
126.	Notice the **Status** is **Closed/Resolved**.
127.	Click the scroll bar.
128.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
129.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

ePerformance

PHCMEPR100: EPR Overview

Review Historical Documents

Use this task to review completed or cancelled documents. You can review historical documents to review prior goals, competencies and ratings.

Navigation:
PeopleSoft Menu > Self Service > Performance Documents > My Performance Documents > **Historical Documents**
OR
PeopleSoft Menu > Self Service > Performance Documents > My Development Documents > **Historical Documents**

Step	Action
1.	This example reviews an historical performance document, but you can use the same process to review historical development documents.

Step	Action
2.	The **Performance Document History** page displays a list of the completed and canceled performance documents. You can see the **Document Type**, **Document Status** and **Business Unit**, as well as the **Period Begin** and **Period End** dates for each document.
3.	In this example, the employee has one historical performance document in the **Completed** status. It is an **Annual Performance Document**.
4.	Click the **Document Type** link to open the historical document. For this example, click the **Annual Performance Documents** link.  Annual Performance Documents
5.	Review the information in the **Performance Process** pane, which identifies the steps and tasks for the selected document. In this example, all steps were completed except the self evaluation.
6.	You can click any step link to expand the step, as seen in this example for the **Review Manager Evaluation** step. Click the **View** link to access the step details, if needed. For this example, do not click the **View** link.
7.	Click the **Hide** (<<) button to collapse the **Performance Process** pane. This provides additional viewing area for the historical document. The **Hide** button works as a toggle to hide or show the panel as needed. For this example, do not hide the **Performance Process** pane.
8.	The header section provides job and employee details.
9.	In this example, the document details appears as tabs on the lower half of the page. You can click each tab to review the associated document details. Or you can switch to the **Long Format** layout to display the information on a single page that allows you to scroll through the sections. For this example, click the **Long Format** link.  Long Format
10.	In this format the **Expand All** option is selected by default. You also have options to collapse all sections, expand a single section or return to the TAB format.
11.	Click the scroll bar. 
12.	You can display the rating information for the section. Click the **Rating Description** button.

Step	Action
13.	Review the historical proficiencies and ratings associated with the document.
14.	Click the **Return** link. 
15.	You have successfully viewed a historical document. **End of Procedure.**

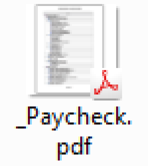
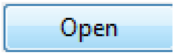
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
16.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
17.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
18.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
19.	Click the button to the right of the **Category** field. 

Step	Action
20.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
21.	Click in the **Subject** field.
22.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
23.	Click in the **Description** field.
24.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
25.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
26.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
27.	Click in the **Best Contact Phone Number** field.
28.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
29.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
30.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
31.	Click the **Add Attachment** link. 
32.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
33.	For this example, click the **_Paycheck.pdf** list item. 
34.	Click the **Open** button. 
35.	The file name appears in the **Attachments** box.

Step	Action
36.	Click the **Submit** button.
37.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
38.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
39.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
40.	Click the scroll bar.
41.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
42.	Click the scroll bar.
43.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
44.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

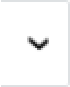
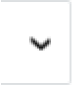
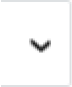
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
45.	Click the **Ask UCPath Center** button. 

Step	Action
46.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
47.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
48.	UCPath returned one result. Click the scroll bar.
49.	Click the **Create an Inquiry** link. 
50.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
51.	Click the button to the right of the **Requested By** field. 
52.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
53.	Click the button to the right of the **Topic** field. 
54.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
55.	Click the button to the right of the **Category** field. 

Step	Action
56.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
57.	Click in the **Subject** field.
58.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
59.	Click the scroll bar.
60.	Click in the **Description** field.
61.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
62.	In this example, the full **Description** was completed on your behalf.
63.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
64.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
65.	Click the **Submit Inquiry** button. 
66.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
67.	The submitter's name appears.
68.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

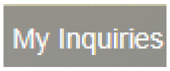
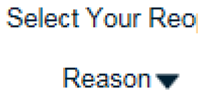
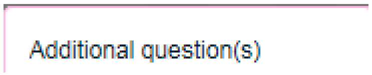
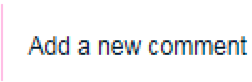
Reopen Closed UCPath Center Case

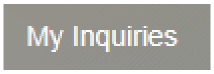
Use this task to reopen a closed inquiry via the UCPath website.

A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
69.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
70.	Click the **My Closed Inquiries** link. 
71.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
72.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
73.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
74.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
75.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 

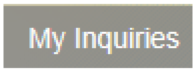
Step	Action
76.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
77.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
78.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
79.	Click the scroll bar.
80.	Notice the comment now appears in the **Case Comments** section.
81.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
82.	Return to the top of the page. Click the scroll bar.
83.	Click the **My Inquiries** link. 
84.	The new inquiry appears in the **My Open Inquires** list.
85.	You have reopened a closed inquiry. **End of Procedure.**

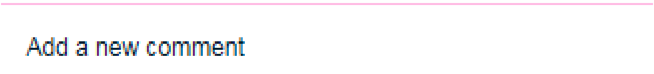
Monitor UCPath Center Cases

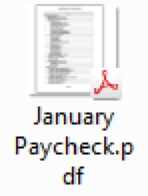
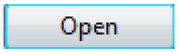
Use this task to review the status of an existing inquiry via the UCPath website.

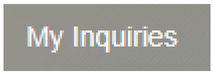
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
86.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
87.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
88.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
89.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
90.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 
91.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 
92.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 

Step	Action
93.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field.  Add a new comment
94.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
95.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
96.	Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center
97.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
98.	Click the scroll bar.
99.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link.  View All
100.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▾
101.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
102.	To return to the case details, click the **00180573** link.  00180573
103.	Click the scroll bar.

Step	Action
104.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
105.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
106.	Click the **Open** button. 
107.	A message confirms the file was uploaded. Click the **Done** button. 
108.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
109.	You can view all attachments in a list. Click the **View All** link. 
110.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 
111.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 

Step	Action
112.	Click the **00180573** link. 00180573
113.	Click the scroll bar.
114.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
115.	Click the **Email** link. Sandbox: UCPath Center: Inquir.
116.	Review the email information as you scroll down the page. Click the scroll bar.
117.	Review the email from the UCPath Center. Click the scroll bar.
118.	Click the case number to return to the details of the case. Click the **00180573** link. 00180573
119.	To review closed inquiries, click the **My Inquiries** link. My Inquiries
120.	Click the **My Closed Inquiries** tab. My Closed Inquiries
121.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
122.	Click the **00180567** link. 00180567
123.	Click the scroll bar.
124.	Notice the **Status** is **Closed/Resolved**.
125.	Click the scroll bar.

Step	Action
126.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
127.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

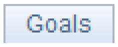
PHCMEPR200: Employee ePerformance Activities

Define Criteria - Add Items (Employee)

Use this task to define criteria for an ePerformance document.

Navigation:
Performance Workcenter > Employee Self Service > **My Current Performance Docs**
OR
Performance Workcenter > Employee Self Service > **My Current Development Docs**

Step	Action
1.	The **Current Performance Documents** page displays your ePerformance documents. Review the list of documents in the **Performance Documents** group box. For this example, you have one current document and the status is **Define Criteria**.
2.	Click the **Document Type** link to access the document. For this example, click the **Annual Performance Documents** link.  Annual Performance Documents
3.	UCPath displays basic information about the document at the top of the page.
4.	The **Performance Process** pane displays the steps and tasks for this document. For this example the current step is **Define Criteria**.
5.	The page sections and format are based on the template assigned when the document was generated. Templates vary from Location to Location. For this example, tabs define the document sections. You can view the sections in a continuous list by clicking the **Long Format** link.

Step	Action
6.	Navigate to the section that requires new criteria. For this example, click the **Goals** tab. 
7.	For this example, the document was populated with pre-defined goals. You can scroll through the document to review the pre-defined goals. Click the horizontal scroll bar.
8.	Use the buttons in each section to update the document items. - Performance notes (notepad icon) - Edit details (pencil icon) - Delete details (trash can icon may not be available for all items) For this example, no changes are needed.
9.	Click the scroll bar.
10.	To add new criteria, click the **Add Item** link in the appropriate section. For this example, click the **Add Item** link in Section 3. 
11.	The **Add Item** page displays four options: 1. Add pre-defined item 2. Add your own Item 3. Copy item from Manager Document 4. Copy Item from My Documents For this example, you will add a pre-defined item and your own item. Let's start with the pre-defined item.
12.	The **Add pre-defined item** option is selected. Click the **Next** button. 
13.	Use the **Add a Pre-Defined Item** page to search for pre-defined goals you can add to the document.
14.	Click in the **Title** field. 
15.	Enter the desired information into the **Title** field. For this example, enter **complete**.
16.	Click the **Search** button. 

Step	Action
17.	A list of items matching the search criteria appears in the **Search Results** section. Select the criteria you want to add. For this example, click the **Complete all QC trainings by Q2** check box. ☐
18.	Click the **Add** button. Add
19.	Click the scroll bar.
20.	Click the scroll bar. <
21.	The pre-defined goal appears in the document. Use the section buttons, as needed, to update the goal. For this example, add another goal using free-form text.
22.	Click the scroll bar.
23.	Click the **Add Item** button. Add Item
24.	Click the **Add your own Item** option. ○
25.	Click the **Next** button. Next
26.	Use the **Add Your Own Item** page to enter free-form text for the criteria.
27.	Enter a title for the criteria. Enter the desired information into the **Title** field. For this example, enter **Complete XYZ document**.
28.	Use the buttons in the **Description** section to format the text.
29.	Click in the **Description** field.
30.	Enter the desired information into the **Description** field. For this example, enter **Complete document by end of Q3**.
31.	The **Status**, **Percent Complete**, **Due Date** and **Start Date** fields are optional. Follow your Location guidelines when entering these fields. For this example, no entries are needed for these fields.
32.	Click the **Add** button. Add

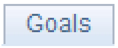
Step	Action
33.	Click the scroll bar. 
34.	The new criteria appears in the document. Use the section buttons, as needed, to update the criteria.
35.	You can continue to add and update criteria by accessing other tabs and items. For this example, no additional changes are needed.
36.	Click the **Save** button. 
37.	You can add or update criteria until your manager finalizes the criteria. In this example the finalize step follows the checkpoints.
38.	You have successfully defined criteria (added pre-defined and free-form items) for an ePerformance document. **End of Procedure.**

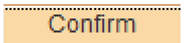
Record Checkpoint Comments (Employee)

Use this task to enter checkpoint comments, update the item's percent complete and share the checkpoint comments with your manager.

Navigation:
Performance Workcenter > Employee Self Service > **My Current Performance Docs**
OR
Performance Workcenter > Employee Self Service > **My Current Development Docs**

Step	Action
1.	The **Current Performance Documents** page displays your ePerformance documents. Review the list of documents in the **Performance Documents** group box. For this example, you have one current document and the status is **Track Progress - Checkpoint 1**.
2.	Click the **Document Type** link to access the document. For this example, click the **Annual Performance Documents** link. 
3.	UCPath displays basic information about the document at the top of the page.

Step	Action
4.	The **Performance Process** pane displays the steps and tasks for this document. For this example the current step is **Checkpoint 1** and the task is **Update and Share**.
5.	The page sections and format are based on the template assigned when the document was generated. Templates vary from Location to Location. For this example, tabs define the document sections. You can view the sections in a continuous list by clicking the **Long Format** link.
6.	Navigate to the section that requires new criteria. For this example, click the **Goals** tab. 
7.	In this example **Goals 1** appears and is ready for your comments. The **Manager Comments** have not been shared yet.
8.	Click the scroll bar.
9.	Click in the **Employee Comments** field.
10.	Enter the desired information into the **Employee Comments** field. For this example, enter **Received customer letter noting my customer service skills.**.
11.	Click the scroll bar. 
12.	Click the scroll bar.
13.	Use the item buttons to display your performance notes and to edit the item details.
14.	For this example, you will update the status and the item's percent complete.
15.	Click the **Edit Details** button. ✏
16.	Use the **Edit Item** page to update the item's title and description. You can also change the item's status, enter a percent complete and enter related dates.
17.	Click the button to the right of the **Status** field. 
18.	Select the appropriate status. For this example, select the **In Progress** list item. 
19.	Click in the **Percent Complete** field. 
20.	Enter the desired information into the **Percent Complete** field. For this example, enter **30**.

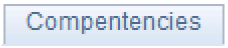
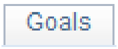
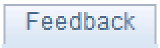
Step	Action
21.	You can add a start date and due date for the item, if needed.
22.	Click the **Update** button. 
23.	Continue to add comments to other items as needed and update the item's percent complete. After all comments have been entered, share the comments with the manager. For this example, no other updates are needed.
24.	Save the document updates. You can return to this page to make additional updates as needed until the manager marks the checkpoint as completed. Click the **Save** button. 
25.	Share your comments with your manager. Your comments appear in the **Employee Comments** text box on the manager document. Click the **Share with Manager** button. 
26.	The **Share Comments** page provides an opportunity to confirm the share. You can cancel the share if other updates are needed. Click the **Confirm** button. 
27.	A confirmation message appears. Click the **Return to Current Documents** link. 
28.	The **Document Status** remains **Track Progress - Checkpoint 1** until the manager marks the checkpoint as complete.
29.	You have successfully entered checkpoint comments, updated the item's percent complete and shared the checkpoint comments with your manager. **End of Procedure.**

Complete Employee Self-Evaluation

Use this task to complete a self-evaluation of your performance against the performance criteria contained in the ePerformance document.

Navigation:
Performance Workcenter > Employee Self Service > **My Current Performance Docs**
OR
Performance Workcenter > Employee Self Service > **My Current Development Docs**

Step	Action
1.	The **Current Performance Documents** page displays your ePerformance documents. Review the list of documents in the **Performance Documents** group box. For this example, you have two current documents and you will enter the self-evaluation for the Annual Performance Documents.
2.	Click the **Document Type** link to access the document. For this example, click the **Annual Performance Documents** link.  Annual Performance Documents
3.	Use the **Self-Evaluation - Update and Complete** page to enter and maintain your self-evaluation information.
4.	The **Performance Process** pane displays the steps and tasks for this document. For this example the current step is **Complete Self Evaluation**.
5.	The page sections and format are based on the template assigned when the document was generated. Templates vary from Location to Location. For this example, tabs define the document sections. You can view the sections in a continuous list by clicking the **Long Format** link.
6.	The fields that you complete for your self-evaluation are the same as the fields that your manager will complete on the **Manager Evaluation** page.
7.	In the **Employee Comments** field enter descriptive text about your performance. Use the **Spell Check** button displayed next to the comments text box to check spelling in your comments. Click in the **Employee Comments** field.
8.	The comments used in this example are brief. Be sure to enter detailed comments when completing your self-evaluation. Enter the desired information into the **Employee Comments** field. For this example, enter **Performed above expectations.**.
9.	Click the scroll bar.
10.	In this example, you will also rate your performance for some of the performance items. The use of ratings is based on business practices at your Location. Click the button to the right of the **Employee Rating** field. ⌄

Step	Action
11.	Select the appropriate rating. For this example, select the **Exceptional** list item. 
12.	Click in the **Employee Comments** field.
13.	Enter the desired information into the **Employee Comments** field. For this example, enter **Completed all required training.**.
14.	Click the scroll bar.
15.	Work your way through each tab/section in the evaluation. For this example, click the **Competencies** tab. 
16.	Click in the **Employee Comments** field.
17.	Enter the desired information into the **Employee Comments** field. For this example, enter **Provided exceptional care.**.
18.	Work your way through each tab/section in the evaluation. For this example, click the **Goals** tab. 
19.	For this example, all entries will be entered for you.
20.	Work your way through each tab/section in the evaluation. For this example, click the **Feedback** tab. 
21.	Enter your summary comments. Click in the **Employee Comments** field
22.	Enter the desired information into the **Employee Comments** field. For this example, enter **Strong performance throughout the year.**.
23.	Click the **Calculate All Ratings** link to calculate your overall rating based on the ratings you entered for each section/item. If you selected **Not Applicable** for a particular item, it is excluded from the calculation. For this example, do not calculate the rating.
24.	You can save your self-evaluation and return to it later to make additional updates. Updates are allowed until you mark the evaluation as complete. Click the **Save** button. 

Step	Action
25.	When you finish all of your entries, complete the document. Click the **Complete** button. 
26.	The **Complete Evaluation** page provides an opportunity to confirm the completion. You can cancel the completion if other updates are needed.
27.	Click the **Confirm** button. 
28.	A confirmation message appears. Click the **Return to Current Documents** link. 
29.	The Annual Performance Document retains the **Document Status** of **Evaluation in Progress**. Your manager can now review your self-evaluation as they complete the manager's evaluation document.
30.	You have successfully completed your employee self-evaluation. **End of Procedure.**

Nominate Participant (Employee)

Use this task to nominate participants to provide peer feedback on your ePerformance document.

Navigation:
Performance Workcenter > Employee Self Service > **My Current Performance Docs**
OR
Performance Workcenter > Employee Self Service > **My Current Development Docs**

Step	Action
1.	The **Current Performance Documents** page displays your ePerformance documents. Review the list of documents in the **Performance Documents** group box. For this example, you have one current document and the status is **Evaluation in Progress**.

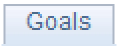
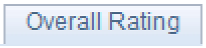
Step	Action
2.	Click the **Document Type** link to access the document. For this example, click the **Annual Performance Documents** link. 
3.	UCPath displays basic information about the document at the top of the page.
4.	The page sections and format are based on the template assigned when the document was generated. Templates vary from Location to Location. For this example, tabs define the document sections. You can view the sections in a continuous list by clicking the **Long Format** link.
5.	The **Performance Process** pane displays the steps and tasks for this document. For this example the current step is **Nominate Participants**.
6.	Click the **Add Nominees** link. 
7.	Use the **Nominate Participants - Add Nominees** page to invite peers to provide feedback on your performance.
8.	UCPath displays the minimum and maximum number of participants for your evaluation. In this example, you are not required to nominate peers, but you may nominate up to five peers.
9.	Click the **Add Participant** link. 
10.	Search for the peer you want to nominate. Click in the **Last Name** field. 
11.	Enter the desired information into the **Last Name** field. For this example, enter **jones**.
12.	Click the **Search** button. 

Step	Action
13.	A list of employees matching the search criteria appears in the **Search Results** section. Click the **Details** button (letter i icon) to view the employee's details to ensure you select the correct person, especially in the case of multiple people with the same name. Otherwise, select the check box to the left of the peer(s) you want to nominate. For this example, click the **Details** button for Abe. ⓘ
14.	Review the details for the selected peer, then perform one of the following options. * Click the **Return to List** link to select a different person from the list. * Click the **Select This Person** button to nominate this person. For this example, click the **Select This Person** button. Select This Person
15.	The selected peer appears in the **Nominations** list. You can add additional peers, as needed. Click the **Delete** button to remove a nominated peer from the list. Delete is available until your manager submits the nominations.
16.	Click the **Save** button to save the nominations without submission so that you can access the list at a later time to complete your nominations. Click the **Save** button. Save
17.	Click the **Return to Current Documents** link. Return to Current Documents
18.	Your nominees appear in the **Nominations** section on the manager's document. The manager is responsible for submitting the invitation to the nominees.
19.	You have successfully nominated a participant to provide peer feedback on your ePerformance document. **End of Procedure.**

Acknowledge Employee Evaluation

Use this task to acknowledge an ePerformance evaluation document. This is the employee's last step in the evaluation cycle.

Navigation:
Performance Workcenter > Employee Self Service > **My Current Performance Docs**
OR
Performance Workcenter > Employee Self Service > **My Current Development Docs**

Step	Action
1.	The **Current Performance Documents** page displays your ePerformance documents. Review the list of documents in the **Performance Documents** group box. In this example, you have one document and the status is **Pending Acknowledgement**.
2.	Click the **Document Type** link to access the document. For this example, click the **Annual Performance Documents** link. 
3.	The **Performance Process** pane displays the steps and tasks for this document. For this example the current step is **Review Manager Evaluation** and the task is **Acknowledge**.
4.	Use the **Manager Evaluation - Acknowledge** page to review the evaluation contents and acknowledge the evaluation. The online acknowledgement provides confirmation that you received the evaluation.
5.	Navigate through the sections and items to perform your review. For this example, click the **Goals** tab. 
6.	Review the section details. Click the scroll bar. 
7.	For this example, click the **Overall Rating** tab. 
8.	Review the section details. Click the scroll bar. 
9.	After you complete your review of the evaluation, click the **Acknowledge** button. 
10.	The **Confirm Review Action** page provides an opportunity to confirm the acknowledgement. You can cancel your acknowledgement, if you need to review the document again.

Step	Action
11.	Click the **Confirm** button. 
12.	UCPath displays a confirmation and your electronic signature is added to the document.
13.	Click the **Return to Current Documents** link. 
14.	The document status now displays **Acknowledged**.
15.	You have successfully acknowledged an ePerformance evaluation document. **End of Procedure.**

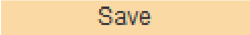
Record Performance Notes (Employee)

Use this task to capture and update your performance notes throughout the evaluation period. Employees and managers can enter performance notes, which can be referenced when creating the final employee evaluation.

Only the author of the performance notes can see the notes in UCPath.

Navigation: Performance Workcenter > Employee Self Service > **Employees Performance Notes**

Step	Action
1.	Use the **My Performance Notes** page to view a list of your existing performance notes or add new notes. Use the **Notes From** and **Through** fields to search for notes in a specific time period. For this example, add a new note.
2.	Click the **Expand** button to view page instructions. ▶
3.	The **Instructions** section appears. Review the instructions.
4.	Click the **Add a New Note** button. 
5.	Use the **Performance Notes - Add/Update Notes** page to record notes about your performance and accomplishments. You can refer to these notes when completing your self-evaluation.
6.	Click in the **Subject** field.

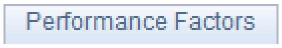
Step	Action
7.	Enter the desired information into the **Subject** field. For this example, enter **Application design completed**.
8.	Click in the **Note Text** field.
9.	Enter the desired information into the **Note Text** field. For this example, enter **Completed application design document on time. Document received positive feedback.**.
10.	Click the **Save** button. 
11.	Click the **Return to Performance Note Selection** link. 
12.	The note appears in the **Your existing Performance Notes** section. To edit an existing note, click the **Subject** link to display the **Performance Notes - Add/Update Notes** page for that note.
13.	You can delete or transfer notes. Select the check box to the left of the note and then click the **Delete** or **Transfer** button at the bottom of the page.
14.	You have successfully entered a performance note. **End of Procedure.**

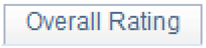
Complete Participant Evaluation

Use this task to accept or decline an invitation to participate in an employee's evaluation and then complete participant feedback for the evaluation.

Navigation:
Performance Workcenter > Employee Self Service > **Others Pending Perf Evaln**
OR
Performance Workcenter > Employee Self Service > **Others Pend Dev Evaln Requests**

Step	Action
1.	The **Pending Evaluation Requests** page displays pending requests that require your attention. The list contains the name of the employee for whom the evaluation is due, the document type and the evaluation due date.

Step	Action
2.	Click the **Accept** button if you will provide employee feedback. Click the **Decline** button if will not provide employee feedback. Notification of your participation decision is provided to the employee's manager.
3.	Select the check box for the pending request. For this example, click the check box for Ama Won. ☐
4.	Click the check box for your participation decision. For this example, click the **Accept** button. 
5.	UCPath displays a note confirming your decision. The current status for the evaluation displays **Not Started**. The status will update again when you begin your data entry and save the evaluation document.
6.	Click the **Name** link to display the evaluation for which you want to enter feedback. For this example, click the **Ama Won** link. 
7.	Use the **Annual Performance Documents** page to enter participant evaluation data. Documents are divided into tabs/sections for different types of content.
8.	For this example, begin by reviewing the employee's performance factors. Click the **Performance Factors** tab. 
9.	Review the evaluation content. Click the scroll bar.
10.	Rate the employee's performance for the displayed item. Click the button to the right of the **Rating** field. 
11.	Select the appropriate rating. For this example, select the **Meets Performance Expectations** list item. 
12.	The associated rating level appears to the right of the field. In this example, the rating is 3.00.

Step	Action
13.	Review the second item and rate it. Click the button to the right of the **Rating** field. ▼
14.	Select the appropriate rating. For this example, select the **Exceptional Performance** list item.  Exceptional Performance
15.	Continue to rate the items on each tab. Managers are required to complete all of the rating fields, but entering ratings is optional for peer reviewers. For this example, the remaining ratings have been completed for you.
16.	Provide details about the employee's performance as it relates to the displayed item. For this example, you will enter a short note. Click in the **Comments** field.
17.	Enter the desired information into the **Comments** field. For this example, enter **Pleasure to work with.**.
18.	Click the scroll bar.
19.	Now display the last tab. Click the **Overall Rating** tab. 
20.	Click the button to the right of the **Rating** field. ▼
21.	Select the overall rating for the employee. For this example, select the **Exceptional Performance** list item.  Exceptional Performance
22.	Provide details about the employee's overall performance. For this example, you will enter a short note. Click in the **Comments** text box.
23.	Enter the desired information into the **Comments** field. For this example, enter **Resourceful, knowledgeable, and committed.**.

Step	Action
24.	Click the **Save** button to save the content. You can return to it at a later time to complete your comments. Click the **Complete** button to submit your feedback to the employee's manager. For this example, click the **Complete** button.  Complete
25.	The **Complete Evaluation** page provides an opportunity to confirm the completion. You can cancel the completion if needed and make additional updates to the evaluation document.
26.	Click the **Confirm** button.  Confirm
27.	A confirmation message appears. Click the **Return to Current Documents** link.  Return to Current Documents
28.	For this example, there are no other evaluations awaiting your feedback.
29.	You have successfully accepted an invitation to participate in an employee's evaluation and entered participant feedback. **End of Procedure.**

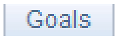
PHCMEPR250: Supervisor and Manager ePerformance Activities

Define Criteria - Add Items (Supervisor/Manager)

Use this task to define criteria and add new items to a Performance document.

Navigation:
Performance Workcenter > Manager Self Service > **Teams Current Performance Docs**
OR
Performance Workcenter > Manager Self Service > **Teams Current Development Docs**

Step	Action
1.	The **Current Performance Documents** page displays a list of ePerformance documents for your employees. You can search for a specific document or review the list of documents in the **Performance Documents** section.

Step	Action
2.	In this example, search for documents with a **Define Criteria** status. Click the button to the right of the **Document Status** field. 
3.	Select the appropriate status. For this example, select the **Define Criteria** list item.  Define Criteria
4.	Click the **Filter** button.  Filter
5.	Documents with the **Define Criteria** status appear in the **Performance Documents** section. Locate the document you must update.
6.	Click the **Name** link to display the document. For this example, click the **Ken Isal** link.  Ken Isal
7.	The **Performance Process** pane displays the steps and tasks for this document. The top portion of the page displays basic information about the document. The page sections and format are based on the template assigned when the document was generated. For this example, tabs define the document sections. You can view the sections in a continuous list by clicking the **Long Format** link.
8.	Navigate to the section that requires new criteria. For this example, click the **Goals** tab.  Goals
9.	For this example, the document was populated with pre-defined goals. You can scroll through the document to review the pre-defined goals.
10.	Click the scroll bar. 
11.	Use the buttons in each section to update the document item: - Copy to other documents - Performance notes - Edit details - Delete details For this example, no changes are needed.

Step	Action
12.	Click the scroll bar. <
13.	To add new criteria, click the **Add Item** link in the appropriate section. For this example, click the **Add Item** link in the Goals 1 section. Add Item
14.	The **Add Item** page displays four options: 1. Add pre-defined item 2. Add your own Item 3. Copy item from my Documents 4. Copy Item from My Team's Documents For this example, add a pre-defined item and your own item. Let's start with the pre-defined item first.
15.	The **Add pre-defined item** option is selected. Click the **Next** button. Next
16.	Use the **Add a Pre-Defined Item** page to search for pre-defined goals you can add to the document.
17.	Click in the **Title** field.
18.	Enter the desired information into the **Title** field. For this example, enter **Complete**.
19.	Click the **Search** button. Search
20.	A list of items matching the search criteria appears in the **Search Results** section. Select the criteria you want to add. For this example, select the **Complete 5% of target sales** check box. ☐
21.	Click the **Add** button. Add
22.	Click the scroll bar.
23.	The pre-defined goal appears in the document. Use the section buttons, as needed to update the goal. For this example, add another goal using free-form text.
24.	Click the scroll bar.

Step	Action
25.	Click the **Add Item** button. 
26.	For this example, select the **Add your own Item** radio button. 
27.	Click the **Next** button. 
28.	Use the **Add Your Own Item** page to enter free-form text for the criteria.
29.	Enter a title for the criteria. Click in the **Title** field.
30.	Enter the desired information into the **Title** field. For this example, enter **Complete policy build**.
31.	Use the buttons in the **Description** section to format the text.
32.	Click in the **Description** field.
33.	Enter the desired information into the **Description** field. For this example, enter **Document policy and publish by end of 2018.**.
34.	The **Status**, **Percent Complete**, **Due Date** and **Start Date** fields are optional. Follow your Location guidelines when entering these fields. For this example, leave these fields blank.
35.	Click the **Add** button. 
36.	Click the scroll bar.
37.	Click the scroll bar. 
38.	The new criteria appears in the document. Use the section buttons, as needed, to update the goal. You can continue to add and update criteria by accessing other tabs and items. For this example, no additional changes are needed.
39.	Save the updated document. Click the **Save** button. 

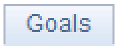
Step	Action
40.	When all criteria have been entered, click the **Approve** button to approve the criteria and complete the **Define Criteria** step. For this example, do not approve the criteria.
41.	You have successfully defined criteria (added pre-defined and free-form items) for an ePerformance document. **End of Procedure.**

Record Checkpoint Comments (Supervisor/Manager)

Use this task to enter checkpoint comments, update the item's percent complete and share the checkpoint comments with the employee.

Navigation:
Performance Workcenter > Manager Self Service > **Teams Current Development Docs**
OR
Performance Workcenter > Manager Self Service > **Teams Current Performance Docs**

Step	Action
1.	The **Current Performance Documents** page displays a list of the performance documents for your employees. Search for a specific document or review the list of documents in the **Performance Documents** section.
2.	Start by accessing the current documents and locating the document with the **Track Progress** status. In this example, complete the checkpoint for Ama Won.
3.	Click the **Name** link to open the document. For this example, click the **Ama Won** link.  Ama Won
4.	The **Performance Process** pane displays the steps and tasks for this document. The top portion of the page displays basic information about the document. The page sections and format are based on the template assigned when the document was generated. Templates vary from Location to Location. For this example, tabs define the document sections. You can view the sections in a continuous list by clicking the **Long Format** link.
5.	Click the **Skip Checkpoint** button if a checkpoint is not needed or you won't complete it. Skipping the checkpoint pushes the document to the next document status.

Step	Action
6.	Navigate to the section for which you want to add checkpoint comments. For this example, click the **Goals** tab. 
7.	The **Goals 1** section appears and is ready for manager checkpoint comments.
8.	Click the scroll bar.
9.	Click in the **Manager Comments** field. 
10.	Enter the desired information into the **Manager Comments** field. For this example, enter **Received positive customer feedback.**.
11.	Notice that the employee has not yet shared their checkpoint comments with you.
12.	Click the scroll bar. 
13.	Next, you can edit the item. For this example, update the status and the item's percent complete.
14.	Click the **Edit Details** button. ✏
15.	Use the **Edit Item** page to update the item's title and description. You can also change the item's status, enter a percent complete and enter related dates. Note: You can edit the item's title and description for ad hoc items only (you can add your own items). If pre-loaded items from Profile Management are used in the document, they cannot be edited. You cannot edit pre-defined items loaded from the **Add Pre-defined Items** option.
16.	Click the button to the right of the **Status** field. ▼

Step	Action
17.	Select the appropriate status. For this example, select the **In Progress** list item. 
18.	Click in the **Percent Complete** field. 
19.	Enter the desired information into the **Percent Complete** field. For this example, enter **30**.
20.	Click the **Update** button. 
21.	The item is updated. Click the **Save** button. 
22.	Continue to add comments to other items as needed and update the item's percent complete.
23.	After all comments are entered, you are ready to share the comments with the employee. The system displays your comments on the employee's document. Click the **Share with Employee** button. 
24.	The **Share Comments** page provides an opportunity to confirm the share. You can cancel the share if other updates are needed.
25.	Click the **Confirm** button. 
26.	Review the confirmation message and if further action is required, you must complete that action before completing this task. Click the **Return to Current Documents** link. 
27.	The **Document Status** remains in the **Track Progress - Checkpoint 1** status until the next step in the checkpoint, **Review with Employee** is completed.
28.	You have successfully entered checkpoint comments, updated the item's percent complete and shared the checkpoint comments with the employee. **End of Procedure.**

Complete Checkpoint (Supervisor/Manager)

Use this task to complete a checkpoint and move the document to the next status.

Navigation:
Performance Workcenter > Manager Self Service > **Teams Current Development Docs**
OR
Performance Workcenter > Manager Self Service > **Teams Current Performance Docs**

Step	Action
1.	The **Current Performance Documents** page displays a list of ePerformance documents for your employee. You can search for a specific document or review the list of documents in the **Performance Documents** section.
2.	Start by accessing the current documents and locating the document with the **Track Progress** status. In this example, complete the checkpoint for Ama Won.
3.	Click the **Name** link to open the document. For this example, click the **Ama Won** link.  Ama Won
4.	The **Performance Process** pane displays the steps and tasks for this document. The top portion of the page displays basic information about the document. The page sections and format are based on the template assigned when the document was generated. Templates vary from Location to Location. For this example, tabs define the document sections. You can also view the sections in a continuous list by clicking the **Long Format** link.
5.	Use the **Skip Checkpoint** button if you don't require a checkpoint or you don't intend to complete it and you want to push the document to the next document status.
6.	Use the **Stop Sharing** button to no longer share document comments with the employee. You may want to use this button if updates are required to your comments and you don't want the comments shared until after all updates are completed.
7.	When the checkpoint is complete and you have reviewed the document with the employee, mark the checkpoint as complete. Click the **Complete Checkpoint** button.  Complete Checkpoint

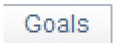
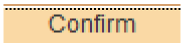
Step	Action
8.	The **Complete Checkpoint** page provides an opportunity to confirm the completion. You can cancel the completion if other updates are needed.
9.	Click the **Confirm** button. 
10.	Review the confirmation message and if further action is required, you must complete that action before completing this task. For this example, click the **Return to Current Documents** link. 
11.	The **Document Status** advances to the next status, which is **Track Progress - Checkpoint 2** in this example.
12.	You have successfully completed a checkpoint after reviewing the checkpoint comments with the employee. **End of Procedure.**

Finalize Criteria

Use this task to finalize criteria in a document. This step usually follows completion of the last checkpoint (if checkpoints are used) and finalizes the criteria before the evaluation starts.

Navigation:
Performance Workcenter > Manager Self Service > **Teams Current Development Docs**
OR
Performance Workcenter > Manager Self Service > **Teams Current Performance Docs**

Step	Action
1.	The **Current Performance Documents** page displays a list of the performance documents for your employees. Search for a specific document or review the list of documents in the **Performance Documents** section.
2.	Start by accessing the current documents and locating the document with the **Track Progress - Finalize Criteria** status. In this example, finalize the criteria for Ama Won.
3.	Click the **Name** link to open the document. For this example, click the **Ama Won** link. 

Step	Action
4.	The **Performance Process** pane displays the steps and tasks for this document. For this example the current step is **Finalize Criteria** and the task is **Update and Complete**. The top portion of the page displays basic information about the document. The page sections and format are based on the template assigned when the document was generated. Templates vary from Location to Location. For this example, tabs define the document sections. You can view the sections in a continuous list by clicking the **Long Format** link.
5.	Click the **Goals** tab. 
6.	To add new criteria, click the **Add Item** button in the appropriate section. For this example, do not enter new criteria.
7.	Click the scroll bar. 
8.	Click the **Performance Notes** button to access notes on the employee's performance. Click the **Update** button to update the item. Click the **Delete** button to delete the item. For this example, changes are not needed.
9.	Click the **Save** button if you made changes.
10.	If changes were saved, click the **Share with Employee** button to send the changes to the employee's sub-document. You may want to discuss the criteria updates with the employee before completing the finalize step.
11.	Finalize the criteria. Click the **Complete** button. 
12.	The **Finalize Criteria** page provides an opportunity to confirm the completion. You can cancel the completion if other updates are needed.
13.	Click the **Confirm** button. 

Step	Action
14.	Review the confirmation message and if further action is required, you must complete that action before completing this task. For this example, click the **Return to Current Documents** link. Return to Current Documents
15.	The **Document Status** advances to the next status, which is **Evaluation in Progress** in this example.
16.	You have successfully finalized the criteria for an employee's performance document. **End of Procedure.**

Nominate Participant (Supervisor/Manager)

Use this task to nominate participants to provide peer feedback on an employee's ePerformance document.

Navigation:
Performance Workcenter > Manager Self Service > **Teams Current Development Docs**
OR
Performance Workcenter > Manager Self Service > **Teams Current Performance Docs**

Step	Action
1.	The **Current Performance Documents** page displays a list of the performance documents for your employees. Search for a specific document or review the list of documents in the **Performance Documents** section.
2.	Start by accessing the current documents and locating the document with the **Evaluation in Progress** status. In this example, nominate a participant for Ama Won's document.
3.	Click the **Name** link to open the document. For this example, click the **Ama Won** link. Ama Won

Step	Action
4.	The **Performance Process** pane displays the steps and tasks for this document. For this example the current step is **Complete Manager Evaluation** and the task is **Update and Submit**. The top portion of the page displays basic information about the document. The page sections and format are based on the template assigned when the document was generated. Templates vary from Location to Location. For this example, tabs define the document sections. You can view the sections in a continuous list by clicking the **Long Format** link.
5.	Expand the **Nominate Participants** step. Click the **Expand** button. ▸
6.	UCPath displays one of two links. If the employee already nominated participants, the link reads **Add Nominees and Submit**. If the employee did not nominate participants, the link reads **Add Nominees**. For this example, click the **Add Nominees** link.  Add Nominees
7.	Use the **Nominate Participants - Add Nominees** page to invite peers to provide feedback on the employee's performance.
8.	UCPath displays the minimum and maximum number of participants for the evaluation. In this example, you are not required to nominate peers, but you may nominate up to five peers.
9.	Nominate a participant. Click the **Add Participant** link.  Add Participant
10.	Search for the peer that you want to nominate. Click in the **Last Name** field. 
11.	Enter the desired information into the **Last Name** field. For this example, enter **jones**.

Step	Action
12.	Click the **Search** button. Search
13.	A list of employees matching the search criteria appear in the **Search Results** section. Click the **Details** button (letter i icon) to view the employee's details to ensure you select the correct person, especially in the case of multiple people with the same name. Otherwise, select the check box to the left of the peer(s) you want to nominate.
14.	For this example, click the **Details** button for Abe.. ⓘ
15.	Review the details for the selected peer, then perform one of the following options: - Click the **Return to List** link to select a different person from the list. - Click the **Select This Person** button to nominate this person.
16.	For this example, click the **Select This Person** button. Select This Person
17.	The selected peer appears in the **Nominations** list. You can add additional peers, as needed. Click the **Delete** button to remove a nominated peer from the list. Delete is available until your manager submits the nominations. Click the **Save** button to save the nominations without submission so that you can access the list at a later time to complete your nominations.
18.	Click the **Submit Nominations** button. Submit Nominations
19.	The **Submit Nominations** page provides an opportunity to confirm the nomination. You can cancel the submission if updates are needed.
20.	Click the **Confirm** button. Confirm
21.	Review the confirmation message and if further action is required, you must complete that action before completing this task. Click the **Return to Current Documents** link. Return to Current Documents
22.	You have successfully nominated a participant to provide peer feedback on an employee's performance. **End of Procedure.**

Track Participant Nomination

Use this task to track the status of submitted participant nominations.

Navigation:
Performance Workcenter > Manager Self Service > **Teams Current Development Docs**
OR
Performance Workcenter > Manager Self Service > **Teams Current Performance Docs**

Step	Action
1.	The **Current Performance Documents** page displays a list of the performance documents for your employees. Search for a specific document or review the list of documents in the **Performance Documents** section.
2.	Start by accessing the current documents and locating the document with the **Evaluation in Progress** status. In this example, track participant nominations for Ama Won's document.
3.	Click the **Name** link to open the document. For this example, click the **Ama Won** link. Ama Won
4.	The performance document opens. The top portion of the page displays basic information about the document. The page sections and format are based on the template assigned when the document was generated. Templates vary from Location to Location. For this example, tabs define the document sections. You can also view the sections in a continuous list by clicking the **Long Format** link.
5.	The **Performance Process** pane displays the steps and tasks for this document. For this example, the current step is **Nominate Participants**. Expand the **Nominate Participants** step.
6.	Click the **Expand** button. ►
7.	Click the **Track Nominations** link. Track Nominations
8.	Use the **Nominate Participants - Track Nominations** page to track the status of each nominated participant.

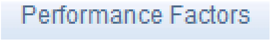
Step	Action
9.	View the status of each nominee, by role, in the **Nominations** section. If anonymity is allowed, the nominee is identified by role and a number. Otherwise, the nominee's name appears in the list.
10.	You may be able to perform the following **Actions**: **- Cancel:** Click the link to cancel a nomination request. **- Resubmit:** Click the link to resubmit a nomination request. This link appears only for previously canceled nominations. **- Decline:** Click the link to view the nominee's reason for declining the nomination. This link appears only when the nominee declined the evaluation request.
11.	Click the **Return to Current Documents** link. Return to Current Documents
12.	You have successfully tracked the status of a participant's nomination. **End of Procedure.**

Review Participant Evaluation

Use this task to review the contents of a participant's evaluation of an employee.

Navigation:
Performance Workcenter > Manager Self Service > **Teams Current Development Docs**
OR
Performance Workcenter > Manager Self Service > **Teams Current Performance Docs**

Step	Action
1.	The **Current Performance Documents** page displays a list of the performance documents for your employees. Search for a specific document or review the list of documents in the **Performance Documents** section.
2.	Start by accessing the current documents and locating the document with the **Evaluation in Progress** status. In this example, view participant evaluations for Ama Won's document.
3.	Click the **Name** link to open the document. For this example, click the **Ama Won** link. Ama Won

Step	Action
4.	The performance document opens. The top portion of the page displays basic information about the document. The page sections and format are based on the template assigned when the document was generated. Templates vary from Location to Location. For this example, tabs define the document sections. You can view the sections in a continuous list by clicking the **Long Format** link.
5.	The **Performance Process** pane displays the steps and tasks for this document. For this example, the current step is **Review Participant Evaluations**.
6.	Expand the **Review Participant Evaluations** step. Click the **Expand** button. ▶
7.	Click the **View Participant Evaluation** link. View Participant Evaluation
8.	The **Performance Process** pane displays a list of participants. Click the **Return** button to display the list of steps and tasks again. Click the **Participant** link to display the participant's evaluation.
9.	For this example, click the **Abe Jones** link. Abe Jones
10.	The participant's evaluation opens in a new browser window. Review the participant's feedback across all tabs. Click the **Reopen** link to set the status back to **Evaluation In Progress** to enable the participant to edit the document and add comments. Reset the due date for the peer evaluation if needed. Review the document details and evaluation data from the participant.
11.	For this example, click the **Overall Rating** tab. Overall Rating
12.	Review the overall rating and participant comments. The overall rating is calculated from each item's rating. For this example, the employee rating is 4.00 and exceeds performance expectations.
13.	For this example, click the **Performance Factors** tab. Performance Factors

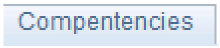
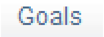
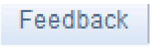
Step	Action
14.	Scroll through the page to review the individual item ratings. When your review is complete, close the browser window.
15.	Click the **Close [X]** button. 
16.	Click the **Return** button. 
17.	You have successfully reviewed a participant's evaluation feedback for an employee. **End of Procedure.**

Complete Manager Evaluation

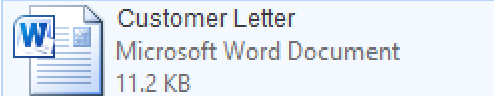
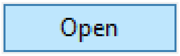
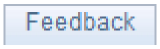
Use this task to complete the manager's evaluation for an employee. Completion activities include entering comments and ratings anytime during the performance period and attaching documents to the evaluation as needed.

Navigation:
Performance Workcenter > Manager Self Service > **Teams Current Development Docs**
OR
Performance Workcenter > Manager Self Service > **Teams Current Performance Docs**

Step	Action
1.	The **Current Performance Documents** page displays a list of the performance documents for your employees. Search for a specific document or review the list of documents in the **Performance Documents** section.
2.	Start by accessing the current documents and locating the document with the **Evaluation in Progress** status. In this example, complete the **Annual Performance Evaluation** document for Abe Jones and save the document.
3.	Click the **Name** link to open the document. Click the **Abe Jones** link. 

Step	Action
4.	The performance document opens. The top portion of the page displays basic information about the document. The page sections and format are based on the template assigned when the document was generated. Templates vary from Location to Location. For this example, tabs define the document sections. You can view the sections in a continuous list by clicking the **Long Format** link.
5.	The **Performance Process** pane displays the steps and tasks for this document. For this example, the participant evaluation was already reviewed and notes were captured from it to use in the manager's evaluation.
6.	Expand the **Review Self Evaluation** step. Click the **Expand** button.
7.	Click the **View Self Evaluation** link.  View Self Evaluation
8.	The **Employee Self-Assessment** opens in a new browser window. You can toggle between the self-assessment document and manager's document as needed. For this example, review the **Employee Comments**.
9.	For this example, click the **Competencies** tab.  Compentencies
10.	Review the competencies. For this example, click the **Goals** tab.  Goals
11.	Review the goals. For this example, click the **Feedback** tab.  Feedback
12.	When you complete your review of the employee's self-evaluation, return to the manager's evaluation document. Click the **Performance Process** browser tab.  Performance Process
13.	Enter comments and select a rating for the required section items.

Step	Action
14.	Click the **Rating History** link to view the **Rating History** page. This page displays all of the past overall ratings for the employee and document type. For this example, do not review the rating history information.
15.	Click in the **Manager Comments** field.
16.	Manager comments should be thorough and provide relevant details regarding the employee's performance and goals. For this example, the comments are short to save data entry time.
17.	Click the desired information into the **Manager Comments** text box. For this example, enter **Employee performance was strong.**.
18.	Click the **Rating Description** button to display a page that provides an explanation of each rating. You can select the appropriate item rating for the employee from this page. You can also select the appropriate item rating from the **Manager Rating** list. Click the **Rating Description** button.
19.	Review the available proficiency ratings. For this example, select the **Exceeds Expectations** radio button. ○
20.	Click the **Select Proficiency** button. Select Proficiency
21.	The **Exceeds Expectations** rating appears in the **Manager Rating** field.
22.	Click in the **Manager Comments** field.
23.	Enter the desired information into the **Manager Comments** field. For this example, enter **All training was completed.**.
24.	Use the **Attachments** section to add supplemental documents regarding the employee's performance. For this example, attach a customer letter.
25.	Click the **Add Attachment** link. ⊞ Add Attachment
26.	Search for the document to attach. Click the **Browse…** button. Browse...
27.	Click the scroll bar.

Step	Action
28.	For this example, click the **Customer Letter** file. 
29.	Click the **Open** button. 
30.	Click the **Upload** button. 
31.	The attachment appears in the **Attachments** section. Click in the **Description** field. 
32.	Enter the desired information into the **Description** field. For this example, enter **Customer letter**.
33.	Identify the audience for the attachment. For this example, the audience is both the manager and the employee.
34.	Click the button to the right of the **Attachment Audience** field. 
35.	Select the appropriate audience for the attachment. For this example, select the **Employee and Manager** list item. 
36.	Click the scroll bar.
37.	Continue to access the remaining tabs, enter comments and select item ratings. For this example, the **Competencies** and **Goals** tabs were completed for you.
38.	For this example, click the **Feedback** tab. 
39.	Click in the **Manager Comments** field.
40.	Enter the desired information into the **Manager Comments** field. For this example, enter **Good performance throughout the year.**.
41.	Click the **Calculate All Ratings** button to calculate all item and section ratings, as well as the overall rating. Rates are not calculated for items, sections or summaries that are overridden.
42.	Click the **Calculate All Ratings** button. 

Step	Action
43.	Click the scroll bar.
44.	Complete the **Overall Summary** section. Click the **Override** link to open the **Manager Rating** field for editing.
45.	Click the **Override** link. Override
46.	Update the **Manager Rating**. For this example, change the rating from **Exceptional** to **Meets Expectations**.
47.	Click the button to the right of the **Manager Rating** field. 
48.	Select the appropriate rating. For this example, select the **Meets Expectations** list item. Meets Expectations
49.	Click in the **Manager Comments** field.
50.	Enter the desired information into the **Manager Comments** field. For this example, enter **Pleasure to work with.**.
51.	Click the **Save** button to save the evaluation. You can return to the document at a later time to update the comments and ratings and then submit the document for approval. Click the **Submit for Approval** button when the document is completed and is ready for approval. For this example, save the document for further updates before approval submission.
52.	Click the **Save** button. Save
53.	Click the **Return to Current Documents** link. Return to Current Documents
54.	You have successfully completed the manager's evaluation document for an employee. **End of Procedure.**

Submit Manager Evaluation for Approval

Use this task to submit a completed manager's evaluation for approval.

Navigation:
Performance Workcenter > Manager Self Service > **Teams Current Development Docs**

OR

Performance Workcenter > Manager Self Service > **Teams Current Performance Docs**

Step	Action
1.	The **Current Performance Documents** page displays a list of the performance documents for your employees. Search for a specific document or review the list of documents in the **Performance Documents** section.
2.	Start by accessing the current documents and locating the document with the **Evaluation in Progress** status. In this example, submit the **Annual Performance Evaluation** document for Abe Jones for approval.
3.	Click the **Name** link to open the document. Click the **Abe Jones** link.  Abe Jones
4.	The performance document opens. The top portion of the page displays basic information about the document. The page sections and format are based on the template assigned when the document was generated. For this example, tabs define the document sections. You can view the sections in a continuous list by clicking the **Long Format** link.
5.	The **Performance Process** pane displays the steps and tasks for the document. For this example, the manager's document was completed and saved. Now it is ready to submit for approval. You can review the evaluation sections and items and make updates where needed. For this example, no updates are necessary.
6.	Click the **Submit for Approval** button.  Submit for Approval
7.	The **Submit for Approval** page provides an opportunity to confirm the submission. You can cancel the submission if updates are needed.
8.	Click the **Confirm** button.  Confirm

Step	Action
9.	Review the confirmation message. Click the **Return to Current Documents** link. Return to Current Documents
10.	The **Document Status** is now **Approval - Submitted**. After the manager's document is approved, you can share the document with the employee.
11.	You have successfully submitted a manager's evaluation for approval. **End of Procedure.**

Share Approved Evaluation and Request Employee Acknowledgement

Use this task to share an approved manager's evaluation document with the employee in UCPath. After your share it, shared, you should schedule time to review the document with the employee and request that the employee acknowledge their receipt of the document.

Navigation:
Performance Workcenter > Manager Self Service > **Teams Current Development Docs**
OR
Performance Workcenter > Manager Self Service > **Teams Current Performance Docs**

Step	Action
1.	The **Current Performance Documents** page displays a list of the performance documents for your employees. Search for a specific document or review the list of documents in the **Performance Documents** section.
2.	Start by accessing the current documents and locating the document with the **Approval - Approved** status. In this example, share the **Annual Performance Evaluation** document with Abe Jones.
3.	Click the **Name** link to open the document. Click the **Abe Jones** link. Abe Jones

Step	Action
4.	The performance document opens. The top portion of the page displays basic information about the document. The page sections and format are based on the template assigned when the document was generated. Templates vary from Location and Location. For this example, tabs define the document sections. You can also view the sections in a continuous list by clicking the **Long Format** link.
5.	The **Performance Process** pane displays the steps and tasks for the document. For this example, the manager's document was completed and approved. It is now ready to share with the employee.
6.	Click the **Share with Employee** button. 
7.	The **Share with Employee** page provides an opportunity to confirm the submission. You can cancel the submission if updates are needed.
8.	Click the **Confirm** button. 
9.	Review the confirmation message. Click the **Return to Current Documents** link. 
10.	The **Document Status** is now **Pending Acknowledgement**. After meeting with the employee to discuss the evaluation document, you can request that the employee acknowledge receipt of the document.
11.	You have successfully shared an approved evaluation document with the employee. **End of Procedure.**

View Current Documents (Supervisor/Manager)

Use this task to view documents that you own and to verify the document statuses.

Navigation:
Performance Workcenter > Manager Self Service > **Teams Current Development Docs**
OR
Performance Workcenter > Manager Self Service > **Teams Current Performance Docs**

Step	Action
1.	The **Current Performance Documents** page displays a list of the performance documents for your employees. Search for a specific document or review the list of documents in the **Performance Documents** section.
2.	You can verify the **Document Type** and **Document Status**, as well as the **Period Dates** for each document.
3.	Click the **Name** link to open the document to view, update or perform other administration actions. For this example, click the **Eliza Seth** link. Eliza Seth
4.	UCPath displays the ePerformance document for the selected employee. The top section of the page displays basic information about the employee. Hover over the employee's name to view contact information for the employee.
5.	In this example, the **Annual Performance Document** displays the **Approved** status and the next step in the process is to share the document with the employee. Use the tabs and scroll bars to view the complete document.
6.	Click the **Return to Current Documents** link. Return to Current Documents
7.	Next, use the **Filter Criteria** section to search for a specific employee's documents using the employee's last name.
8.	Click in the **Last Name** field. 
9.	Enter the desired information into the **Last Name** field. For this example, enter **lei**.
10.	Click the **Filter** button. Filter
11.	Click the link to open the document. For this example, click the **Woobo Lei** link. Woobo Lei
12.	UCPath opens the performance document for the selected employee. You can work on the required tasks if needed.
13.	Click the **Return to Current Documents** link. Return to Current Documents
14.	You have successfully accessed current ePerformance documents. **End of Procedure.**

View Approval Statuses and Comments

Use this task to view document approval statuses and the pending approval process actions. You can view documents for which you are a participant in the approval process.

Navigation: Performance Workcenter > Manager Self Service > **View Approval Workflow Status**

Step	Action
1.	Use the **Filter Criteria** section to search for documents using various criteria. For this example, search for documents with an **Approval - Submitted** status.
2.	Click the button to the right of the **Approval Status** field. 
3.	Select the appropriate status. For this example, select the **Submitted** list item.  Submitted
4.	Click the **Search** button.  Search
5.	UCPath displays the documents that meet the search criteria in the **Performance Document** section. Click the **Name** link to access the **View Approval Status Detail** page to review the status of an employee's document.
6.	For this example, click the **Don Chidi** link.  Don Chidi
7.	The **View Approval Status Detail** page appears. Review the approval status. For this example, the status is **Pending**. Click the **Performance Document Details** link to open the document.
8.	Use the **Multiple Approvers** link to view the list of approvers in the approval workflow. Click the **Multiple Approvers** link.  Multiple Approvers
9.	Review the list of approvers that are part of the approval workflow. When your review is complete, click the **Close [X]** button. 

Step	Action
10.	Click the **Approval Summary** link. 
11.	The **View Approval Status Summary** page appears again. Next, search for all **Denied** documents.
12.	Click the **Clear** button. 
13.	Click the button to the right of the **Approval Status** field. ▾
14.	Select the appropriate status. For this example, select the **Denied** list item. 
15.	Click the **Search** button. 
16.	Documents with a **Denied** approval status appear. Click the **Name** link to access the **View Approval Status Detail** page.
17.	Click the **Lonna Don** link. 
18.	The **View Approval Status Detail** page displays the denial.
19.	Review the comments provided by the approver. Click the **Expand** button. ▶
20.	Review the comments. Click the scroll bar.
21.	Click the **Approval Summary** link. 
22.	You have successfully viewed document approval statuses on the **View Approval Status Summary** page. **End of Procedure.**

Record Performance Notes (Supervisor/Manager)

Use this task to capture and update employee performance notes throughout the evaluation period. Employees and managers can enter performance notes which can be referenced when creating the final employee evaluation.

Only the author of the performance notes can see the notes in UCPath.

Navigation: Performance Workcenter > Manager Self Service > **Maintain Teams Performce Notes**

Step	Action
1.	Use the **Performance Notes** page to identify the employee for whom you want to enter or update performance notes. Note that buttons at the bottom of the page become available after you enter search criteria.
2.	Click the **Expand** button to view page instructions. ▶
3.	The **Instructions** section appears. Review the instructions.
4.	For this example, enter new notes for an employee. Click in the **Employee ID** field.
5.	Enter the desired information into the **Employee ID** field. For this example, enter **17540581**.
6.	For this example, select the **17540581** link.  17540581
7.	Press **[Tab]** and the employee name appears.
8.	Click the **Add a New Note** button. 
9.	Use the **Performance Notes - Add/Update Notes** page to record notes about an employee's performance and accomplishments. You can reference these notes when updating and completing the employee's evaluation documents.
10.	Click in the **Subject** field.
11.	Enter the desired information into the **Subject** field. For this example, enter **Resolved issue with application**.
12.	Click in the **Note Text** field.

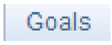
Step	Action
13.	Enter thorough notes and details. For this example, a short note is entered to save data entry time. Enter the desired information into the **Note Text** field. For this example, enter **Abe found issue with.....**
14.	Click the **Save** button. 
15.	Click the **Return to Performance Note Selection** link. 
16.	The note appears in the **Existing Performance Notes for this Employee** section. To edit an existing note, click the **Subject** link to display the **Performance Notes - Add/Update Notes** page.
17.	You can delete or transfer notes. Select the check box to the left of the note, then click the **Delete** or **Transfer** button at the bottom of the page.
18.	You have successfully recorded performance notes for an employee. **End of Procedure.**

Copy Item to Another Document

Use this task to copy items from one employee document to another employee document.

Navigation:
Performance Workcenter > Manager Self Service > **Teams Current Development Docs**
OR
Performance Workcenter > Manager Self Service > **Teams Current Performance Docs**

Step	Action
1.	The **Current Performance Documents** page displays a list of the performance documents for your employees. Search for a specific document or review the list of documents in the **Performance Documents** section.
2.	Start by accessing the current documents and locating the document with the item to copy. In this example, copy an item from Kendal Isunza's document.

Step	Action
3.	Click the **Name** link to open the document. Click the **Ken Isal** link.  Ken Isal
4.	The performance document opens. The top portion of the page displays basic information about the document. The page sections and format are based on the template assigned when the document was generated. Templates vary from Location to Location. For this example, tabs define the document sections. You can also view the sections in a continuous list by clicking the **Long Format** link.
5.	Navigate to the item you want to copy. For this example, click the **Goals** tab.  Goals
6.	Click the scroll bar. 
7.	For this example, click the **Copy to Other Documents** button in the **Goals 1** section.
8.	The **Performance Documents** section lists the other documents you own and which you can copy. The list contains only those documents where define criteria is in progress. The document type and section must be the same as the document from which you initiated the copy.
9.	Notice that the list of available documents displays a check mark if the copied item already exists in the receiving document.
10.	Select the document where you want to copy the information. For this example, select the check box for **Minoo Fin**. ☐
11.	Click the **Continue** button.  Continue
12.	Verify your selection. Click **Return** to select a different document if needed. For this example, click the **Save** button.  Save

Step	Action
13.	Review the confirmation message. Click the **OK** button. 
14.	The document for which you copied the information no longer appears in the list. Click the **Return** link. 
15.	You can continue to work with the displayed document or navigate to another document.
16.	You have successfully copied an item from one employee's document to another employee's document. **End of Procedure.**

Override Employee Acknowledgement

Use this task to acknowledge receipt of an evaluation document on behalf of an employee. Perform this task if the employee is either unable or unwilling to acknowledge receipt of the document.

Navigation:
Performance Workcenter > Manager Self Service > **Teams Current Development Docs**
OR
Performance Workcenter > Manager Self Service > **Teams Current Performance Docs**

Step	Action
1.	The **Current Performance Documents** page to displays list of the performance documents for your employees. Search for a specific document or review the list of documents in the **Performance Documents** section. Start this task by searching for the document that requires an acknowledgement override.
2.	Click the button to the right of the **Document Status** list. 
3.	Select the appropriate status. For this example, select the **Pending Acknowledge** list item. 

Step	Action
4.	Click the **Filter** button. 
5.	Documents in a **Pending Acknowledgement** status appear in the **Performance Documents** section. In this example, one document is awaiting employee acknowledgement.
6.	Click the **Name** link to open the document. Click the **Don Chidi** link. 
7.	The performance document for the selected employee appears. The top section of the page displays basic information about the employee. Hover over the employee's name to view contact information for the employee.
8.	The **Performance Process** pane displays the **Pending Acknowledgement** status in the **Steps and Tasks** section.
9.	Click the **Override Acknowledgement** button to override the employee's acknowledgement. 
10.	An **Acknowledge** page appears. You have two options: 1. Employee Not Available 2. Employee Refused Upon confirmation, your electronic signature appears in the employee's signature section with the reason for the override. For this example, accept the **Employee Not Available** default.
11.	Click the **Confirm** button. 
12.	Review the confirmation message and if further action is required, complete that action before completing this task. For this example, click the **Return to Current Documents** link. 
13.	The **Document Status** now displays **Approval - Approved**.
14.	You have successfully overridden an employee acknowledgement of a document. **End of Procedure.**

PHCMEPR300: Location Configuration Activities

Build and Define Group

Use this task to build a group that can be used when creating performance and development documents for employees.

Groups can consist of one or more employees. You must first define the group and then assign security to the group.

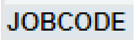
In this example, you define the group. Refer to the *Define Group Security* for details on group security.

Navigation: PeopleSoft Menu > Set Up HCM > Common Definitions > Group Build > **Group Build - Group Definition**

Step	Action
1.	In this example, build a new group for the Riverside Campus Police. You will exclude student employees and select current employee records.
2.	Use the **Group Build - Group Definition** page to search for an existing group or build a new group.
3.	Click the **Add a New Value tab.** 
4.	Name the new group. Click in the **Group ID** field. 
5.	Enter the desired information into the **Group ID** field. For this example, enter **POLDEPT**.
6.	Click the **Add** button. 
7.	Use the **Group Profile** page to create the group profile. You can attach an existing group criteria ID or query to build a group definition. In this example, use an existing group criteria ID.
8.	The group definition is effective dated and the date defaults to the current system date (today's date). UCPath policy recommends that you backdate new groups to 01/01/1910.

Step	Action
9.	In this example, the defaulted **Effective Date** is highlighted for you. Press **[Delete]**.
10.	Enter the desired information into the **Effective Date** field. For this example, enter **01011910**.
11.	The **Status** field defaults to **Active**. When a group is no longer needed, you can inactivate the group.
12.	Use the **Group Criteria ID** field to identify the group template that represents the criteria that you want to use to select the employees for the groups. If you want to define new criteria to select the employees for the group, leave the field blank and use query to define the group. In this example, use a template.
13.	Click the **Look Up Group Criteria ID** button.
14.	Select the criteria you want to use to identify the employees in the group. For this example, select the **DEPT** list item. 
15.	A message regarding the effective dated information appears. Review the message. For this example, click the **Yes** button. 
16.	If you decide to select a different template, click the **Refresh** button after selecting the new template so that you can enter new values on the **Group Definition** page.
17.	Click in the **Description** field. 
18.	Enter the desired information into the **Description** field. For this example, enter **RVCMP Police Department**.
19.	Click in the **Short Description** field. 
20.	Enter the desired information into the **Short Description** field. For this example, enter **Police**.

Step	Action
21.	Click the **Comments** link to enter free-form comments for the new group. You can also view the **Where Clause** section, which is used for record selection, on the **Group Definition** page. Click the **Comments** link. 
22.	Click in the **Comments** text box.
23.	Enter the desired information into the **Comments** field. For this example, enter **Group for Riverside Police Department**.
24.	The **Where Clause** section currently displays two lines from the template selected for the **Group Criteria ID**.
25.	Click the **OK** button. 
26.	The **Query Name** field is disabled because a **Group Criteria ID** was used.
27.	You can add the department manager's ID in the **Manager ID** field. For this example, leave the field blank. The **Approver Empl ID** field is used when the group is used in the **Variable Compensation Administration by Groups** process. Because this group is being used for ePerformance activities, leave this field blank also.
28.	Click the **Group Definition** tab. 
29.	Use the **Group Definition** page to specify the records, fields and field values to define a group or refine the group's criteria.
30.	In this example, the group is the Police department. The Where Clause was automatically generated from the **Group Criteria ID** for **DEPT** that was defined on **Group Profile** page. Now you must identify specific department(s) for the group.
31.	Click the **Look Up SetID** button. 🔍
32.	Click in the **Set ID** field. 
33.	Enter the desired information into the **Set ID** field. For this example, enter **r**.
34.	Click the **Look Up** button. 

Step	Action
35.	Select the appropriate Set ID. For this example, select the **RVCMP** list item. RVCMP
36.	Click in the **Value** field.
37.	If you know the **Department ID**, you can enter it into the field. Otherwise, you can use the **Look Up** button. Enter the desired information into the **Value** field. For this example, enter **d01123**.
38.	Click the **D01123** list option. D01123
39.	The specific department may include personnel that you do not want to include in the group. In this example, there are student employees who are not be eligible for performance reviews. You will exclude them from the group by adding an additional **Where Clause**.
40.	Before you add a new **Where Clause**, navigate to the last record.
41.	Click the **Last** link. Last
42.	Click the **Add a New Row** button. 
43.	A new row appears. Click in the **Record** field. 
44.	Enter the desired information into the **Record** field. For this example, enter **Job**.
45.	Click the **JOB** list item. JOB
46.	Click in the **Field Name** field. 
47.	Enter the desired information into the **Field Name** field. For this example, enter **jobcode**.
48.	Click the **JOBCODE** list item. JOBCODE

Step	Action
49.	Click the button to the right of the **Operator** field. ▼
50.	Select the appropriate operator for the clause. For this example, select the **Not Equal** list item.  Not Equal
51.	Click in the **SetID** field.
52.	Enter the desired information into the **SetID** field. For this example, enter **ucshr**.
53.	For this example, select the **UCSHR** list item.  UCSHR UC Shared SetID
54.	Click the **Look Up Value** button. 🔍
55.	Look for descriptions that start with 'st'. Click in the **Description** field.
56.	Enter the desired information into the **Description** field. For this example, enter **st**.
57.	Click the **Look Up** button.  Look Up
58.	For this example, select the **004921 STDT 2** list item.  004921 STDT 2
59.	Next, add another row to ensure that only the current employee row is selected for the group. Use the effective sequence for the record and only select rows with an effective sequence equal to zero.
60.	Click the **Add a New Row** button. ➕
61.	Click in the **Record** field.
62.	Enter the desired information into the **Record** field. For this example, enter **job**.
63.	Click the **JOB** list item.  JOB
64.	Click the **Look Up Field Name** button. 🔍

Step	Action
65.	For this example, select the **EFFSEQ** list item.  EFFSEQ Effective Sequence
66.	The **Operator** field defaults to **Equal** and the **Value** field defaults to **0.000000**. Accept the default values.
67.	Click the **Save** button. Save
68.	Click the **Launch Count** button to compute how many members are in the group.
69.	The group contains 69 employees. You can now view the group members.
70.	Click the **Group Visualize** button.
71.	The **Group Results** page displays the **Group Employees**. The first 25 records are shown.
72.	Click the scroll bar.
73.	When your review is complete, click the **OK** button. OK
74.	Click the **Save** button. Save
75.	You have successfully created a new group and defined the group criteria. **End of Procedure.**

Assign Group Security

Use this task to assign security to a group. Security defines the UCPath users allowed to use the group.

Navigation: PeopleSoft Menu > Set Up HCM > Common Definitions > Group Build > **Security by Group**

Step	Action
1.	In this example, assign security to the **POLDEPT** group (Riverside Campus Police department) so that the group can be used to create performance and development documents.

Step	Action
2.	Search for the group. In this example, search for groups that start with 'p'. Click in the **Group ID** field. 
3.	Enter the desired information into the **Group ID** field. For this example, enter **p**.
4.	Click the **Search** button. 
5.	Select the appropriate group. For this example, click the **POLDEPT** list item. 
6.	Use the **Security by Group** page to define users who can work with the group. Group security is effective dated and defaults to the current system date (today's date). UCPath policy recommends that you back date the effective date to 01/01/1910.
7.	Click in the **Effective Date** field. 09/11/2018
8.	In this example, the field is highlighted for you. Press **[Delete]**.
9.	Enter the desired information into the **Effective Date** field. For this example, enter **01011910**.
10.	Look up the user for who you want to assign group security. Click the **Look Up User ID** button. 🔍
11.	Click in the **User ID** field. 
12.	Search for IDs that start with eper. Enter the desired information into the **User ID** field. For this example, enter **eper**.
13.	Click the **Look** Up button. 
14.	For this example, select the **EPERFHRADMIN** list item. 

Step	Action
15.	The user name and ID appear. The **Status** is active. When the user's access to the group should be revolked, you can inactivate the record.
16.	Multiple users can have access to the group. Click the **Add a New Row** button. +
17.	When adding new users, the effective date should reflect the date of the user addition and does not need to be back dated. Note the back date was retained in this example.
18.	Click in the **User ID** field.
19.	If the **User ID** is known, enter it directly into the field. Enter the desired information into the **User ID** field. For this example, enter **UC_ROLEN**.
20.	For this example, select the **UC_ROLEN** list item. UC_ROLEN
21.	Define the components that the user can access for the group. In this example, use the **Default** button to apply the components that are listed on the **Group Security Default** page.
22.	Click the **Default** button. Default
23.	The first 3 out of 171 components are shown in the **Component Name** group box. Use the navigation buttons to move through the components. Add or delete components as needed by using the **[+]** and **[-]** buttons.
24.	Click the **Save** button. Save
25.	You have successfully assigned security to a group. **End of Procedure.**

Define Performance Calendar

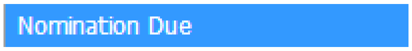
Use this task to define a performance calendar and due dates for evaluation process steps.

Use of performance calendars is based on your Location's business practices.

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > ePerformance > Document Structure > **Performance Calendar**

Step	Action
1.	In this example, create a new performance calendar for the annual performance evaluation, with seven evaluation process steps and dates.
2.	Use the **Find an Existing Value** tab to search for an existing performance calendar. Use the **Add a New Value** tab to create a new performance calendar.
3.	Click the **Add a New Value** tab. 
4.	Name the new calendar by entering the desired information into the **Calendar ID** field. For this example, enter **UCRANN1**.
5.	Click the **Add** button. 
6.	Use the **Performance Calendar** page to identify the calendar period and due dates for the evaluation process steps.
7.	Enter a description of the performance calendar. Click in the **Description** field.
8.	Enter the desired information into the **Description** field. For this example, enter **Annual Performance Calendar**.
9.	The **Business Unit** defaults. Based on your security settings, you may be able to update the field. For this example, use the Riverside business unit.
10.	Click the **Look up Business Unit** button.
11.	Select the appropriate business unit. For this example, select the **RVCMP** list item. 
12.	Click in the **Calendar Period ID** field.

Step	Action
13.	Enter a descriptive identifier of the period within the performance calendar. Enter the desired information into the **Calendar Period ID** field. For this example, enter **2018-19**.
14.	The **Status** defaults to **Active.** When a performance calendar is no longer needed, you can inactive it.
15.	Click in the **Period Begin Date** field.
16.	Enter the desired information into the **Period Begin Date** field. For this example, enter **04012018**.
17.	Click in the **Period End Date** field.
18.	Enter the desired information into the **Period End Date** field. For this example, enter **03312019**.
19.	Next, identify the evaluation process steps and dates in the **Due Dates** section.
20.	Click the button to the right of the **Due Date Type** field.
21.	Select the appropriate type. For this example, select the **Approve Criteria** list item.  Approve Criteria
22.	Click in the **Due Date** field.
23.	Enter the desired information into the field. For this example, enter **08312018**.
24.	Click the **Add a New Row** button.
25.	**Checkpoint Due** defaults in the new row and can be changed if needed. For this example, accept the default.
26.	Click the button to the right of the **Checkpoint Sequence** field.
27.	Select the appropriate sequence. For this example, select the **Checkpoint 01** list item.  Checkpoint 01
28.	Click in the **Due Date** field.

Step	Action
29.	Enter the desired information into the **Due Date** field. For this example, enter **12302018**.
30.	Click the **Add a New Row** button. ⊞
31.	Accept the **Due Date Type** default and then click the button to the right of the **Checkpoint Sequence** field. ⌄
32.	Select the appropriate sequence. For this example, select the **Checkpoint 02** list item.  Checkpoint 02
33.	Click in the **Due Date** field. 
34.	Enter the desired information into the **Due Date** field. For this example, enter **02202019**.
35.	Click the **Add a New Row** button. ⊞
36.	Click the button to the right of the **Due Date Type** field. ⌄
37.	Select the appropriate type. For this example, select the **Evaluation Due** list item.  Evaluation Due
38.	Click in the **Due Date** field. 
39.	Enter the desired information into the **Due Date** field. For this example, enter **02252019**.
40.	Click the **Add a New Row** button. ⊞
41.	Click the button to the right of the **Due Date Time** field. ⌄
42.	Select the appropriate item. For this example, select the **Nomination Due** list item.  Nomination Due

Step	Action
43.	Click the **Due Date** field.
44.	Enter the desired information into the **Due Date** field. For this example, enter **02282019**.
45.	Click the **Add a New Row** button. ⊞
46.	Click the button to the right of the **Due Date Type** field. ⌄
47.	Select the appropriate type. Select the **Evaluation Due** list item.  Evaluation Due
48.	Click the button to the right of the **Role** field. ⌄
49.	Select the appropriate role. For this example, select the **Employee** list item.  Employee
50.	Click in the **Due Date** field.
51.	Enter the desired information into the **Due Date** field. For this example, enter **04152019**.
52.	Click the **Add a New Row** button. ⊞
53.	Click the button to the right of the **Due Date Type** field. ⌄
54.	Select the appropriate type. For this example, select the **Evaluation Due** list item.  Evaluation Due
55.	Click the button to the right of the **Role** field. ⌄

Step	Action
56.	Select the appropriate role. For this example, select the **Manager** list item. 
57.	Click in the **Due Date** field. 
58.	Enter the desired information into the **Due Date** field. For this example, enter **05312019**.
59.	When all of the evaluation process step dates are defined, save the record. Click the **Save** button. 
60.	You have successfully defined a performance calendar. **End of Procedure.**

Create Document Section

Use this task to define a new document section to be used in a document template.

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > ePerformance > Document Structure > **Section Definition**

Step	Action
1.	You can search for existing document sections on the **Find an Existing Value** tab. Always search for an existing section before adding a new one.
2.	In this example, create a new section called COMPNCY (competency). Assume that a search was already performed and the section does not exist.
3.	Click the **Add a New Value** tab. 
4.	Click in the **Section Type** field. 
5.	Enter the desired information into the **Section Type** field. For this example, enter **COMPNCY**.
6.	Click the **Add** button. 

Step	Action
7.	Use the **Section Definition** page to define sections to be used in performance and development documents.
8.	Sections are effective dated and the date defaults to the current system date (today's date). UCPath policy recommends that you backdate sections to 01/01/1910.
9.	Click in the **Effective Date** field.  09/20/2018
10.	In this example, the date is highlighted for you. Press **[Delete]**.
11.	Enter the desired information into the **Effective Date** field. For this example, enter **01011910**.
12.	The **Status** field defaults to **Active**. When a section is no longer needed, you can inactivate it.
13.	Provide a description for the section. Click in the **Description** field. 
14.	Enter the desired information into the **Description** field. For this example, enter **Competency Section**.
15.	Use the **Rate** check box to enable a rating assignment for the section. The rating assignment can be a system calculation or manual calculation. If the check box is selected, a rating field appears in the section summary of a document created with this section. The check box is enabled if **Learning**, **None** or **Overall Summary** is selected in the **Special Processing** field.
16.	Click the **Rate** check box. ☐
17.	Use the **Preliminary Rating** check box to enable a manager to enter a preliminary rating for the performance document. The check box is enabled if the **Rate** check box is selected and the **Special Processing** field is set to **Overall Summary**. For this example, do not select the check box.

Step	Action
18.	Use the **Weight** check box to enable weighting for this section relative to the other sections in the document. If the check box is selected, the **Weight Section** field appears in the section summary of a document created with this section. This check box is enabled if the **Rate** check box is marked and the **Special Processing** field is set to **Learning** or **None**. You cannot weight sections of a performance document if the **Summation** or **Review Band** calculation method is selected for the **Overall Summary** section.
19.	For this example, click the **Weight** check box. ☐
20.	There are three calculation methods: - **Average:** Uses numeric ratings to calculate a weighted average if weights exist, otherwise it calculates a straight average. - **Summation:** The rating model must define evaluation points. Ratings are converted to evaluation points. - **Review Band**: Similar to **Summation** but available only for the **Overall Summary** section of a document. For this example, leave the field blank.
21.	Select the default **Rating Model** for the section. For this example, leave this field blank.
22.	The **Rating Display** field indicates how you want the system to display the rating options. **Drop-Down Box** is the default.
23.	The **Minimum Weight** field is used when ratings are calculated to ensure that the section weight cannot fall below a minimum value. The **Weight** field contains the default weight for a section. Both fields are enabled if the **Weight** check box is selected. For this example, do not change the values.
24.	Use the **Special Processing** field to determine the type of information that is entered in this section and how the system processes the information. For this example, accept the default of **None**.
25.	The **Items** section contains fields that determine if the section on the document can contain content items. These fields are only available if the **Special Processing** field is set to **None.**
26.	Click the **Enable Items** check box. ☐

Step	Action
27.	Use the **Content Type** field to identify which content items are included when defining the criteria used to evaluate performance on the document template.
28.	Click the button to the right of the **Content Type** field. ⌄
29.	Select the appropriate content type. For this example, select the **Competencies** list item.  Competencies
30.	The **Prompt Table** contains the content items to be included in the section. UCPath populates this field based on the **Content Type** selected.
31.	Use the **Mandatory** check box to restrict the document author from editing or deleting items. For this example, click the **Mandatory** check box. ☐
32.	Use the **Description** check box to display the description field on the document template and documents. Click the **Description** check box. ☐
33.	Use the **Critical** check box to display a critical indicator for all item section fields and check boxes. Click the **Critical** check box. ☐
34.	Click the scroll bar.
35.	The **Sub-Items** section fields are enabled if the **Enable Items** check box is selected in the **Items** section. For this example, sub-items are enabled and a few other check boxes are marked.
36.	Use the **Enable Sub-Items** check box to indicate that the section can contain sub-items. Click the **Enable Sub-Items** check box. ☐
37.	The **Description** check box displays the description on the evaluation document. Click the **Description** check box. ☐

Step	Action
38.	Specify the table that holds the sub-items that are included in the section. Click the **Look up Prompt Table** button. 🔍
39.	For this example, select the **EP_J_CAT_SUB_I** list item. EP_J_CAT_SUB_I
40.	Select the **Content Type** from which the content items should be selected. It is associated with the value selected in the **Content Type** field in the **Items** section. Click the button to the right of the **Content Type** field. ⌄
41.	Select the appropriate content type. For this example, select the **Sub-Competencies** list item. Sub-Competencies
42.	The **Profile** section identifies whether non-person profile criteria downloads are allowed.
43.	Use the **Initialize from Profile** check box to automatically load competencies or responsibilities associated with the profile type from the profile into the template or document. Click the **Initialize from Profile** check box. ☐
44.	Select a **Profile Type**. Click the button to the right of the **Profile Type** list. ⌄
45.	Select the appropriate profile type. For this example, select the **Job** list item. Job
46.	Click the **Save** button. Save
47.	You have successfully defined a new document section. **End of Procedure.**

Clone Template Definition

Use this task to clone an existing template definition.

Cloned templates can be used when last year's template can be reused for next year's evaluation cycle. It must be used for the same group of employees.

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > ePerformance > Document Structure > **Clone Template Definition**

Step	Action
1.	Begin this task by searching for an existing template definition. You can use a variety of search criteria to locate a template.
2.	Click the **Search** button. 
3.	In this example, no criteria is entered so a list of all templates appears (up to the first 300). For this example, select the **UCANNUAL** list item. 
4.	The **Clone Template Definition** page appears. The top portion of the page displays information about the template being cloned. The bottom portion of the page contains the fields that are required for the new cloned template. The original template definition is effective dated and displays 01/01/1910.
5.	Click in the **Effective Date** field. 
6.	UCPath policy recommends that you use the evaluation cycle's begin date as the effective date for the cloned template.
7.	Enter the desired information into the **Effective Date** field. For this example, enter **04012018**.
8.	Click the **Look up New Document Type** button. 🔍
9.	Select the appropriate document type. For this example, select the **PERF&SAL** list item. 
10.	Click in the **New Template ID** field. 

Step	Action
11.	Enter the desired information into the **New Template ID** field. For this example, enter **EUCANNL**.
12.	Click the **Save** button. 
13.	The cloned information appears in the **Template Definition** component. You can update the information for the cloned template by navigating to each page and changing the details as needed. In this example, no changes are needed.
14.	Click the **Save** button. 
15.	If you used last year's template for the new year's evaluation cycle with new content items added, you must inactivate the previous year's template before using the new template.
16.	You have successfully cloned an existing template definition. **End of Procedure.**

Define Document Template

Use this task to define a new document template to create a performance or development document.

There are several high-level steps to create a document template:

- Define the general template information
- Define the document processes
- Define tabs in the document
- Add sections to the document
- Add criteria to document sections
- Load content from profiles

Before you define a document template, document roles, document types, and section definitions must exist, as well as performance calendars, if calendars are used at your Location.

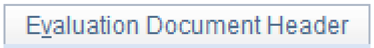
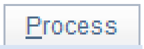
Navigation: PeopleSoft Menu > Set Up HCM > Product Related > ePerformance > Document Structure > **Template Definition**

Step	Action
1.	You can search for existing document templates on the **Find an Existing Value** tab. Always search for an existing template before adding a new template.

Step	Action
2.	In this example, create a new template called UCAPD (annual performance document). Assume that a search was already performed and the template does not already exist.
3.	Click the **Add a New Value** tab.  Add a New Value
4.	Click the **Look up Document Type** button. 🔍
5.	Select the appropriate document type. For this example, select the **UCANNUAL** list item.  UCANNUAL
6.	Name the new document template. Click in the **Document Template ID** field. 
7.	Enter the desired information into the **Document Template ID** field. For this example, enter **UCAPD**.
8.	Templates are effective dated and the date defaults to the current system date (today's date). UCPath recommends that you backdate the document template to 01/01/1910.
9.	Click in the **Effective Date** field.  09/21/2018
10.	For this example, the effective date is highlighted for you. Press **[Delete]**.
11.	Enter the desired information into the **Effective Date** field. For this example, enter **01011910**.
12.	Click the **Add** button.  Add
13.	Use the **General** page to define general template information. The information specified on this page controls the sections that are available on the other pages of the **Template Definition** component.
14.	Add a description for the template. The description appears as a selection field when creating evaluations from a template. Click in the **Description** field. 

Step	Action
15.	Enter the desired information into the **Description** field. For this example, enter **Annual Staff Perform Eval**.
16.	The **Display Type** defaults to **Long Format Only**. For this type, managers and employees must scroll through the document and no page tabs appear. Other options include: - **Tabs**: the document displays in sections that appear as tabs. - **Toggle-Default Long**: the document displays in long format and employees can toggle to tabbed format. - **Toggle-Default Tabs:** the document displays in tabbed format and employees can toggle to the long format. For this example, accept the default value.
17.	The **Status** field defaults to **Active**. When a template is no longer needed, you can inactivate it.
18.	The three check boxes on the page represent the following: **- Official Review:** designates that the document generated from the template is used to update salary planning information. **- Language Checker**: enables the use of the Language Checker tool when entering comments. **- Concatenate Page Title:** indicates the document page title displays both the step and action to be performed for the step. For this example, only the **Concatenate** check box is selected.
19.	The **Business Process** section defines additional business process steps to add when the template is used to create a document. When a check box is selected here, a corresponding section is added to the **Process** page.
20.	Use the **Define Criteria** check box to enable the **Define Criteria** step, which allows managers and employees to add goals and other content to the evaluation. For this example, click the **Define Criteria** check box. ☐
21.	Use the **Track Progress** check box to enable mid-period checkpoints. For this example, click the **Track Progress** check box. ☐

Step	Action
22.	Use the **Nominate Participants** check box to allow peer feedback on an employee's performance. For this example, click the **Nominate Participants** check box. ☐
23.	Use the **Document Due Date Method** section to identify how due dates for steps in the evaluation will be determined. Options include: **- Performance Calendar:** use an existing calendar to determine the due dates when a document is created. **- Template Setup:** document due dates manually when the document is created. For this example, use the performance calendar.
24.	Click the button to the right of the **Due Date Method** field. ⌄
25.	Select the appropriate method. For this example, select the **Performance Calendar** list item.  Performance Calendar
26.	New fields appear. You must select the **Calendar ID** and provide the **Calendar Period**. When the period is identified, UCPath populates the potential due dates in the **Calendar Period Due Date** field in the **Evaluations** section, along with the due dates that appear on the **Process** page.
27.	Click the button to the right of the **Calendar ID** field. ⌄
28.	Select the appropriate calendar. For this example, select the **ANNUAL** list item.  ANNUAL
29.	Click the button to the right of the **Calendar Period ID** field. ⌄
30.	Select the appropriate period. For this example, select the **2018** list item.  2018

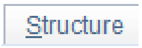
Step	Action
31.	Use the **Evaluations** section to identify the roles associated with the document and actions that each role can perform in the evaluation.
32.	Click the **Employee Evaluation** check box. ☐
33.	Add the Participant role. Click the **Add a New Role** button. ⊞
34.	Click the button to the right of the **Role** field. ▾
35.	Select the appropriate role. For this example, select the **Participant** list item.  Participant
36.	Click the **Participant Allow Document Download** check box. ☐
37.	Click the **Evaluation Document Header** tab.  Evaluation Document Header
38.	Use the **Evaluation Document Header** tab to indicate the information that should display in the document header for those assigned the manager's role.
39.	Do not use the **Yrs of Service** and **Yrs in Job** columns. UC uses a custom calculation to determine years of service and years in job. The custom calculation is not used in ePerformance. Do not select those check boxes.
40.	Select the appropriate header information check boxes. For this example, the check boxes for the **Manager** and **Participant** have been selected for you.
41.	Click the **Process** tab.  Process
42.	Use the **Process** page to define the document processes. Information specified here determines the functions that employees, managers and participants can perform in each step of the evaluation process.
43.	Use the **Define Criteria Step** section to establish the document criteria used for updates and completion.
44.	Select the roles that can update the criteria in documents created by this template. Click the button to the right of the **Updated By** field. ▾

Step	Action
45.	Select the appropriate role. For this example, select the **Manager and Employee** list item.  Manager and Employee
46.	Click the button to the right for the **Approved By** field. ⌄
47.	Select the appropriate role. For this example, select the **Manager** list item.  Manager
48.	Click the button to the right of the **Updated By** field. ⌄
49.	Select the appropriate role. For this example, select the **Manager and Employee** list item.  Manager and Employee
50.	If **Template Setup** is used as the **Due Date Method** on the **General** page, **Approval Due in Days** and **Approval Due Date** fields appear. Because **Performance Calendar** was used in this example, these fields do not appear.
51.	Use the **Track Process Steps** section to define the number of checkpoint reviews assigned as part of the evaluation. Specify the roles who can add and update the evaluations. This section appears only if the **Track Progress** business process is selected on the **General** page. There are three sub-sections in this section: - Mid-Period Checkpoints - Scheduled Checkpoints - Finalize Criteria In this example, a number of fields in this section are populated based on the **Due Date Method** field and the use of a **Performance Calendar**. Otherwise, you must specify the details.
52.	For this example, accept the default for the **Updated By** and **No. of Checkpoint** fields. The **Scheduled Checkpoint** dates default from the associated **Performance Calendar**.

Step	Action
53.	The **Finalize Criteria** section is used to identify the roles that can complete the **Finalize Criteria** step in documents. In this example, the **Manager** defaults for the **Completed By** field. Accept this default.
54.	Use the **Copy Comments to Evaluation** check box to copy the latest comments from the **Finalize Criteria** step to the employee and manager evaluations. Note that only comments entered by the employee are copied to the employee self evaluation and only comments entered by the manager are copied to the manager evaluation. For this example, do not select the check box.
55.	If **Template Setup** is used as the **Due Date Method** on the **General** page, a **Final Due in Days** field is provided for completion to indicate the final due date. Otherwise, a **Final Due Date** field displays the due date specified on the **Performance Calendar**.
56.	Click the scroll bar.
57.	Use the **Nominate Participants** section to identify who can update and submit the names of peers that should participant in the evaluation process.
58.	Select the roles that can add peers by name to participant in the evaluation. Click the button to the right of the **Added By** field. ⌄
59.	Select the appropriate roles. For this example, select the **Manager and Employee** list item.  Manager and Employee
60.	Select the roles that can submit the names of nominees to participate in the evaluation. Click the button to the right of the **Submitted By** field. ⌄
61.	Select the appropriate roles. For this example, select the **Manager** list item.  Manager

Step	Action
62.	Select the roles that can track the nomination process. Click the button to the right of the **Tracked By** field.
63.	Select the appropriate roles. For this example, select the **Manager** list item. Manager
64.	If **Template Setup** is used as the **Due Date Method** on the **General** page, a **Nomination in Days** field is provided to indicate the nomination due date. Otherwise, a **Calendar Due Date** field displays the due date specified on the **Performance Calendar**.
65.	The **Nomination Role Rules** section provides the minimum and maximum number of participants that are required for the evaluation. The **Anonymity for Employee** and **Anonymity for Manager** check boxes are used to indicate if the name of the manager or employee nominating the participant should be anonymous to the participants. For this example, do not select the check boxes. This section appears only if the **Nominate Participants** business process is selected on the **General** page.
66.	Click in the **Maximum Required** field. 0
67.	Enter the desired information into the **Maximum Required** field. For this example, enter **5**.
68.	Use the **Review Participant Evaluations** section to identify who can access and view the names of peers that are participating in the evaluation. This section appears only if the **Nominate Participants** business process is selected on the **General** page.
69.	Click the button to the right of the **Track Evaluations** field.
70.	Select the appropriate role. For this example, select the **Manager** list item. Manager
71.	Click the button to the right of the **View Evaluations** field.

Step	Action
72.	Select the appropriate role. For this example, select the **Manager** list item. Manager
73.	Click the scroll bar.
74.	Use the **Manage Evaluation** section to identify the evaluation sequence and evaluation approval definition.
75.	Specify when the evaluation takes place relative to a formal approval of the document. Click the button to the right of the **Review Process** field. 
76.	Select the appropriate timing. For this example, select the **Apvl After Review-4 Steps** list item. Apvl After Review-4 Steps
77.	The **Definition ID** field defines approval routing used when the manager clicks the **Submit** button on the performance document. For this example, accept the default of **ManagerOnly**.
78.	You can view a graphical representation of the ratings on the document by marking the **Manager** and **Employee** check boxes. For this example, click the **Manager** check box. ☐
79.	Use the **Cancel Outstanding Evaluations** check box to automatically cancel evaluations that are not completed and nominations that are not accepted when the manager evaluation moves past the **In Progress** status. For this example, do not select the check box.
80.	Use the **Allow Attachments** check box to allow attachment capability for manager documents. For this example, click the **Allow Attachments** check box. ☐
81.	Use the **Evaluation Rules** section to define rules for calculating ratings that apply to the document as a whole. For this example, accept the defaulted values.
82.	Click the scroll bar.

Step	Action
83.	Click in the **Tabs** tab. 
84.	Use the **Tabs** page to define tab labels and tab display order for the document. Use this page only if the **Display Type** field on the **General** page is set to **Tabs**. In this example, the **Long Format Only** option was used on the **General** page so tabs are not needed.
85.	Click the **Structure** tab. 
86.	Use the **Structure** page to define the document structure. You can add sections to the template, define override default section settings and define the way each role interacts with the document section.
87.	Select a section to include in the documents that are generated from this template. Click the button to the right of the **Section** field. ▾
88.	Select the appropriate section. For this example, select the **Accomplishments** list item. 
89.	The **Include in Define Criteria and Track Process** check box is selected, indicating that the section will be included as part of those steps. This check box appears only if the **Define Criteria and Track Progress** business processes are selected on the **General** page. For this example, do not select the check box.
90.	The **Display Order** specifies the relative order in which this section appears in the document. The default value for the first section is 10. This number is incremented by 10 for each new section added. You can override a sequence as needed. For this example, accept the default of 10.
91.	The **Section**, **Items**, **Sub-Items** and **Profile Management** sections fields default to the values defined for the section on the **Section Definition** page. You can override the values as needed.
92.	For this example, deselect the **Rate** check box. ☑

Step	Action
93.	Leave the default values for the **Items**, **Sub-Items** and **Profile Management** sections.
94.	Click the scroll bar.
95.	Use the **Define Criteria Step - Role Rules** section to define how managers and employees can view and update items in the **Define Criteria** step of the evaluation process. Use the check boxes to grant the role permission to add, update, or copy items on the evaluation document during creation. This section appears only if the **Include in Define Criteria** check box is selected on the **Selection Definition**. For this example, no changes are needed to this section.
96.	Use the **Track Progress Step - Role Rules** section to define how managers and employees can view and update items in the **Track Progress** business process of the evaluation process. Use the check boxes to grant the role permission to add, update or copy items on the evaluation document during creation. This section appears only if the **Include in Track Process** business process is selected on the **General** page. For this example, no changes are needed to this section.
97.	The **Final Evaluation Step - Role Rules** section defines how managers and employees can view and update items in the **Define Criteria** step of the evaluation process. Select the appropriate check boxes to grant the manager or employee permission to add items, update items, delete items, copy objective items or copy manager's items on the evaluation document when it's created. This section appears only if the **Track Progress** business process is selected on the **General** page.
98.	In this example, first add the **Employee** and **Participant** roles.
99.	Click the **Add a New Role** button. ⊞
100.	Click the button to the right of the **Role** field. ⌄
101.	Select the appropriate role. For this example, select the **Employee** list item.  Employee
102.	Click the **Add a New Role** button. ⊞

Step	Action
103.	Click the button to the right of the **Role** field. 
104.	Select the appropriate role. For this example, click the **Participant** list item. 
105.	Because the **Rate** check box was not selected in the **Sections** section, no check boxes are selected on the **Rate/Weight** tab.
106.	Click the **Section** tab. 
107.	Continue through the remaining tabs in the **Final Evaluation Step - Role Rules** section and select the appropriate check boxes.
108.	For this example, **Comments** were selected for all roles and **Participant Feedback** and **Other Evaluator Comments** check boxes were selected for the **Manager** role.
109.	Click the **Item** tab. 
110.	For this example, no changes are needed for the items.
111.	Click the **Edit** tab. 
112.	For this example, click the **Add** check box for the **Manager**. ☐
113.	For this example, click the **Update** check box for the **Manager**. ☐
114.	Click the **Profile Management** tab. 
115.	For this example, no changes are needed for the **Profile Management** tab.
116.	Click the scroll bar.
117.	You can add additional sections for the evaluation document by adding a new row to the **Sections** group box. Follow the same process to update the various sections as needed.
118.	For this example, a new **Competency Section** was added. Take a minute to review the **Section** updates.

Step	Action
119.	Click the **Content** tab. Content
120.	Use the **Content** page to add criteria to sections. Only sections entered on the **Structure** page are available on this page. To add more sections, return to the **Structure** page.
121.	In this example, there are two sections defined in the template and the **Competency Section** appears. Use the navigation buttons to move between sections. Be sure to set up content for each of the sections as required.
122.	Use the **Section Items** section to load content for the section. The fields in this section are available only if the **Enable Items** check box is selected on the **Structure** page.
123.	Select an item from the **Content Item Detail** table. Click the **Look up Item ID** button. 🔍
124.	Select the appropriate item. For this example, select the **1000** list item. 1000
125.	For this example, no other changes are needed to the remaining fields.
126.	Click the **Save** button. Save
127.	You have successfully defined a new document template to be used in the document creation process. **End of Procedure.**

PHCMEPR310: HR Administrator Performance Activities

Cancel ePerformance Document

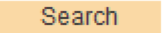
Use this task to cancel an ePerformance document.

Only documents with a status of **Define Criteria**, **Track Progress** or **Evaluation in Progress** can be canceled. Canceled documents are not deleted from UCPath; they become inactive and move to the **Canceled** status. Canceled documents appear on the **Historical Documents** page and the **View Documents** page.

Navigation: PeopleSoft Menu > Workforce Development > Performance Management > Performance Documents > Administrative Tasks > **Cancel Document**

OR
PeopleSoft Menu > Workforce Development > Performance Management > Development Documents > Administrative Tasks > **Cancel Document**

Step	Action
1.	Use the **Cancel Document** page to view documents in the **Define Criteria**, **Track Progress** or **Evaluation in Progress** statuses, and initiate the **Cancel** activity. As the ePerformance HR Administrator, you can select and cancel any uncanceled document.
2.	Use the search criteria to find the document you want to cancel. For this example, cancel the annual performance evaluation document for Abe Jones. The document is in the **Evaluation in Progress** status.
3.	Click in the **Last Name** field. 
4.	Enter the desired information into the **Last Name** field. For this example, enter **Jones**.
5.	Click the **Search** button. 
6.	UCPath displays the performance documents matching the search criteria.
7.	Select the check box for each document you want to cancel. For this example, click the check box for the annual performance document for Abe Jones. 
8.	Click the scroll bar. 
9.	Click the **Continue** button. 
10.	Use the **Confirm Cancellation** page to verify that you have selected the correct employee document(s). Click the **Return to Previous Page** link to perform a new search, if needed.

Step	Action
11.	Click the **Save** button. 
12.	UCPath displays a confirmation message.
13.	Click the **OK** button. 
14.	The **Cancel Document** page appears again, but the canceled document no longer appears in the search results.
15.	Click the **Performance Documents** menu. 
16.	Click the **View Documents** list item. 
17.	Click in the **Last Name** field. 
18.	Enter the desired information into the **Last Name** field. For this example, enter **Jones**.
19.	Click the **Search** button. 
20.	Notice that the canceled annual performance document for Abe Jones appears on the **View Performance Documents** page.
21.	You have successfully canceled an ePerformance document. **End of Procedure.**

Delete ePerformance Document

Use this task to delete an ePerformance document. Only documents with the **Canceled** status can be deleted.

Navigation: PeopleSoft Menu > Workforce Development > Performance Management > Performance Documents > Administrative Tasks > **Delete Document**
OR
PeopleSoft Menu > Workforce Development > Performance Management > Development Documents > Administrative Tasks > **Delete Document**

Step	Action
1.	Use the **Delete Documents** page to view documents in the **Canceled** status and initiate the delete process. As the ePerformance HR Administrator, you can delete any canceled documents.
2.	Use the search criteria to find the document to delete. For this example, delete a canceled document for Atha Martin.
3.	Click in the **Last Name** field.
4.	Enter the desired information into the **Last Name** field. For this example, enter **martin**.
5.	Click the **Search** button. Search
6.	UCPath displays the performance documents matching the search criteria.
7.	Select the check box for each document you want to delete. For this example, click the check box for Atha Martin. ☐
8.	Click the **Continue** button. Continue
9.	Use the **Confirm Delete** page to verify that you have selected the correct employee document(s). Click the **Return to Previous Page** link at the bottom of the page to perform a new search, if needed.
10.	Click the **Save** button. Save
11.	UCPath displays a confirmation message.
12.	Click the **OK** button. OK
13.	The **Delete Documents** page appears again. Perform another search as needed. For this example, search again to verify that the document was deleted. Notice the last name Martin is still in the search criteria fields.
14.	Click the **Search** button. Search
15.	UCPath displays a message that there are no documents that meet the search criteria.

Step	Action
16.	You have successfully deleted an ePerformance document. **End of Procedure.**

Reopen ePerformance Document

Use this task to reopen a closed or canceled document in ePerformance. You can also use the reopen task to change the status of documents that are currently in the evaluation phase back to **Evaluation in Progress**.

Navigation: PeopleSoft Menu > Workforce Development > Performance Management > Performance Documents > Administrative Tasks > **Reopen Document**
OR
PeopleSoft Menu > Workforce Development > Performance Management > Development Documents > Administrative Tasks > **Reopen Document**

Step	Action
1.	Use the **Reopen Document** page to view documents in an **Approval**, **Shared with Employee**, **Completed**, **Pending Acknowledgement**, **Acknowledged** and **Canceled** status. As the ePerformance HR Administrator, you can reopen a document in one of these statuses. Managers with the appropriate security role can reopen documents with the above statues excluding the **Completed** and **Canceled** status.
2.	Use the search criteria to locate the document to reopen. For this example, reopen the canceled annual performance evaluation document for Abe Jones.
3.	Click in the **Last Name** field. 
4.	Enter the desired information into the **Last Name** field. For this example, enter **jones**.
5.	Click the **Search** button. 
6.	UCPath displays the performance documents matching the search criteria.
7.	Select the check box for each document you want to reopen. For this example, click the check box for Abe Jones. ☐
8.	Click the **Continue** button. 

Step	Action
9.	Use the **Confirm Reopen Document** page to verify that you have selected the correct document. Click the **Return to Previous Page** link at the bottom of the page to perform a new search, if needed.
10.	Click the **Save** button. 
11.	UCPath displays a confirmation message.
12.	Click the **OK** button. 
13.	The **Reopen Document** page appears again, and the document now displays the **Completed** status instead of the **Canceled** status.
14.	You have successfully reopened an ePerformance document. **End of Procedure.**

Transfer ePerformance Document

Use this task to transfer performance documents from one manager to another. Documents with any status other than **Completed** or **Cancelled** are transferable.

When a document is transferred, UCPath automatically notifies the new manager that he or she is responsible for completing the evaluation process that is in progress for the employee.

The manager role also has the ability to transfer documents but can only see documents for their direct reports and transferred documents. Managers access this page from the **Performance WorkCenter**.

Navigation: PeopleSoft Menu > Workforce Development > Performance Management > Performance Documents > Administrative Tasks > **Transfer Document**
OR
PeopleSoft Menu > Workforce Development > Performance Management > Development Documents > Administrative Tasks > **Transfer Document**

Step	Action
1.	Use the **Transfer Document** page to view documents in all statuses except **Completed** and **Cancelled**. As the ePerformance HR Administrator, you can select any document and transfer it to another manager.

Step	Action
2.	Use the search criteria to find the document for transfer. For this example, transfer the annual performance evaluation document for Abe Jones from manager Shi Bow to Thomas Fo. The document is in the **Evaluation in Progress** status.
3.	Click in the **Last Name** field.
4.	Enter the desired information into the **Last Name** field. For this example, enter **jones**.
5.	Click the **Search** button. Search
6.	UCPath displays the performance documents matching the search criteria.
7.	Select the check box for each document you want to transfer to another manager. For this example, click the check box for Abe Jones. ☐
8.	Click the **Continue** button. Continue
9.	Use the **Confirm Transfer** page to verify that you have selected the correct employee document(s). Click the **Return to Previous Page** link at the bottom of the page to perform a new search, if needed.
10.	Click the **Select a Manager** link to continue with the transfer process. Select a Manager
11.	Use the **Person Search** page to search for the manager that will become responsible for completing the employee's evaluation.
12.	You can find the manager using various search criteria. Click in the **Last Name** field.
13.	Enter the desired information into the **Last Name** field. For this example, enter **fo**.
14.	Click the **Search** button. Search
15.	Managers matching the search criteria appear in the **Search Results** section.
16.	If necessary, click the **Details** button to review detailed information about the individual to ensure that you select the correct person.

Step	Action
17.	Click the **Details** button to review detailed information about the individual to ensure that you select the correct person. For this example, click the **Details** button for Thomas Fo.
18.	Review the details for the selected manager. If needed, click the **Return to List** link at the bottom of the page to return to the search results to select a different manager.
19.	Click the **Select This Person** button to continue with the transfer process for the selected manager. Select This Person
20.	The selected manager's name appears on the **Confirm Transfer** page.
21.	Click the **Save** button. Save
22.	UCPath displays a confirmation message. Upon confirmation, an email notification is automatically sent to the newly selected manager.
23.	Click the **OK** button. OK
24.	You have successfully transferred an employee's performance document to a different manager. **End of Procedure.**

Generate ePerformance Documents and View Results

Use this task to generate ePerformance documents for an individual employee or a group of employees.

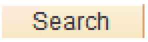
When generating documents for a group of employees, a group must exist in UCPath. After generating documents, you can review the results on the **View Document Creation Results** page.

Navigation: PeopleSoft Menu > Workforce Development > Performance Management > Performance Documents > **Create Documents**
OR
PeopleSoft Menu > Workforce Development > Performance Management > Development Documents > **Create Documents**

Step	Action
1.	For this example, generate annual performance documents for a group of employees. The group has already been defined in UCPath.
2.	Begin by searching for an existing run control ID used for the document generation process. If a run control ID is not available, use the **Add a New Value** tab to create a new ID. The run control ID is paired to your user ID. It uniquely identifies the process and defines the parameters to be used when you run the process. For this example, create a new run control ID.
3.	Click the **Add a New Value** tab. 
4.	Enter the desired information into the **Run Control ID** field. For this example, enter **CREATE**.
5.	Click the **Add** button. 
6.	Use the **Create Documents** page to enter the request parameters that define the processing rules and data to be included when generating the documents. When you save the page, the parameters are saved to the run control ID.
7.	Define the period of time for the documents. Click in the **Period Begin Date** field.
8.	Enter the desired information into the **Period Begin Date** field. For this example, enter **04012018**.
9.	Click in the **Period End Date** field.
10.	Enter the desired information into the **Period End Date** field. For this example, enter **03312019**.
11.	Select the type of documents you want to create. Click the button to the right of the **Document Type** field.
12.	Select the appropriate document type. The **Document Type** list is not restricted by **Business Unit** so the full list of available document types in UCPath appears. For this example, select the **Annual Performance Documents** list item. 

Step	Action
13.	Select the template to assign to the documents. Click the button to the right of the **Template ID** field. ⌄
14.	Select the appropriate template. For this example, select the **Perf Eval Plan Non-Sup Emp** list item.  Perf Eval Plan Non-Sup Emp
15.	In the **Manager Selection Method** field, specify a method for selecting manager IDs. Click the button to the right of the **Manager Selection Method** field. ⌄
16.	Use the **By Department Manager ID** option to retrieve a manager based on the department of the employee, which uses the **Manager ID** field on the **Department Profile** page.
17.	Use the **By Group ID** option to retrieve the manager from the **Manager ID** field on the **Group Profile** page.
18.	Use the **By Part Posn Mgmt Dept Mgr ID** to search for reports to relationships between managers and employees. UCPath uses the **By Manager ID** option if a reports to ID is not found.
19.	Use the **By Part Posn Mgmt Supervisor** to search for a reports to relationship between managers and employees. UCPath uses the **By Supervisor ID** option if a reports to ID is not found.
20.	Use the **By Reports To Position** option to retrieve the manager of the employee's position specified in the **Position Data** component. This is the preferred method.
21.	Use the **By Supervisor ID** option to retrieve the manager based on the **Supervisor ID** field on the **Job Information** page.
22.	For this example, select the **By Reports To Position** list item.  By Reports To Position
23.	UCPath automatically updates the **Create Documents Using** section to indicate the use of a **Group ID**.
24.	Use the **Documents Using Group ID** section to select the groups for which you want to create documents.
25.	Click the **Look up Group ID** button. 🔍

Step	Action
26.	Select the appropriate group. For this example, select the **POLICE** list item. 
27.	The **As Of Date** field defaults to the system date (today's date). Update the date to reflect the as of date for the documents.
28.	Click in the **As Of Dat**e field.
29.	In this example, the date has been highlighted for you. Press **[Delete]**.
30.	Enter the desired information into the field. For this example, enter **04012018**.
31.	Click the **Save** button. 
32.	Click the **Run** button. 
33.	Use the **Process Scheduler Request** page to enter parameters for the process. For this example, no changes are needed.
34.	Click the **OK** button. 
35.	A **Process Instance** number appears and helps you to identify the process when checking the run status on the **Process Monitor**.
36.	Click the **Process Monitor** link. 
37.	Use the **Process List** page to view the status of submitted process requests. Refresh the page every 15 seconds until the **Run Status** for your job is **Success**, **No Success** or **Error**.
38.	Click the **Refresh** button. 
39.	The **Run Status** is **Success**. Contact your supervisor if the **Run Status** is **No Success** or **Error**.
40.	The **Distribution Status** of **Posted** means that you can view process reports and output logs if applicable for the process.
41.	Navigate to the **View Documents Creation Results** page to review the process outcome.
42.	Click the **Performance Management** menu item. 

Step	Action
43.	Click the **View Documents Creation Results** menu item. 
44.	To view the results, enter the same run control ID used for the document creation process.
45.	Click in the **Run Control ID** field.
46.	Enter the desired information into the **Run Control ID** field. For this example, enter **CREATE**.
47.	Click the **Search** button. 
48.	Use the **View Document Creation Results** page to view a list of manager performance documents that were successfully created (and documents not created) in the **Create Document** process.
49.	The employees that are part of the group appear in the **Results** section.
50.	The **Success?** column displays **Yes** if the document was created successfully or **No** if it was not created.
51.	The **Status** column displays the document's status.
52.	You have successfully generated performance documents for a group and viewed the creation results. **End of Procedure.**

View ePerformance Documents

Use this task to view performance documents based on selected search criteria.

Navigation: PeopleSoft Menu > Workforce Development > Performance Management > Performance Documents > **View Documents**
OR
PeopleSoft Menu > Workforce Development > Performance Management > Development Documents > **View Documents**

Step	Action
1.	Use the **View Performance Documents** page to search for documents. Enter search criteria to search for a single document or a group of documents. For this example, search for incentive award program documents with the **Evaluation in Progress** status.

Step	Action
2.	Click the button to the right of the **Document Type** field. 
3.	Select the appropriate document type. For this example, select the **Incentive Award Programs** list item.  Incentive Award Programs
4.	Click the button to the right of the **Document Status** field. 
5.	Select the appropriate status. For this example, select the **Evaluation in Progress** list item.  Evaluation in Progress
6.	Click the **Search** button.  Search
7.	The performance documents that match the search criteria appear in the list.
8.	Click the **Name** link to open a specific document. For this example, click the **Dan Alice** link.  Dan Alice
9.	The document appears. In this example it is the **Manager Evaluation - View**. The **Performance Process** pane on the left side of the page displays the steps and tasks for this document. You can click each step link to expand the step and review the tasks.
10.	In this example, you can cancel the evaluation by clicking the **Cancel Evaluation** link. Or you can change the evaluation due dates by clicking the **Change Due Date** link.
11.	If the **Not Participating** check box is selected the eligible employee is not participating in the program.
12.	Click the **Return to View Performance Documents** link.  Return to View Performance Documents
13.	The **View Performance Documents** page appears again. Perform another search if needed.
14.	You have successfully viewed performance documents. **End of Procedure.**

Approve ePerformance Document

Use this task to approve an ePerformance document.

Approval levels are defined in UCPath and are based on local business practices.

Navigation: PeopleSoft Menu > Workforce Development > Performance Management > **Approve Documents**

Note: Managers can also perform document approvals by navigating to Performance WorkCenter > Manager Self Service > **Approve Perform/Develop Docs**

Step	Action
15.	Use the **Select Transactions to Approve** page to search for documents that are pending your approval. In this example, the **Document Type** defaults to **UCANNUAL**. Use this to search for annual performance evaluation documents.
16.	Click the **Search** button. Search
17.	UCPath displays documents pending your approval for the selected document type.
18.	Select the check box for each document you want to approve. For this example, click the check box for Evan Sut. ☐
19.	Click the scroll bar.
20.	Approve or deny the document. For this example, click the **Approve** button. Approve
21.	UCPath displays a confirmation message. Click the **Yes** button. Yes
22.	The document for Evan Sut no longer appears in the list of documents pending approval. **Note:** A manager may have both the ePerformance HR administrator role and the Manager role. If this is the case and the template for the document has the ManagerToAdmin approval definition ID attached, then the document remains in manager's approval queue waiting for administrator approval. If the manager approves the document a second time, then both approvals are processed and the document no longer appears in the manager's approval queue.

Step	Action
23.	If you have not reviewed the document yet, click the **Name** link to open the evaluation document before you approve it. For this example, review a document before you approve it.
24.	For this example, click the **Don Chidi** link.  Don Chidi
25.	Use the **Approve Document** page to approve or deny the document, provide approval comments, and view and add approvers as needed.
26.	Review high-level document details, such as the document type and rating. Use the **Performance Document Details** link to open the document for your review.
27.	The **Evaluation Approval Chain** section displays the current approval status. For this example, the document is in the **Pending** status.
28.	The **Evaluation Approval Chain** section also displays the approval routing and approver names. In some cases, multiple approvers may be required. To view the names of approvers, click the **Multiple Approvers** link. Use the **[+]** button to add additional approvers, if needed.
29.	Click the **Performance Document Details** link to review the document.  Performance Document Details
30.	Review the manager document, which includes inputs from the manager and the employee. When your review is complete, return to the **Approve Document** page.
31.	Click the scroll bar.
32.	Click the **Return to Performance Document Approval** link.  Return to Performance Document Approval
33.	Review the multiple approvers. Click the **Multiple Approvers** link.  Multiple Approvers
34.	Review the list of approvers. Click the **Close** button.  x
35.	Add comments about your approval or denial of the document. Click in the **Comment** field.

Step	Action
36.	Enter the desired information into the field. For this example, enter **I agree with the evaluation results.**.
37.	Click the **Approve** button. Approve
38.	UCPath displays a confirmation message.
39.	Click the **Close** button. Close
40.	The **Approve Document** page displays the new approval status of **Approved**. The document is now available for review as a historical document.
41.	You have successfully approved an ePerformance document. **End of Procedure.**

General Ledger

PHCMGEN100: Commitment Accounting Overview

Job Aid: Labor Ledger Structure

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMGEN100JA_LaborLedgerStructure_D1Rev00.pdf) to open the **Labor Ledger Structure** job aid in a new web browser window/tab.

PHCMGEN101: Chartfield Configuration

Job Aid: ChartFields at UC

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMGEN101JA_ChartFieldsUC_D1Rev00.pdf) to open the **Chartfields at UC** job aid in a new web browser window/tab.

PCHMGEN102: GL Assessment Configuration

Job Aid: Assessment Configuration – CBR Groupings

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMGEN102JA_CBRgroupings_D1Rev00.pdf) to open the **Assessment Configuration – CBR Groupings** job aid in a new web browser window/tab.

Job Aid: Assessment Configuration – CBR Rates

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMGEN102JA_CBRrates_D1Rev00.pdf) to open the **Assessment Configuration – CBR Rates** job aid in a new web browser window/tab.

Job Aid: Assessment Configuration – VLA Rates

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMGEN102JA_VLArates_D1Rev00.pdf) to open the **Assessment Configuration – VLA Rates** job aid.This is a link to the job aid in a new web browser window/tab.

Job Aid: Assessment Configuration – GAEL Rates

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMGEN102JA_GAELrates_D1Rev00.pdf) to open the **Assessment Configuration – GAEL Rates** job aid in a new web browser window/tab.

Job Aid: Assessment Configuration – FAU Redirect

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMGEN102JA_FAUredirect_D1Rev00.pdf) to open the **Assessment Configuration – FAU Redirects** job aid in a new web browser window/tab.

PHCMGEN110: Funding Entry Inquiry

Job Aid: Examples of Funding Entry Inquiry

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMGEN110JA_FundingEntryInquiry_D1Rev00.pdf) to open the **Examples of Funding Entry Inquiry** job aid in a new web browser window/tab.

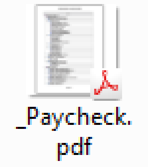
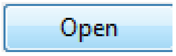
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
42.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
43.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
44.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
45.	Click the button to the right of the **Category** field. 
46.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
47.	Click in the **Subject** field.
48.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
49.	Click in the **Description** field.
50.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
51.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
52.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
53.	Click in the **Best Contact Phone Number** field.
54.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
55.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.

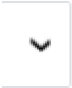
Step	Action
56.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
57.	Click the **Add Attachment** link. 
58.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
59.	For this example, click the **_Paycheck.pdf** list item. 
60.	Click the **Open** button. 
61.	The file name appears in the **Attachments** box.
62.	Click the **Submit** button.
63.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
64.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
65.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
66.	Click the scroll bar.
67.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
68.	Click the scroll bar.
69.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
70.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

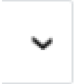
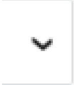
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
71.	Click the **Ask UCPath Center** button. 
72.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
73.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
74.	UCPath returned one result. Click the scroll bar.
75.	Click the **Create an Inquiry** link. 
76.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
77.	Click the button to the right of the **Requested By** field. 

Step	Action
78.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
79.	Click the button to the right of the **Topic** field. 
80.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
81.	Click the button to the right of the **Category** field. 
82.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
83.	Click in the **Subject** field.
84.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
85.	Click the scroll bar.
86.	Click in the **Description** field.
87.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
88.	In this example, the full **Description** was completed on your behalf.
89.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
90.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
91.	Click the **Submit Inquiry** button. 
92.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
93.	The submitter's name appears.

Step	Action
94.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

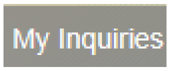
Reopen Closed UCPath Center Case

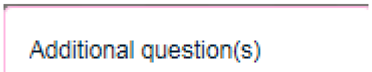
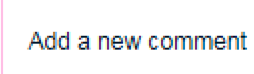
Use this task to reopen a closed inquiry via the UCPath website.

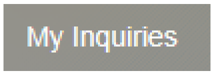
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
95.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
96.	Click the **My Closed Inquiries** link. 
97.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
98.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 

Step	Action
99.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
100.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
101.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
102.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
103.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
104.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
105.	Click the scroll bar.
106.	Notice the comment now appears in the **Case Comments** section.
107.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
108.	Return to the top of the page. Click the scroll bar.

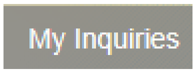
Step	Action
109.	Click the **My Inquiries** link. 
110.	The new inquiry appears in the **My Open Inquires** list.
111.	You have reopened a closed inquiry. **End of Procedure.**

Monitor UCPath Center Cases

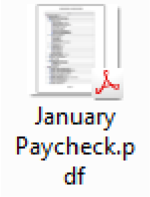
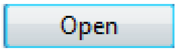
Use this task to review the status of an existing inquiry via the UCPath website.

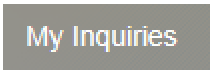
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
112.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
113.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
114.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.

Step	Action
115.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
116.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link.  Date/Time Opened ▲
117.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again..  Date/Time Opened ▼
118.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link.  00180573
119.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field.  Add a new comment
120.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
121.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
122.	Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center
123.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
124.	Click the scroll bar.

Step	Action
125.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. 
126.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. 
127.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
128.	To return to the case details, click the **00180573** link. 
129.	Click the scroll bar.
130.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
131.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
132.	Click the **Open** button. 
133.	A message confirms the file was uploaded. Click the **Done** button. 
134.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.

Step	Action
135.	You can view all attachments in a list. Click the **View All** link. View All
136.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. ▾
137.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. ▾
138.	Click the **00180573** link. 00180573
139.	Click the scroll bar.
140.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
141.	Click the **Email** link. Sandbox: UCPath Center: Inquir.
142.	Review the email information as you scroll down the page. Click the scroll bar.
143.	Review the email from the UCPath Center. Click the scroll bar.
144.	Click the case number to return to the details of the case. Click the **00180573** link. 00180573
145.	To review closed inquiries, click the **My Inquiries** link. My Inquiries

Step	Action
146.	Click the **My Closed Inquiries** tab. My Closed Inquiries
147.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
148.	Click the **00180567** link. 00180567
149.	Click the scroll bar.
150.	Notice the **Status** is **Closed/Resolved**.
151.	Click the scroll bar.
152.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
153.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMGEN112: Budget Inquiry

Job Aid: UCPath Budget Inquiry Navigation

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMGEN112JA_BudgetInquiryNavigation_D1Rev00.pdf) to open the **UCPath Budget Inquiry Navigation** job aid in a new web browser window/tab.

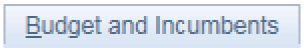
View Position Information

Use this task to view position data for a specific position in UCPath.

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Maintain Positions/Budgets > **Add/Update Position Info**

Step	Action
1.	When you navigate to the **Add/Update Position Info** component, the system displays the **Find an Existing Value** tab, which you use to search for existing positions. If you don't know the position number you can search using other search fields. Enter search criteria in one or more of the search fields.
2.	Click in the **Position Number** field. 
3.	Enter the desired information into the **Position Number** field. For this example, enter **40078651**.
4.	Select the **Include History** check box to view historical, current and future rows of data. You also have the ability to select this action within the **Position Data** component.
5.	Click the **Search** button. 
6.	The **Description** page displays header-level information about the position, as well as **Job Information**, **Work Location** information and **Salary Plan Information**. This component is effective dated and captures the history of all changes to the position.
7.	Positions are typically set up as single headcount, but there are instances of multiple headcount positions. This example displays a **Current Head Count** of **1 out of 1**, which is currently filled by an employee, as indicated by the **Headcount Status** field.
8.	Review the **Job Information** associated with the position. The **Union Code**, **Title** and **Short Title** fields are attributes of the **Job Code**. These fields default from the job code when the position is created. The **Reg/Temp** and **Regular Shift** fields are not used by UC.
9.	Review the **Work Location** information associated with the position. These fields identify the **Department** and physical **Location** of the position, as well as the position to which this position reports (**Reports To** field). The **Supervisor Lvl** field is not used by UC.
10.	Scroll down to display additional fields and page options.

Step	Action
11.	Review the **Salary Plan Information** associated with the position. These fields identify the position's **Salary Admin Plan** and the **Grade**. You can also view the **Standard Hours** within the **Work Period**. The **Step** field is not used at the position level.
12.	The daily hours are inconsequential and are not used to determine an employee's time/pay.
13.	Review the position's **FLSA Status**. **FLSA Status** options include: **Exempt**, **Nonexempt, Nonexempt Alt Overtime** and **No FLSA Required**. **Note:** The **Nonexempt Alt Overtime** option is used to track whether someone is eligible for an alternate overtime calculation when working in states that do not use the federal overtime guidelines. This status enables the calculation of double overtime using the regular rate of pay.
14.	The **Bargaining Unit** field is not used by UC. Union dues and fees are based on the **Union Code** (above) which defaults from the **Job Code**. However, for record keeping purposes, the union codes are mapped to the respective bargaining unit behind the scenes in UCPath.
15.	If you did not select the **Include History** check box when you searched for and selected the position, you can click the **Include History** button at the bottom of each page in the component.
16.	Click the **Specific Information** link.  Specific Information
17.	The **Specific Information** page displays the **Max Head Count** for the position, a series of check boxes, and a section specific to **Education and Government**.
18.	The **Incumbents** check boxes become available for update (by a Position Administrator only) when the position has at least one incumbent, as seen in this example.
19.	The **Update Incumbents** check box is selected when the position has incumbents. When selected, any updates to the position automatically update the position-related **Job Data** fields for the assigned incumbents.
20.	The **Include Salary Plan/Grade** check box is selected when the grade is not configured to include steps and the **Update Incumbents** check box is selected.
21.	The **Force Update for Title Changes** check box is selected when there is a requirement for the title on the position to be different from the **Business Title** on the job.
22.	The **Include FTE** check box is selected when there is a requirement for the full time equivalency (FTE) on the position to be different from the FTE on the job.

Step	Action
23.	If the position is approved, then the **Budgeted Position** check box is selected. All approved positions are considered budgeted; if this check box is not selected, you cannot report on this position.
24.	UC does not use the following fields: **Signature Authority**, **Confidential Position**, **Job Sharing Permitted** and **Available for Telework**.
25.	The **Education and Government** section identifies the position's **Classified Indicator** and the **FTE**. If applicable, the **Position Pool ID** field indicates the position pool to which the position belongs. Work Study positions must have a position pool. The **FTE** field displays the maximum FTE that a single incumbent in the position can have. The **Adds to FTE Actual Count** field indicates whether the position counts against the department's FTE maximum, if established. UC does not use the following fields: **Pre-Encumbrance Indicator**, **Encumber Salary Option**. **Calc Group (Flex Service)** and **Academic Rank**.
26.	Click the **UC Position Data** tab. 
27.	The **UC Position Data** page displays employee relations information, such as the **HR Worksite ID**, **Employee Relations Code**, **Representation Code** and if there are any special training or security clearances required for the position.
28.	The **HR Worksite ID** field drives the majority of UCPath and Tracker integration functionality. This field determines: • If the Worksite is configured to send automatic emails or not. • If the Worksite has e-Verify turned on or not. • If the Worksite requires new I-9s for rehires within less than three years of previous start date. Refer to your Location's business process on Tracker processing.
29.	Click the **Budget and Incumbents** tab. 
30.	The **Budget and Incumbents** page displays the current incumbent(s) assigned to the position. The **Current Budget** section is not used by UC.

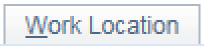
Step	Action
31.	This is an example of a filled position, so the **Current Incumbent** section displays incumbent information. If the position is a multi-headcount position, all incumbents assigned to the position appear. To view additional information about an employee's job, click the **Job Data** link. You must have the appropriate security access to view the **Job Data** component.
32.	Click the **Supporting Documents** tab. 
33.	The **Supporting Documents** page stores any attachments associated with the position record. Attachments can be opened and viewed but cannot be deleted. This example does not have any supporting documents.
34.	You have viewed position data for a specific position in UCPath. **End of Procedure.**

View Position Summary

Use this task to view position summary data in UCPath.

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Review Positions/Budget Info > **Position Summary**

Step	Action
1.	When you navigate to the **Position Summary** page, the system displays the **Find an Existing Value** tab, which you use to search for the applicable position. If you don't know the position number you can search using other search fields. Enter search criteria in one or more of the search fields.
2.	Click in the **Position Number** field. 
3.	Enter the desired information into the **Position Number** field. For this example, enter **40000082**.
4.	Click the **Search** button. 
5.	Use the **Position Summary** component to review a position's current and historical data. You can view a list of all changes that have occurred over time, such as department moves, title changes or reports to updates.
6.	Review the information on the **General** tab.

Step	Action
7.	The **Action Reason** column displays the reason for changes to the position as of the corresponding effective date in the first column.
8.	Position **Status** options are: - **Approved** is used for filled or vacant positions that are approved for use. - **Frozen** is used for inactive positions that can be re-instated (**Approved**) when needed. - **Proposed** is used when a position is created but not yet approved for use.
9.	The **Budgeted** column indicates whether the position is budgeted: **Y** for yes or **N** for no.
10.	When you are finished viewing information on the **General** tab, click the **Work Location** tab. 
11.	Review the information on the **Work Location** tab.
12.	The **Reports To** column displays the position number to which this position reports as of the effective date in the first column. In this example, you can see that there was a reports to change in May 2016.
13.	The **Job Code** column displays the job code for the selected position as of the corresponding effective date.
14.	When you are finished viewing information on the **Work Location** tab, click the **Payroll Information** tab. 
15.	Review the summary data on the **Payroll Information** tab.
16.	UC does not use the **Reg/Temp** (regular/temporary) field; it always displays **Not Applicable**.
17.	The **Full/Part** (full-time or part-time) column indicates whether this is a full or part-time position as of the corresponding effective date.
18.	The **Standard Hours** column displays the position's standard hours as of the corresponding effective date.
19.	The **Work Period** column displays the position's standard work period as of the corresponding effective date. The standard work period is the time period in which employees must complete the standard hours.
20.	UC does not use the **Shift** field; it always displays **Not Applicable**.
21.	To return to the **Find an Existing Value** tab and search for another position, click the **Return to Search** button. For this example, do not click the button.
22.	You have viewed position summary data in UCPath. **End of Procedure.**

View Position History

Use this task to view position history details for a specific position.

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Review Position/Budget Info > **Position History**

Step	Action
1.	When you navigate to the **Position Summary** page, the system displays the **Find an Existing Value** tab, which you use to search for the applicable position. If you don't know the position number you can search using other search fields. Enter search criteria in one or more of the search fields.
2.	Click in the **Position Number** field. 
3.	Enter the desired information into the **Position Number** field. For this example, enter **40000082**.
4.	Click the **Search** button. 
5.	If the position is currently filled, the **Position History** page displays the current incumbent's details, and if applicable, information for any employees previously assigned to the position.
6.	The **Position Entry Date** field displays the date the employee was assigned to the position. If applicable, the **Position End Date** field displays the date the employee exited the position.
7.	The **Compensation Rate** field displays the compensation amount, currency and frequency associated with the position at the incumbent's position entry and end dates.
8.	To display the **Salary Components** page, on which you can view the salary components information associated with the position at the incumbent's position begin and end dates, click the **Components** link that appears on either the **Position Entry Date** or **Position End Date** row.
9.	The **Sal Plan** (salary plan), **Grade** and **Step** fields displays the salary plan, salary grade, and salary step at the incumbent's position entry date, and if applicable, at the time the employee exited the position.
10.	To view current position data, including the business unit, job code and more, click the **Current Position Data** link. 
11.	The **Position History - Current Position Data** page displays a summary of current position details.

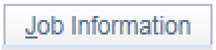
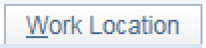
Step	Action
12.	When you are finished reviewing the data on this page, click the **Return** button to return to the **Position History** page. 
13.	To return to the **Find an Existing Value** tab and search for another position, click the **Return to Search** button. For this example, do not click the button.
14.	You have viewed position history data for a specific position. **End of Procedure.**

View Vacant Budgeted Positions

Use this task to view vacant budgeted positions in UCPath.

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Review Position/Budget Info > **Vacant Budgeted Positions**

Step	Action
1.	When you navigate to the **Vacant Budgeted Positions** page, the system displays the **Find an Existing Value** tab, which you use to search for vacant positions. Enter search criteria in one or more of the search fields.
2.	In the **Department** field, enter the department code or use the lookup to search for and select it.
3.	Click the **Search** button. 
4.	Positions for employees on Short Work Break appear on this page even though the position is still filled. This is because the employee is in an unpaid status; therefore, from a budget perspective the position is vacant.
5.	The **Total Vacant Positions** field displays the total number of vacant, budgeted positions for the selected department.
6.	The **Position Data** tab displays position details for each vacant position that has been flagged as budgeted (in Position Management) in the selected department. This information includes the position number and description.
7.	The **Position Status** column displays the position's status: **Approved** or **Frozen**.
8.	The **Reports To** column displays the position number of the supervisor to which the position reports.
9.	This tab also displays the number of vacant positions associated with each position number based on the maximum head count.

Step	Action
10.	When you are finished viewing information on the **Position Data** tab, click the **Job Information** tab. 
11.	The **Job Information** tab displays the job details for the vacant positions, including job code and description, job function, salary administration plan and salary grade.
12.	When you are finished viewing information on the **Job Information** tab, click the **Work Location** tab. 
13.	The **Work Location** tab displays work location details for each vacant position.
14.	To return to the **Find an Existing Value** tab and search for another department's vacant, budgeted positions, click the **Return to Search** button. 
15.	You have viewed vacant budgeted positions in UCPath. **End of Procedure.**

View Budget Status

Use this task to view position budget details for a specific position in UCPath.

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Review Positions/Budget Info > **Budget Status**

Step	Action
1.	When you navigate to the **Budget Status** page, the system displays the **Find an Existing Value** tab, which you use to search for the applicable position. If you don’t know the position number you can search using other search fields. Enter search criteria in one or more of the search fields.
2.	Click in the **Position Number** field. 
3.	Enter the desired information into the **Position Number** field.
4.	Click the **Search** button. 
5.	The **Budget Status** page displays a summary view of the selected position's budgeted and actual figures. It displays the total budgeted FTE and the budgeted salary.

Step	Action
6.	To the left of **Current Incumbents,** click the **Expand section** button to display additional fields. ▶
7.	When the position is filled, the **Current Incumbents** section displays incumbent employee information. In this example, it is a single headcount position, which is filled.
8.	To display the employee's salary components, click the **Components** link.  Components
9.	The **Salary Components** page displays the incumbent's salary information at the time of position entry, and if applicable, when the employee exited the position. Notice that there multiple tabs on this page, which you can view. For this example, you will view only the first tab.
10.	When you are finished reviewing the detail, click the **OK** button to return to the **Budget Status** page.  OK
11.	To return to the **Find an Existing Value** tab and search for another position, click the **Return to Search** button.  Return to Search
12.	You have viewed position budget details for a specific position in UCPath. **End of Procedure.**

View Budget Distribution

Use this task to review the budget distribution for a position.

This example identifies key data fields and provides best practices for reviewing budget distributions.

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Commitment Accounting > Budget Information > UC Customizations > **Budget Distribution**

Step	Action
1.	When you navigate to the **Budget Distribution** page, the system displays the **Find an Existing Value** tab, which you use to search for existing records. If you don't know the position number you can search using other search fields. Enter search criteria in one or more of the search fields.

Step	Action
2.	Click in the **Position Number** field. 
3.	Enter the desired information into the **Position Number** field. For this example, enter **40001063**.
4.	Select the **Include History** check box to view history, current, and future rows of data.
5.	Click the **Search** button. 
6.	The **Budget Distribution** page displays the specified position. The header of the page displays the **Set ID**, **Department** and **Position** fields.
7.	The **Job Data Snapshot** section displays two tabs with job details. If the position is unfilled many of the fields in this section are blank.
8.	In this example, one person is in this position. If multiple people are in this position, you may need to scroll through the individual rows to see all employees.
9.	Click the **Job details 2** tab to see additional information about the job. 
10.	This tab displays the **Payroll Status**, **Pay Group**, **FTE** and more.
11.	Click the scroll bar to see more information on the right side of the page.
12.	Click the scroll bar to return to the left side of the page.
13.	If you prefer, you can click the **Show all columns** button to see all job details on the page. For this example, leave the two tabs as-is.
14.	The **Position Budget** section displays position information, such as the **Max Position Head Count**, **Current Job Headcount** and **Total Position Budget**.
15.	Click the scroll bar.
16.	The **Budget Distribution** section displays the budget line(s).
17.	Click the scroll bar.
18.	Click the scroll bar.
19.	You have reviewed the budget distribution for a position. **End of Procedure.**

Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

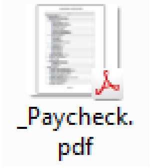
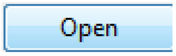
Dashboard Navigation:
Ask UCPath Center

or

Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
20.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
21.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
22.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
23.	Click the button to the right of the **Category** field. 
24.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
25.	Click in the **Subject** field.
26.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
27.	Click in the **Description** field.
28.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
29.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.

Step	Action
30.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
31.	Click in the **Best Contact Phone Number** field.
32.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
33.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
34.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
35.	Click the **Add Attachment** link. 
36.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
37.	For this example, click the **_Paycheck.pdf** list item. 
38.	Click the **Open** button. 
39.	The file name appears in the **Attachments** box.
40.	Click the **Submit** button.
41.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
42.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
43.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
44.	Click the scroll bar.
45.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.

Step	Action
46.	Click the scroll bar.
47.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
48.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

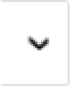
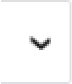
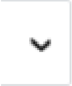
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
49.	Click the **Ask UCPath Center** button. 
50.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
51.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
52.	UCPath returned one result. Click the scroll bar.
53.	Click the **Create an Inquiry** link. 

Step	Action
54.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
55.	Click the button to the right of the **Requested By** field. 
56.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
57.	Click the button to the right of the **Topic** field. 
58.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
59.	Click the button to the right of the **Category** field. 
60.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
61.	Click in the **Subject** field.
62.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
63.	Click the scroll bar.
64.	Click in the **Description** field.
65.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
66.	In this example, the full **Description** was completed on your behalf.

Step	Action
67.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
68.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
69.	Click the **Submit Inquiry** button. 
70.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
71.	The submitter's name appears.
72.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

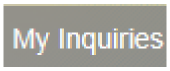
Reopen Closed UCPath Center Case

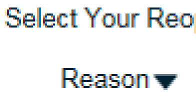
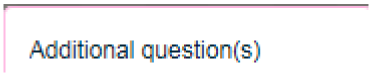
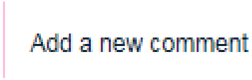
Use this task to reopen a closed inquiry via the UCPath website.

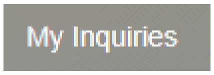
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
73.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
74.	Click the **My Closed Inquiries** link. 

Step	Action
75.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
76.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
77.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
78.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
79.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
80.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
81.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 

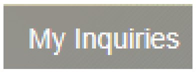
Step	Action
82.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button.
83.	Click the scroll bar.
84.	Notice the comment now appears in the **Case Comments** section.
85.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
86.	Return to the top of the page. Click the scroll bar.
87.	Click the **My Inquiries** link. 
88.	The new inquiry appears in the **My Open Inquires** list.
89.	You have reopened a closed inquiry. **End of Procedure.**

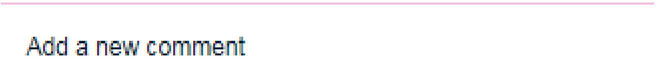
Monitor UCPath Center Cases

Use this task to review the status of an existing inquiry via the UCPath website.

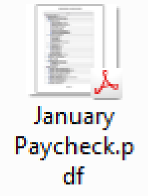
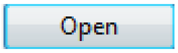
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

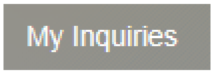
Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
90.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 

Step	Action
91.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
92.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
93.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
94.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link.  Date/Time Opened ▲
95.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again..  Date/Time Opened ▼
96.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link.  00180573
97.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field.  Add a new comment
98.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.

Step	Action
99.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
100.	Click the **Submit comment to the UCPath Center** button. Submit comment to the UCPath Center
101.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
102.	Click the scroll bar.
103.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. View All
104.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▾
105.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
106.	To return to the case details, click the **00180573** link. 00180573
107.	Click the scroll bar.
108.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. Upload Files

Step	Action
109.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
110.	Click the **Open** button. 
111.	A message confirms the file was uploaded. Click the **Done** button. 
112.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
113.	You can view all attachments in a list. Click the **View All** link. 
114.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 
115.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 
116.	Click the **00180573** link. 
117.	Click the scroll bar.

Step	Action
118.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
119.	Click the **Email** link. 
120.	Review the email information as you scroll down the page. Click the scroll bar.
121.	Review the email from the UCPath Center. Click the scroll bar.
122.	Click the case number to return to the details of the case. Click the **00180573** link. 
123.	To review closed inquiries, click the **My Inquiries** link. 
124.	Click the **My Closed Inquiries** tab. 
125.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
126.	Click the **00180567** link. 
127.	Click the scroll bar.
128.	Notice the **Status** is **Closed/Resolved**.
129.	Click the scroll bar.

Step	Action
130.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link.
131.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMGEN115: Direct Retro Inquiry

Review Retro Distribution

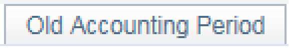
Use this task to review a direct retro distribution transaction.

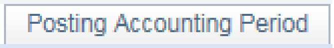
This example identifies key data fields and provides best practices for reviewing a direct retro details.

Navigation: PeopleSoft Menu > Payroll for North America > Payroll Distribution > UC Customization > **Review Retro Distribution**

Step	Action
1.	Use any of the search criteria fields to find the transaction. This example demonstrates how to search by an employee's identification number (Empl ID). Click in the **Empl ID** field.
2.	Enter the desired information into the **Empl ID** field.
3.	Click the **Search** button.  Search
4.	Direct Retro, also known as a salary cost transfer, can be done multiple times. In this example the employee has four transactions, which may update the same pay period or different pay periods. In this example, you will review the transaction created on 4/21/2016. Click the appropriate transaction ID link.  DR00000000105

Step	Action
5.	The **Retro Distribution** component is composed of six pages. Review the **Retro Distribute Earnings** page only, as UC currently uses the direct retro process exclusively for earnings. Funding for deductions and taxes follows the earnings' funding for payroll distribution.
6.	The first section of the **Retro Distribute Earnings** page is **Retro Distribution Transaction**. The **Run Cntl** field is the system-generated transaction ID. The **Created By** field displays the employee identification number of the person who created the entry. The date of the data entry appears in the **Created** field (upper right). The **Trans Type** always displays **Direct** and the **Date of Pay** field displays the appropriate pay date. The values in this section are the same for all transactions on this page. Other key fields in this section are **Processing Status** and **Request Status**.
7.	The **Check Earnings** section displays the check information related to the employee earnings, including the **Empl ID** (employee's identification number) and the employee's name. Other pay information includes **Company**, **Pay Group**, **Pay Run ID** and **Off Cycle** indicator. The key information is the **Pay Begin Date** and **Pay End Date**. This data identifies the paycheck data provided is the sections below.
8.	If necessary, scroll right to display additional fields and page options.
9.	Notice that there are four individual paycheck earnings within this direct retro transaction. Use the **View All** functionality to display each paycheck earnings on one page.
10.	Click the **View All** link.  View All
11.	After you display all rows, begin reviewing the **Old Data** and **New Data** sections for each paycheck earnings. If necessary, scroll left to display additional fields and page options.
12.	Use the **Pay Begin Date** and **Pay End Date** to identify which check earnings data is currently displayed on the page.
13.	The **Old Data** section data displays the original data at the time the initiator submitted the transaction.
14.	The **New Data** section displays the updated data created by the transaction.

Step	Action
15.	Compare the data in these sections to find the changes. Specifically look at the number of rows, as well as the full accounting unit data, such as the **Account/CC**, **Fund** and **Project** fields. Scroll right to see the **Sub** and **New Earnings Amount** fields. Each transaction is unique and multiple scenarios may occur: 1) Multiple lines from the original data may be consolidated into a single fund line in the new data. 2) A single fund line can be updated for a different fund source. In this case the old and the new funding have a single row but the funding details (account, fund, project and so forth) are different. 3) A single fund line can be split into multiple rows in the new data. 4) Many rows can be split, consolidated or updated. So you have the same number of rows but a different distribution in the new data. In this example, there is an additional line for REG earnings assigned to a new found source (Account/CC - 666553, Fund - 69828).
16.	Review all fields on this page. If necessary, scroll right to display additional fields.
17.	Review the **Sub** and **New Earnings Amount** fields. In this example, there is an additional line for REG earnings going to a new found source (Account/CC - 666553, Fund - 69828). The $8,466.45 amount has been split. $1,840.61 remains in the old fund distribution and $6,625.84 is assigned to a new fund distribution.
18.	If necessary, scroll left to display additional fields.
19.	Comparing the old data with the new data provides an audit trail of the retroactive change. There are three tabs within the **Old Data** and **New Data** sections: earnings details, job details and accounting period information. The additional tabs display related data for the earnings details.
20.	Under **Old Data**, click the **Job details** tab. 
21.	Under **New Data**, click the **Job Details** tab. 
22.	Remember to click the tab in each section so that you have a side-by-side comparison. The data presented is additional information. In this example, there weren't any updates to the job details.
23.	Under **Old Data**, click the **Old Accounting Period** tab. 

Step	Action
24.	Under **New Data**, click the **Posting Accounting Period** tab. Posting Accounting Period
25.	The **Old Accounting Period** tab displays the posting period of the original data at the time of the direct retro entry. The **Posting Accounting Period** tab displays the period in which the updated data posted to the accounting entries. These values typically differ.
26.	If necessary, scroll down to display additional pay periods. In this example, there are multiple paycheck earnings to review, including the data for the pay period 01/01/2016 - 01/31/2016 check earnings.
27.	In this example, the data displayed is for the second pay period (01/01/2016 - 01/31/2016). As you review a transaction, review each tab to display key information related to selected earnings period.
28.	Continue scrolling down to review each pay period.
29.	When you are finished reviewing the pay periods, review the information at the bottom of the page, which is an extension of the **Retro Distribution Transaction** section. It displays additional transaction detail.
30.	Review the **Initiator Comment** field.
31.	Click to expand the **Questionnaire** section. ▶
32.	The **Questionnaire** section has specific questions or requests for information deemed necessary for high-risk transactions. If the transaction meets the high-risk conditions the questionnaire fields are required fields. However, initiators can answer the questions for any transaction. Best practice is to expand the section and review all provided detail.
33.	Click to collapse the **Questionnaire** section. ▼
34.	Initiators can attach supporting documentation to the transaction. Attached documents are accessible by clicking the **View Attachment** button. This example does not include an attachment.
35.	Click to expand the **Approver document upload** section. ▶
36.	Approvers can attach supporting documentation during the approval action. Attached documents are accessible by clicking the **View Attachment** button. This example does not include an attachment.

Step	Action
37.	Click to collapse the **Approver document upload** section. ▼
38.	The **Reason Code** field displays the value selected by the initiator.
39.	The approver section displays the approver's employee ID, as well as the approval date and time.
40.	You have reviewed a direct retro distribution transaction. **End of Procedure.**

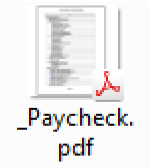
Submit Case to UCPath Center

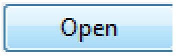
Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
41.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
42.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. ▼
43.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 

Step	Action
44.	Click the button to the right of the **Category** field. 
45.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
46.	Click in the **Subject** field.
47.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
48.	Click in the **Description** field.
49.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
50.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
51.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
52.	Click in the **Best Contact Phone Number** field.
53.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
54.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
55.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
56.	Click the **Add Attachment** link. Add Attachment
57.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
58.	For this example, click the **_Paycheck.pdf** list item. _Paycheck.pdf

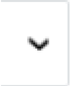
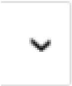
Step	Action
59.	Click the **Open** button. 
60.	The file name appears in the **Attachments** box.
61.	Click the **Submit** button.
62.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
63.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
64.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
65.	Click the scroll bar.
66.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
67.	Click the scroll bar.
68.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
69.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

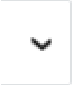
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
70.	Click the **Ask UCPath Center** button. 
71.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
72.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
73.	UCPath returned one result. Click the scroll bar.
74.	Click the **Create an Inquiry** link. 
75.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
76.	Click the button to the right of the **Requested By** field. 
77.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
78.	Click the button to the right of the **Topic** field. 
79.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.

Step	Action
80.	Click the button to the right of the **Category** field. 
81.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
82.	Click in the **Subject** field.
83.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
84.	Click the scroll bar.
85.	Click in the **Description** field.
86.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
87.	In this example, the full **Description** was completed on your behalf.
88.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
89.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
90.	Click the **Submit Inquiry** button. 
91.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
92.	The submitter's name appears.
93.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

Reopen Closed UCPath Center Case

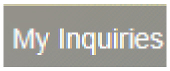
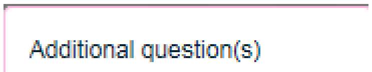
Use this task to reopen a closed inquiry via the UCPath website.

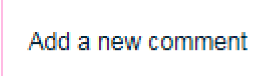
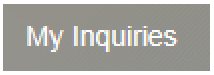
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:

Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
94.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
95.	Click the **My Closed Inquiries** link. 
96.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
97.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
98.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
99.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.

Step	Action
100.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field.  Add a new comment
101.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
102.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center
103.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
104.	Click the scroll bar.
105.	Notice the comment now appears in the **Case Comments** section.
106.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
107.	Return to the top of the page. Click the scroll bar.
108.	Click the **My Inquiries** link.  My Inquiries
109.	The new inquiry appears in the **My Open Inquires** list.
110.	You have reopened a closed inquiry. **End of Procedure.**

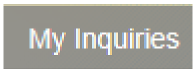
Monitor UCPath Center Cases

Use this task to review the status of an existing inquiry via the UCPath website.

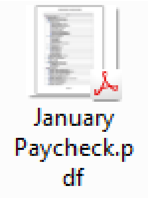
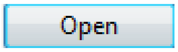
Dashboard Navigation:
Ask UCPath Center
or

Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
111.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
112.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
113.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
114.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
115.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 
116.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 

Step	Action
117.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 00180573
118.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field. Add a new comment
119.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
120.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
121.	Click the **Submit comment to the UCPath Center** button. Submit comment to the UCPath Center
122.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
123.	Click the scroll bar.
124.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. View All
125.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▾
126.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.

Step	Action
127.	To return to the case details, click the **00180573** link. 
128.	Click the scroll bar.
129.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
130.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
131.	Click the **Open** button. 
132.	A message confirms the file was uploaded. Click the **Done** button. 
133.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
134.	You can view all attachments in a list. Click the **View All** link. 
135.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 

Step	Action
136.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. ▼
137.	Click the **00180573** link. 00180573
138.	Click the scroll bar.
139.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
140.	Click the **Email** link. Sandbox: UCPath Center: Inquir.
141.	Review the email information as you scroll down the page. Click the scroll bar.
142.	Review the email from the UCPath Center. Click the scroll bar.
143.	Click the case number to return to the details of the case. Click the **00180573** link. 00180573
144.	To review closed inquiries, click the **My Inquiries** link. My Inquiries
145.	Click the **My Closed Inquiries** tab. My Closed Inquiries
146.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**

Step	Action
147.	Click the **00180567** link. 00180567
148.	Click the scroll bar.
149.	Notice the **Status** is **Closed/Resolved**.
150.	Click the scroll bar.
151.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
152.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMGENL201: Position Funding Entry and Updates

Submit New Position Funding Entry Request

Use this task to add funding for a new position.

Navigation: PeopleSoft Menu > Set up HCM > Product Related > Commitment Accounting > UC Customizations > **Funding Entry**

Note: This page may also be available in **Workcenter** depending on your security access.

Step	Action
1.	When you navigate to the **Funding Entry** page, the system displays the **Find an Existing Value** tab. To begin the steps for adding new funding, click the **Add a New Value** tab. Add a New Value
2.	Use the fields on this tab to select the appropriate position and fiscal year for which you want to request position funding. Notice that in this example, the **Set ID**, **Fiscal Year** and **Budget Level** field values default. You can accept the default values or update them as necessary.
3.	Enter the desired information into the **Department** field.
4.	Click in the **Position Number** field. 

Step	Action
5.	Enter the desired information into the **Position Number** field.
6.	Click the **Add** button. 
7.	The system displays the **Funding Entry** page. The request details appear at the top of the page. When you begin the steps for entering funding, the **Request Status** is **In Progress**. After you save and submit the position funding request, the system displays the status of **Pending Approval**.
8.	In the **Level** section, the **Position** option is selected to indicate this is position level funding details. This section also displays the position number and position description. If necessary, you can return to the position funding for a specific fiscal year and insert an effective-dated row to update the data. Refer to the *Enter Position Funding Update* topic for details about updating position funding.
9.	In this example, the **Job Data Snapshot** section is blank, which indicates there is not an incumbent employee in the position at this time.
10.	Enter the desired information into the **Funding Effective Date** field.
11.	Enter the appropriate funding source(s) in the **Earnings Distribution** section.
12.	A **Salary Cap / MCOP Funding Worksheet** link is available below the **Earnings Distribution** section (to the right of the **Budget Distribution Details** link) for filled, single-headcount positions. The example shown here is for an unfilled position, so the link is not visible. Refer to the *Submit New Position Funding Entry Request - MCOP* topic for more information on adding funding for a filled, single-headcount position using the **Salary Cap / MCOP Funding Worksheet**.
13.	If necessary, scroll right to display additional fields and page options.
14.	There are a variety of earnings distribution scenarios. The total distribution percentage by earn code must equal 100 percent. In this example, all earnings are funded by a single source. To enter funding details for multiple funds and allocation percentages, you can insert additional rows as necessary in the **Earnings Distribution** section. To enter multiple distribution rows, click the **Add a New Row** button and repeat the steps for entering the funding details. In this example, the position is fully funded by the funding source entered on the first row. Notice that in this example, there is not a value in the **Ern Code** field, which indicates the funding is **REG** (Regular Earnings). When entering funding, it's only necessary to enter the **Ern Code** value for funding sources other than **REG**.

Step	Action
15.	To attach a supporting document, click the **Add Attachment** button, and search for and select the appropriate file. If you add an attachment, the options for viewing and deleting the attachment are available. Only the user who adds an attachment is able to delete it from the transaction. After the transaction is fully approved, attachments can no longer be added or deleted, but are viewable by any user with access to the page/transaction.
16.	Use the **Initiator Comment** field to enter details related to this funding entry.
17.	When you are finished entering data, click the **Save** button. 
18.	After you click **Save**, if there are no errors, the system displays the **Submit** button.
19.	The system automatically assigns the transaction a unique **Request ID** number. Prior to submitting for review and approval, the **Request Status** is **In Progress**. If necessary, you can access and submit the funding entry for review and approval at a later time.
20.	When you are ready to submit the funding entry for review and approval, click the **Submit** button. 
21.	After you submit the request, it's automatically routed to the appropriate Location approver(s). To display the specific approvers' names, click the **Multiple Approvers** link.
22.	In the page header, the system updates the **Request Status** from **In Progress** to **Pending Approval** and also displays the **Submitted on** date. After final Location approval. the system updates the **Request Status** and **Record Status** to **Saved to Database**.
23.	You have added funding for a new position. **End of Procedure.**

Submit New Position Funding Entry Request - MCOP

Use this task to add funding for a filled, single-headcount position using the **Salary Cap / MCOP Funding Worksheet**.

Use the **Salary Cap / MCOP Worksheet**, which is accessible from the **Funding Entry** page to set up complex funding, such as funding subject to salary cap rates or positions with multiple components of pay.

Navigation: PeopleSoft Menu > Set up HCM > Product Related > Commitment Accounting > UC Customizations > **Funding Entry**

Note: This page may also be available in **Workcenter** depending on your security access.

Step	Action
1.	When you navigate to the **Funding Entry** page, the system displays the **Find an Existing Value** tab. Begin the steps for entering funding on the **Add a New Value** tab. Click the **Add a New Value** tab. 
2.	Use the fields on the **Add a New Value** tab select the appropriate position and fiscal year for which you want to request position funding. Notice that in this example, the **Set ID, Fiscal Year** and **Budget Level** field values default. You can accept the default values or update them as necessary.
3.	Click in the **Department** field. 
4.	Enter the desired information into the **Department** field.
5.	Click in the **Position Number** field. 
6.	Enter the desired information into the **Position Number** field.
7.	Click the **Add** button. 
8.	The system displays the **Funding Entry** page. The position details appear at the top of the page and the **Request Status** is **In Progress**. After you save and submit the position funding request, the system will display the status of **Pending Approval**.
9.	The **Job Data Snapshot** section displays the incumbent employee's job details over two tabs: **Job details 1** and **Job details 2**.
10.	Click in the **Funding Effective Date** field. 
11.	Enter the desired information into the **Funding Effective Date** field.

Step	Action
12.	The **Funding Entry** page displays the **Salary Cap / MCOP Worksheet** link only for a filled position with a single incumbent, as in this example. If you enter a capped fund on one of the rows in the **Earnings Distribution** section of this page, the system prompts you to use the worksheet. If the employee's salary is above the cap, the system displays an error and you cannot save the data.
13.	Click the **Salary Cap / MCOP Funding Worksheet** link.  Salary Cap / MCOP Funding Worksheet
14.	The **Compensation Data Snapshot** section displays the incumbent employee's compensation data from Job Data, including **Salary Plan**, **Salary Grade**, **Step**, **Comp Frequency** and **FTE**. The **Pay Component** detail defaults from the employee's job earnings distribution (JED) from Job Data, including the earnings codes, and the monthly and annual dollar amount breakdowns, and the breakdown percentages. This is view-only data to help you complete the MCOP worksheet.
15.	Use the **Default Funding Profile** section to set standard over-the-cap (OTC) fund sources. If the dollar amount that is part of the employee's total UC salary is not fully allocated on the **Salary Cap / MCOP Worksheet**, the system uses this data to create funding lines for any pay components on the **Funding Distribution Preview** page. This section of the worksheet is effective dated; you can return to edit this throughout the fund year as necessary and retain a history of updates.
16.	Click in the **Effective Date** field. 
17.	Enter the desired information into the **Effective Date** field.
18.	Click the button to the right of the **OTC Indicator** field. 
19.	Select the appropriate indicator. • **No** indicates the "catch all" overage funding source. • **Yes** indicates the OTC funding source. It's recommended that you enter the "catch all" row first.  No
20.	Enter the appropriate funding values and distribution percentage for the "catch all" row.

Step	Action
21.	Next, insert an additional row to set up the OTC funding source. Click the **Add a new row** button. ⊞
22.	Click the button to the right of the **OTC Indicator** field. ⌄
23.	Click the **Yes** list item. This designates the data you enter as the OTC funding source. Yes
24.	Enter the appropriate funding values and distribution percentage for the OTC row.
25.	In this example, there is only one fund associated with each **OTC Indicator** (**Yes** or **No**) row. You have multiple rows for each, but the distribution for each must total 100%.
26.	If necessary, scroll down to display the **Funding Distribution Worksheet** section.
27.	In the **Funding Distribution Worksheet** section, enter the funding begin and end dates. Click in the **Begin Date** field.
28.	Enter the desired information into the **Begin Date** field.
29.	Click in the **End Date** field.
30.	Enter the desired information into the **End Date** field.
31.	Next, enter the appropriate funding distribution details.
32.	If necessary, scroll right to display additional fields and page options.
33.	You can enter a value in only one of the following fields: **Total Allocated Amount**, **Percent of Pay** or **Percent of Effort.** The system derives the value for the other two fields and those fields are not editable. If necessary, you can delete the value in the field for which you entered a value to prompt the system to make the other fields editable again.
34.	If you are entering funding distribution for a capped fund, the system defaults the **Cap Type** and the cap rate dollar values.
35.	Continue to enter the necessary funding distribution detail for the selected position. You can insert additional rows as necessary by clicking the **Add a new row** button. ⊞

Step	Action
36.	When you are finished entering funding distribution details in the **Funding Distribution Worksheet** and **Default Funding Profile** sections,click the **Funding Distribution Preview** button. 
37.	The system displays the funding distribution preview data. The data on this page is view-only, except for Location-specific chartfields fields for the OTC funding lines.
38.	The preview displays fiscal year funding distributions broken down by each pay period from the **Salary Cap / MCOP Worksheet** and includes any OTC rows, if applicable.
39.	An OTC Indicator value identifies whether a distribution line is the up-to-the-cap row, over-the-cap row or uncapped. • Uncapped does not have an OTC Indicator (field is blank). • An OTC Indicator starting with **N** is the up-to-the-cap row. • An OTC Indicator starting with **Y** is the over-the-cap row. • An OTC value with **-OTCXXX** at the end links the OTC row to the capped funding source line that is responsible for OTC funding line. **Note:** OTC may not apply at your Location.
40.	If necessary, scroll right to display additional fields and page functions.
41.	If any of the funding lines are inaccurate, click the **Return to the Salary Cap/ MCOP Worksheet** link to return to the worksheet, make necessary changes, and regenerate the preview.
42.	To preview the distributions for the year, click the **FAU Monthly Preview** button. The system generates an Excel spreadsheet, which you are prompted to open or save.
43.	To load rows from the worksheet to the main funding entry page, click the **Submit to Funding Entry** button. 
44.	The system copies the funding rows from the worksheet to the **Earnings Distribution** section of the **Funding Entry** page.
45.	If necessary, scroll down to display additional fields and page options.
46.	To attach a supporting document, click the **Add Attachment** button, and search for and select the appropriate file. If you add an attachment, the options for viewing or deleting the attachment are available. Only the user who adds an attachment is able to delete it from the transaction. After the transaction is fully approved, attachments can no longer be added or deleted, but are viewable by any user with access to the page/transaction.

Step	Action
47.	Use the **Initiator Comment** field to enter details related to this funding entry.
48.	When are you finished entering data, click the **Save** button. 
49.	If there are no errors, the system displays the **Submit** button.
50.	The system automatically assigns the transaction a unique **Request ID** number. If necessary, you can access and submit the funding entry transaction for review and approval at a later time.
51.	After you save the transaction, the system displays the **Cancel** button at the top of the page. After you save a funding entry transaction, if necessary, you can cancel it before submitting it for review and approval.
52.	When you are ready to submit the funding entry for review and approval, click the **Submit** button. 
53.	After you submit the request, it's automatically routed to the appropriate Location approver(s). To display the specific approvers' names, click the **Multiple Approvers** link.
54.	In the page header, the system updates the **Request Status** from **In Progress** to **Pending Approval** and also displays the **Submitted on** date. After final Location approval. the system updates the **Request Status** and **Record Status** to **Saved to Database**.
55.	You have added funding for a filled, single-headcount position using the **Salary Cap / MCOP Worksheet**. **End of Procedure.**

Job Aid: Complete the CSV File Template for Mass Funding Uploads

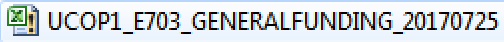
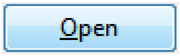
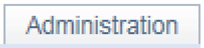
Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMGENL201JA_CompletingtheTextFileTemplateforMassFundingUploads_D1Rev01.pdf) to open the **Complete the CSV File Template for Mass Funding Uploads** job aid in a new web browser window/tab.

Upload Funding File

Use this task to upload funding data to UCPath using a completed Excel template. Blank funding upload templates are located on the **UCPath Location Support** SharePoint site: https://sp.ucop.edu/sites/ucpc/UCPathLocationSupport/UCPathTemplates/Forms/AllItems.aspx (https://sp.ucop.edu/sites/ucpc/UCPathLocationSupport/UCPathTemplates/Forms/AllItems.aspx)

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Commitment Accounting > Budget Information > UC Customizations > **Funding Upload**

Step	Action
1.	When you run a process or report, the system prompts you to select an existing **Run Control ID** value or create a new one. Use the **Find an Existing Value** tab to search for and select an existing ID or click the **Add a New Value** tab to create a new one. You do not have to create a new run control ID each time you run a process or report; you can use a previously-created ID. This example reviews the steps for using an existing **Run Control ID**.
2.	Click in the **begins with** field. 
3.	Enter the desired information into the **begins with** field.
4.	Click the **Search** button. 
5.	The system displays the **Funding Upload** page. Use this page to select the appropriate template type you must upload and attach the CSV file. • Select the **Salary Cap/MCOP** option for loading funding distributions for employees/positions that are funded on capped funding source or have multiple components of pay in Job Data. • Select the **Non Salary Cap/MCOP** option for loading funding distributions for employees/positions that are funded on uncapped funding sources or have a single component of pay.
6.	Click the **Add Attachment** button. 
7.	The system displays the **File Attachment** window. Click the **Browse** button. 

Step	Action
8.	The **Choose File to Upload** window appears. Use this window to search for and select the file you want to upload. Be sure you use the correct filename naming convention for the CSV file you are uploading. For example, **BU_E703_GENERALFUNDING_YYYYMMDD** (where BU equals your Business Unit, such as UCOP1, LACMP, and so forth) for Non Salary Cap/MCOP funding uploads and **BU_E703_SALARY-CAP-MCOP-FUNDING_YYYYMMDD** for Salary Cap/MCOP Funding uploads.  UCOP1_E703_GENERALFUNDING_20170725
9.	Click the **Open** button. 
10.	The **File Attachment** window appears, which displays the selected file path. Click the **Upload** button. 
11.	The **Funding Upload** page appears with the attached filename displayed. Click the **Run** button. 
12.	The system displays the **Process Scheduler Request** page. If this is the first time you are running the process, select the appropriate **Server Name** value. Under **Process List**, verify the **Process Funding** option is selected or click to select it.
13.	Click the **OK** button. 
14.	The **Budget Distribution Upload** page appears. Notice that the system displays the process instance number at the top of the page. Click the **Report Manager** link. 
15.	The system displays the **Report Manager** component. Click the **Administration** tab. 

Step	Action
16.	The **Administration** page displays the most recent request at the top of the list. If necessary, click the **Refresh** button until the **Run Status** is **Success** and the **Distribution Status** is **Posted**. Click the **Details** link. 
17.	The **Report Detail** page appears. In the **Report** section, the **Run Status** field displays **Success** if the upload is successful, as in this example.
18.	The **File List** section displays the log output file. Click the log file link to display the log file output in a separate browser tab or window (depending on system settings). Use the data to determine the number of rows processed and those for which there are errors. If there are errors, you can correct them, and repeat the upload process, or you can manually enter the position funding on the **Funding Entry** page. You can also navigate to the **Funding Entry Inquiry** page to confirm that funding was uploaded successfully.
19.	When you are finished reviewing process output, click the **OK** button on the **Report Detail** page. 
20.	The system displays the **Administration** page. Click the **Go back to Budget Distribution Upload** link. 
21.	You have uploaded funding data using the **Funding Upload** page in UCPath. **End of Procedure.**

Enter Position Funding Update

Use this task to update existing funding data.

Navigation: PeopleSoft Menu > Set up HCM > Product Related > Commitment Accounting > UC Customizations > **Funding Entry**

Note: This page may also be available in **Workcenter** depending on your security access.

Step	Action
1.	When you navigate to the **Funding Entry** page, the system displays the **Find an Existing Value** tab. Begin the steps for entering an update to existing funding on the **Add a New Value** tab. Click the **Add a New Value** tab.  Add a New Value
2.	Use the fields on the **Add a New Value** tab to select the appropriate position and fiscal year for which you want to update position funding. Notice that in this example, the **Set ID, Fiscal Year** and **Budget Level** field values default. You can accept the default values or update them as necessary.
3.	Click in the **Department** field. 
4.	Enter the desired information into the **Department** field.
5.	Click in the **Position Number** field. 
6.	Enter the desired information into the **Position Number** field.
7.	Click the **Add** button.  Add
8.	The **Funding Entry** page displays the existing funding row for the selected position. You cannot overwrite the existing funding data; you must insert a new effective-dated row to enter the necessary funding update.
9.	If necessary, scroll right to display additional fields and page options.
10.	Click the **Add a new row** button. ⊞
11.	Enter the desired information into the **Funding Effective Date** field.
12.	If you entered an effective date that is the same as an existing row, UCPath increments the effective sequence field. In this example the effective date is new and the sequence is 0 for the first row on that date. The earnings distribution from the previous row is copied to the new effective dated data row.
13.	Make all necessary updates in the **Earnings Distribution** section. Updates may include a simple line change, multiple line changes, the addition of distribution rows, or the deletion of existing rows.
14.	⊟

Step	Action
15.	
16.	
17.	
18.	To attach a supporting document, click the **Add Attachment** button, and search for and select the appropriate file. If you add an attachment, the options for viewing or deleting the attachment are available. Only the user who adds an attachment is able to delete it from the transaction. After the transaction is fully approved, attachments can no longer be added or deleted, but are viewable by any user with access to the page/transaction.
19.	Use the **Initiator Comments** field to enter details related to this funding update.
20.	When are you finished making updates, click the **Save** button. 
21.	If there are no errors, the system displays the **Submit** button.
22.	The system automatically assigns the transaction a unique **Request ID** number. If necessary, you can access and submit the funding entry transaction for review and approval at a later time.
23.	After you save the project funding detail, the system displays the **Cancel** button at the top of the page. If necessary, you can cancel the transaction before submitting it for review and approval.
24.	When you are ready to submit the funding update for review and approval, click the **Submit** button. 
25.	After you submit the request, it's automatically routed to the appropriate Location approver(s). Notice that in the header, the system updates the **Request Status** from **In Progress** to **Pending Approval** and also displays the **Submitted on** date (not pictured here). After final Location approval. the system updates the **Request Status** and **Record Status** to **Saved to Database**.

Step	Action
26.	You have updated existing funding data. **End of Procedure.**

View Funding Entry Inquiry Page

Use this task to view position funding information using the **Funding Entry Inquiry** page.

Navigation: PeopleSoft Menu > Set up HCM > Product Related > Commitment Accounting > UC Customizations > **Funding Entry Inquiry**

Note: This page may also be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the fields on the **Find an Existing Value** tab to search for and select the funding entry (or entries) you want to view. Notice that in this example, the **Set ID** and **Fiscal Year** field values default. You can accept any default values on this page or update them as necessary.
2.	Click in the **Department** field.
3.	Enter the desired information into the **Department** field.
4.	Click the button to the right of the **Budget Level** field. ⌄
5.	Select the appropriate **Budget Level** value. **Note:** This example reviews common details of position-level funding. Notice that you can also search for and view department-level funding and position pool funding using this page. Position
6.	Click in the **Position Number** field.
7.	Enter the desired information into the **Position Number** field.
8.	Click the **Search** button. Search

Step	Action
9.	The system displays the **Funding Entry Inquiry** page. The position details appear at the top of the page, including the **Set ID** (location) and **Department** values, and the fiscal year with its corresponding budget date range. The position may be filled or unfilled.
10.	Under **Level**, the **Position** option is selected to indicate this is position level funding details. This section also displays the position number and position description, and the date on which the funding was last updated in UCPath.
11.	When a position is filled, the **Job Data Snapshot** section displays a summary of the incumbent employee's current job data.
12.	The **Funding Effective Date** indicates the date on which this funding became effective or will become effective. If there was more than one update to the funding on the same date, the **Eff Seq** (effective sequence) field keeps track of which entry was made first: 0 for the first entry, 1 for the second entry, and so forth.
13.	The **Earnings Distribution** section displays the details for the funding source or sources for the selected position. This is a combination of earning code, full accounting unit (FAU) and pay distribution percent.
14.	A blank **Ern Code** field indicates the default salary funding. At least one row must have a blank earnings code.
15.	If necessary, scroll right to display additional fields and page options.
16.	The **OTC Indicator** field identifies whether a distribution line is the up-to-the-cap row or over-the-cap row. The **OTC Indicator** field value is blank for an uncapped row, as in this example. **Note:** This field does not appear if OTC does not apply at your Location.
17.	**Pay Dist %** values must total 100% by earning code.
18.	In this example, the scroll area in the upper right displays **1 of 2**, indicating that there is an additional row of data for this record. This signifies that there's been an update to the position funding data since its initial entry for the corresponding fiscal year. To see all effective-dated rows on one page, click the **View All** link or use the right/left arrows to display additional rows of information.
19.	If necessary, scroll left to display additional fields and page options.
20.	When you are finished viewing the funding entry information for the selected position, click the **Return to Search** button. 
21.	You have viewed position funding information using the **Funding Entry Inquiry** page. **End of Procedure.**

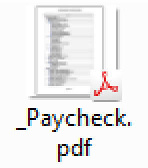
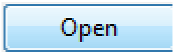
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
22.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
23.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
24.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
25.	Click the button to the right of the **Category** field. 
26.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
27.	Click in the **Subject** field.
28.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
29.	Click in the **Description** field.

Step	Action
30.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
31.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
32.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
33.	Click in the **Best Contact Phone Number** field.
34.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
35.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
36.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
37.	Click the **Add Attachment** link. 
38.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
39.	For this example, click the **_Paycheck.pdf** list item. 
40.	Click the **Open** button. 
41.	The file name appears in the **Attachments** box.
42.	Click the **Submit** button.
43.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
44.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
45.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
46.	Click the scroll bar.

Step	Action
47.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
48.	Click the scroll bar.
49.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
50.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

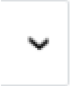
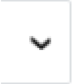
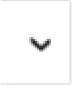
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
51.	Click the **Ask UCPath Center** button. 
52.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
53.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.

Step	Action
54.	UCPath returned one result. Click the scroll bar.
55.	Click the **Create an Inquiry** link. 
56.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
57.	Click the button to the right of the **Requested By** field. 
58.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
59.	Click the button to the right of the **Topic** field. 
60.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
61.	Click the button to the right of the **Category** field. 
62.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
63.	Click in the **Subject** field.
64.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
65.	Click the scroll bar.
66.	Click in the **Description** field.

Step	Action
67.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
68.	In this example, the full **Description** was completed on your behalf.
69.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
70.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
71.	Click the **Submit Inquiry** button. 
72.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
73.	The submitter's name appears.
74.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

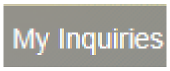
Reopen Closed UCPath Center Case

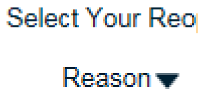
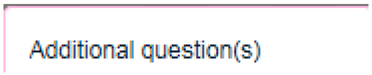
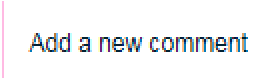
Use this task to reopen a closed inquiry via the UCPath website.

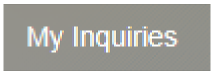
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
75.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 

Step	Action
76.	Click the **My Closed Inquiries** link. 
77.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
78.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
79.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
80.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
81.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
82.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
83.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 

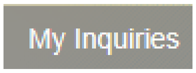
Step	Action
84.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
85.	Click the scroll bar.
86.	Notice the comment now appears in the **Case Comments** section.
87.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
88.	Return to the top of the page. Click the scroll bar.
89.	Click the **My Inquiries** link.  My Inquiries
90.	The new inquiry appears in the **My Open Inquires** list.
91.	You have reopened a closed inquiry. **End of Procedure.**

Monitor UCPath Center Cases

Use this task to review the status of an existing inquiry via the UCPath website.

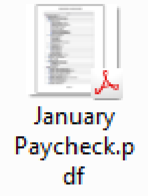
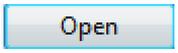
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

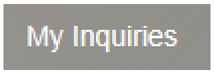
Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
92.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link.  My Inquiries

Step	Action
93.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
94.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
95.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
96.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link.  Date/Time Opened ▲
97.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again..  Date/Time Opened ▼
98.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link.  00180573
99.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field.  Add a new comment
100.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.

Step	Action
101.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
102.	Click the **Submit comment to the UCPath Center** button. 
103.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
104.	Click the scroll bar.
105.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. 
106.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▾
107.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
108.	To return to the case details, click the **00180573** link. 
109.	Click the scroll bar.
110.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 

Step	Action
111.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
112.	Click the **Open** button. 
113.	A message confirms the file was uploaded. Click the **Done** button. 
114.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
115.	You can view all attachments in a list. Click the **View All** link. 
116.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 
117.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 
118.	Click the **00180573** link. 
119.	Click the scroll bar.

Step	Action
120.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
121.	Click the **Email** link.  Sandbox: UCPath Center: Inquir.
122.	Review the email information as you scroll down the page. Click the scroll bar.
123.	Review the email from the UCPath Center. Click the scroll bar.
124.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
125.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
126.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
127.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
128.	Click the **00180567** link.  00180567
129.	Click the scroll bar.
130.	Notice the **Status** is **Closed/Resolved**.
131.	Click the scroll bar.

Step	Action
132.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
133.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMGENL202: Direct Retro Funding Updates

Enter Direct Retro Funding Update

Use this task to enter retroactive changes to pay distributions directly in the accounting entries.

Navigation: PeopleSoft Menu > Payroll for North America > Payroll Distribution > UC Customizations > **Process Direct Retro**

Note: This page may also be available in **Workcenter** depending on your security access.

Step	Action
1.	When you navigate to the **Process Direct Retro** component, the system displays the **Find an Existing Value** tab. Begin the steps for entering a direct retro transaction on the **Add a New Value** tab. Click the **Add a New Value** tab. 
2.	Notice that the **Run Control ID** displays a default value of **NEW**. You cannot update this value; when you successfully submit the transaction, the system automatically assigns your request a **Direct Retro ID** number.
3.	Click the **Add** button. 
4.	The system defaults the **Set ID** based on your user ID.
5.	The **Processing Option** section value defaults to **All**. You cannot update this value.
6.	In the **Earnings End Dates** section, the system defaults the dates to the begin and end date of the current fiscal year. The fields are editable so transactions can be made to the prior fiscal year distributions. Enter the appropriate date range to locate the pay distributions you want to update.

Step	Action
7.	Click in the **Empl ID** field. 
8.	Enter the desired information into the **Empl ID** field.
9.	Notice that there is also an **Empl Record** (employee record) field. If the employee has multiple jobs, select the appropriate job record. The system allows you to update only one job earnings in a direct retro transaction. If all jobs require updating, enter multiple direct retro transactions (one for each job requiring a redistribution).
10.	Click the **Search** button. 
11.	The system displays a list of available payroll dates (within the date parameters you entered). In this example, there is only one result.
12.	Click the **Selected** option for each applicable payroll date for which you must update the selected employee's earnings distributions. ☐
13.	Click the **Save** button. 
14.	After you click **Save**, if there are no errors, the system displays a unique **Direct Retro ID** at the top of the page.
15.	Upon successfully saving the transaction, there is open activity on these pay periods for the selected employee. No one else can make changes to the employee's pay period data until this transaction is complete and updates are made to the distribution lines. If necessary, you can click the **Cancel** button to close the transaction without submitting for processing, and the periods become available for updating.
16.	The **Run** button initiates a process that provides data for the next action, which takes place on the **Retro Distribution** component. This process may take a minute or longer to run; the process is complete when a new page appears. Click the **Run** button. 

Step	Action
17.	There are six data pages within the **Retro Distribution** component. The only page with editable fields is the **Retro Distribution Earnings** page. UC currently uses the direct retro process for earnings only. The funding for the deductions and taxes follow the earnings funding for payroll distribution. Therefore, the **Retro Distribution Deductions, Retro Distribution Taxes, Deduction Messages** and **Earnings Messages, Tax Messages** pages display informational data only.
18.	The **Old Data** section displays the current funding detail. In the **New Data** section, enter the funding update(s) and then click **Check Balance**. Scroll right to display additional fields on the **Retro Distribute Earnings** page.
19.	There is only one pay check earnings period within the example shown here. When you select multiple pay runs, best practice is to use the **View All** functionality, which displays all individual data sets into a single list to ensure updates occur on each of the selected pay earnings.
20.	There are several update scenarios: 1.) Multiple lines under the old data are consolidated into a single fund line in the new data. 2.) A single fund line can be updated for a different fund source. So both the old and the new will have a single row but the funding details (account, fund, project and so on) are different. 3.) A single fund line can be split into multiple rows in the new data. 4.) Many rows can be split, consolidated or updated, so that you have the same number of rows but a different distribution in the new data. Make the necessary funding distribution updates in the **New Data** section. In this example, a project code will be added to the existing funding row.
21.	After entering all necessary updates in the **New Data** section, check the balance. Click the **Check Balance** button. 
22.	When the old data total does not match the new data total, the system displays an error message. The earnings must balance in order to save or submit. If the system displays an error message, go back to fix the balance.
23.	If necessary, scroll down to display additional fields and page options.
24.	Click in the **Initiator Comment** field.
25.	Use the **Initiator Comment** field to enter details related to this update. Enter the desired information into the **Initiator Comment** field.

Step	Action
26.	Click the **Expand section Questionnaire** button. ▶
27.	Provide answers to the questions/requests as appropriate. The system reviews the transaction for certain conditions. If the transaction meets the conditions for being a high-risk transaction, the questionnaire is required data entry.
28.	To attach supporting documents, click the **Add Attachment** button to begin the steps for attaching a justification document.
29.	Next, enter the reason for the update. Click the button to the right of the **Reason Code** field. ⌄
30.	Select the appropriate reason for the update. Other (Specify in Comments)
31.	When are you finished making updates, click the **Save** button. Save
32.	If there are no errors, you can submit the transaction for review and approval. If necessary, scroll down to display the **Submit** button.
33.	Click the **Submit** button. Submit
34.	After you submit the transaction, the **Cancel** button disappears from the top of the **Retro Distribute Earnings** page.
35.	If necessary, scroll down to display the approval workflow details.
36.	The transaction is pending approval. The **Direct Retro** approval status monitor displays the Location approval workflow details, including approval levels and the assigned approvers (**Multiple Approvers** link).
37.	Click the **Return to Search** button. Return to Search
38.	You have initiated the direct retro transaction. The transaction must be approved, and processed in the nightly batch to be complete. The nightly batch job loads the updates into the pay distribution and accounting entries. **End of Procedure.**

Enter Direct Retro Funding Update - MCOP

Use this task to enter retroactive changes to pay distributions directly in the accounting entries using the **Salary Cap/MCOP Worksheet**.

Navigation: PeopleSoft Menu > Payroll for North America > Payroll Distribution > UC Customizations > **Process Direct Retro**

Note: This page may also be available in **Workcenter** depending on your security access.

Step	Action
1.	When you navigate to the **Process Direct Retro** component, the system displays the **Find an Existing Value** tab. Begin the steps for entering a direct retro transaction on the **Add a New Value** tab. Click the **Add a New Value** tab. 
2.	Notice that the **Run Control ID** displays a default value of **NEW**. You cannot update this value; when you successfully submit the transaction, the system automatically assigns your request a **Direct Retro ID** number.
3.	Click the **Add** button. 
4.	The system defaults the **Set ID** based on your user ID.
5.	The **Processing Option** section value defaults. You cannot update this value.
6.	The system defaults the dates to the begin and end date of the current fiscal year. The fields are editable so transactions can be made to the prior fiscal year distributions. Update the date range as necessary.
7.	Click in the **Empl ID** field. 
8.	Enter the desired information into the **Empl ID** field.
9.	If the employee has multiple jobs, use the **Empl Record** field to select the appropriate job record for this update. The system allows you to update only one job earnings in a direct retro transaction. If all jobs require updating, enter multiple direct retro transactions (one for each job requiring a redistribution).
10.	Click the **Search** button. 
11.	The system displays a list of available payroll dates (within the date parameters you entered).

Step	Action
12.	Click the **Selected** option for each applicable payroll date for which you must update the selected employee's earnings distribution data. ☐
13.	Click the **Save** button. Save
14.	After you click **Save**, if there are no errors, the displays a unique **Direct Retro ID** at the top of the page.
15.	Upon successfully saving the transaction, there is open activity on these pay periods for the selected employee. No one else can make changes to the employee's pay period data until this transaction is complete and updates are made to the distribution lines. If necessary, you can click the **Cancel** button to close the transaction without submitting for processing, and the periods become available for updating.
16.	The **Run** button initiates a process that provides data for the next action, which takes place on the **Retro Distribution** component. This process may take a minute or longer to run; the process is complete when the **Retro Distribute Earnings** page appears. Click the **Run** button. Run
17.	There are six data pages within the **Retro Distribution** component. The only page with editable fields is the **Retro Distribution Earnings** page. UC currently uses the direct retro process for earnings only. The funding for the deductions and taxes follow the earnings funding for payroll distribution. Therefore, the **Retro Distribution Deductions, Retro Distribution Taxes, Deduction Messages** and **Earnings Messages, Tax Messages** pages display informational data only.
18.	Scroll down to display additional fields on the **Retro Distribute Earnings** page.
19.	The **Old Data** section displays the current funding detail. In the **New Data** section, enter the funding update(s) and then click **Check Balance**. There are several possible update scenarios. This example shows the steps for updating an uncapped fund to a capped fund. When you are making updates in the **New Data** section and you enter a capped fund, and the employee's **Total UC Salary** value exceeds the salary cap rate, the system prompts you to use the **Direct Retro Salary Cap/MCOP Funding Worksheet**. In the **New Data** section, make the necessary funding updates.

Step	Action
20.	In this example, the system recognizes that capped fund was entered in the **New Data** section and displays a message, which indicates that the employee's total UC Salary is greater than the salary cap. Notice the link for the **Direct Retro Salary Cap/MCOP Funding Worksheet** is now active. This is a warning message, which directs you to enter all direct retro (salary cost transfers) on the **Direct Retro Salary Cap / MCOP Funding Worksheet**.
21.	Click the **Direct Retro Salary Cap/MCOP Funding Worksheet** link. 
22.	The **Direct Retro Salary Cap/MCOP Funding Worksheet** appears. The worksheet includes a header with transaction details, and also includes the **Old Data** and **New Data** sections identical to those on the **Retro Distribute Earnings** page from which you navigated. The **New Data** values are a copy of the **Old Data** values, Make the necessary updates to the earnings distributions in the **New Data** section. In this example, the fund code must be updated on the first row.
23.	Based on the new fund you enter, the system automatically adjusts the values in the **Earnings**, **Percent of Pay** and **Percent of Effort** fields.
24.	When you are finished making updates, click the **Check Balance** button. 
25.	The **Earnings** field indicates the amount the system allows to be spent against the funding source. In this example, the first row, which was updated, is the up-to-the-cap amount, so there's another row that must be generated to support the over-the-cap (OTC) amount. The new combo code hasn't been generated. In this example, an updated **Account/CC** value must be entered to complete all chartfields and establish a valid funding source.
26.	Scroll left to display additional fields and page functions. Click the scroll bar.
27.	Click the **Preview Direct Retro Distribution** button. 

Step	Action
28.	The **Preview Direct Retro Distribution Worksheet** page appears. Notice that in this example, the funding line is split and there's an additional field to reference: The **OTC Indicator**. The **Y-OTC** line is the amount of money that is not eligible to be spent against the capped fund. You must establish another funding source that is not a capped fund. Enter the appropriate funding source in the **New Data** section.
29.	When you are finished making any necessary updates on the **Preview Retro Distribution Worksheet** page, you can submit the updated funding distribution to the **Direct Retro Page**. You also have the option to return to the **Direct Retro Salary Cap/MCOP Worksheet**. Click the **Submit to Direct Retro Page** button. 
30.	The system copies the updated funding distribution rows to the **New Data** section of the **Retro Distribute Earnings** page. In this example, the **Y-OTC001** row (the first row) established a new funding line with uncapped funds. This row is referred to as the over-the-cap(OTC) row. If necessary, continue making updates to the other funding distribution rows.
31.	Scroll down to display additional fields and page functions.
32.	Use the **Initiator Comment** field to enter details related to this funding entry.
33.	Click the **Expand section Questionnaire** button. If necessary, provide answers to the questions/requests, as appropriate. The system reviews the transaction for certain conditions. If the transaction meets the conditions for being a high-risk transaction, the questionnaire is required data entry.
34.	To attach a supporting document, click the **Add Attachment** button, and search for and select the appropriate file. If you add an attachment, the options for viewing and deleting the attachment are available. Only the user who adds an attachment is able to delete it from the transaction. After the transaction is fully approved, attachments can no longer be added or deleted, but are viewable by any user with access to the page/transaction.
35.	If necessary, scroll down to display additional fields and page functions.
36.	Click the button to the right of the **Reason Code** field. ▼

Step	Action
37.	Select the appropriate reason for the update. 
38.	When are you finished making updates, click the **Save** button. 
39.	If the system displays a warning or error message, make any necessary updates and click **Save**. If the system does not display an error message, you can submit the transaction for review and approval. Remember that the system automatically assigns the transaction a unique **Run Control** number. If necessary, you can access and submit the transaction for review and approval at a later time.
40.	Remember, if you must cancel without processing the changes, click the **Cancel** button at the top of the page. This closes the transaction and the periods become available for updating.
41.	Click the **Submit** button. 
42.	The transaction is pending approval. The **Direct Retro** approval status monitor displays the Location approval workflow details, including approval levels and the assigned approvers (**Multiple Approvers** link).
43.	You have entered retroactive changes to pay distributions directly in the accounting entries using the **Salary Cap/MCOP Worksheet**. The transaction must be approved, and processed in the nightly batch to be complete. The nightly batch job loads the updates into the pay distribution and accounting entries. **End of Procedure.**

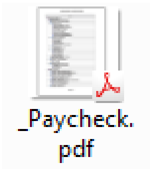
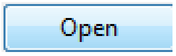
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
44.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
45.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
46.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
47.	Click the button to the right of the **Category** field. 
48.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
49.	Click in the **Subject** field.
50.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
51.	Click in the **Description** field.
52.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
53.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
54.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
55.	Click in the **Best Contact Phone Number** field.
56.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.

Step	Action
57.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
58.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
59.	Click the **Add Attachment** link. 
60.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
61.	For this example, click the **_Paycheck.pdf** list item. 
62.	Click the **Open** button. 
63.	The file name appears in the **Attachments** box.
64.	Click the **Submit** button.
65.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
66.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
67.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
68.	Click the scroll bar.
69.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
70.	Click the scroll bar.
71.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
72.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

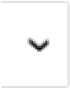
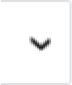
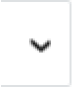
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
73.	Click the **Ask UCPath Center** button. 
74.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
75.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
76.	UCPath returned one result. Click the scroll bar.
77.	Click the **Create an Inquiry** link. 
78.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.

Step	Action
79.	Click the button to the right of the **Requested By** field. 
80.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
81.	Click the button to the right of the **Topic** field. 
82.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
83.	Click the button to the right of the **Category** field. 
84.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
85.	Click in the **Subject** field.
86.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
87.	Click the scroll bar.
88.	Click in the **Description** field.
89.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
90.	In this example, the full **Description** was completed on your behalf.
91.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
92.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.

Step	Action
93.	Click the **Submit Inquiry** button. 
94.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
95.	The submitter's name appears.
96.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

Reopen Closed UCPath Center Case

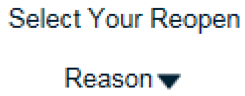
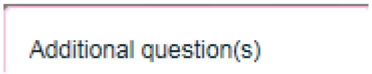
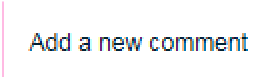
Use this task to reopen a closed inquiry via the UCPath website.

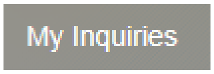
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
97.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
98.	Click the **My Closed Inquiries** link. 
99.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 

Step	Action
100.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button.  Select Your Reopen Reason
101.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item.  Additional question(s)
102.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
103.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field.  Add a new comment
104.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
105.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center
106.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
107.	Click the scroll bar.
108.	Notice the comment now appears in the **Case Comments** section.

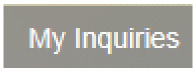
Step	Action
109.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
110.	Return to the top of the page. Click the scroll bar.
111.	Click the **My Inquiries** link. 
112.	The new inquiry appears in the **My Open Inquires** list.
113.	You have reopened a closed inquiry. **End of Procedure.**

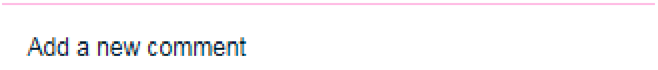
Monitor UCPath Center Cases

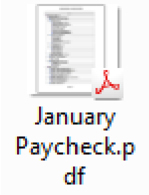
Use this task to review the status of an existing inquiry via the UCPath website.

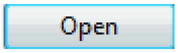
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

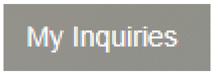
Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
114.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
115.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).

Step	Action
116.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
117.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
118.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link.  Date/Time Opened ▲
119.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again..  Date/Time Opened ▼
120.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link.  00180573
121.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field.  Add a new comment
122.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
123.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.

Step	Action
124.	Click the **Submit comment to the UCPath Center** button. 
125.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
126.	Click the scroll bar.
127.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. 
128.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. 
129.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
130.	To return to the case details, click the **00180573** link. 
131.	Click the scroll bar.
132.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
133.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 

Step	Action
134.	Click the **Open** button.  Open
135.	A message confirms the file was uploaded. Click the **Done** button.  Done
136.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
137.	You can view all attachments in a list. Click the **View All** link.  View All
138.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. ▼
139.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. ▼
140.	Click the **00180573** link.  00180573
141.	Click the scroll bar.
142.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
143.	Click the **Email** link.  Sandbox: UCPath Center: Inquir.
144.	Review the email information as you scroll down the page. Click the scroll bar.

Step	Action
145.	Review the email from the UCPath Center. Click the scroll bar.
146.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
147.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
148.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
149.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
150.	Click the **00180567** link.  00180567
151.	Click the scroll bar.
152.	Notice the **Status** is **Closed/Resolved**.
153.	Click the scroll bar.
154.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
155.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMGENL203: Benefit Cost Transfers

Enter Benefit Cost Transfer

Use this task to enter a benefit cost transfer transaction.

Navigation: PeopleSoft Menu > Payroll for North America > Payroll Distribution > UC Customizations > **Process Benefit Cost Transfer**

Note: This page may also be available in **Workcenter** depending on your security access.

Step	Action
1.	When you navigate to the **Process Benefit Cost Transfer** page, the system displays the **Find an Existing Value** tab. Begin the steps for entering a benefit cost transfer transaction on the **Add a New Value** tab. Click the **Add a New Value** tab. 
2.	Notice that the **Run Control ID** displays a default value of **NEW**. You cannot update this value; when you successfully submit the transaction, the system automatically assigns your request a **Benefit Cost Transfer ID** number.
3.	Click the **Add** button. 
4.	The system defaults the **Set ID** based on your user ID.
5.	In the **Pay End Dates** section, the system defaults the dates to the begin and end date of the current fiscal year. The fields are editable so transactions can be made to the prior fiscal year distributions. Enter the appropriate date range to locate the pay distributions you want to update.
6.	Enter the desired information into the **Begin Date** field.
7.	Click in the **Empl ID** field. 
8.	Enter the desired information into the **Empl ID** field.
9.	Notice that there is also an **Empl Record** (employee record) field. If the employee has multiple jobs, select the appropriate job record. The system allows you to update only one job per transaction. If all jobs require updating, enter multiple benefit cost transfer transactions (one for each job requiring an adjustment).
10.	Click the **Search** button. 
11.	The system displays a list of available payroll dates (within the date parameters you entered).
12.	Click the **Selected** option for each applicable payroll date for which you must update the selected employee's benefit costs. ☐

Step	Action
13.	Click the **Save** button. 
14.	After you click **Save**, if there are no errors, the system displays a unique **Benefit Cost Transfer ID** at the top of the page. The **Cancel** and **Run** buttons also appear at the top of the page. When you create a benefit cost transfer transaction, the system recognizes it as open activity on the employee's selected pay period(s). Other users cannot make changes to the employee's pay period data until this transaction is fully approved and updates are made to the distribution lines. If necessary, you can click the **Cancel** button to close the transaction without submitting for processing, and the periods become available for updating.
15.	The **Run** button initiates a process that provides data for the next action, which takes place on the **Review Benefit Cost Transfer** page. This process may take a minute or longer to run; the process is complete when a new page appears. Click the **Run** button. 
16.	The system displays the **Review Benefit Cost Transfer** page. The **Old Data** section displays the current benefit expense detail. In the **New Data** section, enter the necessary update(s) and then click **Check Balance**.
17.	If necessary, scroll right to display additional fields and page functions.
18.	Each transaction is unique and multiple scenarios may occur. You can add rows under **New Data**, but cannot delete rows that defaulted in. However, for defaulted rows, you can update the appropriate chartfields as necessary. If the total of the new data dollars does not match the old data dollars by **Deduction Code/Benefit Transaction Type**, the system displays an error message and you cannot save the data. Make the necessary benefit cost updates in the **New Data** section.

Step	Action
19.	After you enter all necessary updates in the **New Data** section, check the balance. Click the **Check Balance** button. 
20.	When the old data total does not match the new data total, the system displays an error message. The earnings must balance in order to save or submit. If the system displays an error message, make the necessary adjustments and click the **Check Balance** button.
21.	Use the **Requester Comments**, **Questionnaire** answers (if applicable) and the transaction **Reason Code** to provide the approver(s) with insight as to why the benefit cost transfer transaction is necessary.
22.	Click in the **Requester Comments** field.
23.	Use the **Requester Comments** field to enter details related to this update. Enter the desired information into the **Requester Comments** field.
24.	If necessary, scroll down to display additional fields and page options.
25.	**Expand the Questionnaire** section and provide answers to the questions/requests as appropriate. The system reviews the transaction for certain conditions. If the transaction meets the conditions for being a high-risk transaction, the questionnaire is required data entry.
26.	To attach supporting documents, click the **Add Attachment** button to begin the steps for attaching a justification document.
27.	Click the button to the right of the **Reason Code** field. ⌄
28.	Select the appropriate reason for the update. Misc Adjustment/Award Closeout
29.	When are you finished making updates, click the **Save** button. 
30.	If there are no errors, you can submit the transaction for review and approval. Click the **Submit** button. 
31.	After you submit the transaction, the **Cancel** button disappears from the top of the **Review Benefit Cost Transfer** page.

Step	Action
32.	If necessary, scroll down to display the approval workflow details.
33.	The transaction is pending approval. The **Benefit Cost Transfer** approval status monitor displays the Location approval workflow details, including approval levels and the assigned approvers (**Multiple Approvers** link).
34.	You have entered a benefit cost transfer transaction. **End of Procedure.**

Review Existing Benefit Cost Transfer Transaction

Use this task to review a benefit cost transfer transaction.

Navigation: PeopleSoft Menu > Payroll for North America > Payroll Distribution > **Review Benefit Cost Transfer**

Note: This page may also be available in **Workcenter** depending on your security access.

Step	Action
1.	Use any of the search criteria fields to find the transaction. This example demonstrates how to search by an employee's identification number (Empl ID). Click in the **Empl ID** field. 
2.	Enter the desired information into the **Empl ID** field.
3.	Click the **Search** button. 

Step	Action
4.	The first section of the **Review Benefit Cost Transfer** page is **Benefit Cost Transfer Transaction**. The **Benefit Cost Transfer ID** field is the system-generated transaction ID. The **Created By** field displays the employee identification number and name of the person who created the entry. The **Created** field identifies the date the transaction was created, but not necessarily the date the transaction was processed. The two status fields indicate the processing status and the request status. **Processing Status** is the overall status. Valid values are: **Initiated**, **Editing** and **Complete**. The **Processing Status** of **Editing** indicates the transaction will be updated with the nightly process. **Request Status** indicates the AWE approval status of the transaction. Valid values are: **In Progress**, **Approved**, **Denied** and **Complete**.
5.	The top of the **Benefit Expenses** section displays the check information related to the employee expenses, including the **Empl ID** and the employee's name. Additional information includes **Company**, **Pay Group**, **Pay Run ID** and **Off cycle** indicator. The key information is the **Pay Begin Date** and **Pay End Date**. This data identifies the paycheck data provided in the sections below.
6.	This section of the page also includes the **Old Data** and **New Dat**a fields, where the necessary benefit cost transfer updates are made. For example, moving a benefit cost from one fund to another.
7.	If necessary, scroll right to display additional fields and page functions.
8.	Notice that there is only one selected pay period for this transaction as indicated by **1 of 1** in the **Benefit Expenses** section header. If there are multiple pay periods, you can use the **View All** functionality to display each pay period's detail on one page.
9.	Notice that there are four individual expense lines for the selected pay period and all are currently displayed on the page, as indicated by **1-4 of 4** in the **Old Data** section heading.
10.	Notice that there are also four individual expense lines for the selected pay period and all are currently displayed on the page, as indicated by **1-4 of 4** in the **New Data** section heading.
11.	After you confirm that all rows are displayed on the page, you can begin reviewing the specific updates that were made by comparing the **Old Data** and **New Data** sections. Scroll left to display additional fields and page functions.
12.	The **Old Data** section displays the original data at the time the initiator submitted the transaction.

Step	Action
13.	The **New Data** section displays the updated data entered for the transaction.
14.	Compare the data in the **Old Data** and **New Data** sections to find the changes. Specifically look at the number of rows, as well as the full accounting unit (FAU) data.
15.	If necessary, scroll down to display additional fields and page options.
16.	In this example, the department and fund values were changed on the second row.
17.	Each transaction is unique and multiple scenarios may occur. An initiator can add rows under **New Data**, but cannot delete rows that defaulted in. However, for defaulted rows, the initiator can update the appropriate chartfields as necessary. When entering a benefit cost transfer transaction, if the total of the new data dollars does not match the old data dollars by **Deduction Code/Benefit Transaction Type**, the system displays an error message and the user cannot save the data.
18.	If necessary, scroll right to display additional fields.
19.	In this example, notice that the initiator did not add any additional expense rows or make updates to the existing expense amounts.
20.	Scroll left to display additional fields and page functions.
21.	Scroll down to display the bottom portion of the page.
22.	The **Requester Comments**, **Questionnaire** answers (if applicable) and the transaction **Reason Code** provide insight as to why the benefit cost transfer transaction was necessary. The **Questionnaire** section has specific questions or requests for information deemed necessary for high-risk transactions. If the transaction meets the high-risk conditions the questionnaire fields are required fields. However, initiators can answer the questions for any transaction. To see the specific questions and answers, you can click ► to expand the section. In this example, you won't expand the section.
23.	If the initiator or the approver uploaded one or more documents to the transaction, the **View Attachment** button is enabled. Click the button to view the attached document(s). In this example, there are no attachments to view.
24.	If the transaction has been submitted, as in this example, the system displays the approval routing details, including the approval actions that have taken place.
25.	Scroll right to display additional fields and page functions.
26.	Notice that in this example, the transaction has been approved, which coincides with the **Request Status** displayed at the top of the page.
27.	If necessary, scroll left to display additional fields and page values.

Step	Action
28.	To see the specific approvers to whom the transaction was routed, c ▶
29.	The approver section displays the approver's employee ID, as well as the approval date and time. When you are finished reviewing the approver details, click the **Collapse** button to close the section. ▼
30.	Approvers can enter comments on any transaction routed for their approval, but must enter comments when denying or pushing back the transaction to a previous approver during the approval process
31.	You have reviewed a benefit cost transfer transaction. **End of Procedure.**

Submit Case to UCPath Center

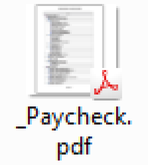
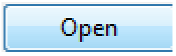
Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
32.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
33.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. ▼

Step	Action
34.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
35.	Click the button to the right of the **Category** field. 
36.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
37.	Click in the **Subject** field.
38.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
39.	Click in the **Description** field.
40.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
41.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
42.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
43.	Click in the **Best Contact Phone Number** field.
44.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
45.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
46.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
47.	Click the **Add Attachment** link. 
48.	Navigate to the document you want to attach. In this example, the document is located on the desktop.

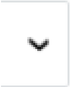
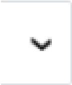
Step	Action
49.	For this example, click the **_Paycheck.pdf** list item. 
50.	Click the **Open** button. 
51.	The file name appears in the **Attachments** box.
52.	Click the **Submit** button.
53.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
54.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
55.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
56.	Click the scroll bar.
57.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
58.	Click the scroll bar.
59.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
60.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

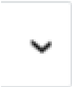
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
61.	Click the **Ask UCPath Center** button. 
62.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
63.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
64.	UCPath returned one result. Click the scroll bar.
65.	Click the **Create an Inquiry** link. 
66.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
67.	Click the button to the right of the **Requested By** field. 
68.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
69.	Click the button to the right of the **Topic** field. 
70.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.

Step	Action
71.	Click the button to the right of the **Category** field. 
72.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
73.	Click in the **Subject** field.
74.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
75.	Click the scroll bar.
76.	Click in the **Description** field.
77.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
78.	In this example, the full **Description** was completed on your behalf.
79.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
80.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
81.	Click the **Submit Inquiry** button. 
82.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
83.	The submitter's name appears.
84.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

Reopen Closed UCPath Center Case

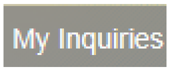
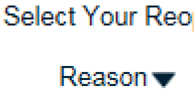
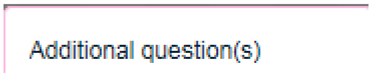
Use this task to reopen a closed inquiry via the UCPath website.

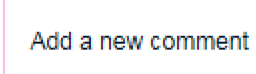
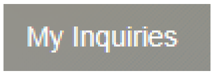
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:

Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
85.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
86.	Click the **My Closed Inquiries** link. 
87.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
88.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
89.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
90.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.

Step	Action
91.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
92.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
93.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
94.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
95.	Click the scroll bar.
96.	Notice the comment now appears in the **Case Comments** section.
97.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
98.	Return to the top of the page. Click the scroll bar.
99.	Click the **My Inquiries** link. 
100.	The new inquiry appears in the **My Open Inquires** list.
101.	You have reopened a closed inquiry. **End of Procedure.**

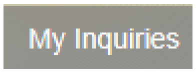
Monitor UCPath Center Cases

Use this task to review the status of an existing inquiry via the UCPath website.

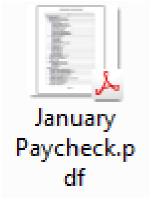
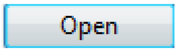
Dashboard Navigation:
Ask UCPath Center
or

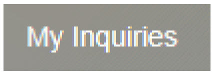
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
102.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
103.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
104.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
105.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
106.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 
107.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 

Step	Action
108.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 00180573
109.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field. Add a new comment
110.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
111.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
112.	Click the **Submit comment to the UCPath Center** button. Submit comment to the UCPath Center
113.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
114.	Click the scroll bar.
115.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. View All
116.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▼
117.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.

Step	Action
118.	To return to the case details, click the **00180573** link. 
119.	Click the scroll bar.
120.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
121.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
122.	Click the **Open** button. 
123.	A message confirms the file was uploaded. Click the **Done** button. 
124.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
125.	You can view all attachments in a list. Click the **View All** link. 
126.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 

Step	Action
127.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu.
128.	Click the **00180573** link. 
129.	Click the scroll bar.
130.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
131.	Click the **Email** link. 
132.	Review the email information as you scroll down the page. Click the scroll bar.
133.	Review the email from the UCPath Center. Click the scroll bar.
134.	Click the case number to return to the details of the case. Click the **00180573** link. 
135.	To review closed inquiries, click the **My Inquiries** link. 
136.	Click the **My Closed Inquiries** tab. 
137.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**

Step	Action
138.	Click the **00180567** link. 00180567
139.	Click the scroll bar.
140.	Notice the **Status** is **Closed/Resolved**.
141.	Click the scroll bar.
142.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link.
143.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMGENL215: Budget Distribution

Enter Budget Distribution

Use this task to enter budget distribution data for a position.

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Commitment Accounting > Budget Information > UC Customizations > **Budget Distribution**

Step	Action
1.	Click the **Add a New Value** tab. Add a New Value
2.	Click in the **Set ID** field.
3.	Enter the desired information into the **Set ID** field.
4.	Click in the **Department** field.
5.	Enter the desired information into the **Department** field.
6.	Click in the **Position Number** field.
7.	Enter the desired information into the **Position Number** field.

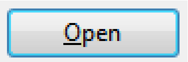
Step	Action
8.	Click the **Add** button. 
9.	The system displays the **Budget Distribution** page for the selected position.
10.	In this example, the **Job Data Snapshot** section is blank, which indicates this is an unfilled position. For a filled position, the **Job Data Snapshot** section displays a summary of the incumbent employee's job data across two tabs: **Job details 1** and **Job details 2**.
11.	Click in the **Effective Date** field. 
12.	Enter the desired information into the **Effective Date** field.
13.	There are two methods for entering budget data. • Manually enter the budget distribution lines on this page. • Default the funding data for the position, enter any required fields, and make additional changes if the budget distribution is not the same as the funding distribution. Only unspecified earnings code distribution data is pulled from funding. This example reviews the steps for defaulting the funding data and making required changes.
14.	Click the **Default Funding Entry** button to automatically update the **Budget Distribution** section with the most current position funding data. 
15.	The system updates the **Position Budget** section based on the selected position. For an unfilled position, the **Annualized Budget Rate** value is the lowest value on the **Salary Grade** table. For a filled position, the system defaults the annual compensation from **Job Data**. If there is more than one employee tied to the position, then the **Annualized Budget Rate** value is an average of all employees' annual compensation rates. Default data is based on the system date at the time of data entry.
16.	Use the **Adjustment Amount** field to increase the budget amount. You can also use this field to add specific earn code amounts to include in budgeting, such as a bonus or stipend associated with the position. The system does not pull specific earnings codes from funding data; you must add a budget distribution row for the earnings code. Make sure you enter the same amount on the distribution row as entered here.

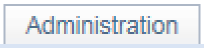
Step	Action
17.	The system defaults the appropriate budget distribution lines in the **Budget Distribution** section. However, defaulting the funding data does not populate the **Earn Code** and **Budget Sub** fields, which are required fields. Enter the appropriate value in the **Earn Code** field for each row, and if necessary, update the distribution data on the existing rows. You can also insert additional rows or delete existing rows as necessary.
18.	The **STF Flag**, which defaults to selected on each row, determines whether the distribution line populates the budget snapshot tables and is included in data reported to UC Locations and in the state staffing report. You can deselect the check box if necessary.
19.	Before saving you must refresh the annualized budget rate (ABR). Click the **Refresh ABR** button. 
20.	Review the **Position Budget** section to verify an recalculations. The **Budget FTE** cannot exceed the **Position FTE**. If you budget for an adjustment amount as a separate distribution line using an earning code other than regular earnings, the FTE should be zero. The system displays a warning message, but you can save the entry.
21.	Click the **Save** button. 
22.	You have entered a new budget distribution data for a position. **End of Procedure.**

Upload Budget Distribution

Use this task to upload budget distribution data to UCPath using a completed Excel template. The blank template is located on the **UCPath Location Support** SharePoint site: https://sp.ucop.edu/sites/ucpc/UCPathLocationSupport/UCPathTemplates/Forms/AllItems.aspx (https://sp.ucop.edu/sites/ucpc/UCPathLocationSupport/UCPathTemplates/Forms/AllItems.aspx)

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Commitment Accounting > Budget Information > UC Customizations > **Budget Distribution Upload**

Step	Action
1.	When you run a process or report, the system prompts you to select an existing **Run Control ID** value or create a new one. Use the **Find an Existing Value** tab to search for and select an existing ID or click the **Add a New Value** tab to create a new one. You do not have to create a new run control ID each time you run a process or report; you can use a previously-created ID. This example reviews the steps for creating a new Run Control ID.
2.	Click the **Add a New Value** tab. 
3.	Enter the desired information into the **Run Control ID** field.
4.	Click the **Add** button. 
5.	Click the **Add Attachment** button. 
6.	The system displays the **File Attachment** window. Click the **Browse** button. 
7.	The **Choose File to Upload** window appears. Use this window to search for and select the file you want to upload. 
8.	After you select the file you want to upload, click the **Open** button. 
9.	The **File Attachment** window appears, which displays the selected file path. Click the **Upload** button. 
10.	The **Budget Distribution Upload** page appears with the attached filename displayed. Click the **Run** button. 

Step	Action
11.	The system displays the **Process Scheduler Request** page. If this is the first time you are running the process, select the appropriate **Server Name** value. Under **Process List**, verify the **Budget Distribution Upload** option is selected or click to select it.
12.	Click the **OK** button. 
13.	The **Budget Distribution Upload** page appears. Notice that the system displays the process instance number at the top of the page. Click the **Report Manager** link. 
14.	The system displays the **Report Manager** component. Click the **Administration** tab. 
15.	The **Administration** page displays the most recent request at the top of the list. If necessary, click the **Refresh** button until the **Run Status** is **Success** and the **Distribution Status** is **Posted**. Click the **Details** link. 
16.	The **Report Detail** page appears. In the **Report** section, the **Run Status** field displays **Success** if the upload is successful, as in this example.
17.	The **File List** section displays the log output and standard output files. Click the log file link to display the log file output in a separate browser tab or window (depending on system settings). Use the data to determine the number of rows processed and those for which there are errors. The CSV file provides the lines that could not be loaded. You can copy the data into the Excel template, fix the data, and repeat the upload process, or you can manually enter the data on the **Budget Distribution** page.
18.	When you are finished reviewing process output, click the **OK** button on the **Report Detail** page. 

Step	Action
19.	The system displays the **Administration** page. Click the **Go back to Budget Distribution Upload** link. Go back to Budget Distribution Upload
20.	You have uploaded budget distribution data to UCPath using an Excel template. **End of Procedure.**

Update Budget Distribution

Use this task to update existing budget distributions.

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Commitment Accounting > Budget Information > UC Customizations > **Budget Distribution**

Step	Action
1.	Click in the **Set ID** field.
2.	Enter the desired information into the **Set ID** field.
3.	Click in the **Department** field.
4.	Enter the desired information into the **Department** field.
5.	Click in the **Position Number** field.
6.	Enter the desired information into the **Position Number** field.
7.	Click the **Search** button. Search
8.	The **Budget Distribution** page displays the current data row. You must insert an effective-dated row to update the data.
9.	If necessary, scroll right to display additional fields and page options.
10.	Click the **Add a new row** button. ⊞
11.	The system copies the existing funding information to the new row. Notice that, in the **Position Budget** section, the budget amount was not copied. The budget amount appears when you click the **Default Funding Entry** button or the **Refresh ABR** button.

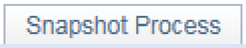
Step	Action
12.	Click in the **Effective Date** field. 
13.	Enter the desired information into the **Effective Date** field.
14.	The **Eff Seq** (effective sequence) field identifies the number of entries for the same effective date; 0 for the first entry, 1 for the second entry, 2 for the third entry, and so forth. In this example, the update is being made on a different date, so the value is 0.
15.	Determine whether it's easier to update the data from current funding data or from the previous budget data. Click the **Default Funding Entry** button to automatically update the **Budget Distribution** section with the most current funding data for the position. The funding data does not populate the **Budget Distribution** required fields **Earn Code** and **Budget Sub**.
16.	Click the **Default Funding Entry** button. 
17.	Use the **Adjustment Amoun**t field to increase the budget amount. You also can use this field to add specific earn code amounts to include in budgeting, such as a bonus or stipend associated with the position. The system does not pull specific earn codes from funding data; you must add a budget distribution row for the earn code. Make sure you enter the same dollar amount on the distribution row as entered here.
18.	Funding data with blank earnings codes are pulled in as budget distribution lines. Add, update, or delete this information, as necessary.
19.	You must enter the **Earn Code** on the budget distribution entry. Click in the **Earn Code** field. 
20.	Enter the desired information into the **Earn Code** field.
21.	Continue reviewing and making updates to any additional budget distribution lines as necessary.
22.	When you are finished making updates, click the **Save** button. 
23.	You have updated an existing budget distribution. **End of Procedure.**

Export Budget Snapshot Data

Use this task to export a budget data snapshot. You can use this task to:

- **Create** a new snapshot.
- **Re-Process** an open snapshot.
- **Finalize** the snapshot.
- **Re-Open** a finalized snapshot
- **Delete** a snapshot.
- Perform a mass update of the **Status** field (**Mass Update Status**) on budget lines in the snapshot.

Navigation: PeopleSoft Menu > Payroll for North America > Payroll Distribution > Commitment Accounting USA > UC Customizations > **Budget Data Export**

Step	Action
1.	When you run a process or report, the system prompts you to select an existing Run Control ID value or create a new one. Use the **Find an Existing Value** tab to search for and select an existing ID or click the **Add a New Value** tab to create a new one. You do not have to create a new run control ID each time you run a process or report; you can use a previously-created ID. This example reviews the steps for creating a new Run Control ID.
2.	Click the **Add a New Value** tab. 
3.	Enter the desired information into the **Run Control ID** field.
4.	Click the **Add** button. 
5.	There are two options for running this process. Use the **Budget Data Export** page for the nightly processing to capture compensation changes into the budget distribution data. This process updates the budget distribution data, but not the snapshot data. This example shows how to export data to create the budget snapshot, which you will run from the **Snapshot Process** page.
6.	Click the **Snapshot Process** tab. 
7.	Click in the **As of Date** field. 
8.	Enter the desired information into the **As of Date** field.

Step	Action
9.	Click in the **Business Unit** field. 
10.	Enter the desired information into the **Business Unit** field.
11.	The Snapshot Process modes are: • **Create** a new snapshot. Inserts new data rows in the snapshot tables. • **Re-Process** an open snapshot. This will overwrite snapshot data with changes made in the budget distribution tables since the last snapshot processing. • **Finalize** the snapshot. This is the last snapshot step in the budget event. All open statuses will be set to final and the data is available for reporting and downloading to the local budget systems. • **Re-Open** a finalized snapshot. This allows finalized snapshot to be re-opened for review and additional processing. • **Delete** a snapshot. This process completely removes all data lines from the snapshot tables. • **Mass Update Status** for budget lines in the snapshot. This option requires the entry of the current status and the new status. The new status value will be overwritten wherever the current status value is found.
12.	Select the appropriate snapshot process option. 
13.	Click the **Run** button. 
14.	The system displays the **Process Scheduler Request** page. If this is the first time you are running the process, select the appropriate **Server Name** value. Under **Process List**, verify the **Budget Data Export** option is selected or click to select it.
15.	Click the **OK** button. 
16.	Click the **Report Manager** link. 
17.	The system displays the **Report Manager** component. Click the **Administration** tab. 

Step	Action
18.	The **Administration** page displays the most recent request at the top of the list. If necessary, click the **Refresh** button until the **Run Status** is **Success** and the **Distribution Status** is **Posted**. Click the **Details** link.  Details
19.	Click the log link to display process details.  I154_BUDG_EMP_DTL_94595_20170802114825.log
20.	The system displays the detail in a separate browser window or tab. When you are finished reviewing the output, close the separate window or tab.
21.	When you are finished reviewing process output data, click the **OK** button on the **Report Detail** page.  OK
22.	The system displays the **Administration** page. Click the **Go back to Budget Data Export** link.  Go back to Budget Data Export
23.	You have exported a budget data snapshot. **End of Procedure.**

Review Budget Snapshot Data

Use this task to review position budget distribution data in the snapshot and set the status on individual lines during the budgeting event.

Navigation: PeopleSoft Menu > Payroll for North America > Payroll Distribution > Commitment Accounting > UC Customizations > **Snapshot Review**

Step	Action
1.	Click in the **Business Unit** field. 
2.	Enter the desired information into the **Business Unit** field.
3.	Click in the **Snapshot Name** field. 

Step	Action
4.	The snapshot name is the combination of the business unit and the as of date used during create snapshot processing. You can also use the lookup to search for and select the appropriate snapshot name. Enter the desired information into the **Snapshot Name** field.
5.	Click the button to the right of the **Snapshot Status** field. 
6.	Select the appropriate status.  In Progress
7.	Click in the **Department** field. 
8.	Enter the desired information into the **Department** field.
9.	Click the **Search** button.  Search
10.	The system displays the first record that meets your search conditions, even when multiple search result rows are available. You must return to the **Search for Existing Value** page to view the complete list of search results.
11.	Click the **Return to Search** button.  Return to Search
12.	The system displays the **Find an Existing Value** page with the search results listed at the bottom of the page. This example shows a complete list of all positions within **Department 003300** in snapshot **LACMP_20170701**
13.	From the list of search results, click the link for the position number you want to review budget distribution details.  40064424
14.	The system displays the **Snapshot Review** page for the position you selected. When you are finished reviewing the position details, If necessary, scroll right to display additional fields and page options.

Step	Action
15.	Notice that in this example, you can update only the **Status** field. This field is editable only when the snapshot is in progress. Determine whether you want to change the status for the budget distribution. Click the button to the right of the **Status** field. ⌄
16.	**Open** status prompts the system to update the distribution line when the snapshot is reprocessed. Reprocessing overwrites the snapshot data with any changes made in the budget distribution pages and is done periodically during the budget event until the snapshot is finalized. **Final** status stops the line from updating when the snapshot is reprocessed. **Exclude** status removes the budget distribution line from the snapshot population. This status will stop the budget distribution line from updating or being included in the reporting.
17.	Select the appropriate status. Final
18.	If necessary, scroll left to display additional fields and page options.
19.	When you are finished reviewing and updating all budget lines, click the **Save** button. Save
20.	Click the button to the right of the **Status** field. ⌄
21.	Click the **Return to Search** button to return to the **Find an Existing Value Page**. Return to Search
22.	You have reviewed position budget distribution data in the snapshot and set the status on individual lines. **End of Procedure.**

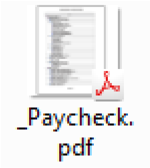
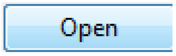
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
23.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link.  Submit An Inquiry
24.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. ▼
25.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.  Payroll
26.	Click the button to the right of the **Category** field. ▼
27.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
28.	Click in the **Subject** field.
29.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
30.	Click in the **Description** field.
31.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
32.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
33.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
34.	Click in the **Best Contact Phone Number** field.

Step	Action
35.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
36.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
37.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
38.	Click the **Add Attachment** link. 
39.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
40.	For this example, click the **_Paycheck.pdf** list item. 
41.	Click the **Open** button. 
42.	The file name appears in the **Attachments** box.
43.	Click the **Submit** button.
44.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
45.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
46.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
47.	Click the scroll bar.
48.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
49.	Click the scroll bar.
50.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.

Step	Action
51.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

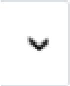
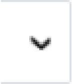
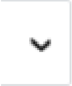
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
52.	Click the **Ask UCPath Center** button. 
53.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
54.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
55.	UCPath returned one result. Click the scroll bar.
56.	Click the **Create an Inquiry** link. 

Step	Action
57.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
58.	Click the button to the right of the **Requested By** field. 
59.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
60.	Click the button to the right of the **Topic** field. 
61.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
62.	Click the button to the right of the **Category** field. 
63.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
64.	Click in the **Subject** field.
65.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
66.	Click the scroll bar.
67.	Click in the **Description** field.
68.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
69.	In this example, the full **Description** was completed on your behalf.

Step	Action
70.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
71.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
72.	Click the **Submit Inquiry** button. 
73.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
74.	The submitter's name appears.
75.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

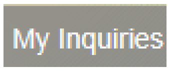
Reopen Closed UCPath Center Case

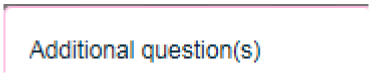
Use this task to reopen a closed inquiry via the UCPath website.

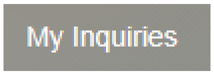
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
76.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
77.	Click the **My Closed Inquiries** link. 

Step	Action
78.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 00180567
79.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. Select Your Reopen Reason ▼
80.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. Additional question(s)
81.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
82.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. Add a new comment
83.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
84.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. Submit comment to the UCPath Center

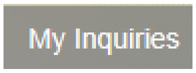
Step	Action
85.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
86.	Click the scroll bar.
87.	Notice the comment now appears in the **Case Comments** section.
88.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
89.	Return to the top of the page. Click the scroll bar.
90.	Click the **My Inquiries** link. 
91.	The new inquiry appears in the **My Open Inquires** list.
92.	You have reopened a closed inquiry. **End of Procedure.**

Monitor UCPath Center Cases

Use this task to review the status of an existing inquiry via the UCPath website.

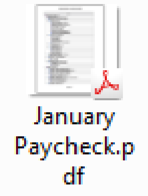
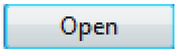
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

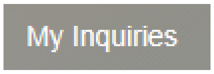
Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
93.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 

Step	Action
94.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
95.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
96.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
97.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link.  Date/Time Opened ▲
98.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again..  Date/Time Opened ▼
99.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link.  00180573
100.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field.  Add a new comment
101.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.

Step	Action
102.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
103.	Click the **Submit comment to the UCPath Center** button. 
104.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
105.	Click the scroll bar.
106.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. 
107.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▼
108.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
109.	To return to the case details, click the **00180573** link. 
110.	Click the scroll bar.
111.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 

Step	Action
112.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
113.	Click the **Open** button. 
114.	A message confirms the file was uploaded. Click the **Done** button. 
115.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
116.	You can view all attachments in a list. Click the **View All** link. 
117.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 
118.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 
119.	Click the **00180573** link. 
120.	Click the scroll bar.

Step	Action
121.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
122.	Click the **Email** link. Sandbox: UCPath Center: Inquir.
123.	Review the email information as you scroll down the page. Click the scroll bar.
124.	Review the email from the UCPath Center. Click the scroll bar.
125.	Click the case number to return to the details of the case. Click the **00180573** link. 00180573
126.	To review closed inquiries, click the **My Inquiries** link. 
127.	Click the **My Closed Inquiries** tab. 
128.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
129.	Click the **00180567** link. 00180567
130.	Click the scroll bar.
131.	Notice the **Status** is **Closed/Resolved**.
132.	Click the scroll bar.

Step	Action
133.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
134.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

Payroll

PHCMPAYL110: Payroll Inquiry

View Recurring Additional Pay

Use this task to view an employee's recurring additional pay request.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Self Service Additional Pay**

Step	Action
1.	Use the **Find an Existing Value** tab to search for a recurring additional pay transaction. If you do not know the **Transaction ID**, you can search by **Empl ID**. You may also include the **Approval Status** in your search criteria. Click in the **Empl ID** field. 
2.	Using the employee's ID number, enter the desired information into the **Empl ID** field. For this example, enter **10004437**.
3.	Click the **Search** button. 
4.	The **Self Service Additional Pay** page is comprised of three sections: 1. Header information at the top of the page. 2. **New Additional Pay** section on the left side of the page 3. **Current Additional Pay** section on the right side of the page.
5.	The left side of the page displays the **New Additional Pay** section. Initiators use this section to create new recurring additional pay transactions. This section displays the latest entry, which also appears in the **Current Additional Pay** section on the right side of the page. If no payments exist for the employee, both sides of the page display no data.

Step	Action
6.	Focus your review on the **Current Additional Pay** section on the right side of the page.
7.	Click the scroll bar to view the right side of the page.
8.	The first piece of information is the **Earnings Code**, which displays **RGN** in this example. Notice this is **1 of 1** earnings codes for the employee. If the employee has more than one earnings code you can scroll through the earnings codes using the buttons in this section.
9.	The **Effective Date** section displays the effective date associated with the currently displayed earnings code. If the additional pay has changed over time, you will see multiple rows in this section.
10.	The **Payment Details** section displays details for the currently displayed earnings code and effective date. If the additional pay has changed over time, you will see multiple rows in this section. This section displays an **End Date** if applied, **Reason** for the payments and **Pay Period Amt** (amount). Additional pay transactions may also display a **Goal Amount** and **Goal Balance**. UCPath tracks the total amount paid in the balance and stops the payment when the goal is reached. Finally, the **OK to Pay** check box is selected by default when created by the Initiator.
11.	The **Applies to Pay Periods** section indicates in which pay periods the additional pay should be processed. By default, payments for monthly employees automatically select the **First** pay period check box. Payments for biweekly employees automatically select the **First** and **Second** period check boxes. The **Third** period check box can be manually selected to indicate biweekly employees should receive this payment in months with three paychecks.
12.	The **Job Information** section displays data from the employee's **Job Data** record, including **Compensation Rate**.
13.	Click the scroll bar to view the bottom of the page.
14.	At the bottom of the page you can review the **Initiator Comment**, **Requester ID** and the date/time when the request was submitted. The **Upload / View Supporting Documents** link is not enabled for inquiry-only users.
15.	When you are done with your review, click the **Return to Search** button. 
16.	In the **Search Results** section you can review the **Approval Status** for the transaction.
17.	You have viewed an employee's recurring additional pay request. **End of Procedure.**

View One-Time Payment

Use this task to view an employee's one-time payment request.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Self Service Transaction Links**

Step	Action
1.	The **Self Service Transaction Links** page provides access to several payroll-related pages to initiate requests and also view/approve requests. Users with inquiry-only access use the following approval links to view information. - **Approve One Time Pay** - **Approve One Time File** - **Approve Payroll Requests**
2.	Click the **Approve One Time Pay** link.  Approve One Time Pay
3.	Use the **Find an Existing Value** tab to search for a one-time pay transaction. If you do not know the **Transaction ID**, you can search by **Empl ID**. You may also include the **Approval Status** in your search criteria. Click in the **Empl ID** field. 
4.	Enter the desired information into the **Empl ID** field. For this example, enter **10005138**.
5.	Click the **Search** button.  Search
6.	The **One-Time Payments** page is comprised of three sections: 1. Header information at the top of the page. 2. **New One Time Payments** section on the left side of the page 3. **Current One-Time Payments** section on the right side of the page.
7.	The left side of the page displays the **New One Time Payments** section. Initiators use this section to create new general deductions. This section displays the latest entry, which also appears in the **Current One-Time Payments** section on the right side of the page. If no payments exist for the employee, both sides of the page display no data.
8.	Focus your review on the **Current One-Time Payments** section on the right side of the page.
9.	The first piece of information is the **Earnings Code**, which displays **XSL** in this example. Notice this is **1 of 1** earnings codes for the employee. If the employee has more than one earnings code you can scroll through the earnings codes using the buttons in this section.

Step	Action
10.	This section also displays the **Approval Status** of the transaction. Possible values include **Approved**, **Pending** or **Denied**. The **Earnings Amoun**t, **Earnings Begin** date and **Earnings End** date also appear.
11.	The **ChartField Detail** section displays information if the Initiator overrode the default ChartField values for the transaction. Notice the **Do you want to override the ChartField values?** check box is selected in the header section for this transaction.
12.	At the bottom of the page you can review the **Initiator Comment**, **Requester ID** and the date/time when the request was submitted.
13.	Click the scroll bar to view more information at the bottom of the page.
14.	The approval process details appear at the bottom of the page. The transaction ID, employee ID, effective date, business unit and status appear in the blue header. The approvers appear in the section details. Click the approver ID number to see the approver details. **Note:** The **Notify** button at the bottom of the page is not enabled for inquiry-only users.
15.	When you are done with your review, click the **Return** button.  Return
16.	You have viewed an employee's one-time payment request. **End of Procedure.**

View One-Time Payment File

Use this task to view the status of a **One-Time Payment File** request with one-time payments for multiple employees.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Self Service Transaction Links**

Step	Action
1.	The **Self Service Transaction Links** page provides access to several payroll-related pages to initiate requests and also view/approve requests. Users with inquiry-only access use the following approval links to view information. - **Approve One Time Pay** - **Approve One Time File** - **Approve Payroll Requests**
2.	Click the **Approve One Time File** link.  Approve One Time File

Step	Action
3.	Use the **Find an Existing Value** tab to search for a one-time pay file. Click in the **Transaction ID begins with** field. 
4.	Enter the desired information into the **begins with** field. For this example, enter **OTP0001006**.
5.	Click the **Search** button. 
6.	The **Upload One-Time Payment File** page displays details for a file submitted with one-time payments for multiple employees. The header section displays the **Transaction ID**, **Business Unit**, **Department** and the **On or Off-Cycle** indicator.
7.	The **Add Attachment** section displays the name of the file submitted by the Initiator. This is not a link to the file; you cannot open the file to review the employees and details.
8.	The middle of the page displays the **Requester** and the date/time of the request.
9.	The approval process details appear at the bottom of the page. The transaction ID, business unit, department and status appear in the blue header. The approvers appear in the section details. Click the approver ID number to see the approver details.
10.	When you are done with your review, click the **Return to Search** button. 
11.	In the **Search Results** section you can review the **Approval Status** for the transaction.
12.	You have viewed the status of a **One-Time Payment File** request with one-time payments for multiple employees. **End of Procedure.**

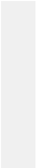
View Payroll Request

Use this task to view an employee's payroll request, including **Final Pay** and **Off-Cycle Check** requests.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Self Service Transaction Links**

Step	Action
1.	The **Self Service Transaction Links** page provides access to several payroll-related pages to initiate requests and also view/approve requests. Users with inquiry-only access use the following approval links to view information. - **Approve One Time Pay** - **Approve One Time File** - **Approve Payroll Requests**
2.	To inquire on **Final Pay** and **Off-Cycle** check requests, click the **Approve Payroll Requests** link. 
3.	Use the **Find an Existing Value** tab to search for a payroll request transaction. By default this page is in the **Basic Search** mode with **Transaction ID** as the only search criteria field. Additional search criteria fields are available with the **Advanced Search** mode. Click the **Advanced Search** link. 
4.	If you do not know the **Transaction ID**, you can search by **Empl ID**. You may also include the **Approval Status** in your search criteria. Click in the **Empl ID** field. 
5.	Enter the desired information into the **Empl ID** field. For this example, enter **10011985**.
6.	Click the **Search** button. 
7.	Two tabs appear in the **Payroll Requests** component: - **Earnings** tab - **Leave** tab
8.	The header section appears on both tabs. it displays the **Transaction ID**, as well as the employee name, ID and record number. The **Payroll Request** (type) indicates whether it is a **Final Pay** request or an **Off-Cycle** request. If the **Off Cycle?** check box is selected, the request is processed outside of the regular biweekly or monthly payroll process. (The **Off Cycle?** check box is not visible in this example.)
9.	The left side of the page displays the **New Payroll Requests** section. Initiators use this section to create new payroll requests. This section displays the latest entry, which also appears in the **Current Payroll Requests** section on the right side of the page. If no requests exist for the employee, both sides of the page display no data.

Step	Action
10.	Focus your review on the **Current Payroll Requests** section on the right side of the page.
11.	Click the scroll bar to view more information.
12.	The **Off Cycle?** check box is now visible. There may be situations when a final pay transaction triggers off-cycle processing for a final pay request. For example, if the employee is represented and the payment is time-sensitive, UCPath automatically selects the **Off Cycle?** check box.
13.	The first piece of information in the **Current Payroll Requests** section is the **Earnings Code**, which displays **REG** in this example. Notice this is **1 of 1** earnings codes for the employee. If the employee has more than one earnings code you can scroll through the earnings codes using the buttons in this section. **Note:** Initiators cannot enter earnings codes related to absences, such as sick and vacation on the **Earnings** tab. That information must be entered on the **Leave** tab.
14.	This section also displays the **Approval Status**, the **Transaction ID**, the **Pay End Date** for payroll processing, and the **Earnings Begin** date and the **Earnings End** date. Depending on the transaction, you may see the **Earnings** (amount), salary or hours information.
15.	The **ChartField Details** section displays information if the Initiator overrode the default ChartField values for the transaction.
16.	Click the scroll bar to see the bottom of the page.
17.	Both tabs in the **Payroll Requests** component display the comments and approval information. At the bottom of the page you can review the **Initiator Comments**, **Requester ID** and the date/time when the request was submitted.
18.	The approval process details appear at the bottom of the page. The transaction ID, employee ID, effective date, business unit and status appear in the blue header. The approvers appear in the section details. Click the approver ID number to see the approver details.
19.	Click the scroll bar to return to the top of the page.
20.	Next, review the **Leave** tab to determine if leave details were entered for this payroll request. Click the **Leave** tab. 
21.	The **Leave** page records the employee's takes or absences, such as sick and vacation. Only absence-related earnings codes are available on this tab.
22.	The header on the **Leave** tab has an additional field, the **Payout Accruals?** check box. If selected, this check box indicates to the UCPath Center Payroll Team that they must determine what the employee's payout should be and include it in the request.

Step	Action
23.	The **Current Payroll Requests** section displays the **Earnings Code** and description for any absence takes, as well as the **Approval Status** and **Transaction ID**.
24.	Click the scroll bar to move to the bottom of the page.
25.	The approval information is the same as the details on the **Earnings** tab. Click the scroll bar. 
26.	You have viewed an employee's payroll request. **End of Procedure.**

View General Deduction

Use this task to view an employee’s recurring voluntary general deduction.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **General Deduction Entry Update**

Note: This page does not display garnishments and systemwide deductions.

Step	Action
1.	Use the **Find an Existing Value** tab to search for an employee. If you do not know the employee ID (**Empl ID**), you can search by employee name (**Name**). Click in the **Empl ID** field. 
2.	Enter the desired information into the **Empl ID** field. For this example, enter **10005618**.
3.	Click the **Search** button. 
4.	The **General Deduction Update** page is comprised of three sections: 1. Header information at the top of the page. 2. **New General Deductions** section on the left side of the page 3. **Current General Deductions** section on the right side of the page.
5.	The header provides a summary of the employee’s job data, including **Business Unit**, **Department**, **Position** and **Job Code**.

Step	Action
6.	The left side of the page displays the **New General Deductions** section. No data appears in this section. Initiators use this section to create new general deductions.
7.	Click the scroll bar to review the right side of the page.
8.	The right side of the page displays the **Current General Deductions** section. The first piece of information is the **Deduction Code**, which displays **FEEREM** in this example.
9.	Notice this is **1 of 2** deductions for the employee. If the employee has more than one deduction you can scroll through the deductions using the buttons in this section.
10.	The **Deduction Details** section displays the details for the currently displayed **Deduction Code**, including the **Effective Date**, **Calculation Routine**, and the monthly/period percent or amount.
11.	Deductions may also display a **Goal Amount** and **Current Goal Balance**. UCPath tracks the total amount withheld in the balance and stops the deduction when the goal is reached.
12.	Click the scroll bar to return to the left side of the page. 
13.	Click the **Return to Search** button. 
14.	You have viewed an employee's recurring voluntary general deduction. **End of Procedure.**

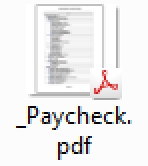
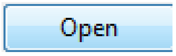
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
15.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link.  Submit An Inquiry
16.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
17.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.  Payroll
18.	Click the button to the right of the **Category** field. 
19.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
20.	Click in the **Subject** field.
21.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
22.	Click in the **Description** field.
23.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
24.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
25.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
26.	Click in the **Best Contact Phone Number** field.
27.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
28.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.

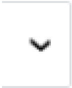
Step	Action
29.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
30.	Click the **Add Attachment** link. 
31.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
32.	For this example, click the **_Paycheck.pdf** list item. 
33.	Click the **Open** button. 
34.	The file name appears in the **Attachments** box.
35.	Click the **Submit** button.
36.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
37.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
38.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
39.	Click the scroll bar.
40.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
41.	Click the scroll bar.
42.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
43.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

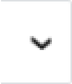
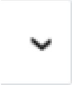
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
44.	Click the **Ask UCPath Center** button. 
45.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
46.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
47.	UCPath returned one result. Click the scroll bar.
48.	Click the **Create an Inquiry** link. 
49.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
50.	Click the button to the right of the **Requested By** field. 

Step	Action
51.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
52.	Click the button to the right of the **Topic** field. 
53.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
54.	Click the button to the right of the **Category** field. 
55.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
56.	Click in the **Subject** field.
57.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
58.	Click the scroll bar.
59.	Click in the **Description** field.
60.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
61.	In this example, the full **Description** was completed on your behalf.
62.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
63.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
64.	Click the **Submit Inquiry** button. 
65.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
66.	The submitter's name appears.

Step	Action
67.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

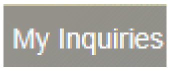
Reopen Closed UCPath Center Case

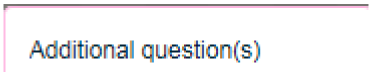
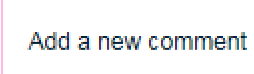
Use this task to reopen a closed inquiry via the UCPath website.

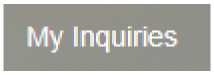
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
68.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
69.	Click the **My Closed Inquiries** link. 
70.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
71.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 

Step	Action
72.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
73.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
74.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
75.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
76.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
77.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
78.	Click the scroll bar.
79.	Notice the comment now appears in the **Case Comments** section.
80.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
81.	Return to the top of the page. Click the scroll bar.

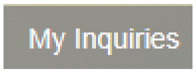
Step	Action
82.	Click the **My Inquiries** link. 
83.	The new inquiry appears in the **My Open Inquires** list.
84.	You have reopened a closed inquiry. **End of Procedure.**

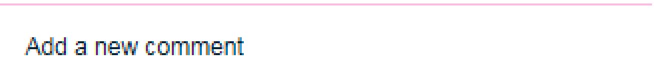
Monitor UCPath Center Cases

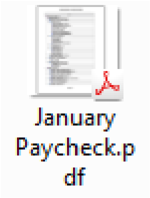
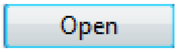
Use this task to review the status of an existing inquiry via the UCPath website.

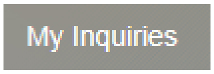
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
85.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
86.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
87.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.

Step	Action
88.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
89.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link.  Date/Time Opened ▲
90.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again..  Date/Time Opened ▼
91.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link.  00180573
92.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field.  Add a new comment
93.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
94.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
95.	Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center
96.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button.
97.	Click the scroll bar.

Step	Action
98.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. 
99.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. 
100.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
101.	To return to the case details, click the **00180573** link. 
102.	Click the scroll bar.
103.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
104.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
105.	Click the **Open** button. 
106.	A message confirms the file was uploaded. Click the **Done** button. 
107.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.

Step	Action
108.	You can view all attachments in a list. Click the **View All** link. View All
109.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. ▼
110.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. ▼
111.	Click the **00180573** link. 00180573
112.	Click the scroll bar.
113.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
114.	Click the **Email** link. Sandbox: UCPath Center: Inquir.
115.	Review the email information as you scroll down the page. Click the scroll bar.
116.	Review the email from the UCPath Center. Click the scroll bar.
117.	Click the case number to return to the details of the case. Click the **00180573** link. 00180573
118.	To review closed inquiries, click the **My Inquiries** link. My Inquiries

Step	Action
119.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
120.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
121.	Click the **00180567** link.  00180567
122.	Click the scroll bar.
123.	Notice the **Status** is **Closed/Resolved**.
124.	Click the scroll bar.
125.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
126.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMPAYL200: Additional Compensation and Payroll Requests

Submit One-Time Payment Request

Use this task to submit a one-time payment request.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Self Service Transactions Links**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Click the **One-Time Payments** link.  One-Time Payments

Step	Action
2.	Enter search criteria for the employee. The fastest way to locate the employee is to enter the employee's ID. Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10005639**.
4.	Click the **Get Employees** button. 
5.	The system displays the search results at the bottom of the page. If no records match the search criteria, the search grid is blank. If multiple records match the search criteria, the system displays a list of employees who match that criteria. In this example, you entered an employee ID for an employee who has only one employee record (**Empl Record 0**) in UCPath, so the system returned only one search result. For this example, click the **Johnston,Cheryl H** link. 
6.	Use the **One-Time Payments** page to enter the payment details, including the earnings code and the dollar amount.
7.	Notice that the **Transaction ID** field displays **NEW**. When you successfully complete all required fields and submit the request for review and approval, the system automatically assigns the ID number.
8.	If applicable, select the **Do you want to override the ChartField values?** check box to display the **ChartField Detail** section. Update ChartField values only when directed.
9.	In the **Earnings Code** field, select the appropriate earnings code value from the list. Earnings codes in the list are based on the codes available for the employee's **Pay Group**. The list includes only those codes that allow flat amounts. Click in the **Earnings Code** field. 
10.	Enter the desired information into the **Earnings Code** field. For this example, enter **RFA**.
11.	Press the **[Tab]** key.

Step	Action
12.	If applicable, select the **Gross-Up** check box to indicate that the employee should be reimbursed for the taxes paid on this payment. For this example, do not select the check box.
13.	In the **Earnings Amount** field, enter the one-time payment dollar amount. This can be a positive or negative amount. Click in the **Earnings Amount** field. 
14.	Enter the desired information into the **Earnings Amount** field. For this example, enter **1182.75**.
15.	The **Pay End Date** field defaults to the end date of the current pay cycle (monthly or biweekly, based on the employee's **Pay Group**). Accept the default value. Only on-cycle pay calendars are referenced; off-cycle pay calendars are ignored.
16.	Click in the **Earnings Begin** field. 
17.	For the **Earnings Begin** and **Earnings End** fields, enter the dates associated with the payment. **Earnings Begin** and **Earnings End** values should not be greater than **Pay End Date**. The dates should fall within either the **FLSA Calendar** for non-exempt employees (1 week) or the **Pay Calendar** for exempt employees (1 month). Enter the desired information into the **Earnings Begin** field. For this example, enter **03/01/2018**.
18.	In the **Earnings End** field, enter the other end of date range to which this payment applies. For one-time payments, this date might be the same as the earnings begin date. Click in the **Earnings End** field. 
19.	Enter the desired information into the **Earnings End** field. For this example, enter **03/31/2018**.
20.	In the **Initiator Comment** field, enter additional information regarding this transaction. This information is specifically for the approver and UCPath Center processors. Be sure to include specific details about the request you are submitting.
21.	Click in the **Initiator Comment** field. 

Step	Action
22.	Follow Location standards when entering comments. The notes are stored with the data. Enter the desired information into the **Initiator Comment** field. For this example, enter **One-time payment for D01010 March/2018 per Manager.**.
23.	Click the **Submit** button to initiate approval routing via workflow. 
24.	After you click **Submit**, if there are no errors, the system generates and displays a unique **Transaction ID**.
25.	After you submit the request for approval, the transaction status and details appear on the right side of the page. The **Approval Status** field displays a status of **Pending** until the request is approved or denied.
26.	Notice that the **Transaction ID** field on this side of the page also displays the unique, system-generated transaction ID number, which you can use later to access the transaction and check its status.
27.	If you override the existing ChartField values in your request, the override values appear in the **ChartField Detail** section. In this example, ChartField values were not updated.
28.	If necessary, scroll down to display additional page details. Click the scroll bar.
29.	The **Requester ID** and **Requested** date/time stamp appear.
30.	The **One Time Pay** approval routing section displays the transaction ID, employee ID, effective date, business unit and status.
31.	Click the scroll bar.
32.	You have submitted a one-time payment request. **End of Procedure.**

Job Aid: View and Update PREPSHUP Staging Tables

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMPAYL200JA_PREPSHUP_D1Rev00.pdf) to open the **View and Update PREPSHUP Staging Tables** job aid in a new web browser window/tab.

Submit Recurring Additional Pay Request

Use this task to submit recurring additional pay, such as a monthly stipend.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Self Service Transactions Links**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Click the **Additional Pay** link. 
2.	Enter search criteria for the employee. The fastest way to locate the employee is to enter the employee ID. Click in the **Empl ID** field.
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10000561**.
4.	Click the **Get Employees** button. 
5.	The **Employee Details** section displays basic personal data and job data information about the employee.
6.	Click the employee's name to display the page on which you enter pay request details. 
7.	Use the **Self Service Additional Pay** page to enter specific information about the recurring payment.
8.	If the employee has any additional pay requests in process, they appear on the right side of the page.
9.	Notice that the **Transaction ID** field displays **NEW**. When you successfully complete all required fields and submit the request for review and approval, the system automatically assigns the ID number.
10.	In the **Earnings Code** field, select the appropriate earnings code value from the list. Earnings codes in the list are based on the codes available for the employee's **Pay Group**. Click in the **Earnings Code** field.
11.	Enter the desired information into the **Earnings Code** field. For this example, enter **BON**.
12.	In the **Effective Date** field enter the date this recurring payment becomes effective. In most cases, use the beginning of a pay period. The default value is the system date (today's date).

Step	Action
13.	In the **End Date** field, enter the date the recurring payments should stop. Click in the **End Date** field. 
14.	Enter the desired information into the **End Date** field. For this example, enter **12/31/2017**. 
15.	In the **Pay Period Amt** field, enter the amount of each recurring payment. Click in the **Pay Period Amt** field. 
16.	Enter the desired information into the **Pay Period Amt** field. For this example, enter **150.00**.
17.	In the **Goal Amount** field, enter the maximum compensation amount. If the goal amount in this field has been met before the date entered in the **End Date** field, the recurring payments automatically stop. Click in the **Goal Amount** field. 
18.	Enter the desired information into the **Goal Amount** field. For this example, enter **750.00**.
19.	When a **Goal Amount** exists, the **Goal Balance** is updated by the system after each payroll.
20.	Add a reason for this request. Click the button to the right of the **Reason** field. 
21.	Select the appropriate reason for this request. For this example, click the **New Additional Pay** list item.  New Additional Pay
22.	In the **Applies To Pay Periods** section, the system selects the appropriate pay periods in which the recurring payment should be made based on the employee's **Pay Group**. For monthly employees, the **First** option is selected; for biweekly employees, **First** and **Second** options are selected.
23.	If necessary, scroll down to display additional fields and page options. Click the scroll bar.
24.	The **Job Information** section displays the employee's job details. Review this section for accuracy.

Step	Action
25.	Click the **Upload / View Supporting Documents** link to add one or more supporting documents to justify the additional recurring compensation.
26.	In the **Initiator Comments** field, enter any notes to document this transaction. This information is reviewed by the approver.
27.	Click the **Submit** button to initiate the approval routing process. 
28.	After you click **Submit**, if there are no errors, the system generates and displays a unique **Transaction ID**.
29.	You have submitted a recurring additional payment. **End of Procedure.**

Submit Final Pay Request

Use this task to submit a final pay request. In this example, the final pay request is a voluntary request for a monthly employee.

The final pay request can also be used for involuntary terminations and for requesting death pay.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Self Service Transactions Links**

Step	Action
1.	The **Payroll Request** transaction provides options for **Final Pay**, **Off-Cycle Pay** and **Overpayment** requests. Click the **Payroll Request** link. 
2.	Click the button to the right of the **Payroll Request** field. 
3.	Select the type of request to submit. For this example, click the **Final Pay** list item. 

Step	Action
4.	The **Termination Type** field and the search criteria fields appear. You must select an additional type based on the **Payroll Request** you selected. In this example, the **Final Pay** request requires a **Termination Type**. Click the button to the right of the **Termination Type** field.
5.	For a **Final Pay** request the **Termination Type** determines the Service Level Agreement (SLA) for the respective transaction. When triggered, the SLA is 72 hours upon receiving the payroll request in UCPath Online. This means all required AWE approvals have been obtained and the request has been routed to UCPC Payroll for processing. For this example, click the **Voluntary** list item.  Voluntary
6.	Enter search criteria for the employee(s). The fastest way to locate the employee is to enter the employee's ID. Click in the **Empl ID** field.
7.	Enter the desired information into the **Empl ID** field. For this example, enter **10003727**.
8.	To display the employee information in the search results grid, click the **Get Employees** button.  Get Employees
9.	The system displays the search results at the bottom of the page. If no records match the search criteria, the search grid is blank. If multiple records match the search criteria, the system displays a list of employees who match that criteria. In this example, you entered an employee ID for an employee who has only one employee record (**Empl Record 0**) in UCPath, so the system returned only one search result.
10.	The search results grid displays basic personal data and job data information about the employee(s).
11.	To begin entering the request details, click the name link. lick the **Gustafson,Zhihuan A** link.  Gustafson,Zhihuan A
12.	Use the **Earnings** page to enter specific information about the final payment.

Step	Action
13.	Notice that the **Transaction ID** field displays **NEW**. When you successfully complete all required fields and submit the request for review and approval, the system automatically assigns the ID number.
14.	This section is read-only.
15.	If you selected the **Involuntary Termination** option, the system automatically selects the **Off Cycle?** check box (not seen in this example). You cannot modify this option on this page. When **Voluntary Termination** is selected, the system determines whether the employee is represented or non-represented based on the employee's union code and whether they have a covered or uncovered status. For instance: - If the employee's **Union Code** is **99**, the system does not select the **Off Cycle?** check box. - If the **Union Code** is not **99** and the **Representation Code** is **Covered**, then the request is processed off cycle. - If the **Union Code** is not **99** and the **Representation Code** is **Uncovered**, then the request is processed as on-cycle.
16.	If applicable, select the **Do you want to override the ChartField values?** check box to display the **ChartField Detail** section. Update ChartField values only when directed.
17.	Enter the request details within the **Earnings** and **Leave** pages as necessary for your payroll request. For example, use the **Earnings Code** field to identify the appropriate earnings for the employee to generate the final pay check. The earnings code list includes the codes available for the employee's **Pay Group** and the list excludes any earnings mapped to absence codes (vacation, sick and so on). If you are using the normal payroll processing method and schedule, the earnings are provided through Time & Attendance processing and run through payroll. The employee's final check is delivered to them as usual on the same schedule. This is often used with voluntary terminations. Therefore, no data entry is needed on this page other than the comments section.

Step	Action
18.	The selected **Earnings Code** determines whether you must enter the **Earnings** field (amounts) or the **Hours** field. If the code requires hours, such as **REG**, the **Earnings** field disappears. If the code requires amounts, the **Hours** field disappears. The **Earnings Begin** and **Earnings End** date fields are always required. The **Pay End Date** field defaults to the end date of the current pay cycle (monthly or biweekly, based on the employee's **Pay Group**). Accept the default value; do not change the value.
19.	For biweekly employees, if the earnings are not received via the standard time and attendance interface, you must enter the **Earnings Code** based on the two week pay period. Enter a separate row for each **Earnings Code** for each day, and the **Earnings Begin** and **Earnings End** date fields on a given row must be the same. For example, a standard two-week period should have 10 rows to identify earnings for the standard work days. Additional rows may be required to enter absence takes or additional hours worked during the period. In this example, no earnings entries are made because the time and attendance process will provide the earnings.
20.	The **Salary %** field appears only for a monthly employee and is used to prorate the hours based on the monthly working hours for a particular month. For example, if the monthly employee terminates half way through the month, the **Salary %** would be 50. For biweekly employees, use either the **Earnings** or **Hours** fields only. When an **Earnings Code** for hours is entered for a monthly employee, the **Hours** field becomes view-only and the value entered in the **Salary %** field automatically calculates the **Hours** and **Calc Salary** fields. More information is available in the *Submit an Overpayment Pay Request* simulation.
21.	Provide additional information related to the request in the **Initiator Comments** field. This field is visible for the department approver's benefit, as well as UCPC Payroll processing. Follow Location guidelines when entering comments. Click in the **Initiator Comments** field.

Step	Action
22.	Enter the desired information into the **Initiator Comments** field. For this example, enter **Last day worked 3/30/18. EE has 2 VAC takes this period: 3/8-9/18. Pay out EE's accruals. REG earnings processed by normal method and schedule to UCPC guidelines.**.
23.	Supporting documentation for this transaction can be uploaded to this request by using the **Upload Documents** button. During the approval process, the approver can click the **View Attachment** button to read the supporting information.
24.	To enter leave takes, such as vacation or sick, click the **Leave** tab. 
25.	Use the **Leave** page to enter final pay leave information. Enter all the required takes (leaves) when submitting **Involuntary Terminations**. This assists UCPC Payroll in determining the final payout for **TRM** and any other applicable payout earnings, such as **COMP**.
26.	Select the **Payout Accruals?** check box to indicate UCPC Payroll must calculate and enter the employee's final payout entitlements. Payout codes, such as **TRM**, **COMP** and other related payout earning codes respective to the employee's appointment, can be entered only by UCPC Payroll. They cannot be entered or submitted by the UC Location with this request. Click the **Payout Accruals?** option. ☐
27.	In the **Earnings Code** field enter the appropriate earnings code value. Only absence related codes appear in the list.
28.	In the **Hours** field enter the number of positive or negative hours to report leave taken or accrual adjustments. Hours must be entered as per day amounts.
29.	In the **Earnings Begin** field enter the date for the first day of leave takes.
30.	Takes must be entered by day, so the **Earnings End** date must be the same as the **Earnings Begin** date. If the takes span multiple days, add a new row for each day and enter the code, hours and begin/end date for each day.
31.	For this example, enter the leave takes as stated in the **Initiator Comments** you entered earlier. If you do not know the actual code, you can look it up in the list. For this example, click in the **Earnings Code** field. 

Step	Action
32.	Enter the desired information into the **Earnings Code** field. For this example, enter **VAC**.
33.	Click in the **Hours** field.
34.	Enter the desired information into the **Hours** field. For this example, enter **8**.
35.	Press the **[Tab]** key to move to the next field.
36.	Enter the desired information into the **Earnings Begin** field. For this example, enter **030818**.
37.	Click in the **Earnings End** field.
38.	For leave takes, the **Earnings End** date must be the same as the begin date. Enter the desired information into the **Earnings End** field. For this example, enter **030818**.
39.	To enter the second day of vacation for the employee, click the **Add a new row** button. +
40.	Enter the desired information into the **Earnings Code** field. For this example, enter **VAC**.
41.	Click in the **Hours** field.
42.	Enter the desired information into the **Hours** field. For this example, enter **8**.
43.	Press the **[Tab]** key.
44.	Enter the desired information into the **Earnings Begin** field. For this example, enter **030918**.
45.	Click in the **Earnings End** field.
46.	Enter the desired information into the **Earnings End** field. For this example, enter **030918**.
47.	To initiate the payroll request approval process, click the **Submit** button. Submit
48.	After you submit the request for approval, the transaction status and details appear on the right side of the page.
49.	After you click **Submit**, if there are no errors, the system generates and displays a unique **Transaction ID**.

Step	Action
50.	If you did override the existing ChartField values when creating your request, the override values appear in the **Chart Field Details** section. In this example, ChartField values were not updated.
51.	Click the scroll bar.
52.	The approval information for the request appears at the bottom of the page. It provides the transaction ID, employee ID, effective date, business unit and status. Click the **Multiple Approvers** link in the **Pending** box to see the approver names.
53.	Click the scroll bar.
54.	You have submitted a final pay request for a voluntary termination of a monthly employee. **End of Procedure.**

Submit Off-Cycle Pay Request

Use this task to submit an off-cycle payroll request. In this example, the off-cycle pay request is for a biweekly employee with no pay submitted for the prior pay period.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Self Service Transactions Links**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	The **Payroll Request** transaction provides options for **Final Pay**, **Off-Cycle Pay** and **Overpayment** requests. Click the **Payroll Request** link.  Payroll Request
2.	Click the button to the right of the **Payroll Request** field. 
3.	Select the type of request to submit. For this example, click the **Off Cycle** list item.  Off Cycle

Step	Action
4.	The **Reason** field and the search criteria fields appear. You must select an additional type based on the **Payroll Request** you selected. In this example, the **Off Cycle** request requires a **Reason**. Click the button to the right of the **Reason** field. 
5.	Select the reason for the off-cycle payment. For this example, click the **No Pay Submitted** list item. No Pay Submitted
6.	Enter search criteria for the employee(s). The fastest way to locate the employee is to enter the employee's ID. Click in the **Empl ID** field. 
7.	Enter the desired information into the **Empl ID** field. For this example, enter **10016567**.
8.	To display the employee information in the search results grid, click the **Get Employees** button. 
9.	The system displays the search results at the bottom of the page. If no records match the search criteria, the search grid is blank. If multiple records match the search criteria, the system displays a list of employees who match that criteria. In this example, you entered an employee ID for an employee who has only one employee record (**Empl Record 0**) in UCPath, so the system returned only one search result.
10.	The search results grid displays basic personal data and job data information about the employee(s).
11.	To begin entering the request details, click the name link. lick the **Godinez,Johnny** link. 
12.	Use the **Earnings** page to enter specific information about the off-cycle payment.
13.	Notice that the **Transaction ID** field displays **NEW**. When you successfully complete all required fields and submit the request for review and approval, the system automatically assigns the ID number.
14.	This section is read-only.

Step	Action
15.	If applicable, select the **Do you want to override the ChartField values?** check box to display the **ChartField Detail** section. Update ChartField values only when directed.
16.	Enter the request details within the **Earnings** and **Leave** pages as necessary for your payroll request. For example, use the **Earnings Code** field to identify the appropriate earnings for the employee's missing pay to generate the off-cycle paycheck. The earnings code list includes the codes available for the employee’s **Pay Group** and the list excludes any earnings mapped to absence codes (vacation, sick and so on).
17.	The selected **Earnings Code** determines whether you must enter the **Earnings** field (amounts) or the **Hours** field. If the code requires hours, such as **REG**, the **Earnings** field disappears. If the code requires amounts, the **Hours** field disappears. The **Earnings Begin** and **Earnings End** date fields are always required. The **Pay End Date** field defaults to the end date of the current pay cycle (monthly or biweekly, based on the employee’s **Pay Group**). Accept the default value; do not change the value. When you exit the **Earnings Code** field, the system determines if this a monthly or biweekly employee.
18.	For biweekly employees, if the earnings are not received via the standard time and attendance interface, you must enter the **Earnings Code** based on the two week pay period. Enter a separate row for each **Earnings Code** for each day, and the **Earnings Begin** and **Earnings End** date fields on a given row must be the same. For example, a standard two-week period should have 10 rows to identify earnings for the standard work days. Additional rows may be required to enter absence takes or additional hours worked during the period.
19.	The **Salary %** field appears only for a monthly employee and is used to prorate the hours based on the monthly working hours for a particular month. For biweekly employees, use either the **Earnings** or **Hours** fields only. When an **Earnings Code** for hours is entered for a monthly employee, the **Hours** field becomes view-only and the value entered in the **Salary %** field automatically calculates the **Hours** and **Calc Salary** fields. More information is available in the *Submit an Overpayment Pay Request* simulation.
20.	To begin entering the off-cycle request, click in the **Earnings Code** field. 

Step	Action
21.	Enter the desired information into the **Earnings Code** field. For this example, enter **REG**.
22.	Press **[Tab]**.
23.	Notice that several fields were removed based on the earnings code. Click in the **Earnings Begin** field.
24.	For this off-cycle request, the missed pay is for the previous pay period. The currently displayed **Pay End Date** is 2/24/18. Therefore, the previous pay period is 1/28/18 - 2/10/18. To enter the data for this biweekly employee, add rows for each **Earnings Code** for each day to identify the earnings. There must be 5 rows for week 1 and 5 rows for week 2. Additionally, if there are any absence takes, shift differentials, overtime and so on, they must be entered by day taken or applied; one row for each day.
25.	Enter the desired information into the **Earnings Begin** field. For this example, enter **012818**.
26.	For biweekly input, the begin date is the same as the end date. Click in the **Earnings End** field.
27.	Enter the desired information into the **Earnings End** field. For this example, enter **012818**.
28.	The **REG** code requires an entry in the **Hours** field. Click in the **Hours** field.
29.	Enter the number of hours worked in the first week. Enter the desired information into the **Hours** field. For this example, enter **8**.
30.	Now add the second day for Week 1. Click the **Add a new row** button. +
31.	Enter the desired information into the **Earnings Code** field. For this example, enter **REG**.
32.	Press **[Tab]**.

Step	Action
33.	Enter the data for the continuation of Day 1, for example, sick leave, shift differentials or overtime. Otherwise, enter the data for Day 2. Click in the **Earnings Begin** field.
34.	Enter the desired information into the **Earnings Begin** field. For this example, enter **012918**.
35.	Click in the **Earnings End** field.
36.	Enter the desired information into the **Earnings End** field. For this example, enter **012918**.
37.	For this example, the employee worked 4 hours in the morning on the second day and took 4 hours of sick in the afternoon. Click in the **Hours** field.
38.	Enter the desired information into the **Hours** field. For this example, enter **4**.
39.	To enter the absence data, click the **Leave** tab. 
40.	Click in the **Earnings Code** field.
41.	The employee took a sick leave for 4 hours. For biweekly, the code is **S1L**. Enter the desired information into the **Earnings Code** field. For this example, enter **S1L**.
42.	Press **[Tab]**.
43.	Click in the **Hours** field.
44.	Enter the desired information into the **Hours** field. For this example, enter **4**.
45.	Press **[Tab]**.
46.	Enter the desired information into the **Earnings Begin** field. For this example, enter **012918**.
47.	Click in the **Earnings End** field.

Step	Action
48.	For an absence take, the **Earnings Begin** date must be the same as the **Earnings End** date. Enter the desired information into the **Earnings End** field. For this example, enter **012918**.
49.	Press **[Tab]**.
50.	Click the **Earnings** tab. 
51.	This similar input of daily reporting continues by adding rows for each day, entering the appropriate **Earnings Code**, **Earnings Begin**, **Earnings End** and number of **Hours**. For this example, the concept has been demonstrated. We are not going to enter all of the rows. Assume you have included the necessary rows to capture all of the earnings entitled to the employee for that period. We continue now with the features of the lower section of the page.
52.	Add notes, comments or summary to document the request. Click in the **Initiator Comments** field. 
53.	Enter the desired information into the **Initiator Comments** field. For this example, enter **Employee missed pay last period. REG hours 36 1/28/18 - 2/3/18; 4 hours S1L 1/29/18; REG hours 32 2/4/18 - 2/10/18; 8 hours S1L 2/7/18.**.
54.	Click the scroll bar.
55.	Supporting documentation for this transaction can be uploaded to this request by using the **Upload Documents** button. During the approval process, the approver can click the **View Attachment** button to read the supporting information.
56.	To initiate the approval process, submit the request. Click the **Submit** button. 
57.	After you submit the request for approval, the transaction status and details appear on the right side of the page.
58.	Additionally, if there are no errors, the system generates and displays a unique **Transaction ID**.

Step	Action
59.	If you did override the existing ChartField values when creating your request, the override values appear in the **Chart Field Details** section. In this example, ChartField values were not updated.
60.	You have submitted an off-cycle payroll request for a biweekly employee. **End of Procedure.**

Submit Overpayment Pay Request

Use this task to submit an overpayment request. In this example, a monthly employee was overpaid by 50% on their February 2018 paycheck.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Self Service Transactions Links**

Step	Action
1.	The **Payroll Request** transaction provides options for **Final Pay**, **Off-Cycle Pay** and **Overpayment** requests. Click the **Payroll Request** link.  Payroll Request
2.	Click the button to the right of the **Payroll Request** field. 
3.	Select the type of request to submit. For this example, click the **Overpayment** list item.  Overpayment
4.	The **Reason** field and the search criteria fields appear. You must select an additional type based on the **Payroll Request** you selected. In this example, the **Overpayment** request requires a **Reason**. Click the button to the right of the **Reason** field. 
5.	For an **Overpayment** request, select the appropriate **Reason** to identify whether the transaction should be processed for a **Current Year** or **Prior Year** adjustment. For this example, click the **Current Year** list item.  Current Year

Step	Action
6.	Enter search criteria for the employee(s). The fastest way to locate the employee is to enter the employee's ID. Click in the **Empl ID** field. 
7.	Enter the desired information into the **Empl ID** field. For this example, enter **10004102**.
8.	To display the employee information in the search results grid, click the **Get Employees** button. 
9.	The system displays the search results at the bottom of the page. If no records match the search criteria, the search grid is blank. If multiple records match the search criteria, the system displays a list of employees who match that criteria. In this example, you entered an employee ID for an employee who has only one employee record (**Empl Record 0**) in UCPath, so the system returned only one search result.
10.	The search results grid displays basic personal data and job data information about the employee(s).
11.	To begin entering the request details, click the name link. lick the **Ehlemere,Donald** link. 
12.	Use the **Earnings** page to enter specific information about the overpayment.
13.	Notice that the **Transaction ID** field displays **NEW**. When you successfully complete all required fields and submit the request for review and approval, the system automatically assigns the ID number.
14.	This section is read-only.
15.	If applicable, select the **Do you want to override the ChartField values?** check box to display the **ChartField Detail** section. Update ChartField values only when directed.
16.	Enter the request details within the **Earnings** and **Leave** pages as necessary for your payroll request. For example, use the **Earnings Code** field to identify the earnings code that was overpaid on a previous paycheck. The earnings code list includes the codes available for the employee's **Pay Group** and the list excludes any earnings mapped to absence codes (vacation, sick and so on).

Step	Action
17.	The selected **Earnings Code** determines whether you must enter the **Earnings** field (amounts) or the **Hours** field. If the code requires hours, such as **REG**, the **Earnings** field disappears. If the code requires amounts, the **Hours** field disappears. The **Earnings Begin** and **Earnings End** date fields are always required. The **Pay End Date** field defaults to the end date of the current pay cycle (monthly or biweekly, based on the employee's **Pay Group**). Accept the default value; do not change the value.
18.	For biweekly employees, if the earnings are not received via the standard time and attendance interface, you must enter the **Earnings Code** based on the two week pay period. Enter a separate row for each **Earnings Code** for each day, and the **Earnings Begin** and **Earnings End** date fields on a given row must be the same. For example, a standard two-week period should have 10 rows to identify earnings for the standard work days. Additional rows may be required to enter absence takes or additional hours worked during the period.
19.	The **Salary %** field appears only for a monthly employee and is used to prorate the hours based on the monthly working hours for a particular month. For example, if the monthly employee terminates half way through the month, the **Salary %** would be 50. For biweekly employees, use either the **Earnings** or **Hours** fields only. When an **Earnings Code** for hours is entered for a monthly employee, the **Hours** field becomes view-only and the value entered in the **Salary %** field automatically calculates the **Hours** and **Calc Salary** fields.
20.	To begin entering the overpayment request, click in the **Earnings Code** field.
21.	For this example the employee was overpaid by half of their regular hours on a previous pay period. Enter the desired information into the **Earnings Code** field. For this example, enter **REG**.
22.	Press the **[Tab]** key to move to the next field.
23.	For this example, the overpayment occurred in the month of February and is in the current year (2018). Click in the **Earnings Begin** field.
24.	Enter the desired information into the **Earnings Begin** field. For this example, enter **020118**.
25.	Click in the **Earnings End** field.

Step	Action
26.	Enter the desired information into the **Earnings End** field. For this example, enter **022818**.
27.	UCPath displays the employee's regular monthly salary.
28.	Notice that the **Hours** field is not editable.
29.	When entering **Hours** or **Earnings** amounts, the values must be submitted as negative numbers. **Salary %** must be entered as a positive value. Regular earnings for a monthly employee must be entered as **Salary %**. Click in the **Salary %** field. 
30.	For this example the employee was overpaid by half. Enter the desired information into the **Salary %** field. For this example, enter **50**.
31.	Press the **[Tab]** key.
32.	When you exit the **Salary %** field, the system populates the view-only fields, showing the hourly rate used, the calculated salary of 50% and half the regular hours for the month.
33.	If there are other earnings that may have been overpaid on the same paycheck, add a new row to insert the **Earnings Code**. Click the **Add a new row** button. ➕
34.	For this example, the employee was also overpaid on a stipend. Enter the desired information into the **Earnings Code** field. For this example, enter **SAS**.
35.	Press the **[Tab]** key.
36.	Because this **Earnings Code** requires an amount, the **Salary %** and related fields were removed from the page. Click in the **Earnings** field. 
37.	Enter the earnings amount as a negative number. Enter the desired information into the **Earnings** field. For this example, enter **-1500**.
38.	Enter the earnings period. Click in the **Earnings Begin** field. 

Step	Action
39.	Enter the desired information into the **Earnings Begin** field. For this example, enter **020118**.
40.	Click in the **Earnings End** field. 
41.	Enter the desired information into the **Earnings End** field. For this example, enter **022818**.
42.	Provide additional information related to the request in the **Initiator Comments** field. This field is visible for the department approver's benefit, as well as UCPC Payroll processing. Follow Location guidelines when entering comments. Click in the **Initiator Comments** field. 
43.	Enter the desired information into the **Initiator Comments** field. For this example, enter **Process current year overpayment month of February 2018.**.
44.	To view all the entries on the **Earnings** page, click the **View All** link. 
45.	Supporting documentation for this transaction can be uploaded to this request by using the **Upload Documents** button. During the approval process, the approver can click the **View Attachment** button to read the supporting information.
46.	Click the scroll bar.
47.	To initiate the approval process, click the **Submit** button. 
48.	After you click **Submit**, if there are no errors, the system generates and displays a unique **Transaction ID**.
49.	After you submit the request for approval, the transaction status and details appear on the right side of the page.
50.	If you did override the existing ChartField values when creating your request, the override values appear in the **Chart Field Details** section. In this example, chart field values were not updated.
51.	Click the scroll bar.

Step	Action
52.	The approval information for the request appears at the bottom of the page. It provides the transaction ID, employee ID, effective date, business unit and status. Click the **Multiple Approvers** link in the **Pending** box to see the approver names.
53.	Click the scroll bar.
54.	You have submitted an overpayment request on behalf of a monthly employee for a previous pay period. **End of Procedure.**

Job Aid: View Employee Paycheck Data

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMPAYL200JA_ReviewPaycheck_D1Rev00.pdf) to open the **View Employee Paycheck Data** job aid in a new web browser window/tab.

Job Aid: Inbound File Uploads

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMPAYL200JA_InboundFileUploads_D1Rev00.pdf) to open the **Inbound File Uploads** job aid in a new web browser window/tab.

Job Aid: Complete the Inbound File Generator for I-181 Regular Time

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMPAYL200JA_IB181RegTimeEntry_D1Rev01.pdf) to open the **Complete the Inbound File Generator for I-181 Regular Time** job aid in a new web browser window/tab.

Job Aid: Complete the Inbound File Generator for I-618 Flat Dollar

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMPAYL200JA_IB618FLatDollarAmt_D1Rev00.pdf) to open the **Complete the Inbound File Generator for I-618 Flat Dollar Amount Template** job aid in a new web browser window/tab.

Job Aid: Location Error Report for Locations

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMSYS301JA_LocationErrorReportForLocations_D1Rev01.pdf) to open the **Location Error Report for Locations** job aid in a new web browser window/tab.

Job Aid: E-010 Location Error Reporting Resolution Guide

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMSYS301JA_E010_LocErrorResolution_D1Rev00.pdf) to open the **E-010 Location Error Reporting Resolution Guide** job aid in a new web browser window/tab.

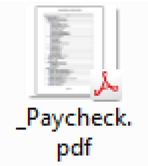
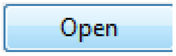
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
55.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
56.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. ▼
57.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
58.	Click the button to the right of the **Category** field. ▼
59.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
60.	Click in the **Subject** field.
61.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
62.	Click in the **Description** field.
63.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.

Step	Action
64.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
65.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
66.	Click in the **Best Contact Phone Number** field.
67.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
68.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
69.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
70.	Click the **Add Attachment** link. 
71.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
72.	For this example, click the **_Paycheck.pdf** list item. 
73.	Click the **Open** button. 
74.	The file name appears in the **Attachments** box.
75.	Click the **Submit** button.
76.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
77.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
78.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
79.	Click the scroll bar.

Step	Action
80.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
81.	Click the scroll bar.
82.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
83.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

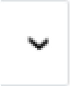
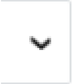
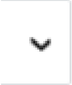
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
84.	Click the **Ask UCPath Center** button. 
85.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
86.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.

Step	Action
87.	UCPath returned one result. Click the scroll bar.
88.	Click the **Create an Inquiry** link. 
89.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
90.	Click the button to the right of the **Requested By** field. 
91.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
92.	Click the button to the right of the **Topic** field. 
93.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
94.	Click the button to the right of the **Category** field. 
95.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
96.	Click in the **Subject** field.
97.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
98.	Click the scroll bar.
99.	Click in the **Description** field.

Step	Action
100.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
101.	In this example, the full **Description** was completed on your behalf.
102.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
103.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
104.	Click the **Submit Inquiry** button. 
105.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
106.	The submitter's name appears.
107.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

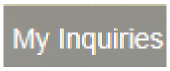
Reopen Closed UCPath Center Case

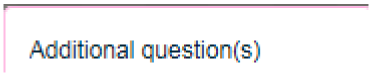
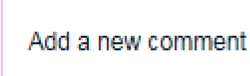
Use this task to reopen a closed inquiry via the UCPath website.

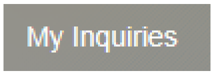
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
108.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 

Step	Action
109.	Click the **My Closed Inquiries** link. 
110.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
111.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
112.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
113.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
114.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
115.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
116.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 

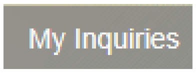
Step	Action
117.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
118.	Click the scroll bar.
119.	Notice the comment now appears in the **Case Comments** section.
120.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
121.	Return to the top of the page. Click the scroll bar.
122.	Click the **My Inquiries** link.  My Inquiries
123.	The new inquiry appears in the **My Open Inquires** list.
124.	You have reopened a closed inquiry. **End of Procedure.**

Monitor UCPath Center Cases

Use this task to review the status of an existing inquiry via the UCPath website.

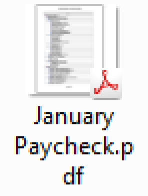
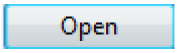
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

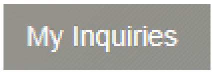
Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
125.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link.  My Inquiries

Step	Action
126.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
127.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
128.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
129.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link.  Date/Time Opened ▲
130.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again..  Date/Time Opened ▼
131.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link.  00180573
132.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field.  Add a new comment
133.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.

Step	Action
134.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
135.	Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center
136.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
137.	Click the scroll bar.
138.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link.  View All
139.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▾
140.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
141.	To return to the case details, click the **00180573** link.  00180573
142.	Click the scroll bar.
143.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link.  Upload Files

Step	Action
144.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
145.	Click the **Open** button. 
146.	A message confirms the file was uploaded. Click the **Done** button. 
147.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
148.	You can view all attachments in a list. Click the **View All** link. View All
149.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. ▼
150.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. ▼
151.	Click the **00180573** link. 00180573
152.	Click the scroll bar.

Step	Action
153.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
154.	Click the **Email** link.  Sandbox: UCPath Center: Inquir.
155.	Review the email information as you scroll down the page. Click the scroll bar.
156.	Review the email from the UCPath Center. Click the scroll bar.
157.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
158.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
159.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
160.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
161.	Click the **00180567** link.  00180567
162.	Click the scroll bar.
163.	Notice the **Status** is **Closed/Resolved**.
164.	Click the scroll bar.

Step	Action
165.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
166.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

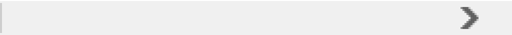
PHCMPAYL201: Payroll General Deductions

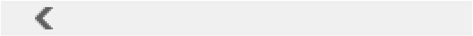
Enter Employee General Deduction Details

Use this task to enter an employee's local general deduction information.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **General Deduction Entry Update**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Enter search criteria for the employee. The fastest way to locate the employee is to enter the employee's ID. Click in the **Empl ID** field. 
2.	Enter the desired information into the **Empl ID** field. For this example, enter **10076451**.
3.	Click the **Search** button. 
4.	Use the **General Deduction Update** page to enter the employee's local general deduction data. All local deductions entered using this page are considered pre-approved when saved. Approval Workflow Engine (AWE) is not used with this page.
5.	Click the scroll bar. 
6.	This section is read-only.
7.	Review all existing general deductions to confirm the new deduction does not exist in UCPath.

Step	Action
8.	Click the scroll bar. 
9.	Click the **Look up Deduction Code** button. 
10.	Select the appropriate deduction code. For this example, click the **0FUND1** list item.  0FUND1
11.	The **Effective Date** defaults to the **Pay Period Begin** date for the next payroll to be processed. This is the next pay calendar for which paysheets have not been created. - Do not back-date general deductions. - You can future-date general deductions. - Do not prorate general deductions entered in the midst of a pay period
12.	The **Calculation Routine** is a required field. In most cases, the selection is **Flat Amount**; however, there are options in the list for percentages and rates. Click the button to the right of the **Calculation Routine** field. 
13.	Select the appropriate calculation method for the deduction. For this example, click the **Flat Amount** list item.  Flat Amount
14.	Enter the general deduction amount in the **Deduction Rate or %** field or in the **Flat/Addl Monthly Amount** field based on the selected **Calculation Routine**.
15.	For this example, enter a flat amount. Click in the **Flat/Addl Monthly Amount** field. 
16.	Enter the flat amount as monthly amount. UCPath calculates the proper pay period deduction based on the employee **Pay Frequency** and the **Deduction Table** settings. Negative amounts are not allowed. Negative amounts and adjustments must be processed with the **One-Time Deductions** inbound interface. Enter the desired information into the **Flat/Addl Monthly Amount** field. For this example, enter **100.00**.
17.	Enter a date in the **Deduction End Date** if the deduction has a specific date range. For this example, leave the date blank.

Step	Action
18.	In the **Goal Amount** field, enter the maximum deduction amount. If the goal amount in this field has been met before the date entered in the **Deduction End Date** field, the deduction automatically stops. Click in the **Goal Amount** field. 
19.	Enter the desired information into the **Goal Amount** field. For this example, enter **1200.00**.
20.	When a **Goal Amount** exists, the **Current Goal Balance** is updated by the system after each payroll.
21.	Click the **Save** button. 
22.	You have entered and submitted an employee's local general deduction information. **End of Procedure.**

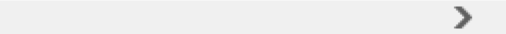
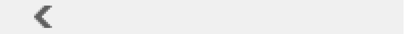
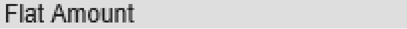
Update Employee General Deduction Details

Use this task to update an employee's existing local general deduction information.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **General Deduction Entry Update**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Enter search criteria for the employee. The fastest way to locate the employee is to enter the employee's ID. Click in the **Empl ID** field. 
2.	Enter the desired information into the **Empl ID** field. For this example, enter **10043966**.
3.	Click the **Search** button. 
4.	Use the **General Deduction Update** page to enter the employee's local general deduction data. This is the same page used to enter the original deduction. All local deductions entered using this page are considered pre-approved when saved. Approval Workflow Engine (AWE) is not used with this page.

Step	Action
5.	Click the scroll bar. 
6.	This section is read-only.
7.	Review all existing general deductions to find the deduction you must change. This employee is paid biweekly and enrolled in the **Student Rec Center - UCR** deduction. $104.02 is deducted per month ($52.01 per pay period). For this example, increase the deduction amount starting with the next pay period.
8.	Click the scroll bar. 
9.	Click in the **Deduction Code** field. 
10.	To update an existing deduction, enter the same **Deduction Code** that appears in the **Current General Deductions** section for this deduction. Enter the desired information into the **Deduction Code** field. For this example, enter **5st**.
11.	As you type, the options list displays codes that match your entry. Click the **5STREC** list item.  5STREC
12.	Press **[Tab]** to move to the next field.
13.	When you exit the **Deduction Code** field, the deduction code description and the effective date appear. The **Effective Date** defaults to the **Pay Period Begin** date for the next payroll to be processed. This is the next pay calendar for which paysheets have not been created. - Do not back-date general deductions. - You can future-date general deductions. - Do not prorate general deductions entered in the midst of a pay period
14.	Click the button to the right of the **Calculation Routine** field. 
15.	Select the appropriate calculation method for the deduction. For this example, click the **Flat Amount** list item. Click the **Flat Amount** list item.  Flat Amount

Step	Action
16.	Enter the general deduction amount in the **Deduction Rate or %** field or in the **Flat/Addl Monthly Amount** field based on the selected **Calculation Routine**. For this example, click in the **Flat/Addl Monthly Amount** field. 
17.	Enter the flat amount as a monthly amount. UCPath calculates the proper pay period deduction based on the employee **Pay Frequency** and the **Deduction Table** settings. Negative amounts are not allowed. Negative amounts and adjustments must be processed with the **One-Time Deductions** inbound interface. Enter the desired information into the **Flat/Addl Monthly Amount** field. For this example, enter **125.74**.
18.	When you exit the **Flat/Addl Monthly Amount** field, UCPath populates the **Flat/Addl Pay Period Amount** field.
19.	Click the **Save** button. 
20.	You have updated and submitted the changes for an employee's existing local general deduction. **End of Procedure.**

Job Aid: Inbound File Uploads

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMPAYL200JA_InboundFileUploads_D1Rev00.pdf) to open the **Inbound File Uploads** job aid in a new web browser window/tab.

Job Aid: Complete the Inbound File Generator for I-171 General

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMPAYL201JA_IB171GenDed_D1Rev00.pdf) to open the **Complete the Inbound File Generator for I-171 General Deductions Template** job aid in a new web browser window/tab.

Job Aid: Complete the Inbound File Generator for I-176 Parking

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMPAYL201JA_IB176PrkDed_D1dRev00.pdf) to open the **Complete the Inbound File Generator for I-176 Parking Deductions Template** job aid in a new web browser window/tab.

Job Aid: Complete the Inbound File Generator for I-178 Parking

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMPAYL201JA_IB178PrkCor_D1Rev00.pdf) to open the **Complete the Inbound File Generator for I-178 Parking Corrections Template** job aid in a new web browser window/tab.

Job Aid: Complete the Inbound File Generator for I-378 One-Time

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMPAYL201JA_IB378_OneTimeDed_D1Rev00.pdf) to open the **Complete the Inbound File Generator for I-378 One-Time Deductions Template** job aid in a new web browser window/tab.

Job Aid: Location Error Report for Locations

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMSYS301JA_LocationErrorReportForLocations_D1Rev01.pdf) to open the **Location Error Report for Locations** job aid in a new web browser window/tab.

Job Aid: E-010 Location Error Reporting Resolution Guide

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMSYS301JA_E010_LocErrorResolution_D1Rev00.pdf) to open the **E-010 Location Error Reporting Resolution Guide** job aid in a new web browser window/tab.

Submit Case to UCPath Center

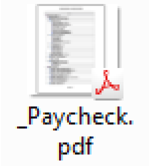
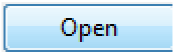
Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
21.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link.  Submit An Inquiry
22.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 

Step	Action
23.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. Payroll
24.	Click the button to the right of the **Category** field. 
25.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
26.	Click in the **Subject** field.
27.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
28.	Click in the **Description** field.
29.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
30.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
31.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
32.	Click in the **Best Contact Phone Number** field.
33.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
34.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
35.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
36.	Click the **Add Attachment** link. Add Attachment
37.	Navigate to the document you want to attach. In this example, the document is located on the desktop.

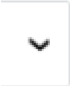
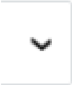
Step	Action
38.	For this example, click the **_Paycheck.pdf** list item. 
39.	Click the **Open** button. 
40.	The file name appears in the **Attachments** box.
41.	Click the **Submit** button.
42.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
43.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
44.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
45.	Click the scroll bar.
46.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
47.	Click the scroll bar.
48.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
49.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

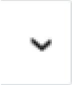
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
50.	Click the **Ask UCPath Center** button. 
51.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
52.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
53.	UCPath returned one result. Click the scroll bar.
54.	Click the **Create an Inquiry** link. 
55.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
56.	Click the button to the right of the **Requested By** field. 
57.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
58.	Click the button to the right of the **Topic** field. 
59.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.

Step	Action
60.	Click the button to the right of the **Category** field. 
61.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
62.	Click in the **Subject** field.
63.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
64.	Click the scroll bar.
65.	Click in the **Description** field.
66.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
67.	In this example, the full **Description** was completed on your behalf.
68.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
69.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
70.	Click the **Submit Inquiry** button. 
71.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
72.	The submitter's name appears.
73.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

Reopen Closed UCPath Center Case

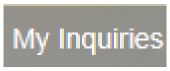
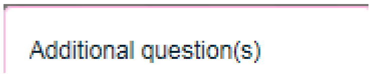
Use this task to reopen a closed inquiry via the UCPath website.

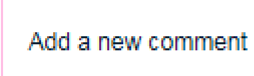
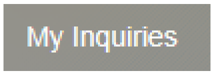
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:

Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
74.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
75.	Click the **My Closed Inquiries** link. 
76.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
77.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
78.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
79.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.

Step	Action
80.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. Add a new comment
81.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
82.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. Submit comment to the UCPath Center
83.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
84.	Click the scroll bar.
85.	Notice the comment now appears in the **Case Comments** section.
86.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
87.	Return to the top of the page. Click the scroll bar.
88.	Click the **My Inquiries** link. My Inquiries
89.	The new inquiry appears in the **My Open Inquires** list.
90.	You have reopened a closed inquiry. **End of Procedure.**

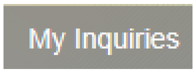
Monitor UCPath Center Cases

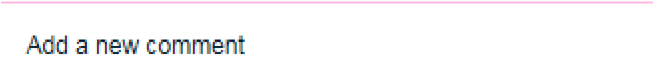
Use this task to review the status of an existing inquiry via the UCPath website.

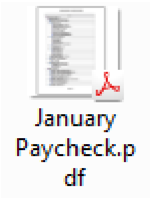
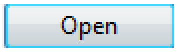
Dashboard Navigation:
Ask UCPath Center
or

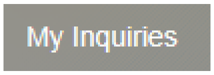
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
91.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
92.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
93.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
94.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
95.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 
96.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 

Step	Action
97.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 
98.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field. 
99.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
100.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
101.	Click the **Submit comment to the UCPath Center** button. 
102.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
103.	Click the scroll bar.
104.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. 
105.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▾
106.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.

Step	Action
107.	To return to the case details, click the **00180573** link. 
108.	Click the scroll bar.
109.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
110.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
111.	Click the **Open** button. 
112.	A message confirms the file was uploaded. Click the **Done** button. 
113.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
114.	You can view all attachments in a list. Click the **View All** link. 
115.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. ▼

Step	Action
116.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 
117.	Click the **00180573** link. 00180573
118.	Click the scroll bar.
119.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
120.	Click the **Email** link. Sandbox: UCPath Center: Inquir.
121.	Review the email information as you scroll down the page. Click the scroll bar.
122.	Review the email from the UCPath Center. Click the scroll bar.
123.	Click the case number to return to the details of the case. Click the **00180573** link. 00180573
124.	To review closed inquiries, click the **My Inquiries** link. 
125.	Click the **My Closed Inquiries** tab. 
126.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**

Step	Action
127.	Click the **00180567** link.  00180567
128.	Click the scroll bar.
129.	Notice the **Status** is **Closed/Resolved**.
130.	Click the scroll bar.
131.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link.
132.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

System Administration

PHCMSYS300 Security Provisioning

Assign User Privileges (Location Admins)

Use this task to:

1) Query the UCPath system to determine security access privileges for an employee or a contingent worker at your location.

2) Provision security for an employee or contingent worker at your location.

Navigation: PeopleSoft Menu > UC Customization > UC Security > **Security Provisioning**

Step	Action
1.	In this example, you will review the current security privileges for a UC Riverside employee and add role and row-level security to the employee's profile.
2.	Enter search criteria to find the employee. Click the **Look up Set ID** button.
3.	Select the appropriate location, **Set ID**, for the employee. For this example, click the **RVCMP** list item.  RVCMP

Step	Action
4.	Click in the **Empl ID** field. 
5.	Enter the desired information into the **Empl ID** field. For this example, enter **10078668**.
6.	Click the **Search** button. 
7.	The **Role Security** page indicates there are no location-specific roles assigned to this user. When no roles are assigned, only the **New** radio button appears. If an employee has one or more location-specific roles, two radio buttons appear; **New** and **Update**.
8.	To add a new location-specific role to this user, click the **New** option. 
9.	In this example, select the initiator role for absence management extended absences. Click the button to the right of the **Business Area** field. 
10.	For this example, click the **AM** list item. 
11.	Click the button to the right of the **System Function/Transaction** field. 
12.	For this example, click the **Extended Absences** list item. 
13.	Click the button to the right of the **Access Level** field. 
14.	For this example, click the **Initiator** list item. 
15.	Click the button to the right of the **Empl Class** field. 
16.	For this example, click the **All** list item. 
17.	Click the **Save** button. 

Step	Action
18.	Return to the search page and select the user to refresh the **Role Security** page. Click the **Return to Search** button. 
19.	Click the **Search** button. 
20.	Now that the employee has one or more location-specific roles, so two radio buttons appear. Use the **New** button to add additional security role rows or the **Update** button to modify existing rows. Click the **Update** option. 
21.	In this example, change the **Business Area** to payroll. Click the button to the right of the **Business Area** field. 
22.	For this example, click the **PY** list item. 
23.	The system automatically clears the other fields on this row. Click the button to the right of the **System Function/Transaction** field. 
24.	For this example, click the **Additional Pay** list item. 
25.	Click the button to the right of the **Access Level** field. 
26.	For this example, click the **Initiator** list item. 
27.	Click the button to the right of the **Empl Class** field. 
28.	For this example, click the **All** list item. 
29.	Click the **Save** button. 

Step	Action
30.	To keep the updated security role and add a new location-specific role, click the **New** option.  ○ New
31.	Enter the new location-specific role. In this example add the extended absences initiator to the employee's **New Security Roles** section. Click the button to the right of the **Business Area** field. 
32.	For this example, click the **AM** list item.  AM
33.	Click the button to the right of the **System Function/Transaction** field. 
34.	For this example, click the **Extended Absences** list item.  Extended Absences
35.	Click the button to the right of the **Access Level** field. 
36.	For this example, click the **Initiator** list item.  Initiator
37.	Click the button to the right of the **Empl Class** field. 
38.	For this example, click the **All** list item.  All
39.	Click the **Save** button.  Save
40.	Click the **Row Level Security** tab.  Row Level Security
41.	Use the **Row Level Security** page to view the current **Row Security Permission List** assigned to the user, display the **Tree Viewer**, add location nodes to the tree and view where the assigned nodes reside on the **Department Security Tree**. In this example, the user is assigned to the **UDP_Default Row Security Permission List** and the grid on the right side of the page is blank, which indicates the user has no location nodes.
42.	To see the available departments click the **Click to Open TreeViewer** link.  Click to Open TreeViewer

Step	Action
43.	The **Tree Viewer** tab appears in a new browser tab and displays the user's **Set ID Department Security Tree**. In this example the **Set ID** is **RVCMP**. You can expand/collapse the tree to see the department roll-up.
44.	Close the **Tree Viewer**. Click the **Close Tab** button. ✕
45.	To grant the user access to Location departments, click the **Update** option. ☐ Update
46.	Click the **Look up Department** button to add departments. 🔍
47.	Use the **Look Up Department** page search for and select appropriate departments. In this example find **D01030** in the list. Click the scroll bar.
48.	For this example, click the **D01030 Psychology** list item. D01030 Psychology
49.	To add another department to the user, click the **Add a new row** button. +
50.	Click the **Look up Department** button. 🔍
51.	Click the scroll bar.
52.	For this example, click the **D01031 Sociology** list item. D01031 Sociology
53.	When updating the Location nodes assigned to a user, you can remove a row by selecting the **Delete Row** button.
54.	Click the **Save** button. Save
55.	Return to the search page and select the user to update the **Row Level Security** page. Click the **Return to Search** button. Return to Search

Step	Action
56.	Click the **Search** button. 
57.	The **Row Security Permission List** is updated with the new **Row Security Permission List**, **UDP_RVCMP_000003**. The grid on the left side of the page displays which tree nodes are assigned to the user. Click the **Expand All** link to view the assigned tree nodes that exist on the **Set ID's Department Security Tree**. 
58.	To update the **Row Level Security** assignment for a user, click the **Update** option. 
59.	Click the **Add a new row** button. 
60.	Click the **Look up Department** button. 
61.	For this example, add department **D01027 - Ethnic Studies**. Click the **Ethnic Studies** list item. 
62.	Click the **Save** button. 
63.	Refresh the page by returning to the search page and selecting the user. Click the **Return to Search** button. 
64.	Click the **Search** button. 
65.	Click the **Expand All** link. 
66.	The grid on the left side of the page displays the three assigned tree nodes. The **Expand All** section, on the right side of the page, displays where those tree nodes exist on the **Set ID's Department Security Tree**.

Step	Action
67.	**Common Warning Messages Returned by the Process** **Message:** No matching values found. **Explanation:** The specified EMPLID does not belong to the location or a User Profile does not yet exist for the user. **Message:** Combination of same attributes exist Role(s) for combination of same attributes exists. Please choose a different combination. **Explanation:** An attempt was made to enter a duplicate role.
68.	You have queried the UCPath system to determine security access privileges for a user and provisioned security for users at your location. **End of Procedure.**

Submit Case to UCPath Center

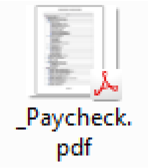
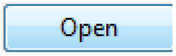
Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
69.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
70.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. ▼

Step	Action
71.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. Payroll
72.	Click the button to the right of the **Category** field. 
73.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
74.	Click in the **Subject** field.
75.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
76.	Click in the **Description** field.
77.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
78.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
79.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
80.	Click in the **Best Contact Phone Number** field.
81.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
82.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
83.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
84.	Click the **Add Attachment** link. Add Attachment
85.	Navigate to the document you want to attach. In this example, the document is located on the desktop.

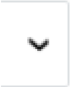
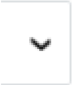
Step	Action
86.	For this example, click the **_Paycheck.pdf** list item. 
87.	Click the **Open** button. 
88.	The file name appears in the **Attachments** box.
89.	Click the **Submit** button.
90.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
91.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
92.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
93.	Click the scroll bar.
94.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
95.	Click the scroll bar.
96.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
97.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

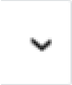
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
98.	Click the **Ask UCPath Center** button. 
99.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
100.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
101.	UCPath returned one result. Click the scroll bar.
102.	Click the **Create an Inquiry** link. 
103.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
104.	Click the button to the right of the **Requested By** field. 
105.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
106.	Click the button to the right of the **Topic** field. 
107.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.

Step	Action
108.	Click the button to the right of the **Category** field. 
109.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
110.	Click in the **Subject** field.
111.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
112.	Click the scroll bar.
113.	Click in the **Description** field.
114.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
115.	In this example, the full **Description** was completed on your behalf.
116.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
117.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
118.	Click the **Submit Inquiry** button. 
119.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
120.	The submitter's name appears.
121.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

Reopen Closed UCPath Center Case

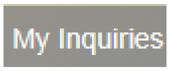
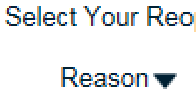
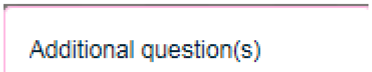
Use this task to reopen a closed inquiry via the UCPath website.

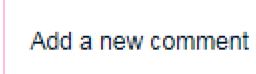
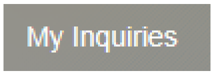
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:

Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
122.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
123.	Click the **My Closed Inquiries** link. 
124.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
125.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
126.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
127.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.

Step	Action
128.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
129.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
130.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
131.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
132.	Click the scroll bar.
133.	Notice the comment now appears in the **Case Comments** section.
134.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
135.	Return to the top of the page. Click the scroll bar.
136.	Click the **My Inquiries** link. 
137.	The new inquiry appears in the **My Open Inquires** list.
138.	You have reopened a closed inquiry. **End of Procedure.**

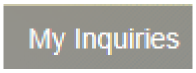
Monitor UCPath Center Cases

Use this task to review the status of an existing inquiry via the UCPath website.

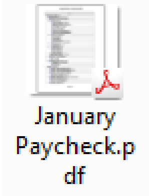
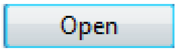
Dashboard Navigation:
Ask UCPath Center
or

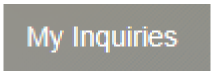
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
139.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
140.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
141.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
142.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
143.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 
144.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 

Step	Action
145.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 00180573
146.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field. Add a new comment
147.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
148.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
149.	Click the **Submit comment to the UCPath Center** button. Submit comment to the UCPath Center
150.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
151.	Click the scroll bar.
152.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. View All
153.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▾
154.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.

Step	Action
155.	To return to the case details, click the **00180573** link. 
156.	Click the scroll bar.
157.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
158.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
159.	Click the **Open** button. 
160.	A message confirms the file was uploaded. Click the **Done** button. 
161.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
162.	You can view all attachments in a list. Click the **View All** link. 
163.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. ▾

Step	Action
164.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 
165.	Click the **00180573** link.  00180573
166.	Click the scroll bar.
167.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
168.	Click the **Email** link.  Sandbox: UCPath Center: Inquir.
169.	Review the email information as you scroll down the page. Click the scroll bar.
170.	Review the email from the UCPath Center. Click the scroll bar.
171.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
172.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
173.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
174.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**

Step	Action
175.	Click the **00180567** link.  00180567
176.	Click the scroll bar.
177.	Notice the **Status** is **Closed/Resolved**.
178.	Click the scroll bar.
179.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
180.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMSYS301: Location Error Reporting

Job Aid: Location Error Report for Locations

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMSYS301JA_LocationErrorReportForLocations_D1Rev01.pdf) to open the **Location Error Report for Locations** job aid in a new web browser window/tab.

Job Aid: E-010 Location Error Reporting Resolution Guide

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMSYS301JA_E010_LocErrorResolution_D1Rev00.pdf) to open the **E-010 Location Error Reporting Resolution Guide** job aid in a new web browser window/tab.

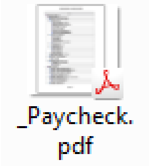
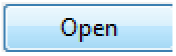
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
181.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link.  Submit An Inquiry
182.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. ▼
183.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.  Payroll
184.	Click the button to the right of the **Category** field. ▼
185.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
186.	Click in the **Subject** field.
187.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
188.	Click in the **Description** field.
189.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
190.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
191.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
192.	Click in the **Best Contact Phone Number** field.
193.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
194.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.

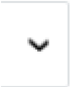
Step	Action
195.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
196.	Click the **Add Attachment** link. 
197.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
198.	For this example, click the **_Paycheck.pdf** list item. 
199.	Click the **Open** button. 
200.	The file name appears in the **Attachments** box.
201.	Click the **Submit** button.
202.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
203.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
204.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
205.	Click the scroll bar.
206.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
207.	Click the scroll bar.
208.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
209.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

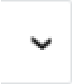
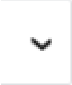
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
210.	Click the **Ask UCPath Center** button. 
211.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
212.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
213.	UCPath returned one result. Click the scroll bar.
214.	Click the **Create an Inquiry** link. 
215.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
216.	Click the button to the right of the **Requested By** field. 

Step	Action
217.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
218.	Click the button to the right of the **Topic** field. 
219.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
220.	Click the button to the right of the **Category** field. 
221.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
222.	Click in the **Subject** field.
223.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
224.	Click the scroll bar.
225.	Click in the **Description** field.
226.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
227.	In this example, the full **Description** was completed on your behalf.
228.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
229.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
230.	Click the **Submit Inquiry** button. 
231.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
232.	The submitter's name appears.

Step	Action
233.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

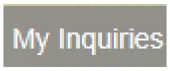
Reopen Closed UCPath Center Case

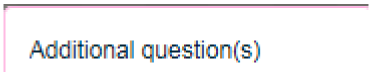
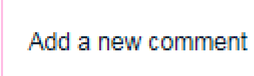
Use this task to reopen a closed inquiry via the UCPath website.

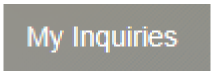
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
234.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
235.	Click the **My Closed Inquiries** link. 
236.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
237.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 

Step	Action
238.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
239.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
240.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
241.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
242.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
243.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
244.	Click the scroll bar.
245.	Notice the comment now appears in the **Case Comments** section.
246.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
247.	Return to the top of the page. Click the scroll bar.

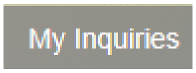
Step	Action
248.	Click the **My Inquiries** link. 
249.	The new inquiry appears in the **My Open Inquires** list.
250.	You have reopened a closed inquiry. **End of Procedure.**

Monitor UCPath Center Cases

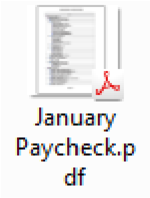
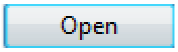
Use this task to review the status of an existing inquiry via the UCPath website.

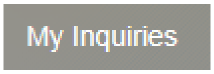
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
251.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
252.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
253.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.

Step	Action
254.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
255.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link.  Date/Time Opened ▲
256.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again..  Date/Time Opened ▼
257.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link.  00180573
258.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field.  Add a new comment
259.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
260.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
261.	Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center
262.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
263.	Click the scroll bar.

Step	Action
264.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. 
265.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. 
266.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
267.	To return to the case details, click the **00180573** link. 
268.	Click the scroll bar.
269.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
270.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
271.	Click the **Open** button. 
272.	A message confirms the file was uploaded. Click the **Done** button. 
273.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.

Step	Action
274.	You can view all attachments in a list. Click the **View All** link. View All
275.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. ▾
276.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. ▾
277.	Click the **00180573** link. 00180573
278.	Click the scroll bar.
279.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
280.	Click the **Email** link. Sandbox: UCPath Center: Inquir.
281.	Review the email information as you scroll down the page. Click the scroll bar.
282.	Review the email from the UCPath Center. Click the scroll bar.
283.	Click the case number to return to the details of the case. Click the **00180573** link. 00180573
284.	To review closed inquiries, click the **My Inquiries** link. My Inquiries

Step	Action
285.	Click the **My Closed Inquiries** tab. 
286.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
287.	Click the **00180567** link. 
288.	Click the scroll bar.
289.	Notice the **Status** is **Closed/Resolved**.
290.	Click the scroll bar.
291.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
292.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMSYS330 Profile Management

Create Content Type

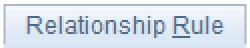
Use this task to create a new content type, define its properties and set up the relationships between other content types in the content catalog.

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Profile Management > Content Catalog > **Content Types**

Step	Action
1.	Use the **Find an Existing** tab to search for existing content types or use the **Add a New Value** tab to create a content type. For this example, you will create a new content type called **COMPETENCIES**.
2.	Click the **Add a New Value** tab. 

Step	Action
3.	Name the content type. Enter the desired information into the **Content Type** field. For this example, enter **COMPETENCIES**.
4.	Click the **Add** button. 
5.	Use the **Content Types** page to define the properties of the content type. The properties selected for a content type determine the fields that appear on the **Content Items - Item Details** page and the attributes of those fields.
6.	Enter a description of the content type. Enter the desired information into the **Description** field. For this example, enter **Competencies**.
7.	If the **System Data** check box is selected, the content type is part of the delivered PeopleSoft system.
8.	Select the **Free Form Type Only** check box to create a free-form content type. Note that you cannot define properties or content items for free-form content types. For this example, do not select the **Free Form Type Only** check box.
9.	In the **Properties** section use the **Properties** tab to define the content items for this content type. All content types that are not defined as free-from types automatically include the following five properties: • Content Item ID (JPM_CAT_TYPE) • Content Item ID (JPM_CAT_ITEM_ID) • Effective Date (EFFDT) • Status as of Effective Date (EFF_STATUS) • Description (JPM_DESCR90) You can edit these properties if needed. If the items define content whose rating will be tracked in a profile, add the RATING_MODEL property.
10.	For each content property: • Update the **Label Text** as needed. UCPath displays the label text defined here on the **Item Details** page. • Review the **Sys Data** and **Key Field** columns. UCPath selects the **Sys Data** check box if the property is part of the delivered PeopleSoft system. UCPath selects the **Key Field** check box if the property is a key field for the record. • Select the **Required** check box to indicate the property is required when defining an item on the **Item Details** page.
11.	For this example, no updates are needed for the default properties. You will add two new properties to the content type.

Step	Action
12.	Click the **Add a New Row** button. ⊞
13.	A new row appears on the **Properties** tab. Click the **Look up Field Name** button. 🔍
14.	Select the appropriate field. For this example, select the **CM_CATEGORY** list item. CM_CATEGORY
15.	For this example, select the **Required** check box. ☐
16.	Add another new row. Click the **Add a New Row** button. ⊞
17.	Click the **Look up Field Name** button. 🔍
18.	Select the appropriate field. For this example, select the **DESCRLONG** list item. DESCRLONG
19.	For this example, select the **Required** check box. ☐
20.	Click the **Property Attributes** tab. Property Attributes
21.	Use the **Property Attributes** tab to define the property attributes. • Indicate whether the property should be available for entry, unavailable for entry or hidden on the **Items Details** page. • Define the field length of the property. • Define the minimum and maximum values for numeric properties. • The **List** field is used only for the attribute **EP_SUB_LEVEL**, which is used in ePerformance processing. You can select a custom list defined in the **Custom List Values** table. This field appears only when there is a custom list defined for the field. When a list value is selected, the **Default** field values are dynamically built from the list values associated with the custom list value assigned. • Define the default value for the properties.
22.	The two properties you added are both editable. The **Max Len** for the **CM_CATEGORY** property defaults to 1 and cannot be changed.

Step	Action
23.	Click in the **Max Len** field for the **DESCRLONG** property.
24.	Enter the desired information into the field. For this example, enter **1234**.
25.	Click the **Relationship Rule** tab.  Relationship Rule
26.	Use the **Relationship Rule** tab to set up and review relationships between content types. If a content type is related to other content types, define the relationship on this page. Leave the page blank if there are no relationship rules for the content type. In this example, there are two relationships associated with the new content type.
27.	Click the button to the right of the **Relationship** field.
28.	Select the relationship type. For this example, select the **Is a parent of** list item.  Is a parent of
29.	If you select the **Is a child of** list item, the child options are added to profiles under the parent items. A hierarchy is created for the relationships.
30.	Click the **Look up Related Content Type** button.
31.	Select the content type to which this content type is related from the list of provided values. For this example, select the **ELEMENT** list item.  ELEMENT
32.	Add the second relationship. Click the **Add a New Value** button.
33.	A new row appears. Click the button to the right of the **Relationship** field.

Step	Action
34.	Select the relationship type. For this example, select the **Is a parent of** list item.  Is a parent of
35.	Click the **Look up Related Content Type** button.
36.	Click the scroll bar.
37.	Select the appropriate content type. For this example, select the **SUB_COMP** list item.  SUB_COMP
38.	Click the **Save** button.  Save
39.	You have successfully created a new content type, defined its properties and set up the relationships between other content types in the content catalog. **End of Procedure.**

Create Content Item

Use this task to define content items details for a selected content type.

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Profile Management > Content Catalog > **Content Items**

Step	Action
1.	Use the **Find an Existing** tab to search for existing content items or use the **Add a New Value** tab to create a content item. For this example, add a new content item called **UCCMP3**.
2.	Click the **Add a New Value** tab.  Add a New Value
3.	Enter the associated content type. Click the **Look up Content Type** button.

Step	Action
4.	Select the appropriate content type. For this example, select the **COMPETENCIES** list item. 
5.	Assign an item ID. Click in the **Content Item ID** field. 
6.	Follow your local business practices when assigning the content item ID. Enter the desired information into the **Content Item ID** field. For this example, enter **UCCMP3**.
7.	Click the **Add** button. 
8.	The fields on this page are dependent on the properties selected on the **Content Types** page. The **Group Memberships** page (not seen in this example) appears only if content groups have been set up for the content type. If there are no content groups, the page does not appear.
9.	The effective date defaults to the system date (today's date) and can be changed if needed. UCPath policy recommends that you back date the item to **01/01/1910**.
10.	For this example, the date has been highlighted for you. Press **[Delete]**.
11.	Enter the desired information into the **Effective Date** field. For this example, enter **01011910**.
12.	The status defaults to **Active**.
13.	Click in the **Description** field. 
14.	Enter a description for the content item. Enter the desired information into the **Description** field. For this example, enter **Flexibility**.
15.	The **Business Unit** defaults but can be updated if needed. For this example, accept the default value.
16.	Click in the **Description** field. 

Step	Action
17.	Use the second **Description** field to define the item details. Enter the desired information into the **Description** field. For this example, enter **Ability to support multiple tasks and move between projects.**.
18.	Click the button to the right of the **Competency Category** field. 
19.	Select the appropriate competency category. For this example, select the **Ability** list item. 
20.	Click the **Relationships** tab. 
21.	The **Relationships** tab is available if relationship rules were set up for the content type on the **Content Types - Relationship Rule** page. If there are no relationship rules for the content type, UCPath hides this tab. Set up of relationships at the content item level is optional. For this example, no content item level relationships are needed.
22.	Click the **Save** button. 
23.	You have successfully created a content item for a selected content type. **End of Procedure.**

Create Rating Model

Use this task to create a new Rating Model that contains values to rate an employee's performance or level of proficiency.

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Profile Management > Content Catalog > **Rating Model**

Step	Action
1.	Use the **Find an Existing** tab to search for existing Rating Models or use the **Add a New Value** tab to create a Rating Model. For this example, create a new Rating Model to rate employees during their probationary period.
2.	Click the **Add a New Value** tab. 

Step	Action
3.	Name the new Rating Model. Enter the desired information into the **Rating Model** field. For this example, enter **UCPP**.
4.	Click the **Add** button. 
5.	Use the **Rating Model** page to enter the model details and attributes. If a Rating Model is no longer needed, you can inactivate it in the **Status** field.
6.	The **Effective Date** defaults to the system date (today's date). UCPath policy recommends that you back the rating model to 01/01/1910.
7.	Click in the **Effective Date** field. 11/05/2018
8.	Enter the desired information into the **Effective Date** field. For this example, enter **01011910**.
9.	Click in the **Description** field. 
10.	Enter the desired information into the **Description** field. For this example, enter **UC Probationary Period Rating**.
11.	Click in the **Short Description** field. 
12.	Enter the desired information into the **Short Description** field. For this example, enter **UCPP**.
13.	Select the **Review Band** check box if the Rating Model is to be defined as a Review Band Rating model. For this example, do not select the check box.
14.	Based on your UCPath settings, the **Business Unit** may default, but you can change it if needed. For this example, a default did not appear.
15.	Click the **Look up Business Unit** button. 🔍
16.	Select the appropriate business unit. For this example, select the **RVCMP** list item. 
17.	Use the **General** tab to define all possible rating levels that can be used to evaluate an employee. At least two rating levels are required.

Step	Action
18.	Enter an alphanumeric code for the rating. For this example, use a numeric code. Click in the **Rating** field. 
19.	Enter the desired information into the **Rating** field. For this example, enter **1**.
20.	Press **[Tab]**.
21.	Provide a description of the rating. Enter the desired information into the **Description** field. For this example, enter **Satisfactory**.
22.	Click in the **Short Description** field. 
23.	Enter the desired information into the field. For this example, enter **SAT**.
24.	The **Numeric Rating** field is used by ePerformance only. Enter a numeric value for the rating, if applicable. The value you enter serves two purposes: • For performance document sections that use the average calculation method, the system uses this value to calculate the section's average or weighted average. It also uses this value to calculate the average rating for each item in the section (when sub-items exist). • If you select the **Show Numeric Ratings/Points** check box on the **Rules/Roles** page of the **Template Definition** component, the value you enter here displays next to the rating on the performance document.
25.	Click in the **Numeric Rating** field.  0.00
26.	Enter the desired information into the **Numeric Rating** field. For this example, enter **1**.
27.	Click the button to the right of the **Career Strength/Development** field. ⌄
28.	Select the appropriate value. • **Developmnt** (development) indicates an area that needs more skill development, education or training. • **Strength** indicates an area of strength. For this example, select the **Strength** list item.  Strength
29.	Click the **Rating Explanation** button.
30.	Use the **Review Rating Explanation** page to add a description of the rating. Follow local business practices for explanation details.

Step	Action
31.	Click in the **Explanation** field.
32.	Enter the desired information into the **Explanation** field. For this example, enter **Can perform all job tasks without issue.**.
33.	Click the **OK** button. OK
34.	Add a new row for the second rating level. Click the **Add a New Row** button. ⊞
35.	Enter the desired information into the **Rating** field. For this example, enter **2**.
36.	Click in the **Description** field.
37.	Enter the desired information into the field. For this example, enter **Improvement Needed**.
38.	Click in the **Short Description** field.
39.	Enter the desired information into the field. For this example, enter **IN**.
40.	Click in the **Numeric Rating** field. 0.00
41.	Enter the desired information into the **Numeric Rating** field. For this example, enter **2**.
42.	Click the button to the right of the **Career Strength/Development** field. ⌄
43.	For this example, select the **Development** list item. Development
44.	Click the **Rating Explanation** button.
45.	Click in the **Explanation** field.
46.	Enter the desired information into the **Explanation** field. For this example, enter **Unable to perform all job tasks adequately.**.
47.	Click the **OK** button. OK

Step	Action
48.	Use the **Review Points** tab if you want to associate a number of points or a point range with each rating level defined on the **General** tab. Click the **Review Points** tab. 
49.	The two rating levels that you defined on the **General** tab appear. For this example, assign points to each rating. Follow your local business practices for assignment of review points.
50.	Enter a numeric rating in the **Review Points** field. This field is used by both ePerformance and Manage Profiles. • ePerformance uses this field for section calculations using the **Summation** method. • Manage Profiles uses the matching function to determine how well an employee profile matches the competencies for a non-person profile.
51.	Click in the **Review Points** field. 
52.	Enter the desired information into the field. For this example, enter **1**.
53.	Press **[Tab]**.
54.	Define a range of points to associate with this rating. These points are used to convert summed-up points to either a review band or a qualitative rating.
55.	Enter the desired information into the field. For this example, enter **10**.
56.	Press **[Tab]**.
57.	Enter the desired information into the field. For this example, enter **12**.
58.	The **Eligibility Points** field is not used at UC.
59.	Click in the **Review Points** field for the second rating.
60.	Enter the desired information into the field. For this example, enter **2**.
61.	Press **[Tab]**.
62.	Enter the desired information into the field. For this example, enter **1**.
63.	Press **[Tab]**.
64.	Enter the desired information into the field. For this example, enter **9**.
65.	Click the **Save** button. 
66.	You have successfully created a new Rating Model. **End of Procedure.**

Define Instance Qualifier

Use this task to define an instance qualifier for a Content Type.

Instance qualifiers uniquely identify a Profile Item and are used to add an additional key to the Profile Item, if needed. Typically, a Profile Item is uniquely identified by the Content Type and Item Identifier. In some cases, such as the Degree content, an additional key (Major) is required to uniquely describe the item.

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Profile Management > Profiles > **Instance Qualifiers**

Step	Action
1.	Use the **Find an Existing Value** tab to search for an existing instance qualifier or use the **Add a New Value** tab to create an instance qualifier. For this example, add a new instance qualifier for **Major**.
2.	Click the **Add a New Value** tab. 
3.	Select the Content Type for which the instance qualifier is defined. For this example, define an instance qualifier for degrees.
4.	Click the **Look up Content Type** button.
5.	Select the appropriate content type. For this example, select the **DEG** list item. 
6.	Click in the **Instance Qualifier Set** field. 
7.	Enter the desired information into the **Instance Qualifier Set** field. For this example, enter **MAJOR**.
8.	Click the **Add** button. 
9.	Use the **Instance Qualifiers** page to define a new instance qualifier. The **Content Type** and **Instance Qualifier Set** appear in the page header.
10.	Click the **Look up Business Unit** button.
11.	Select your business unit. For this example, select the **UCSHR** list item. 

Step	Action
12.	Select the **Use Prompt Record** option to use a record in the database as the instance qualifier. For example, the **PERSON_NAME** record might be used as the instance qualifier. In this example, UCPath made the **Record Name** field available and hid the **Instance Qualifiers** section. When you define a Content Section in a Profile Type, instance qualifiers that use a prompt record can be associated with the **Instance Qualifier 2** field only. You cannot specify instance qualifiers that use a prompt record in the **Instance Qualifier 1** field.
13.	Use the **Create Set of Qualifiers** option to create a new set of instance qualifiers in the **Instance Qualifiers** section (the section appears when this option is selected). Instance qualifiers of this type can be associated with the **Instance Qualifier 1** field on the Content Section in a Profile Type; they cannot be specified in the **Instance Qualifier 2** field.
14.	For this example, accept the default: **Use Prompt Record**.
15.	Click the **Save** button. 
16.	If necessary, click the **Add** button to add another instance qualifier.
17.	You have successfully defined a new instance qualifier for a Content Type. **End of Procedure.**

Search Profile

Use this task to search for a profile in UCPath.

Navigation: PeopleSoft Menu > Workforce Development > Profile Management > Profiles > **Non-person Profiles**
OR
PeopleSoft Menu > Workforce Development > Profile Management > Profiles > **Person Profiles**

Step	Action
1.	Switch to the **Advanced Search** option to include the **Group Type** field as search criteria. For this example, do not change the search option.
2.	Use a variety of search criteria to find the profile. If you want to add a new profile, click the **Add a Profile** link.

Step	Action
3.	For this example, search using the **Type** field to find the **UCI_Position** Profile Type and then make changes.
4.	Click the button to the right of the **Type** field. 
5.	Select the profile type. For this example, select the **UCI_Position** list item. 
6.	Click the **Search** button. 
7.	Profiles that match your search criteria appear in the **Profile Search Results** section. For this example, four UCI_Position Profile Types appear. Click the **Profile Name** link to open the selected profile.
8.	You have successfully searched for a profile. **End of Procedure.**

Create Non-Person Profile

Use this task to create a non-person profile.

Non-person profiles store data (key characteristics) that can be attached to positions, jobs, performance documents and more.

Navigation: PeopleSoft Menu > Workforce Development > Profile Management > Profiles > **Non-person Profiles**

Step	Action
1.	Use the **Select a Profile** page to search for existing profiles using a variety of criteria or to initiate the creation of a new profile. In this example, create a new non-person profile.
2.	Click the **Add a Profile** link. 
3.	The **Add a New Value** tab appears and the **Profile ID** field defaults to **NEW**. The **Profile ID** remains as **NEW** until the non-person profile is saved and UCPath assigns a numeric ID.

Step	Action
4.	Click the **Add** button.  Add
5.	Use the **Non-person Profile** page to define the new profile. The **Profile Status** field defaults to **Inactive**. After a Profile Identity is added and the profile is saved, the **Profile Status** changes to **Active**.
6.	The **Profile Type** defines the Content Types and properties that appear in the profile. Click the **Look up Profile Type** button.
7.	Select the appropriate profile type. For this example, select the **ROLE** link.  ROLE
8.	The tabs and content sections associated with the selected profile type appear. Define the tabs and content sections for Profile Types using the **Profile Type - Content** page. For this example, the **ROLE** Profile Type contains three tabs.
9.	Click in the **Description** field. 
10.	Enter the desired information into the **Description** field. For this example, enter **Role NPP**.
11.	Click in the **Short Description** field. 
12.	Enter the desired information into the **Short Description** field. For this example, enter **Role**.
13.	Click the **Print** button to display the profile in a PDF file that you can print. Click the **Comments** button to display the **Profile Comments** page and enter the employee owner ID, as well as additional comments about the profile.

Step	Action
14.	The **Profile Actions** field enables you to perform transactions directly from the profile pages. Several Profile Actions are standard and you can enable Profile Actions for each role, such as the administrator, employee and manager. To perform an action, select it from the list and then click the **Go** button. Actions for a non-person profile include those profile actions that are enabled on the **Profile Actions** page. Each action opens a corresponding page where you can view or update information related to the action. For this example, Profile Actions are not used.
15.	Complete the content sections on each tab, starting with the **Competencies** tab.
16.	Click the **Add New Competencies** link. Add New Competencies
17.	Use the **Add New Competencies** page to add the item details for the profile.
18.	The **Effective Date** defaults to the system date (today's date) but can be updated if needed. For this example, accept the default date.
19.	Click the **Look up Competency** button. 
20.	Select the appropriate competency. For this example, select the **Communication** list item. Communication
21.	The **Status** field defaults to **Active**. For this example, no change is needed.
22.	The **Rating Model**, **Proficiency** and **Importance** fields default based on their association to the competency but can be updated if needed. You can also add a **Description** for the competency. For this example, no change is needed.
23.	Click the **OK** button to save the changes and return to the previous page. Click the **Cancel** button to return to the previous page without saving the changes. Click the **Apply and Add Another** button to save the changes and add another competency. For this example, click the **OK** button. OK

Step	Action
24.	The competency appears in the **Competencies** section. Click the competency name link to open the **Add New Competency** page and update the details if needed. Add other competencies as needed. For this example, no other competencies are needed.
25.	Click the **Add Profile Identity** link. 
26.	Use the **Profile Identity Add** page to add identities that link the profile to a business entity that is supported by the Profile Type. The entities that are available for selection are based on those that are enabled on the **Profile Identity Options** page.
27.	Click the button to the right of the **Profile Identity** field. 
28.	Select the appropriate profile identity. For this example, select the **Job Family** list item. 
29.	Additional fields may appear based on the selected Profile Identity. In this example, the **Job Family** field appears and the **Position Number** field was hidden.
30.	Click the **Look up Job Family** button. 
31.	Select the appropriate job family. For this example, select the **ACAD** job family code list item. 
32.	The **Effective Date** defaults to the system date (today's date) but can be changed if needed. The **Status** field defaults to **Active**. For this example, no changes are needed.
33.	Click the **OK** button to save the changes and return to the previous page. Click the **Cancel** button to return to the previous page without saving the changes. For this example, click the **OK** button. 

Step	Action
34.	The Profile Identity appears in the **Profile Identities** section. Click the **Update** button to modify the identity details. Click the **Delete** button to delete the identity.
35.	You can link a Profile Type to entities outside of the Manage Profiles business process. These entities are known as Profile Association Options. As an example, you can use the association to locate the ePerformance template during the document creation process. For this example, no associations are needed.
36.	As you complete data for each tab, save the information. Click the **Save** button. 
37.	The **Profile Status** field updated to **Active** after the addition of the Profile Identity and saving the record. The **Profile ID** was also assigned by the system.
38.	Click the **Accomplishments** tab. 
39.	Use the **Accomplishments** tab to add degrees, honors and awards, languages, and other details to the profile. For this example, add a degree and language skill.
40.	Click the **Add New Degrees** link. 
41.	Use the **Add New Degrees** page to add details for the degree item.
42.	The **Effective Date** defaults to the system date (today's date) but can be changed if needed. For this example, accept the default date.
43.	Click the **Look up Degree** button. 
44.	Select the appropriate degree. For this example, select the **Advanced Level** list item. 
45.	The **Status** field defaults to **Active**. For this example, no change is needed.

Step	Action
46.	Click the **Look up Country** button. 🔍
47.	Narrow down the list by entering search criteria. Enter the desired information into the field. For this example, enter **usa**.
48.	Click the **Look Up** button. Look Up
49.	Select the country from the list. For this example, select the **USA** list item. USA
50.	The **Importance** field defaults but can be updated if needed. For this example, no change is needed.
51.	Click the **OK** button to save the changes and return to the previous page. Click the **Cancel** button to return to the previous page without saving the changes. Click the **Apply and Add Another** button to save the degree details and add another degree. For this example, click the **OK** button. OK
52.	The new degree appears in the Degrees section. Click the **Degree** link to open the **Add New Degrees** page and update the details if needed. Click the **Delete** button to delete the degree if needed.
53.	Click the **Add New Honors and Awards** button to add honor or award to the profile. For this example, no honors or awards are needed.
54.	Click the **Add New Language Skills** link. ⊞ Add New Language Skills
55.	Use the **Add New Language Skills** page to add language skills to the profile.
56.	The **Effective Date** defaults to the system date (today's date) but can be changed if needed. For this example, no changes are needed.

Step	Action
57.	Click the **Look up Language** button. 🔍
58.	Select the appropriate language. For this example, select the **Spanish** list item. Spanish
59.	The **Status** field defaults to **Active**. The **Importance** field defaults and can be updated if needed. For this example, no changes are needed.
60.	Click the **OK** button to save the changes and return to the previous page. Click the **Cancel** button to return to the previous page without saving the changes. Click the **Apply and Add Another** button to save the language skill details and add another language. For this example, click the **OK** button. OK
61.	Click the scroll bar.
62.	Click the **Save** button. Save
63.	Click the **NVQ** tab. NVQ
64.	Use the **NVQ** tab to add skills and qualifications to the profile. You can also add Profile Content to the profile as needed. Follow the same process by using the related **Add** buttons to add the item details. For this example, no new items are needed.
65.	Click the **Save** button. Save
66.	You have successfully created a non-person profile **End of Procedure.**

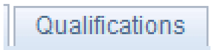
Update Non-Person Profile

Use this task to update an existing non-person profile.

Navigation: PeopleSoft Menu > Workforce Development > Profile Management > Profiles > **Non-person Profiles**

Step	Action
1.	Search for the non-person profile that requires an update. Use a variety of search criteria to locate the desired profile.
2.	For this example, search using the **Type** field to locate the **UCI_Position** Profile Type. You will add a new Profile Identity and delete an existing one. You will navigate through the page tabs to review the profile details on each tab.
3.	Click the button to the right of the **Type** field. 
4.	Select the appropriate profile type. For this example, select the **UCI_Position** list item. 
5.	Click the **Search** button. 
6.	Profiles that match the search criteria appear in the **Profile Search Results** section.
7.	Click the **Profile Name** link to display the profile. For this example, click the **Position 1** link. 
8.	Use the **Non-person Profile** page to view, add and update non-person profiles. In this example, the page includes three tabs.
9.	Click the **Print** button to display the profile in a PDF file that you can print. Click the **Comments** button to display the **Profile Comments** page and enter additional comments about the profile if needed.
10.	Click the scroll bar.
11.	Click the **Add Profile Identity** link. 

Step	Action
12.	Use the **Profile Identity** page to add or edit identities associated with the profile. Identity options are entities, such as a job code or position number. When you create profiles based on a Profile Type, you can only create profiles for the entities that are defined on this page. Active Profile Types must have at least one identity option. Identifiers can be added only for Profile Types with the non-person usage.
13.	Click the button to the right of the **Profile Identity** field. ⌄
14.	Select the appropriate identity. For this example, click the **Position Data** list item.  Position Data
15.	The fields on this page are based on the selected Profile Identity.
16.	Click the **Look up Position Number** button. 🔍
17.	Select the appropriate position. For this example, click the **40000003** list item.  40000003 BUS SYS ANL MGR 1
18.	The **Effective Date** field defaults to the system date (today's date) and the **Status** field defaults to **Active**. For this example, accept the defaults.
19.	Click the **OK** button.  OK
20.	The position appears in the **Profile Identities** section. Click the **Update** button to edit the identity if needed. Click the **Delete** button to delete an identity if needed.
21.	For this example, click the **Delete** button for the **INFO SYS ANL 3** position. 🗑
22.	Confirm the deletion. Click the **Yes - Delete** button.  Yes - Delete

Step	Action
23.	The position was deleted. Now navigate to the **Qualifications** tab. Click the **Qualifications** tab. 
24.	Use the **Qualifications** tab to add and edit qualifications, such as licenses and certifications, degrees, tests or examinations, language skills, and other items on the profile.
25.	Click the scroll bar.
26.	Add additional items by using the **Add** button in the appropriate section. Use the **Edit** and **Delete** buttons in each section as needed.
27.	Click the scroll bar.
28.	Review the remaining items and update if needed. For this example, no additional changes are needed.
29.	Click the **ADA/Safety/Environmental** tab. 
30.	Use the **ADA/Safety/Environmental** tab to view, add and update the ADA, safety and environmental requirements related to the profile.
31.	Click the scroll bar.
32.	Add additional items by using the **Add** button in the appropriate section. Use the **Edit** and **Delete** buttons in each section as needed.
33.	Click the scroll bar.
34.	Review the remaining items and update if needed. For this example, no additional changes are needed.
35.	Save the profile updates. Click the **Save** button. 
36.	You have successfully searched for and updated a non-person profile. **End of Procedure.**

Talent Acquisition Management

PHCMTAM100: Talent Acquisition Management Overview

Use the Recruiting Home Page

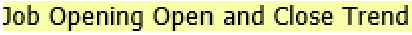
Use this task to navigate within the **Recruiting Home** page.

The **Recruiting Home** page provides a dashboard view of key recruiting activities and quick access to a variety of job and applicant tasks.

Navigation: PeopleSoft Menu > Recruiting > **Recruiting Home**

Step	Action
1.	This simulation demonstrates how to review data on the **Recruiting Home** page, access job and applicant analytics, and use quick links to access other recruiting pages. Access to this page and the information that appears is based on your assigned security role.
2.	**Quick Links** provides links to the most commonly used pages in the recruiting process. After accessing a page through **Quick Links**, you can easily return to the **Recruiting Home** page by clicking the **Recruiting Home** link in the upper left corner of the page.
3.	The **Browse Job Openings** section enables you to use a keyword search to locate a job opening.
4.	The **Browse Applicants** section enables you to use a keyword search to locate an applicant.
5.	The **My Job Openings** section displays job openings that are associated to you. You can review key information about each job opening.
6.	The **Job Opening** column displays the assigned job opening ID and the job opening's posting title.
7.	Use the **Job Opening ID** link to access the **Manage Job Opening** page. For this example, click the **Job Opening ID 994493** link.  994493 - Digital Communication..
8.	The **Manage Job Opening** page displays information for **Job Opening ID 994493**. You can review the job opening and applicant details and navigate to the other page tabs and links. To return to the **Recruiting Home** page, click the **Recruiting Home** link.  Recruiting Home
9.	The **Recruiting Location** displays the primary recruiting location for the job opening.
10.	The **Job Code** displays the job code associated to the job opening.

Step	Action
11.	The **Category** column, if categorization is enabled, allows you to view and change the category for the job opening. If you are not using categorization, you may want to hide this column.
12.	The **Department ID** and **Department Name** columns display the ID and name of the department associated to the job code.
13.	The **Hiring Manager** column displays the name of the hiring manager associated to the job opening.
14.	The **Job Opening Status** column displays the current status of the job opening.
15.	The **Days Open** column displays the number of days since the job opening's earliest posting date. This appears only for job openings in an open status.
16.	The **No Action Taken** column displays the number of applicants in the **Applied** phase.
17.	The **Total Applicants** column displays the number of applicants that have applied to the job.
18.	To see more information for the job opening, click the **Additional Details** tab. 
19.	You can view the **FTE** allocation for the position, along with the assigned employee class. The **Target Openings** and **Available Openings** fields were defined when the job opening record was created. The **Earliest Post Date** field displays the date of posting for the job opening. The job's **Position Number** appears, along with the total number of applicants that have applied to the job opening.
20.	Click the **Notes** tab. 
21.	The **Notes** tab displays notes that were added for the job opening.
22.	You can view actionable operational analytics in graphics for your job openings. Click the **My Job Openings Analytics** link. 
23.	Click the **Job Opening Aging Analysis** link. 

Step	Action
24.	The **Job Opening Aging Analysis** page displays the number of open job openings in various ages in the pie chart. You can use the fields in the **Filters** section to narrow or expand the data in the results.
25.	You can change the display by selecting one of the other chart types. For example, instead of viewing the analytics in a pie chart, you can view it in a bar chart.
26.	Click the **Return** button. 
27.	Click the **My Job Openings Analytics** link. 
28.	Click the **Job Opening Open and Close Trend** link. 
29.	The **Job Opening Open and Close Trend** page displays the number of job openings that were opened and closed each month in a bar chart. You can use the fields in the **Filters** section to narrow or expand the data in the results.
30.	You can change the display by selecting one of the other chart types.
31.	Click the **Return** button. 
32.	The **My Applicants** section displays the applicants who are associated with your job openings. You can review key information about each applicant.
33.	The **Applicant ID**, **Name** and **Phone** columns display identifying information about the applicant. The ID is assigned to the applicant through the **Candidate Gateway**. You can use the name link to access the **Manage Applicant** page.
34.	You can correspond with the applicant by email from the **My Applicants** section. For this example, click the **Email** button for the first applicant. 
35.	Use the **Send Correspondence** page to compose an email and send it to the applicant's email address on record.
36.	Click the scroll bar.

Step	Action
37.	You can add an attachment to the email correspondence. Use the buttons to preview the email, send the email or cancel the correspondence. For this example, click the **Cancel** button. Cancel
38.	The **Jobs Applied** column displays the number of job applications submitted by the applicant.
39.	The **Last Job Applied To** column displays the job opening ID and title of the applicant's most recent application. You can use the **Job Opening ID** link to access the **Manage Job Opening** page and view the job opening details.
40.	If a resume icon appears in the **Resume** column, then the most recent application includes a resume and it is available to view. The resume opens in a separate window. For this example, click the **Resume** button for the applicant Chandler Bing. 📄
41.	You can review, print or save the resume and then close the browser window when your actions are complete. Click **X** to close the browser window. ✕
42.	Use the button in the **Application** column to access the **Manage Application** page, where you can perform a variety of activities for a single job application.
43.	The button in the **Print** column allows you to build a printable report with selected details. Click the **Print** button. 🖨
44.	The **Application Report Options** page appears. You can select application details and other report criteria on this page. Click the scroll bar.
45.	Click the **Generate Report** button. Generate Report
46.	The report opens in a new window and displays application details for the applicant. You can review the information and then close the report window. For this example, the window will be closed for you.

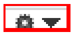
Step	Action
47.	Press **Page Down**.
48.	Click the **My Applicants Analytics** link. 
49.	Click the **In Process Applicants** link. 
50.	The **In Process Applicants** page displays the distribution of dispositions for your active applicants. You can use the fields in the **Filters** section to narrow or expand the data in the results.
51.	You can change the display by selecting one of the other chart types. For example, instead of viewing the analytics in a pie chart, you can select to view it in a bar chart.
52.	Click the **Return** button. 
53.	Click the scroll bar.
54.	**My Alerts** provides a summary of information for your job openings. Links are provided to view more detailed information. Each alert label identifies the alert type and the number of alerts for that type. Click an alert label to open a page that lists the individual alerts. You can take action on the alert from that page.
55.	**Today's Interviews** displays your interviews for the current day.
56.	The **Interview Calendar** link accesses your complete interview calendar.
57.	**My Applicant Lists** displays your active applicant lists. You can elect to view public, private or both types of lists.
58.	The **View All** link accesses the **Applicant Lists** page with all of your lists.
59.	You have reviewed the **Recruiting Home** page, its use and the various elements contained on the page. **End of Procedure.**

Personalize the Recruiting Home Page

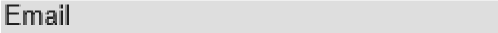
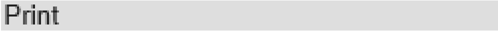
Use this task to personalize the **Recruiting Home** page to better fit your needs. You can personalize the content (the sections that appear) and the layout (where the sections appear) of the page. Changes you make appear only for your user ID; they do not impact the display for other users.

Navigation: PeopleSoft Menu > Recruiting > **Recruiting Home**

Step	Action
1.	In this simulation, you will personalize the content and layout of the **Recruiting Home** page by changing the column order in a grid, hiding a column, displaying the page in two columns and filtering data.
2.	Start by personalizing the page content and layout. Click the scroll bar.
3.	In this example, start by removing the **Today's Interviews** section from the page.
4.	Click the **Content** link.  Conten
5.	The **Personalize Content** page provides a number of personalization options.
6.	Deselect the **Today's Interviews** check box. ☑
7.	Click the **Save** button.  Save
8.	Click the scroll bar.
9.	The **Today's Interview** section no longer appears on the **Recruiting Home** page. If you remove a section by accident, you can always add it back by clicking the **Content** link and selecting the check box for that section.
10.	Now change the layout of the page. Click the **Layout** link.  Layou
11.	The layout is currently a 3-column display. The bottom of this page shows the sections/information that appear in each column.
12.	Change the page layout to display two columns instead of three. Select the **2 columns** option. ○
13.	Now move the **My Applicant Lists** section to the left column. Click the **My Applicant Lists** option to select it.  My Applicant Lists
14.	Click the **Move Left** button. ◄

Step	Action
15.	Notice that **My Applicant Lists** now appears in the **Left Column**. Click the **Save** button. Save
16.	The page layout displays two columns instead of three. The sections that used to appear on the right side of the page now appear at the bottom of the remaining two columns. Click the scroll bar.
17.	In the **My Job Openings** section you can also personalize the columns that appear. Click the **Personalize** link. Personalize
18.	For this example, hide the **Category** column. Click the **Category** list item to select it. Category
19.	Select the **Hidden** check box. ☐
20.	You can preview or cancel the change. For this example, click the **OK** button. OK
21.	The **Category** column no longer appears. Now change the filter items for the **My Job Openings** section.
22.	Click the **My Job Openings Settings** button. 
23.	Click the **Personalize** link. Personalize
24.	Select filter options for the job openings section. For this example, change the filters to **View All** job openings. Click the button to the right of the **Created Within** field. 
25.	For this example, click the **080 - View All** list item. 080 - View All

Step	Action
26.	Click the **Save** button. Save
27.	All job openings now appear in the **My Job Openings** section. You can also personalize the **My Alerts** section to specify the alerts that appear. For this example, add **Questionnaire Requests** and **Unconfirmed Interviews** to **My Alerts**.
28.	Click the **My Alerts Settings** button. ⚙▾
29.	Click the **Personalize** link. Personalize
30.	For this example, select the **Questionnaire Requests** check box. ☐
31.	For this example, select the **Unconfirmed Interviews** check box. ☐
32.	Click the **Save** button. Save
33.	Notice that **My Alerts** now displays **Questionnaire Requests**. There are no unconfirmed interviews, so the link does not appear.
34.	Personalize the **My Applicants** section to filter the applicants that appear in the list. Click the **My Applicants Settings** button. ⚙▾
35.	Click the **Personalize** link. Personalize
36.	Click the button to the right of the **Applied Within** field. ⌄
37.	For this example, click the **070 - Last Year** list item. 070 - Last Year
38.	Click the **Save** button. Save
39.	Only applicants that applied within the last year appear in the list. You can also personalize the columns and sort order for the **My Applicants** section.

Step	Action
40.	Click the **Personalize** link.  Personalize
41.	The **Personalize Column and Sort Order** dialog box appears. For this example, move the **Email** column to appear before the **Phone** column. Click the **Email** list item to select it.  Email
42.	Click the **Move Up** button. 
43.	Next, hide the **Print** column. Click the **Print** list item to select it.  Print
44.	Select the **Hidden** check box. ☐
45.	Click the **OK** button.  OK
46.	The **Email** column now appears before the **Phone** column and the **Print** column no longer appears.
47.	You have personalized the content and layout of the **Recruiting Home** page. The next time you access this page, your display will retain your new personalization settings and the content and layout will appear just as you left it. **End of Procedure.**

Job Aid: Talent Acquisition Management (TAM) Email Notifications

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMTAM100JA_EmailNotifications_D1Rev00.pdf) to open the **Talent Management Acquisition (TAM) Email Notifications** job aid in a new web browser window/tab.

PHCMTAM200: Manage Job Openings and Postings

Browse Job Openings

Use this task to view a list of job openings that are filtered based on specific criteria, such as your association to the job opening, the department or the job family. You can also perform a keyword search from the **Browse Job Openings** page.

Navigation: PeopleSoft Menu > Recruiting > **Browse Job Openings**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Use the **Filter By** links to filter the job openings list based on defined categories. Each category displays the filter subcategory and the number of records in each subcategory.
2.	When you select a filter, it appears just above the results list. The current list is filtered by **Status** and displays all **Open** job openings. Four matches appear in the list. You can remove a filter from the results by clicking the **X**.
3.	The **My Association** category filters for job openings for which you are the creator or a member of the hiring team. The other filter categories include **Department**, **Hiring Manager**, **Recruiter**, **Job Family**, **Recruiting Location**, **Status** and **Created In**. Not all examples are seen here.
4.	Use the **Clear All Filters** link to remove all currently applied filters. Click the **Clear All Filters** link.  Clear All Filters
5.	For this example, click the **Earth Sciences (5)** link to see job openings for that department.  Earth Sciences (5)
6.	Notice that the filter appears above the job openings list and five job openings appear in the list.
7.	Notice the filters have changed based on the first filter you applied. Now apply a second filter. For this example, click the **Main Campus - UCR (5)** link.  Main Campus - UCR (5)
8.	All five job openings for this department are recruited from the Main Campus at UCR.
9.	Click the **Clear All Filters** link.  Clear All Filters

Step	Action
10.	All filters are removed and all 26 job opening records appear in the list. You can also search the list with keywords. For this example, perform a keyword search. Click in the **Search job openings** field.
11.	Enter the desired information into the **Search job openings** field. For this example, enter **manage**.
12.	Click the **Search** button.
13.	The keyword search returned four job openings.
14.	Use the **Posting Title** link to access the **Manage Job Opening** page. For this example, click the **Policy Analyst Manager - Level...** link.  Policy Analyst Manager - Level...
15.	Use the **Manage Job Opening** page to review and update job openings, and manage the applicants.
16.	When you finish your review, you can return to the **Browse Job Openings** page. Click the **Return** button.  Return
17.	You have successfully browsed job openings using filters and a keyword search. **End of Procedure.**

Search Job Openings

Use this task to search for an existing job opening.

Navigation: PeopleSoft Menu > Recruiting > **Search Job Openings**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Searching by **Job Opening ID** is the most efficient way to locate the job opening record. If the ID is not known, you can use the other search criteria to find the job opening.
2.	The **Status** field always defaults to **Open**. You can change it if needed.

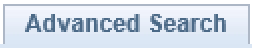
Step	Action
3.	For this example, search for all job openings in a **Draft** status. Click the button to the right of the **Status** field. ⌄
4.	Select the appropriate status. For this example, select the **Draft** list item.  Draft
5.	Click the **Search** button.  Search
6.	The **Search Results** section displays job openings that match your search criteria and summary information about each job opening. In this example, seven job openings appear in the list. Click the job opening title to open the **Job Opening** page.
7.	Expand the **Search Criteria** to display the criteria used in the search. You can clear the fields to start a new search or update the criteria for a new search. Click the **Expand Search Criteria** button. ▶
8.	In this example, search for all open standard requisition job openings.
9.	Click the button to the right of the **Status** field. ⌄
10.	Select the appropriate status. For this example, select the **Open** list item.  Open
11.	Click the button to the right of the **Job Opening Type** field. ⌄
12.	Select the appropriate type. For this example, select the **Standard Requisition** list item.  Standard Requisition
13.	Click the button to the right of the **My Association** field. ⌄

Step	Action
14.	Select the appropriate option. For this example, select the **All Jobs** list item. 
15.	Click the **Search** button. 
16.	The search found 28 open standard requisition job openings. Click the **Expand Search Criteria** button. 
17.	Clear the search criteria and perform another search. For this example, search for a specific job opening using the **Job Opening ID**.
18.	Click the **Clear** button. 
19.	Click in the **Job Opening ID** field. 
20.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994562**.
21.	Click the **Search** button. 
22.	The job opening appears in the **Search Results** section. Click the job opening title to access the **Manage Job Opening** page. For this example, click the **PROF-AY-B/E/E** link. 
23.	Use the **Manage Job Opening** page to review and update job openings, and manage the applicants. In this example, no applicants have applied to the job opening.
24.	Click the **Return** link. 
25.	You have successfully searched for job openings using a variety of search criteria. **End of Procedure.**

Search Job Postings

Use this task to search for an existing job posting.

Navigation: PeopleSoft Menu > Recruiting > Postings > **Search Job Postings**

Step	Action
1.	There are two search options for job postings: - **Quick Search** tab - **Advanced Search** tab In this example, both search options are performed. Start with a quick search for all job postings processed during the last year.
2.	Click the button to the right of the **Posted Within** field. 
3.	Select the appropriate timeframe. For this example, select the **Last Year** list item. 
4.	Click the **Search** button. 
5.	The **Search Results** section displays all job postings from the last year. In this example, 36 postings were retrieved. Use the **Job Posting Title** link to access the **Manage Posting** page. Use the **Job ID** link to access the **Manage Job Opening** page.
6.	Now perform an advanced search. Click the **Advanced Search** tab. 
7.	You can use a variety of search criteria to locate the desired job posting. In this example, search for external job postings within the last year for manager positions.
8.	Before you search, review the search tips to learn more about using the keyword search feature. Click the **Search Tips** link. 

Step	Action
9.	Review the search tips. Click the **Return** button. Return
10.	Click in the **Keywords** field. 
11.	Enter the desired information into the **Keywords** field. For this example, enter **manager**.
12.	Click the button to the right of the **Posting Type** field. 
13.	Select the posting type. For this example, click the **External Posting** list item. External Posting
14.	Use the **Posted Within** field to find job postings from a specific time period. In this example, **Last Year** appears in the field because it was used in the quick search.
15.	Click the **Search** button. Search
16.	The **Search Results** section displays four postings that match your search criteria.
17.	Select the desired posting in the search results. For this example, click the **Executive Assistant 4** link. Executive Assistant 4
18.	The job posting details appear. You can scroll through the posting to review the details. Use the **Job Opening ID** link to access the **Manage Job Opening** page. For this example, click the **994512** link. 994512
19.	Use the **Manage Job Opening** page to view a list of applicants for the job and other job opening details.
20.	Review the job opening details. When your review is complete, click the **Return** button. Return
21.	Click the scroll bar.

Step	Action
22.	Click the **Manage Job Postings** link.  Manage Job Postings
23.	Click the **Expand Search Criteria** button. 
24.	The job opening ID from the previous page appears in the **Job Opening** field.
25.	To perform a new job posting search, click the **Search Job Postings** link.  Search Job Postings
26.	You have successfully searched for job postings using the **Quick Search** and **Advanced Search** options. **End of Procedure.**

Create Job Opening Without Job Profile

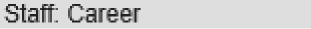
Use this task to create a new job opening for an approved position that does not have an associated job profile.

Navigation: PeopleSoft Menu > Recruiting > **Create Job Opening**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	A new job opening is created when an approved open position must be filled. You can create the job opening using a job profile, which automatically populates most of the fields in the job opening record. If a job profile is not used, you must manually enter each field. In this simulation, a job profile is not used.
2.	Use the **Primary Job Opening Information** page to capture identifying information about the job opening.
3.	The **Job Opening Type** accommodates standard requisitions for a specific job opening that you want to fill. It also accommodates a continuous job opening, used for a placeholder job opening that represents a job that UC is always hiring. The default is **Standard Requisition** but can be changed. For this example, accept the default.
4.	The **Business Unit** is a required field and defaults for you. It can be updated if needed. For this example, accept the default.

Step	Action
5.	Enter or look up the **Position Number**. In this example, you will enter the number. Click in the **Position Number** field. 
6.	Enter the desired information into the **Position Number** field. For this example, enter **40004351**.
7.	Press **[Tab]** to populate the rest of the fields in the **Job Details** section based on the position number.
8.	The **Job Code**, **Recruiting Location** and **Job Posting Title** appear. Update the **Job Posting Title** if needed. If the position has an associated job profile, it defaults from the position. You can also look up a profile to use for the job opening. In this example, a profile is not available for use so leave the field blank.
9.	Click the **Continue** button. 
10.	Use the **Job Opening** page to enter information about the job opening. Most of the details in the **Opening Information** section on this page are based on the primary job opening information that you entered. The header section contains key identifying information for the job opening. The **Job Opening ID** is **NEW** until the job opening is saved, at which time the system assigns a numerical ID to the job opening.
11.	The tabs on the job opening are configurable. The tab names at your Location may be different than those shown in this example.
12.	A recruitment template in UCPath directs the system on the number of pages and sections to include in the job opening. Each location creates and uses Business Unit-specific templates. For example, **Template ID 2035** contains four pages represented as tabs.
13.	Although this page contains four tabs that require data entry, for now you will complete only the **General Information** tab. You save the job opening with a **Draft** status so that you can return to the job opening later to continue with the data entry.
14.	A single job opening can be used to hire more than one job, for example, if hiring for a job series. When hiring for more than one job code, update the **Target Openings** with the number of jobs to be hired. Leave the **Available Openings** set to 1 and as the jobs are filled, the system automatically increments this field. For this example, the job opening is for a single position and job.

Step	Action
15.	Click the button right of the **Employee Classification** field. ⌄
16.	Select the appropriate employee classification for this opening. For this example, select the **Staff: Career** list item.  Staff: Career
17.	The **Status Code** defaults to **005 Draft**. The status changes to **Open** after approval. Press **[Page Down]**.
18.	Enter or look up a **Desired Start Date**. Click the **Choose a date** button. 📅
19.	For this example, click the **25** date link.  25
20.	You can associate a referral program to a job opening. Referral programs typically pay awards to employees who refer successful applicants. This is Location specific. For this example, leave this field blank.
21.	The **Location** information defaults from the position number and identifies your physical offices. Additional locations can be added to the opening if needed. If multiple locations are listed, one location must be marked as primary.
22.	The **Recruiting Location** section classifies your job openings geographically. You can match openings to applicants who express a geographical preference. The **Recruiting Area** defaults and additional areas can be added if needed. If multiple areas are listed, one area must be marked as primary.
23.	Click the scroll bar.
24.	The position information defaults from the **Primary Job Opening** page. If multiple positions are to be included in the job opening, add the additional positions. One of the positions must be marked as the primary position. The multiple positions must have the same job code, department ID and standard hours / FTE as the primary position. An error displays if those three attributes are not the same on all of the positions.
25.	Enter the **Employee ID** being replaced by this opening, if known. Add multiple employees if needed. For this example, leave the field blank.

Step	Action
26.	The **Profile Combination** section does not apply to the job opening because a profile is not being used.
27.	The **Staffing Information** section includes details about the job's schedules and shifts.
28.	Click the scroll bar.
29.	If the job code has salary information associated with it, the salary information defaults. If not, you can manually enter the salary details.
30.	The **Work Experience & Education** section is used to enter the amount of experience required for applicants with different levels of education. Multiple rows of work experience can be added.
31.	Click the button to the right of the **Highest Education Level** field. 
32.	Select the appropriate education level. For this example, select the **C-HS Graduate or Equivalent** list item.
33.	Click the **Years of Work Experience** field. 
34.	Enter the desired information into the **Years of Work Experience** field. For this example, enter **1**.
35.	Click the button to the right of the **Highest Education Level** field. 
36.	For this example, select the **G-Bachelor's Level Degree** list item.
37.	Click in the **Years of Work Experience** field. 
38.	Enter the desired information into the **Years of Work Experience** field. For this example, enter **1**.
39.	If the job opening is for multiple jobs (a job series), use the **Add Job Code** button and enter the job details for the additional job. You can scroll through the multiple job rows by using the **Next** and **Back** arrows in the **Additional Job Specifications** section heading.

Step	Action
40.	The **Save and Submit** button assumes that you are done with the job opening data entry and it is ready to be submitted for approval. The **Save as Draft** button allows you to access the job opening at a later time to complete the data entry. After all entry is complete, you can then **Save and Submit**. In this example, save the job opening as a draft so that it can be completed at a later time. Click the **Save as Draft** button. 
41.	Click the scroll bar.
42.	The job opening is saved in a **Draft** status and a **Job Opening ID** is assigned. You can use this ID to locate the job opening in the system when you are ready to continue with the data entry.
43.	You have created a job opening and entered general information for the job opening. The job opening is saved with a draft status and can be accessed later to complete the qualifications, screening, hiring team and job posting details. **End of Procedure.**

Create Job Opening - Add Qualifications

Use this task to add job qualifications to a saved job opening. In this example, a job profile was not used so qualifications must be manually added to a saved job opening.

Navigation: PeopleSoft Menu > Recruiting > **Search Job Opening**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	In this example the job opening was started and general information was added. The job opening was saved in a **Draft** status. You will manually add the job qualifications.
2.	You can search for the job opening using a variety of criteria. In this example you will use the ID. Click in the **Job Opening ID** field. 
3.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994569**.

Step	Action
4.	The **Status** field defaults to **Open**. Click the button right of the **Status** field. ⌄
5.	Select the appropriate status. For this example, select the **Draft** list item. 
6.	Click the **Search** button. 
7.	The **Search Results** display the job opening. For this example, click the **ADMIN SUPV 2** link. 
8.	The tabs represent the main categories of data that must be entered. In this example you need to update the **Qualifications** tab. The number of tabs, their names, and the sections that appear on each page depend on the recruiting template that was selected for the job opening.
9.	The **Job Opening** page displays the job general information details. You can update the job details if needed. In this example, no updates are needed. Click the **Qualifications** tab. 
10.	The recruiting template used for the job opening defines the qualification sections that must be entered. If a qualification does not apply to the job opening, no entries are required.
11.	Click the **Add Degrees** button. 
12.	Degrees are effective-dated. The effective date defaults to the current date and can be updated if needed. For this example, accept the defaulted date.
13.	Click the **Look up Degree** button. 🔍

Step	Action
14.	Select the appropriate degree. For this example, click the **BBA** link. BBA
15.	The remaining fields are optional. For this example, no additional entry is needed. Use **Save** to save the information and return to the **Qualifications** tab. Use **Save and Add Another** to enter another required degree. Use **Cancel** to return you to the **Qualifications** tab without saving the degree information.
16.	Click the **Save** button. Save
17.	The degree is added with **Profile ID 0**. The zero indicates that the information was not provided from a profile and was instead entered manually.
18.	Click the **Add Honors and Awards** button. Add Honors and Awards
19.	Honors and awards have an issue date that defaults to the current date and can be updated if needed. For this example, accept the default date.
20.	Click the **Look up Honor and Award** button. 🔍
21.	The list of honors and awards appears. You can select an item from the list and add new rows if multiple honors and awards are required. For this example, no honors or awards are needed. Click the **Cancel** button. Cancel
22.	Click the **Cancel** button. Cancel
23.	Click the **Add Language Skills** button. Add Language Skills
24.	Language skills are effective-dated. The effective date defaults to the current date and can be updated if needed. Accept the default date.

Step	Action
25.	For this example, you will add two languages. Click the **Look up Language** button. 🔍
26.	Select the appropriate language. Click the **ENG** link. ENG
27.	Click the **Save and Add Another** button. Save and Add Another
28.	Click the **Look up Language** button. 🔍
29.	Select the appropriate language. Click the **ESP** link. ESP
30.	Click the **Save** button. Save
31.	Click the scroll bar.
32.	You can continue to enter **Licenses and Certifications**, **Memberships** and **Tests or Examinations** following the same process, if required for the job opening. In this example, these items are not required for the open position.
33.	You can screen applicants based on their responses to questionnaires. Screening questions, either from a job profile or entered manually, are included in the application form that applicants complete when they apply to a job opening using the **Candidate Gateway**.
34.	You can add screening questions one at a time or questions can be loaded from a question set available for your Location. A question set typically contains a group of questions that can be added at once.
35.	Click the **Load from Question Set** button. Load from Question Set
36.	Select the appropriate question set. For this example, click the **1003 Select** check box. ☐

Step	Action
37.	Click the **OK** button. 
38.	The screening questions from the question set appear. You can adjust the question order, delete questions that do not apply and view answers. You can also add evaluations for open ended questions. You can add new questions if needed.
39.	Now add an individual question. Click the **Add Screening Question** button. 
40.	Click the **Look up Question ID** button. 🔍
41.	Select the appropriate question. For this example, click the **IRMED ADMINCLERICAL** link. 
42.	Click in the **Question Order** field. 
43.	Enter the desired information into the **Question Order** field. For this example, enter **120**.
44.	Click the **View Answers** link. 
45.	The **Answers to Screening Questions** page displays the possible answers and the default points associated to each answer. During the screening, applicants are awarded points for the answers they select. Default points may be assigned to each answer during the question setup. Points can be associated with both correct and incorrect answers.
46.	For multiple choice questions, a correct answer must be marked. This can include one or more answers. The number of correct answers determines how many answers applicants can select for the question when completing the questionnaire in the **Candidate Gateway**.
47.	Review the information and then click the **Return** button. 

Step	Action
48.	Open-ended questions can also be added. An open ended question, regardless of the specified question order, always appears at the end of the questionnaire following the multiple choice questions. Open-ended questions do not have predefined answers with corresponding points so applicants must receive points from evaluators. You can assign the evaluators by clicking the **Enter Evaluators** link. Evaluators receive an email notification when applicants for this job opening provide answers to evaluate. Note that if evaluators do not provide scores, the applicant receives zero points for the question.
49.	The job opening qualifications are complete. The **Save and Submit** button assumes that you are done with the job opening data entry and it is ready to be submitted for approval. Use the **Save as Draft** button to access the job opening at a later time to complete the data entry. After all entry is complete, you can then **Save and Submit**. Use the **Delete** button to delete the job opening. In this example, save the job opening as a draft so that it can be completed at a later time. Click the **Save as Draft** button. 
50.	You have successfully searched for a draft job opening and added qualifications to the job opening. **End of Procedure.**

Create Job Opening - Add Screening Criteria

Use this task to add screening levels to a saved job opening.

The screening levels within a job opening are used to evaluate applicants by comparing qualifications to job opening requirements. Each screening level has default scoring rules, pass and fail rules, and dispositioning rules that you can override for a specific job opening.

Navigation: PeopleSoft Menu > Recruiting > **Search Job Openings**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	In this example the job opening was started and general information was added. The job opening was saved in a **Draft** status. You will manually add screening levels for the job opening.
2.	You can search for the job opening using a variety of criteria. In this example you will use the ID. Click in the **Job Opening ID** field. 
3.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994569**.
4.	The **Status** field defaults to **Open**. Click the button right of the **Status** field. 
5.	Select the appropriate status. For this example, select the **Draft** list item.  Draft
6.	Click the **Search** button.  Search
7.	The **Search Results** display the job opening. For this example, click the **ADMIN SUPV 2** link.  ADMIN SUPV 2
8.	The tabs represent the main categories of data that must be entered. In this example you need to update the **Screening** tab. The number of tabs, their names, and the sections that appear on each page depend on the recruiting template that was selected for the job opening.
9.	The **Job Opening** page displays the job general information details. You can updated the job details if needed. In this example, no updates are needed. Click the **Screening** tab.  Screening
10.	Refer to the topic *Create a New Job Opening - Add Qualifications* for details about adding screening questions. For this example, no changes are needed.

Step	Action
11.	The recruitment template associated with the job opening provides a default set of screening levels, but you can modify the list of screening levels as needed. In this example, there are two screening levels assigned to the job opening: a preliminary screening and a basic screening. Each level includes screening criteria. The **Sequence** comes from the template. If you add other levels, you must define a sequence number to indicate the order in which you want them to appear on the page. Use the **Delete** button to delete screening levels that do not apply to the job opening.
12.	Click the **Add Screening Option** button. 
13.	Use the **Add Screening Levels** page to add additional screening levels to the job opening. Select the screening option to add and then click the **OK** button. For this example, no additional screening levels are needed for the job opening.
14.	Click the **Cancel** button. 
15.	The **Must Pass Previous Levels** check box is selected if applicants who fail a screening level are excluded from any subsequent screening levels. The default setting for this field is defined in the recruitment template. For this example, leave the check box deselected.
16.	Use the **Screening Levels** link to define the specific criteria for a screening level. For this example, click the **SFMED Preliminary** link. 
17.	In this example, the current screening level is the preliminary level. It begins when an applicant starts the application process in the **Candidate Gateway**. Define dispositions to apply to applicants based on whether they pass or fail the screening level.
18.	Use the **Explain Text ID**, **Pass Text ID** and **Fail Text ID** fields to add messages that display in the **Candidate Gateway** to guide the applicant through the screening process. These messages are mandatory for preliminary and pre-screening levels. The fields do not appear for other standard screening levels.

Step	Action
19.	Click the **View Explanatory Message** link. 
20.	View the text message and then click the **Return** button. 
21.	You can also view the pass and fail messages.
22.	Use the **Scoring Definition** section to configure scoring for the screening level. The recruiting template may default values into the fields in this section. Applicants receive points for meeting specific criteria during the screening. The point total is the applicant's raw score for the level. You have two options: 1) Use the raw points as the final score for the screening level, or 2) Assign a fixed number of points based on whether the applicant passed or failed.
23.	Use the **Percent Needed to Pass** field to indicate what percentage of the available raw points an applicant must achieve in order to pass the screening level.
24.	To use the applicant's raw point score for the screening level, select the **Use Raw Points** check box. You can also identify the **Maximum Points to Assign** if using raw points. For this example, leave the check box deselected.
25.	Use the **Points Assigned for Pass** and **Points Assigned for Fail** fields when raw points are not used. You can assign fixed scores based on whether the applicant passes or fails the screening level.
26.	The **Screening Requirements** section displays all available screening criteria so that you can select which to use and assign each a point value. The screening questions that appear were added when completing the **Qualifications** tab for the job opening.
27.	Click the **Edit Details** link. 
28.	Use the **Define Screening Points** page to assign the point values to each correct and incorrect answer. You can adjust the points values if needed. For this example, no changes are needed.
29.	Click the **Cancel** button. 

Step	Action
30.	Select the **Use in Screening** check box for each question to include in the preliminary screening. For this example, click the **Use in Screening** check box for **MED Overtime**. ☐
31.	Click the scroll bar.
32.	The **Points** column displays the maximum number of points that the applicant can earn for the question.
33.	Use the **Required** check box to indicate the questions that the applicant must answer correctly. For this example, select the **Required** check box for **MED Overtime**. ☐
34.	Click the scroll bar.
35.	Click the **OK** button. 
36.	You can configure other screening levels following the same process.
37.	The job opening screening levels are complete. The **Save and Submit** button assumes that you are done with the job opening data entry and it is ready to be submitted for approval. Use the **Save as Draft** button to access the job opening at a later time to complete the data entry. When all entry is complete, you can then **Save and Submit**. Use the **Delete** button to delete the job opening. In this example, the job opening will be saved as a draft so that it can be completed at a later time. Click the **Save as Draft** button. 
38.	You have successfully searched for a draft job opening and configured the screening levels for the job opening. **End of Procedure.**

Create Job Opening - Add Job Posting Details

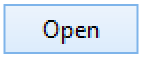
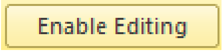
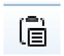
Use this task to add job posting details to a job opening.

Navigation: PeopleSoft Menu > Recruiting > **Search Job Openings**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	In this example the job opening was started and general information was added. The job opening was saved in a **Draft** status. You will manually add job posting details.
2.	Click in the **Job Opening ID** field.
3.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994570**.
4.	Click the button to the right of the **Position Number** field. 
5.	Select the job opening status. For this example, click the **Draft** list item.  Draft
6.	Click the **Search** button.  Search
7.	The **Search Results** display the job opening. Click the **DEPARTMENT VICE CHAIR** link.  DEPARTMENT VICE CHAIR
8.	The **Job Opening** page displays the job opening details. The tabs represent the main categories of data that must be entered. The number of tabs, their names, and the sections that appear on each page depend on the recruiting template that was selected for the job opening. In this example you must update the **Job Posting** tab, which is currently selected.
9.	Use the **Job Posting** fields to create job descriptions to post to internal and external applicants. Click the **Add Job Posting** button.  Add Job Posting
10.	Use the **Posting Information** page to create a job description for the job posting. The **Posting Title** defaults from the information that was entered on the **Primary Job Opening Information** page.

Step	Action
11.	Use the **Job Descriptions** fields to define posting sections that are used to create the complete job posting.
12.	Use the **Description Type** field to select predefined posting sections for the posting. Click the button to the right of the **Description Type** field. 
13.	Select the posting section name. For this example, select the **Qualifications** list item.  Qualifications
14.	Use the **Visibility** field to define whether the section of the job description is for internal, external or both types of postings. Click the button to the right of the **Visibility** field. 
15.	Select the appropriate visibility setting. For this example, select the **Internal and External** list item.  Internal and External
16.	Use the **Template** field to select predefined default text for this section of the job description.
17.	Formatting tools are available to enhance the presentation of the posting information.
18.	Click in the **Description** field.
19.	Enter text for the selected section of the job description. If a template is selected, the data defaults into the text box and you can modify it as needed. In this example, the text has been entered and formatted for you.
20.	Click the **Add Posting Description** button to add a new section of the job posting. Follow the same process to enter the job posting description. Click the **Delete Posting Description** button to remove a section. For this example, click the **Add Posting Description** button.  Add Posting Description
21.	A new description section appears. Click the button to the right of the **Description Type** field. 

Step	Action
22.	Select the posting section name. For this example, click the **Job Details** list item. Job Details
23.	UCPath opens the associated job details document for the position. Click the **Open** button. Open
24.	Click the **Enable Editing** button. Enable Editing
25.	Select the text from the job description so that you can copy it to the job posting. For this example, the text will be selected for you.
26.	Click the **Copy** button. 
27.	Click the **Close** button. X
28.	Click the **Create Job Opening** browser tab. Create Job Opening
29.	In the job posted section, click the **Paste** button. 
30.	You may receive a message stating that the clean up of text was not possible. You can clean up the text as needed, using the formatting toolbars in UCPath. Click the **OK** button. OK
31.	Click the button to the right of the **Visible** field. 
32.	Select the appropriate visibility setting. For this example, select the **Internal and External** list item. Internal and External

Step	Action
33.	You can scroll through the description text. Click the scroll bar.
34.	Use the **Job Posting Destinations** section to identify where the you want to post the job opening. The destinations may default from the recruiting template used for the job opening. You can add other destinations if needed. The most common destination is the internet.
35.	Use the **Relative Open Date** field to enter the number of days after the job opening reaches **Open** status that the job opening should be posted to the defined destination. For this example, accept the default.
36.	The system calculated the posting date and entered it in the **Post Date** field. The date is view-only and cannot be edited. Clearing the **Relative Open Date** field makes the **Post Date** field editable.
37.	Click the scroll bar.
38.	Click in the **Posting Duration (Days)** field. 
39.	Enter the desired information into the **Posting Duration (Days)** field. For this example, enter **30**.
40.	Press **[Tab]**.
41.	The system calculates the date that the job posting will expire and enters that date in the **Remove Date** field. This field is view-only. Clearing the **Posting Duration (Days)** field makes the **Remove Date** field editable.
42.	Click in the **Posting Duration (Days)** field on the second row. 
43.	Enter the desired information into the **Posting Duration (Days)** field. For this example, enter **30**.
44.	Press **[Tab]**.
45.	Click the scroll bar.
46.	Review the job description after you add all of the required sections. Click the **Preview** button. 
47.	The default view displays the sections that are applicable to external postings. To see the internal posting layout, click the **Switch to Internal View** link. For this example, stay on the external view.

Step	Action
48.	Click the **Return to Previous Page** link. 
49.	Click the scroll bar.
50.	Click the **OK** button to return to the **Job Opening** page. 
51.	The postings now appear in the **Job Postings** section. Because there is only one posting in this example, it is automatically marked as the primary posting.
52.	The job opening is complete. The **Save and Submit** button assumes that you are done with the job opening data entry and it is ready to be submitted for approval. Use the **Save as Draft** button to access the job opening at a later time to complete the data entry. When all entry is complete, you can then **Save and Submit**. Use the **Delete** button to delete the job opening. In this example, the job opening will be saved as a draft so that it can be completed at a later time. Click the **Save as Draft** button. 
53.	You have successfully added job posting details to a job opening. **End of Procedure.**

Create Job Opening - Add Hiring Team

Use this task to add a hiring team to a saved job opening.

The hiring team can include roles for Recruiters, Hiring Managers, Interviewers, Interested Parties and Screening team.

Navigation: PeopleSoft Menu > Recruiting > **Search Job Openings**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	In this example the job opening was started and general information was added. The job opening was saved in a **Draft** status. You will manually add the hiring team to the job opening.

Step	Action
2.	You can search for the job opening using a variety of criteria. In this example you will use the ID. Click in the **Job Opening ID** field. 
3.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994569**.
4.	The **Status** field defaults to **Open**. Click the button right of the **Status** field. 
5.	Select the appropriate status. For this example, select the **Draft** list item.  Draft
6.	Click the **Search** button.  Search
7.	The **Search Results** display the job opening. For this example, click the **ADMIN SUPV 2** link.  ADMIN SUPV 2
8.	The tabs represent the main categories of data that must be entered. In this example you need to update the **Hiring Team** tab. The number of tabs, their names and the sections that appear on each page depend on the recruiting template that was selected for the job opening.
9.	The **Job Opening** page displays the job general information details. You can updated the job details if needed. In this example, no updates are needed. Click the **Hiring Team** tab.  Hiring Team
10.	You can add individuals to the hiring team or add a team for each role. In this example, you will add individuals. Locations may use the **Department** table, **UC Recruiting Info** tab to set up hiring team roles. If roles are added to the **Department** table, they default in the **Assignments** section on this page. You can add others to the team or delete members that do not apply to the job opening. A primary recruiter can be assigned on a custom role table and will default here if the assignment is made.

Step	Action
11.	For this example, a primary recruiter was not added to the custom role table so the primary recruiter must be added. Click the **Add Recruiter** button. 
12.	A new recruiter row appears. You can enter the name of the recruiter by typing it into the **Name** field (first name last name). For this example, click the **Look up Recruiter ID** button. 🔍
13.	Select the appropriate recruiter. For this example, click the **17431456** link. 
14.	You can add other individuals to the recruiters role if needed. Only one recruiter can be assigned as the **Primary**. The system selects the **Primary** check box for the first recruiter added. If you add other recruiters, you can change which one is primary. The same idea applies to the hiring manager role as well.
15.	The hiring manager defaults from the position data. You can delete the entry or add a different hiring manager if needed by using the **Add Hiring Manager** or **Add Hiring Manager Team** buttons.
16.	If approvals are active, the primary hiring manager's supervisor is the first approver for the job opening.
17.	Interviewers added to the job opening will default as interviewers when interviews are scheduled for the job opening. Changes can be made to the interviewers on the interview schedule. Click the **Add Interviewer** button. 
18.	Click the **Look up Interviewer ID** button. 🔍
19.	Select the appropriate interviewer. For this example, click the **17366076** link. 

Step	Action
20.	For this example, add a second interviewer. Click the **Add Interviewer** button. 
21.	Click the **Look up Interviewer ID** button. 🔍
22.	Search for the interviewer by last name. Click in the **Last Name** field.
23.	Enter the desired information into the **Last Name** field. For this example, enter **shoufer**.
24.	Click the **Look Up** button. 
25.	Click the **17370242** link. 
26.	You can add additional interviewers following the same process.
27.	Add the interested parties. Click the **Add Interested Party** button. 
28.	Click the **Look up Empl ID** button. 🔍
29.	Select the appropriate person. For this example, click the **17365947** link. 
30.	You can add other interested parties by following the same process.
31.	Click the **Add Screening Team Member** button. 
32.	Click the **Look up Empl ID** button. 🔍
33.	Select the appropriate screener. For this example, click the **17366331** link. 

Step	Action
34.	You can add other screeners following the same process as needed.
35.	Click the scroll bar.
36.	The job opening hiring team is complete. The **Save and Submit** button assumes that you are done with the job opening data entry and it is ready to be submitted for approval. Use the **Save as Draft** button to access the job opening at a later time to complete the data entry. When all entry is complete, you can then **Save and Submit**. Use the **Delete** button to delete the job opening. In this example, the job opening will be saved as a draft so that it can be completed at a later time. Click the **Save as Draft** button. 
37.	You have successfully searched for a draft job opening and added the hiring team to the job opening. **End of Procedure.**

Create Job Opening Using Job Profile

Use this task to create a new job opening with a job profile.

Locations can elect to use job profiles associated to positions. A job profile automatically populates several fields on the job opening, reducing the need for manual input.

Navigation: PeopleSoft Menu > Recruiting > **Create Job Opening**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	A new job opening is created when an approved open position must be filled. You can create the job opening using a job profile, which automatically populates most of the fields in the job opening record. If a job profile is not used, you must manually enter each field. In this simulation, a job profile is used.
2.	Use the **Primary Job Opening Information** page to capture identifying information about the job opening.

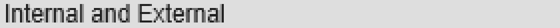
Step	Action
3.	The **Job Opening Type** accommodates standard requisitions for a specific job opening that you want to fill. It also accommodates a continuous job opening, used for a placeholder job opening that represents a job that UC is always hiring. The default is **Standard Requisition** but can be changed. For this example, accept the default.
4.	The **Business Unit** is a required field and defaults for you. It can be updated if needed. For this example, accept the default.
5.	Enter or look up the **Position Number**. In this example, you will enter the number. Click in the **Position Number** field.
6.	Enter the desired information into the **Position Number** field. For this example, enter **40004342**.
7.	Press **[Tab]** to populate the rest of the fields in the **Job Details** section based on the position number.
8.	The **Job Code**, **Recruiting Location** and **Job Posting Title** appear. Update the **Job Posting Title** if needed. If the position has an associated job profile, it defaults from the position. You can also look up a profile to use for the job opening. In this example, a profile is available for use.
9.	The **Profile ID** defaults based on the position number. You can add additional job profiles if needed. Profiles are set up as part of Location system administration and require a specific security role assignment. Profile details are catalogued with content items that are assigned to the profile.
10.	To view the profile details, click the **View Profile** link.  View Profile
11.	The **Profile** page displays the profile details. The **Essential Functions** are provided for the position. Each function is assigned a **Catalog Item** and **ID**. For this example, click the **Mgmt_ Identifies and sets unit performance...** link.
12.	The **View Essential Functions** page displays the item details. You can view the details, which were created as part of the profile setup. Click the **Mgmt_ Identifies and sets unit performance...** link.

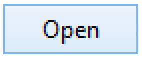
Step	Action
13.	Review the content catalog attributes for the **Essential Functions**. Click the **Close** button. Close
14.	Click the **Cancel** button. Cancel
15.	You can continue to drill down through the profile by clicking the essential function links.
16.	Click the scroll bar.
17.	You can review the **Core Organizational Functions** and **Responsibilities** associated with the profile.
18.	Click the **Expand Profile Identities** button. ▶
19.	The **Profile Identifies** section displays the other available position profiles. Click the scroll bar.
20.	Click the **Expand Profile Associations** button. ▶
21.	The **Profile Associations** section displays available association options. Click the scroll bar.
22.	Click the **Return to Previous Page** link. Return to Previous Page
23.	The **Primary Job Opening Information** page appears. Continue creating the job opening. Click the **Continue** button. Continue
24.	Use the **Combined Profile Information** page to view data from the profiles being used for the job opening and to designate a primary profile for the job. If multiple profiles are used, one of the profiles must be marked as primary. You can also select the **Update Primary Profile** check box if using a non-person profile. If selected, any changes that you make to profile data in the job opening will be made to the primary profile as well.
25.	The recruitment template used for the job opening defines the sections shown on this page, like **Degrees** and **Languages**. The sections represent the data that should be carried over from the profile to the job opening.

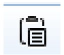
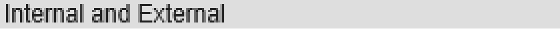
Step	Action
26.	Click the **Continue** button. Continue
27.	Use the **Job Opening** page to enter information about the job opening. Most of the details in the **Opening Information** section on this page are based on the primary job opening information that you entered. The header section contains key identifying information for the job opening. The **Job Opening ID** is **NEW** until the job opening is saved, at which time the system assigns a numerical ID to the job opening.
28.	The tabs on the job opening are configurable. The tab names at your location may be different than those shown in this example.
29.	A recruitment template in UCPath directs the system on the number of pages and sections to include in the job opening. Each location creates and uses Business Unit-specific templates. For example, **Template ID 2035** contains four pages represented as tabs.
30.	A single job opening can be used to hire more than one job, for example, if hiring for a job series. When hiring for more than one job code, update the **Target Openings** with the number of jobs to be hired. Leave the **Available Openings** set to 1 and as the jobs are filled, the system automatically increments this field. For this example, the job opening is for a single position and job.
31.	Click the button to the right of the **Employee Classification** field. ⌄
32.	Select the appropriate employee classification for this opening. For this example, select the **Staff: Career** list item. Staff: Career
33.	Click the scroll bar.
34.	The **Status Code** defaults to **005 Draft**. The status changes to **Open** after approval. Press **[Page Down]**.
35.	Enter or look up a **Desired Start Date**. Click in the **Desired Start Date** field.
36.	Enter the desired information into the **Desired Start Date** field. For this example, enter **07/23/2018**.

Step	Action
37.	You can associate a referral program to a job opening. Referral programs typically pay awards to employees who refer successful applicants. This is Location specific. Click the button to the right of the **Referral Program ID** field. 
38.	Select the referral program. For this example, select the **Program 2 - $500 Bonus** list item.  Program 2 - $500 Bonus
39.	The **Location** information defaults from the position number and identifies your physical offices. Additional locations can be added to the opening if needed. If multiple locations are listed, one location must be marked as primary.
40.	The **Recruiting Location** section classifies your job openings geographically. You can match openings to applicants who express a geographical preference. The **Recruiting Area** defaults and additional areas can be added if needed. If multiple areas are listed, one area must be marked as primary.
41.	Click the scroll bar.
42.	The position information defaults from the **Primary Job Opening** page. If multiple positions are to be included in the job opening, add the additional positions. One of the positions must be marked as the primary position. The multiple positions must have the same job code, department ID and standard hours / FTE as the primary position. An error displays if those three attributes are not the same on all of the positions.
43.	Enter the **Employee ID** being replaced by this opening, if known. Add multiple employees if needed. For this example, leave the field blank.
44.	The **Profile Combination** displays the profile ID for the non-profile used in the job opening. Other profiles can be added if needed.
45.	Click the scroll bar.
46.	The **Salary Information** defaults from the position. For this example, the plan is **BYA - By-Agreement Salary Plan**.
47.	Click the **Top of Page** link.  Top of Page
48.	Click the **Qualifications** tab.  Qualifications

Step	Action
49.	The recruiting template used for the job opening defines the qualification sections that must be entered. The job profile used for the job opening includes the required job qualifications.
50.	Click the scroll bar.
51.	You can screen applicants based on their responses to questionnaires. Screening questions, either from a job profile or entered manually, are included in the application form that applicants complete when they apply to a job opening using the **Candidate Gateway**. The job profile used for this job opening does not include any screening questions, but questions or a question set can be added manually. A question set typically contains a group of questions that can be added at once.
52.	Click the **Load from Question Set** button. 
53.	Select the desired question set. For this example, click the **1026 Select** check box. ☐
54.	Click the **OK** button. 
55.	The screening questions from the question set appear. You can adjust the question order, delete questions that do not apply and view answers. You can also add evaluations for open ended questions. You can add new questions if needed.
56.	Click the scroll bar.
57.	Click the **Top of Page** link. 
58.	Click the **Job Posting** tab. 
59.	In this example, the **Applicant Screening** section appears on the **Job Posting** tab. This is based on the recruitment template used for the job opening. In this example, there are two screening levels defined. For details on setting up screen levels, review the *Create a Job Opening - Add Screening Criteria* topic. For this example, the screening levels that are defined in the recruitment template and populated in this job opening will be used as-is.

Step	Action
60.	Use the **Job Posting** fields to create job descriptions to post to internal and external applicants. Click the **Add Job Posting** button. 
61.	Use the **Posting Information** page to create a job description for the job posting. The **Posting Title** populates from the information that was entered on the **Primary Job Opening Information** page.
62.	The **Job Description** fields define posting sections that are used to create the complete job posting.
63.	Use the **Description Type** field to select predefined posting sections for the posting. Click the button to the right of the **Description Type** field. 
64.	Select a description type. For this example, select the **Qualifications** list item. 
65.	Use the **Visibility** field to control sections of the job description for internal, external or both types of postings. Click the button to the right of the **Visibility** field. 
66.	Select the appropriate option. For this example, select the **Internal and External** list item. 
67.	Use the **Description** field to select predefined default text for this section of the job description. Click the button to the right of the **Description** field. 
68.	Formatting tools are available to enhance the presentation of the posting information.
69.	Click in the **Description** field.

Step	Action
70.	Enter text for the selected section of the job description. In this example, generic text has been entered and formatted for you. **Note:** If a template was selected, the text defaults into the text box and you can format it if needed.
71.	Use the **Add Posting Description** button to add a new group box where you can define another section of the job posting. Repeat the steps in completing the job posting description. Use the **Delete Posting Description** button to remove the selected section.
72.	For this example, click the **Add Posting Description** button. 
73.	A new description section appears. Click the button to the right of the **Description Type** field. 
74.	Select the next description type to add to the posting. For this example, click the **Job Details** list item. 
75.	The system opens the associated job details document for the position. Click the **Open** button. 
76.	Click the **Enable Editing** button. 
77.	Select the text from the job description so that it can be added to the job posting. For this example, the text has been selected for you.
78.	Click the **Copy** button. 
79.	Click the **Close** button. 
80.	Click the **Create Job Opening** browser tab to return to the job opening. 

Step	Action
81.	Click the **Paste** button. 
82.	You may receive a message stating that the clean up of text was not possible. You can clean up the text as needed, using the provided formatting options. Click the **OK** button. 
83.	Click the button to the right of the **Visible** field. 
84.	Select the appropriate option for this section of the posting. For this example, select the **Internal and External** list item. 
85.	You can scroll through the description text. Click the scroll bar.
86.	Use the **Job Posting Destinations** section to identify where you will post the job opening. The **Destinations** may default from the recruiting template used for the job opening. You can add other destinations if needed. The most popular destination is the internet.
87.	Use the **Relative Open Date** field to specify how many days after the job opening reaches the **Open** status that the job opening should be posted to the defined destination. In this example, the job opening will be posted on the day it is approved, and therefore marked as **Open**. For this example, accept the default.
88.	The system calculates the posting date and enters it in the **Post Date** field. The date cannot be edited. If you need to edit the **Post Date**, clear the **Relative Open Date** field.
89.	Click the scroll bar.
90.	Click in the **Posting Duration (Days)** field. 
91.	Enter the desired information into the **Posting Duration (Days)** field. For this example, enter **30**.
92.	Press **[Tab]**.

Step	Action
93.	The system calculates the date that the job posting will expire and enters that date in the **Remove Date** field. This field cannot be edited. If you need to edit the **Remove Date** field, clear the **Posting Duration (Days)** field.
94.	Click in the **Posting Duration (Days)** field. 
95.	Enter the desired information into the **Posting Duration (Days)** field. For this example, enter **30**.
96.	Press **[Tab]**.
97.	Click the scroll bar.
98.	Click the **Preview** button. 
99.	Review the job description after creating all of the sections. By default, the external posting view appears. To view internal postings, click the **Switch to Internal View** link.
100.	Click the **Return to Previous Page** link. 
101.	Click the scroll bar.
102.	Click the **OK** button to return to the main **Job Opening** page. 
103.	The postings now appear in the **Job Posting** section. If there is only one posting, it is automatically marked as the primary posting title.
104.	Click the **Hiring Team** tab. 
105.	You can add individuals to the hiring team or add a team for each role. In this example, you will add individuals. Locations may use the **Department** table, **UC Recruiting Info** tab to set up hiring team roles. If roles are added to the **Department** table, they default in the **Assignments** group box on this page. In this example, **Recruiters** and **Interested Parties** were populated from the **Department** table. You can add others to the team or delete members that do not apply to the job opening.

Step	Action
106.	You can add other individuals to the **Recruiters** role if needed. Only one recruiter can be assigned as the **Primary**. The system selects the **Primary** check box for the first recruiter added. If you add other recruiters, you can change which one is primary. The same applies to the **Hiring Manager** as well.
107.	Click the **Add Hiring Manager** button. 
108.	A new **Hiring Manager** row appears. You can enter the name of the hiring manager by typing it into the **Name** field (first name last name). For this example, look up the hiring manager. Click the **Look up Manager ID** button. 🔍
109.	Select the appropriate employee. For this example, click the **17374691** link. 
110.	If approvals are active, the primary hiring manager's supervisor is the first approver for the job opening.
111.	Interviewers specified on the job opening default as interviewers when interviews are scheduled for the job opening. Changes can be made to the interviewers on the interview schedule. Click the **Add Interviewer** button. 
112.	Click the **Look up Interviewer ID** button. 🔍
113.	Select the appropriate interviewer. For this example, click the **17366393** link. 
114.	For this example, add a second interviewer. Click the **Add Interviewer** button. 
115.	Click the **Look up Interviewer ID** button. 🔍

Step	Action
116.	Select the appropriate interviewer. For this example, click the **17366650** link. 
117.	Click the scroll bar.
118.	Add screeners using the same steps. For this example, no screeners have been identified. The job opening hiring team is complete.
119.	The **Save and Submit** button assumes that you are done with the job opening data entry and it is ready to be submitted for approval. The **Save as Draft** button allows you to access the job opening at a later time to complete the data entry. After all entry is complete, you can then **Save and Submit**. In this example, the job opening is completed and can be submitted. Click the **Save and Submit** button. 
120.	Click the scroll bar.
121.	The job opening **Status** is updated to 006 **Pending Approval**. After approval is received, the status is updated to **Open**.
122.	The **Approvals** tab appears after the job opening is saved and submitted. Click the **Approvals** tab. 
123.	Approvers can approve the job opening from this page or from the **Pending Approvals** page. Approvers have the option to approve, deny or push back the job offer. You can view the list of approvers and add other approvers if needed. You can also add comments for approvers.
124.	Click the **Save** button. 
125.	You have successfully created a new job opening with a job profile. **End of Procedure.**

Clone Job Opening

Use this task to clone a job opening. You can clone existing job openings that have a **Canceled** or **Closed** status.

Navigation: PeopleSoft Menu > Recruiting > Search Job Openings > **Manage Job Opening**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Begin this task by searching for the job opening to be cloned. You can use a variety of criteria to find the desired job opening. In this example, you will search using the job opening ID.
2.	Click in the **Job Opening ID** field. 
3.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994572**.
4.	Click the button to the right of the **Status** field. 
5.	For this example, select the **Canceled** list item.  Canceled
6.	Click the **Search** button.  Search
7.	The job opening that you want to clone appears in the **Search Results**. Click the job opening name to display the details. For this example, click the **FAC MGT SPEC 3** link.  FAC MGT SPEC 3
8.	The **Job Opening** page displays identifying information about the job opening. Notice that the **Status** displays **Canceled** for this example.
9.	Click the **Clone** link.  Clone
10.	The **Clone Job Opening** page enables you to complete the task of cloning a job opening.
11.	The **New Posting Title** field defaults from the job opening being cloned. You can change the title if needed. For this example, do not change the title.

Step	Action
12.	The **Number of New Job Openings** field allows you to specify how many clones to create. With the use of **Position Management** at UC, the number of new job openings should always be one.
13.	Click the **Clone** button. 
14.	A message displays stating that the job opening was successfully cloned. The new job opening appears in the **Cloned Job Openings** section.
15.	Now open the cloned job opening. For this example, click the **994590** link. 
16.	The **Job Opening** page appears. View the job opening details and make any required changes for the new job opening. Notice that the job opening **Status** is **Draft**. Use the **Save as Draft** button to keep the job opening in a **Draft** status so that additional changes can be made at a later time.
17.	After making any required changes to the job opening, you must submit it for approval.
18.	Click the **Save and Submit** button. 
19.	The **Status** now displays **Pending Approval** and the **Approvals** tab is added to the page. When the job opening is approved, the **Status** updates to **Open**.
20.	You have successfully cloned a job opening. **End of Procedure.**

View Job Opening Screening Levels

Use this task to view the predefined screening levels that are associated with a job opening.

Pre Screening and **Online Screening** levels are processed while an applicant is applying online through the Candidate Gateway. Other screening levels are run manually from within the job opening.

Navigation: PeopleSoft Menu > Recruiting > **Search Job Openings**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Begin this task by searching for the job opening for which you want to review the screening levels. You can use a variety of criteria to find the job opening. In this example, use the **Job Opening ID**.
2.	Click in the **Job Opening ID** field. 
3.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994539**.
4.	Click the **Search** button. 
5.	The job opening appears in the **Search Results** section. Use the **Job Opening** link to access the **Manage Job Opening** page. For this example, click the **FAC MGT SPEC 3** link. 
6.	Use the **Manage Job Opening** page to manage the job opening and its applicants.
7.	Click the **Applicant Screening** tab. 
8.	Use the **Applicant Screening** tab to review and screen applicants that are linked to a job opening.
9.	The **Screening Levels** section displays the various screening levels that are associated with the job opening. You can modify the requirements for some of the screening levels.
10.	In this example **Pre Screening** and **Online Screening** are used to screen applicants as they apply online to the job opening. The screening name is not a hyperlink because no modifications are allowed to these levels.
11.	Click the **Preliminary** link. 
12.	Use the **Screening Criteria** page to review and modify the specified job opening screening level.
13.	Click the scroll bar.
14.	Modifications can be made to the screening criteria; however, new criteria cannot be added. To add new screening criteria, you must add additional requirements to the job opening details. The **Required** check boxes reject applicants that do not meet the criteria, even if they have enough points to pass the screening level.
15.	Click the scroll bar.

Step	Action
16.	Each row used in the screening criteria must have an associated point value. The **Total Screening Points** appear at the bottom of the page.
17.	Click the scroll bar.
18.	If modifications were made, use the **Apply** button to apply the updates and stay on the **Screening Criteria** page. Use the **OK** button to save the changes and return to the **Manage Job Opening** page.
19.	Click the **OK** button. 
20.	You return to the **Manage Job Opening** page and the **Applicant Screening** tab. Click the **Final** link. 
21.	The **Final** screening level details appear. Review the criteria and point values. Modifications can be made if needed. Click the scroll bar.
22.	Click the **OK** button. 
23.	You have successfully viewed the screening levels associated with a job opening. **End of Procedure.**

Rank Applicants in Job Opening

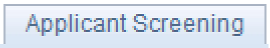
Use this task to complete the screening of applicants and to perform the ranking process.

During screening you evaluate applicants against the specific job opening qualifications. Applicants receive points for the screening criteria that they meet. Points are totaled and used to determine the applicant's overall score and ranking.

There are three primary steps in the ranking process:
1. Run Screening Levels
2. Review Results
3. Apply Results

Navigation: PeopleSoft Menu > Recruiting > **Search Job Openings**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	In this scenario the Sustainability Officer job opening has four applicants. You will run the screening process and rank the applicants. You can run each of the screening levels multiple times until you are satisfied with the results. In this example, the preliminary and final screening levels are run once.
2.	Begin this task by searching for the job opening. You can use a variety of search criteria to find the job opening. For this example, use the **Job Opening ID**.
3.	Click in the **Job Opening ID** field. 
4.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994510**.
5.	Click the **Search** button. 
6.	The job opening appears in the search results. Use the **Job Opening** link to access the **Manage Job Opening** page. For this example, click the **Sustainability Officer** link. 
7.	Use the **Manage Job Opening** page to manage activity related to a single job opening. The **Applicants** section lists the applicants for this job opening. Use the **Applicant Name** link to review detailed applicant information.
8.	Click the **Applicant Screening** tab. 
9.	Use the **Applicant Screening** tab to run screening levels for all applicants.
10.	The **Run** field lists the screening levels associated with this job opening. Click the button to the right of the **Run** field. 
11.	Select the screening level that you want to run. For this example, click the **Preliminary** list item. 
12.	Click the **Go** button to run the process. 

Step	Action
13.	Click the **Process Monitor** link to open a new browser window where you can check the status of the screening process.
14.	In order to see the results of the completed screening process, you must refresh the page. Click the **Refresh Page** button. ↻
15.	Notice that an entry now appears in the **Last Run Date**, **Submitted By** and **Results Applied** fields for the **Preliminary** screening level.
16.	After a screening levels process has been run at least once for the job opening, the **Screening Results** link appears. Click the **Screening Results** link. Screening Results
17.	Use the **Screening Results** to view the results of the screening process. You can also run additional screening levels directly from this page.
18.	The **Screening Levels** section displays the screening levels that have been processed. In this example, only the **Preliminary** level has run.
19.	The **Applicants** section displays the results for each applicant.
20.	The **Disposition** column displays the disposition that will be assigned to the applicant if you apply the screening results. This is not the same as the applicant's current disposition.
21.	The **Screening Results** column indicates whether the applicant passed or failed the screening level. In this example, three of the applicants passed the level and one applicant failed.
22.	You can click the applicant's score to review detailed screening results. For this example, click the **33%** link on the first row. 33%
23.	The **Screening Details** page displays the screening results for the applicant.
24.	At the summary level, you can see the points and score for the level, as well as the screening status. If an applicant fails a screening level, the system provides a reason in the **Status Reason** field.
25.	At the detail level, UCPath shows how many points the applicant earned for the various types of screening criteria.
26.	When your review is complete, click the **Return to Previous Page** link. Return to Previous Page

Step	Action
27.	Click the scroll bar.
28.	Use the **View Rating** button to review an applicant's points for profile-related screening criteria.
29.	Click the scroll bar.
30.	You can run additional screening levels following the same steps. You may need to refine the screening levels before running the remaining screening levels. In this example, no changes are needed before running the **Final** screening level.
31.	Click the button to the right of the **Run** field. 
32.	For this example, select the **Final** list item. 
33.	Click the **Go** button. 
34.	Click the **Refresh Page** button. 
35.	The **Final** screening level now appears in the **Screening Levels** section. You can review the applicants' score and points. If needed, you can adjust the screening levels and run the screening levels again. For this example, no changes are needed and the results can be applied.
36.	Use the **Apply Results** button to update the applicants' disposition based on the results of the screening process. Click the **Apply Results** button. 
37.	Applying results finalizes the screening process and excludes the affected applicants from any subsequent screening processes. Click the **OK** button. 
38.	The **Results Applied** column now displays **Yes** for all applicants.
39.	Click the scroll bar.

Step	Action
40.	After you apply the results, you can review the ranking for each applicant and determine which applicants to move forward in the recruiting process. For those that you want to move forward, you may want to route the applicants to the hiring manager or other individuals for their review and input. You can use the **Select** check box and **Route** button to route the applicants for recommendations from others.
41.	You have successfully run the screening process to rank applicants for a job opening. **End of Procedure.**

Route Applicant

Use this task to route top-rated applicants to people that you specify or to the job opening hiring team after the screening process to get feedback about next steps to take with the applicant.

Navigation: PeopleSoft Menu > Recruiting > Search Job Openings > **Manage Job Opening**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Start by searching for the job opening with applicants for which you want to route to others. Use the job opening name link to access the **Manage Job Opening** page.
2.	Use the **Manage Job Opening** page to manage activity related to a single job opening.
3.	You can perform actions for a single applicant or multiple applicants. In this example, you will route two applicants using **Group Actions**.
4.	Start by selecting the applicants to route. For this example, click the **Select** check box for Sheldon Cooper. ☐
5.	Click the **Select** check box for John Doe. ☐
6.	Click the **Group Actions** link. ▼ Group Actions

Step	Action
7.	A pop-up menu appears. Click the **Recruiting Actions** menu. 
8.	Click the **Route Applicant** menu. 
9.	Use the **Reason** field to identify the type of routing. For example, you can specify that the routing is for peer review, qualifications review and so on. For this example, leave the **Reason** field blank.
10.	You must identify the recipients for the routing. Add individuals one at a time, or add the entire hiring team associated with the job opening. When adding individuals, add the name of the individual and a due date for their response.
11.	In this example, select the hiring team. Click the **Add Hiring Team** button. 
12.	Two rows appears in the **Recipients** section. The hiring team associated with this job opening consists of two roles: Manager and Interviewer.
13.	Specify the date the response is due. Click the **Choose a date** button for the manager. 
14.	For this example, click the **19** date link. 
15.	Click the **Choose a date** button for the interviewer. 
16.	For this example, click the **19** date link. 
17.	Add comments that will appear in the notification to the recipients. Click in the **Comments** field.
18.	Enter the desired information into the **Comments** field. For this example, enter **Top applicants after screening**.

Step	Action
19.	Use the **Include Attachments** button to add other documents to send with the routing, if needed. For this example, no attachments are needed.
20.	Preview the notification before submitting the routing. Click the **Preview Notification** button. 
21.	Review the routing notification. When your review is completed, click the **OK** button. 
22.	Click the **Submit and Email Now** button. 
23.	A message confirms that the applicant routing was successful. Click the **OK** button. 
24.	Notification is sent to the recipients. Note that the **Disposition** for the selected applicants indicates that the applicants have been routed.
25.	Click the scroll bar.
26.	You can view details of the routing in the applicant's record by navigating to the **Manage Applications** page. Click the **Manage Application** button. ▭
27.	Use the **Manage Applications** page to review and manage activity related to a single applicant for a single job opening.
28.	Click the **Route** tab. 
29.	Review the **Routing Summary** details. You can also add new routing by clicking the **Add New Routing** button at the bottom of the page.
30.	To return to the **Manage Job Opening** page, click the **Return** button. 

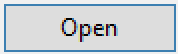
Step	Action
31.	You have successfully routed applicants. **End of Procedure.**

Use Job Opening Activity & Attachments Tab

Use the **Activity & Attachments** tab on the **Manage Job Opening** page to review job opening history, record notes and add attachments to the job opening. This tab appears on job openings with a status other than **Draft**.

Navigation: PeopleSoft Menu > Recruiting > Search Job Openings > Manage Job Opening > **Activities & Attachments tab**

Step	Action
1.	Start by searching for the job opening which you want to view the job opening activity and attachments. Use the job opening name link to access the **Manage Job Opening** page.
2.	Use the **Manage Job Opening** page to manage job openings and their applicants.
3.	Click the **Activity & Attachments** tab. 
4.	Job opening summary information appears on the page, along with notes, attachments and expenses.
5.	The **Job History** section displays the job opening status history. In this example, the job opening was opened and no further activity has been performed.
6.	The **Searches** section displays saved searches that include this job opening. In this example, the job opening is not part of any saved searches.
7.	Use the **Notes** section to add or review notes for the job opening. Click the **Add Note** button. 
8.	The **Note Date** field defaults to current date but can be updated as needed. In the **Audience** field, indicate whether the note is private (for your viewing only) or public (for others to see). In this example, accept both defaults.
9.	Click in the **Subject** field. 
10.	Enter the desired information into the **Subject** field. For this example, enter **Applicant contact**.

Step	Action
11.	Click in the **Details** field.
12.	Enter the desired information into the **Details** field. For this example, enter **Applicant called to ask questions about the position**.
13.	Use the **Spell Check** button to validate the spelling in the note.
14.	Click the **Add Note** button. 
15.	You can also use the **Add Note** link in the action bar to add notes to the job opening.
16.	The note appears in the **Notes** section. Click the scroll bar.
17.	Use the **Edit** button to update the note. Use the **Delete** button to delete the note.
18.	Use the **Attachments** section to review or add documents for the job opening. Click the **Add Attachment** button. 
19.	Search for the file to attach. Click the **Browse** button. 
20.	Select the appropriate file. For this example, click the **Job opening attachment** file. 
21.	Click the **Open** button. 
22.	Click the **Upload** button. 
23.	The new attachment appears in the **Attachments** section.
24.	Click the scroll bar.
25.	You can select a specific audience for the attachment or delete the attachment, if needed. Add other attachments following the same process.
26.	Click the **Save** button. 

Step	Action
27.	A confirmation message appears. Click the **OK** button. OK
28.	You have successfully used the **Activity & Attachments** tab on the **Manage Job Opening** page to add notes and an attachment to the job opening. **End of Procedure.**

Cancel Job Opening

Use this task to cancel a job opening.

Navigation: PeopleSoft Menu > Recruiting > **Search Job Openings**

Note: This page may also be accessible from the **Recruiting Home** page.

Note: TAM administrators can cancel a job opening by updating the **Status** field on the **Manage Job Opening** page.

Step	Action
1.	Begin this task by searching for the job opening you want to cancel. You can use a variety of criteria to find the job opening. In this example, search for a specific job opening by the **Job Opening ID**. Notice the default value in the **Status** field is **Open**.
2.	Click in the **Job Opening ID** field.
3.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994592**.
4.	Click the **Search** button. Search
5.	The job opening appears in the **Search Results** section. You can access the **Manage Job Opening** page to review the job opening details prior to canceling it by clicking the **Job Opening** link. Use the **Return** button at the top of the **Manage Job Opening** page to return to the **Search Results** to complete the cancel action.
6.	For this example, click the **Select** check box for job opening **994592**. ☐

Step	Action
7.	Click the **Group Actions** link.  Group Actions
8.	Select the appropriate action. For this example, select the **Cancel** action.  Cancel
9.	The job opening appears on the **Confirmation** page. Click the **Cancel** button to void the action and return to the **Search Results**. Click the **OK** button to complete the cancel action.
10.	For this example, click the **OK** button.  OK
11.	A message appears stating that the job opening status was successfully changed to **Cancel**. Click the **OK** button.  OK
12.	You have successfully canceled a job opening. **End of Procedure.**

Update Job Opening Details

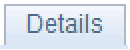
Use this task to update a job opening. The job opening details are initially defined when the job opening is created and updates can be made when needed.

If the job opening is in the **Draft** status, only the initiator can update the job opening.

Navigation: PeopleSoft Menu > Recruiting > Search Job Openings > **Manage Job Opening**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	You can make a variety of updates to a job opening. For this example, you will add the employee who is being replaced.
2.	Begin this task by searching for the job opening that requires an update. You can use a variety of criteria to find the job opening. In this example, search for the job opening using the **Job Opening ID**.

Step	Action
3.	Click in the **Job Opening ID** field. 
4.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994495**.
5.	Click the **Search** button. 
6.	The job opening appears in the **Search Results** section. Use the **Job Opening** link to access the **Manage Job Opening** page. For this example, click the **STATE GOVERNMENT REL MGR 3** link. 
7.	Use the **Manage Job Opening** page to view applicant activity and perform a variety of recruiting and applicant tasks.
8.	Click the **Details** tab. 
9.	Job opening details appear. Updates to the details can be made if required. The links just below the tabs display additional information for the **Details** tab.
10.	Click the scroll bar.
11.	To add the employee that is being replaced, click in the **Employee ID** field. 
12.	Enter the desired information into the **Employee ID** field. For this example, enter **17366809**.
13.	Press **[Tab]**.
14.	The employee name appears. Click the scroll bar.
15.	Click the **Save** button. 
16.	You have successfully updated details for a job opening. **End of Procedure.**

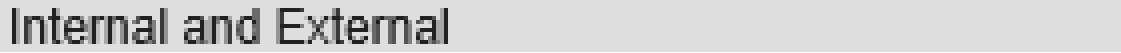
Update Job Posting Details

Use this task to update job posting details for a job opening. The job posting details are initially defined when the job opening is created and updates can be made when needed, even after the job posting has been posted to a job board. Updates in UCPath are pushed to the online posting daily.

Navigation: PeopleSoft Menu > Recruiting > Search Job Openings .> **Manage Job Opening**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	You can make a variety of updates to a job posting. For this example, you will add a new qualifications section to the job posting using free-form text.
2.	Begin this task by searching for the job opening that requires a job posting update. You can use a variety of criteria to find the job opening. In this example, search for the job opening using the **Job Opening ID**.
3.	Click in the **Job Opening ID** field. 
4.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994541**.
5.	Click the **Search** button. 
6.	The job opening appears in the **Search Results** section. Use the **Job Opening** link to access the **Manage Job Opening** page. For this example, click the **TEACHER-UNEX-CONTRACT YR** link. 
7.	Use the **Manage Job Opening** page to view applicant activity and perform a variety of recruiting and applicant tasks.
8.	Click the **Details** tab. 
9.	Job opening details appear. Updates to the details can be made if required. The links just below the tabs display additional information for the **Details** tab.
10.	For this example, click the **Job Postings** link. 
11.	The **Job Postings** section appears. Use the **Postings** link to open the **Posting Information** page. For this example, click the **TEACHER-UNEX-CONTRACT YR** link. 
12.	The **Posting Information** page displays the current job posting details.

Step	Action
13.	For this example, update the posting by adding additional qualifications for the job opening. Click the **Add Posting Description** button. 
14.	A new posting section appears. Click the scroll bar.
15.	Use the **Description Type** field to select predefined posting sections for the job posting. Click the button to the right of the **Description Type** field. ⌄
16.	Select the appropriate posting section. For this example, select the **Qualifications** list item. 
17.	Use the **Template** field to select predefined default text for this section of the job description. Click in the **Template** field. 
18.	Select the appropriate template. For this example, select the **Free Form Qualification Requirements** list item. 
19.	Free-form text allows you to type the qualifications into the text box. Formatting tools are available to enhance the presentation of the posting information.
20.	Use the **Visible** field to specify whether sections of the job description are for internal, external or both types of postings. Click the button to the right of the **Visible** field. ⌄
21.	For this example, select the **Internal and External** list item. 
22.	Click in the **Description** field.
23.	Enter the desired information into the field. For this example, enter **Qualifications include:**.

Step	Action
24.	Additional text has been added for this example. Click the **OK** button. 
25.	The job posting update is complete and you are returned to the **Manage Job Opening** page. You must save the changes.
26.	Click the **Save** button. 
27.	You have successfully updated an existing job posting. **End of Procedure.**

Extend Job Posting

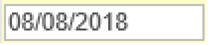
Use this task to extend a job posting.

You have the option to extend the job posting or let the job posting expire and then create a new posting with new dates.

Navigation: PeopleSoft Menu > Recruiting > Search Job Openings > **Manage Job Opening**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Begin this task by searching for the job opening with the job posting to be extended. You can use a variety of criteria to find the desired job opening. In this example, search for the job opening using the **Job Opening ID**.
2.	Click in the **Job Opening ID** field. 
3.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994541**.
4.	Click the **Search** button. 
5.	The job opening that you want appears in the **Search Results**. Click the job opening name to display the details. Click the **TEACHER-UNEX-CONTRACT YR** link. 

Step	Action
6.	The **Manage Job Opening** page appears. Use this page to view applicant activity and perform a variety of recruiting and applicant tasks.
7.	Click the **Details** tab. 
8.	Use the **Details** tab to view the job opening information and update the details as needed. Links below the tabs display additional information.
9.	For this example, click the **Job Postings** link. 
10.	The **Job Postings** section appears. Use the posting link to open the **Posting Information** page. Click the **TEACHER-UNEX-CONTRACT YR** link. 
11.	The **Posting Information** page displays the existing job posting details.
12.	Click the scroll bar.
13.	Click the scroll bar.
14.	To extend a job posting, update the **Remove Date** for the impacted posting type(s). A process runs daily that pushes posting details to the UC job board. For this example, update both posting types.
15.	Click in the **Remove Date** field in the first row. 08/08/2018
16.	In this example, the existing date was highlighted for you. Enter the desired information into the **Remove Date** field. For this example, enter **09012018**.
17.	Click in the **Remove Date** field for the second row. 08/08/2018
18.	For this example, the existing date was highlighted for you. Enter the desired information into the **Remove Date** field. For this example, enter **09012018**.
19.	Press **[Tab]**.
20.	Notice that the **Posting Duration** field reflects the extended timeframe.
21.	Click the **OK** button. 

Step	Action
22.	The **Manage Job Opening** page appears again. You must save the job opening to save the job posting changes. Click the **Save** button. 
23.	You have successfully extended a job posting. **End of Procedure.**

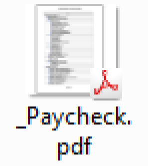
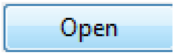
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
24.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
25.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
26.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
27.	Click the button to the right of the **Category** field. 

Step	Action
28.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
29.	Click in the **Subject** field.
30.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
31.	Click in the **Description** field.
32.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
33.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
34.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
35.	Click in the **Best Contact Phone Number** field.
36.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
37.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
38.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
39.	Click the **Add Attachment** link. 
40.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
41.	For this example, click the **_Paycheck.pdf** list item. 
42.	Click the **Open** button. 
43.	The file name appears in the **Attachments** box.

Step	Action
44.	Click the **Submit** button.
45.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
46.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
47.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
48.	Click the scroll bar.
49.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
50.	Click the scroll bar.
51.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
52.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

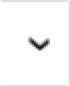
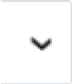
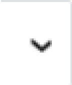
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
53.	Click the **Ask UCPath Center** button. 

Step	Action
54.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
55.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
56.	UCPath returned one result. Click the scroll bar.
57.	Click the **Create an Inquiry** link. 
58.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
59.	Click the button to the right of the **Requested By** field. 
60.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
61.	Click the button to the right of the **Topic** field. 
62.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
63.	Click the button to the right of the **Category** field. 

Step	Action
64.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
65.	Click in the **Subject** field.
66.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
67.	Click the scroll bar.
68.	Click in the **Description** field.
69.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
70.	In this example, the full **Description** was completed on your behalf.
71.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
72.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
73.	Click the **Submit Inquiry** button. 
74.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
75.	The submitter's name appears.
76.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

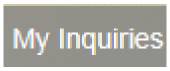
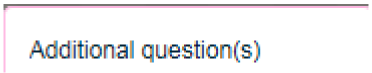
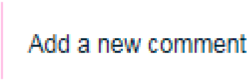
Reopen Closed UCPath Center Case

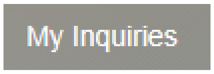
Use this task to reopen a closed inquiry via the UCPath website.

A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
77.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
78.	Click the **My Closed Inquiries** link. 
79.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
80.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
81.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
82.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
83.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 

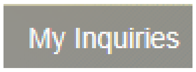
Step	Action
84.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
85.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. Submit comment to the UCPath Center
86.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
87.	Click the scroll bar.
88.	Notice the comment now appears in the **Case Comments** section.
89.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
90.	Return to the top of the page. Click the scroll bar.
91.	Click the **My Inquiries** link. My Inquiries
92.	The new inquiry appears in the **My Open Inquires** list.
93.	You have reopened a closed inquiry. **End of Procedure.**

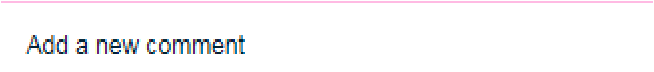
Monitor UCPath Center Cases

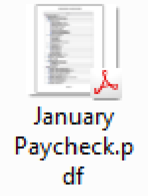
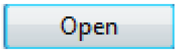
Use this task to review the status of an existing inquiry via the UCPath website.

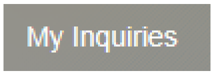
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
94.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
95.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
96.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
97.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
98.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 
99.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 
100.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 

Step	Action
101.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field.  Add a new comment
102.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
103.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
104.	Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center
105.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
106.	Click the scroll bar.
107.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link.  View All
108.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▾
109.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
110.	To return to the case details, click the **00180573** link.  00180573
111.	Click the scroll bar.

Step	Action
112.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
113.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
114.	Click the **Open** button. 
115.	A message confirms the file was uploaded. Click the **Done** button. 
116.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
117.	You can view all attachments in a list. Click the **View All** link. 
118.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 
119.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 

Step	Action
120.	Click the **00180573** link.  00180573
121.	Click the scroll bar.
122.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
123.	Click the **Email** link.  Sandbox: UCPath Center: Inquir.
124.	Review the email information as you scroll down the page. Click the scroll bar.
125.	Review the email from the UCPath Center. Click the scroll bar.
126.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
127.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
128.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
129.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
130.	Click the **00180567** link.  00180567
131.	Click the scroll bar.
132.	Notice the **Status** is **Closed/Resolved**.
133.	Click the scroll bar.

Step	Action
134.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. ⌂
135.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMTAM205: Applicant Search and Add

Browse Applicants

Use this task to view a list of applicants that are filtered based on specific criteria, like the applicant type, status, location or year of application. You can also perform a keyword search from the **Browse Applicants** page.

Navigation: PeopleSoft Menu > Recruiting > **Browse Applicants**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Use the **Filter By** links to filter the applicant list based on defined categories. Each category displays the filter subcategory and the number of records in each subcategory.
2.	When you select a filter, it appears just above the results list. The current list is filtered by **Status** and displays all **Active** applicants. 61 matches appear in the list. You can remove a filter from the results by clicking the **X**. For this example, remove the filter. Click the **Remove Filter** button. ☒
3.	Now that the filter is removed there are 72 applicant records in the list.
4.	Now filter the list by **Applicant Type**. Click the **External Applicant (63)** filter item. External Applicant (63)

Step	Action
5.	All external applicants (63) appear in the list. For this example, apply a second filter. Click the **030 Inactive (6)** filter item. 030 Inactive (6)
6.	Two filters are applied and only six applicants appear in the list. Click the **Clear All Filters** link. Clear All Filters
7.	All filters are removed and all 72 applicant records appear in the list. You can also search the list with keywords. For this example, perform a keyword search. Click in the **Search Applicants** field.
8.	Enter the desired information into the **Search Applicants** field. For this example, enter **program**.
9.	Click the **Search** button. »
10.	The keyword search returned one applicant record. The **Filter By** information is updated to reflect the results.
11.	Use the **Name** link to access the **Manage Applicant** page. For this example, click the **John Doe** link. John Doe
12.	Review the selected applicant's activity and other applicant details.
13.	When you finish your review, you can return to the **Browse Applicants** page. Click the **Return** link. ⇦ Return
14.	For this example, remove all filters. Click the **Clear All Filters** link. Clear All Filters
15.	Although all filters were removed, the keyword search criteria still remains. Remove it to return to the full list of applicants. Click in the **Search Applicants** field.
16.	Click the **X** to delete the keyword. ×

Step	Action
17.	Click the **Search** button. »
18.	The applicant list now shows 61 applicant records; the **Active** status filter is applied by default. You can apply other filters to reduce the list and locate the desired applicant.
19.	You have successfully browsed applicants using filters and a keyword search. **End of Procedure.**

Search Applicants - Quick Search

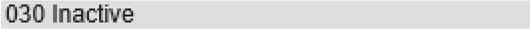
Use this task to perform a quick search for an applicant using a variety of search criteria.

Navigation: PeopleSoft Menu > Recruiting > **Search Applicants**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	The **Search Applicants** page defaults to the **Quick Search** tab.
2.	By default, the **Applicant Status** is set to search for active applicants only. You can select a different status from the list.
3.	A check mark in the **Search My Applicants** check box limits your search results to applicants who are attached to job openings for which you are the originator, recruiter, hiring manager, interviewer or interested party. Click the **Search My Applicants** check box. ☐
4.	Click the **Search** button. Search
5.	The search results display nine applicant records. Key details for each applicant appears in the results list, such as the **Applicant ID**, **Type**, **Status**, **Phone**, **Email Address**, **Date Applied** and **Jobs Applied** (not visible in this image). Use the **Applicant** name link to display the **Manage Applicant** page.

Step	Action
6.	Let's try another search. Notice the **Search Criteria** section collapsed when the search results appeared. Click the **Expand Search Criteria** button. ▶
7.	Use the **Clear** button to remove the previous search criteria. For this example, only the default **Applicant Status** was used in the search so there is no need to clear the fields.
8.	For this example, search for all applicants without the **Search My Applicants** check box selected.
9.	Click the **Search** button. 
10.	The search found 41 applicants. Use the grid navigation buttons to scroll through the applicant list as needed. For example, click the **View All** link to see the full list of results at once.
11.	Now search using the applicant's last name. Click the **Expand Search Criteria** button. ▶
12.	For this example, you do not need to clear the search fields. Click in the **Last Name** field.
13.	Enter the desired information into the **Last Name** field. For this example, enter **Cooper**.
14.	Click the **Search** button. 
15.	One applicant appears in the **Search Results** section. Click the **Sheldon Cooper** link. 
16.	The **Manage Applicant** page displays the **Applicant Activity** tab. Use the tabs and links to view additional applicant information and perform various actions.
17.	Click the **Return** button. 

Step	Action
18.	Now search for all inactive applicants. Click the **Expand Search Criteria** link. ▶
19.	Click the **Clear** button. 
20.	Click the button to the right of the **Applicant Status** field. ⌄
21.	For this example, select the **030 Inactive** list item. 
22.	Click the **Search** button. 
23.	One inactive applicant appears in the **Search Results** section.
24.	You have successfully performed a quick search for applicants using a variety of criteria. **End of Procedure.**

Search Applicants - Keyword Search

Use this task to perform a keyword search for applicants.

Navigation: PeopleSoft Menu > Recruiting > **Search Applicants**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	The **Search Applicants** page defaults to the **Quick Search** tab. In this example, perform a keyword search for all applicants that have the word **program** in their job application or resume.
2.	Click the **Keyword Search** tab. 
3.	If you have previously saved a keyword search, you can select it in the **Use Saved Search** list. For this example, you do not have a saved search.

Step	Action
4.	The **Search Tips** link provides instructions on how to best use the keyword search. Click the **Search Tips** link. 
5.	Review the search tips. Click the **Return** button. 
6.	Click in the **Keywords** field.
7.	Enter the desired information into the **Keywords** field. For this example, enter **Program**.
8.	Use the **Application Received** field to specify the time period in which the applications were received. Only applications received in that time period are included in the search. For this example, accept the default of **Anytime**.
9.	Click the **Search** button. 
10.	The **Search Results** display applicants that match the keyword search criteria. Key details for each applicant appears in the results list. You can access the applicant's resume and application using the corresponding buttons. Or click the **Applicant** name link to display the **Manage Applicant** page.
11.	Perform a group action by selecting the check boxes for the desired applicants and then select a group action.
12.	If necessary, clear the search criteria and enter new criteria to begin a new keyword search.
13.	You have successfully performed a keyword search for applicants. **End of Procedure.**

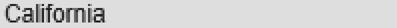
Create Applicant and Application Information

Use this task to create an applicant in UCPath.

Applicants should create their own applicant record through the Candidate Gateway. If an applicant is unable to create their own record, you may be required to create their applicant record on their behalf using a paper application submitted by the applicant.

Navigation: PeopleSoft Menu > Recruiting > **Create Applicant**

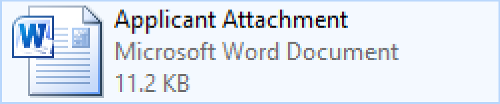
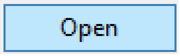
Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Use the **Create Applicant** page to record information about an applicant.
2.	In this example, you will create the applicant record by entering the applicant's personal information and application details. References and the eligibility and identity details will be added later.
3.	Click in the **First Name** field.
4.	Enter the desired information into the **First Name** field. For this example, enter **Tammy**.
5.	Click in the **Last Name** field. 
6.	Enter the desired information into the **Last Name** field. For this example, enter **Martin**.
7.	Click in the **Address 1** field. 
8.	Enter the desired information into the **Address 1** field. For this example, enter **2233 West North St**.
9.	Click in the **City** field. 
10.	Enter the desired information into the **City** field. For this example, enter **Riverside**.
11.	Click the button to the right of the **State** field. 
12.	Select the state. For this example, select the **California** list item. 
13.	Click in the **Postal** field. 
14.	Enter the desired information into the **Postal** field. For this example, enter **98765**.
15.	The **Applicant Status** defaults to **Active**. The **Status Date** defaults to the current date. For this example, accept the defaults.
16.	Click the **Add Email Address** button. 

Step	Action
17.	When entering email addresses, you must specify one email address as the primary email. In this example, you have one email address, so it is the primary address. Click the **Primary** check box. ☐
18.	Click the button to the right of the **Email Type** field. ⌄
19.	Select the email address type. For this example, select the **Home** list item. Home
20.	Click in the **Email Address** field.
21.	Enter the desired information into the **Email Address** field. For this example, enter **tammy.martin@gmail.com**.
22.	You can enter additional email addresses for the applicant, if needed. For this example, only one email address was provided.
23.	Click the **Add Phone Number** button. Add Phone Number
24.	When entering phone numbers, you must specify one phone number as the primary number. In this example, you have one phone number, so it is the primary number. Click the **Primary** check box. ☐
25.	Click the button to the right of the **Phone Type** field. ⌄
26.	Select the phone number type. For this example, select the **Cellular** list item. Cellular
27.	Click in the **Telephone** field.
28.	Enter the desired information into the **Telephone** field. For this example, enter **7023339988**.
29.	You can enter additional phone numbers for the applicant, if needed. For this example, only one phone number was provided.

Step	Action
30.	Click the scroll bar.
31.	Use the **Save** button to save the information and continue adding details for the current applicant. Use the **Save and Create Another** button to save the current applicant record and clear the **Create Applicant** page for entry of a new applicant.
32.	For this example, click the **Save** button. Save
33.	After saving the applicant record, the **Applications** tab appears. You can access and complete the application form on this tab.
34.	Click the **Applications** tab. Applications
35.	Click the **Add Application** button. Add Application
36.	Use the **Add Application Details** page to enter application information, including resume details, job preferences, work experiences and eligibility details.
37.	If the applicant is applying to a specific job opening, enter the job opening ID. Job openings with questionnaires will send the applicant an email request to sign in to the Candidate Gateway to complete the questionnaire. For this example, a job opening was not specified.
38.	Click the button to the right of the **Eligible to Work in U.S.** field. ⌄
39.	Select the appropriate option. For this example, select the **Yes** list item. Yes
40.	Use the **Preferences** section to indicate the applicant's job preferences. These preferences are taken into consideration when you search for applicants for a specific job opening.
41.	Identify the applicant's desired start date. Click the **Choose a date** button. 31
42.	Select the appropriate year, month and date. For this example, click the **30** date link. 30

Step	Action
43.	Click the scroll bar.
44.	Use the **Regular/Temporary** field to identify the applicant's position type preference. For this example, accept the default of **Either**.
45.	Click the button to the right of the **Full/Part-Time** field.
46.	Select the appropriate option. For this example, select the **Full-Time** list item.  Full-Time
47.	Click the button to the right of the **Willing to Relocate** field.
48.	Select the appropriate option. For this example, select the **Yes** list item.  Yes
49.	Click the button to the right of the **Willing to Travel** field.
50.	Select the appropriate option. For this example, select the **Yes** list item.  Yes
51.	Click the button to the right of the **Travel Percentage** field.
52.	Select the appropriate option. For this example, select the **Up to 50% of the time** list item.  Up to 50% of the time
53.	Use the **Geographic Preference** section to identify the applicant's work location preferences. For this example, no preferences were identified.
54.	Use the **Desired Work Days** check boxes to indicate the applicant's preferred work schedule. Monday through Friday check boxes are selected as defaults. For this example, accept the defaults.
55.	If provided, enter the applicant's minimum pay requirements.

Step	Action
56.	Select the **Desired Shift**. For this example, select the **Day** check box. ☐
57.	Click in the **Desired Hours Per Week** field.
58.	Enter the desired information into the **Desired Hours Per Week** field. For this example, enter **40**.
59.	Click the scroll bar.
60.	Use the **Letter** field to select a letter to send to the applicant. If a letter is selected, the **Generate Letter** link becomes active. Click the link to complete the letter generation process. For this example, a letter is not needed.
61.	Use the **Referral Source** section to identify how the applicant was referred to UC. For this example, no referral data was provided.
62.	Click the scroll bar.
63.	Attach the applicant's resume, if provided. Click the **Add Resume Attachment** button. 
64.	Click the **Browse** button. 
65.	Locate the applicant resume. For this example, select the **Applicant Attachment** file. 
66.	Click the **Open** button. 
67.	The path to the file appears. Click the **Upload** button. 

Step	Action
68.	Use the **Resume Text** field to copy/enter resume text. Use the formatting tools to control the presentation of the text. For this example, because the resume was attached, no resume text is needed.
69.	Use the **Attachments** section to attach other applicant documents, such as a cover letter.
70.	Use the **Work Experience** section to list the applicant's prior jobs. Click the **Add Work Experience** button.  Add Work Experience
71.	For this example, the applicant provided prior work experience for a Program Analyst 3 position held from January 7, 2008 to July 9, 2018.
72.	The **Start Date**, **Employer**, and **Ending Job Title** fields are required. Click the **Choose a date** button. 📅
73.	Specify the year, month and date. For this example, click the button to the right of the **Month** field. ⌄
74.	For this example, select the **January** list item.  January
75.	Click the button to the right of the **Year** field. ⌄
76.	For this example, select the **2008** list item.  2008
77.	Click the **7** date link.  7
78.	Enter or select the job end date. Click the **Choose a date** button. 📅
79.	For this example, click the **9** date link.  9
80.	Click in the **Employer** field.

Step	Action
81.	Enter the desired information into the **Employer** field. For this example, enter **UNLV**.
82.	Click in the **Ending Job Title** field. 
83.	Enter the desired information into the **Ending Job Title** field. For this example, enter **Program Analyst 3**.
84.	Click in the **Supervisor** field. 
85.	Enter the desired information into the **Supervisor** field. For this example, enter **Marshal Wee**.
86.	Click in the **Supervisor Email** field. 
87.	Enter the desired information into the **Supervisor Email** field. For this example, enter **Marshal.wee@unlv.edu**.
88.	Click in the **Description** field.
89.	Provide details about the job. Enter the desired information into the **Description** field. For this example, enter **Application development and ...**.
90.	Enter the work address. Click in the **Address 1** field. 
91.	Enter the desired information into the **Address 1** field. For this example, enter **1234 Maryland Parkway**.
92.	Click in the **City** field. 
93.	Enter the desired information into the **City** field. For this example, enter **Las Vegas**.
94.	Click the button to the right of the **State** field. 
95.	Select the state. For this example, select the **Nevada** list item.  Nevada
96.	Click in the **Postal** field. 
97.	Enter the desired information into the **Postal** field. For this example, enter **89313**.

Step	Action
98.	Click the **Save** button. 
99.	Click the scroll bar.
100.	If the applicant provided other work experience, enter it using the same process.
101.	Add the applicant's highest education level, if provided. Click the button to the right of the **Highest Education Level** field. 
102.	Select the education level. For this example, select the **I-Master's Level Degree** list item. 
103.	Add any relevant training provided by the applicant. Click the **Add Training** button. 
104.	Click in the **Course Title** field. 
105.	Enter the desired information into the **Course Title** field. For this example, enter **Oracle Certification**.
106.	Click in the **School Name** field. 
107.	Enter the desired information into the **School Name** field. For this example, enter **Oracle University**.
108.	Click the scroll bar.
109.	Click in the **Course Date** field. 
110.	Enter the desired information into the **Course Date** field. For this example, enter **03/01/2011**.
111.	If the applicant provided additional training details, enter it following the same process.
112.	Add the degree details provided by the applicant. Click the **Add Degrees** button. 

Step	Action
113.	Click the **Look up Degree** button.
114.	Select the appropriate degree. For this example, select the **Bachelor of Science** list item. 
115.	Click in the **Year Acquired** field.
116.	Enter the desired information into the **Year Acquired** field. For this example, enter **2007**.
117.	Use the **Save** button to save the details and return to the **Add Application Details** page. Use the **Save and Add Another** button to enter an additional degree. For this example, a second degree was provided.
118.	Click the **Save and Add Another** button. 
119.	Click the **Look up Degree** button.
120.	Click the scroll bar.
121.	For this example, select the **MASTER OF INFORMATION MANAGEMENT SYSTEMS** list item. 
122.	Click in the **Year Acquired** field.
123.	Enter the desired information into the **Year Acquired** field. For this example, enter **2011**.
124.	Click the **Save** button. 
125.	Click the scroll bar.
126.	Enter **Honors and Awards** and **Licenses and Certifications**, if provided. For this example, these details were not provided by the applicant.
127.	Click the **Add Language Skills** button. 
128.	Click the **Look up Language** button.

Step	Action
129.	Select the appropriate language. For this example, select the **Spanish** list item. 
130.	Click the **Save** button. 
131.	Click the scroll bar.
132.	Click the **Save** button. 
133.	Click the **Return** button. 
134.	The **Create Applicant** page appears again. You can continue to complete the applicant's references, eligibility and identity details.
135.	You have successfully created an applicant record and entered the application details. **End of Procedure.**

Create Applicant - Add References

Use this task to add references to a new applicant record. This task can be completed at the same time as creation of the applicant record, or references can be added after the initial applicant record is created.

Navigation: PeopleSoft Menu > Recruiting > Create Applicant > **References tab**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	In this example, the applicant's personal information and application data was previously entered. The applicant record is currently displayed in the **Create Applicant** page. You will add reference information provided by the applicant.
2.	Click the **Add Reference** button. 
3.	The system automatically assigns a reference number.
4.	Use the **Date Contacted** field to identify the date in which you spoke to the reference. This field defaults to the current date but can be updated if needed.

Step	Action
5.	Click the button to the right of the **Reference Type** list. 
6.	Reference types can be personal, professional or both. For this example, select the **Personal** list item. 
7.	Click in the **Reference Name** field. 
8.	Enter the desired information into the **Reference Name** field. For this example, enter **Mary Margret**.
9.	If the reference type is professional, you may enter the reference's **Title** and **Employer**.
10.	Click in the **Email Address** field. 
11.	Enter the desired information into the **Email Address** field. For this example, enter **mary.margret@yahoo.com**.
12.	Use the **Edit Address** button to add the reference's address information.
13.	Click in the **Contact Phone** field. 
14.	Enter the desired information into the **Contact Phone** field. For this example, enter **4087676655**.
15.	Use the **Comment** text box to document key points from your discussion with the reference.
16.	Click in the **Comment** field. 
17.	Enter the desired information into the **Comment** field. For this example, enter **Personal friend for 15 years**.
18.	Click the **OK** button. 
19.	Click the **Save** button. 

Step	Action
20.	You have successfully added a reference to a new applicant. **End of Procedure.**

Create Applicant - Add Eligibility and Identity

Use this task to add an applicant's eligibility and identity details. This task can be completed at the same time as creation of the applicant record, or it can be added after the initial applicant record is created.

Navigation: PeopleSoft Menu > Recruiting > Create Applicant > **Eligibility and Identity tab**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Use the **Eligibility and Identity** section of the **Create Applicant** page to record eligibility and identity information that UC and your location requires. Some of this information is not directly relevant to the application process, but it will be relevant for hired employees. You can enter the information in the applicant record if the employee record has not yet been created, and then the system transfers the data to the employee record during hire processing. In this example, the applicant's personal information and application data was previously entered. You will add eligibility and identity information provided by the applicant. The applicant record is currently displayed.
2.	Click in the **Date of Birth** field. 
3.	Enter the desired information into the **Date of Birth** field. For this example, enter **08161985**.
4.	Click the button to the right of the **Gender** field. 
5.	Select the appropriate gender. For this example, click the **Female** list item.  Female
6.	Click the **Expand USA** button.  USA

Step	Action
7.	Use the **Ethnic Group** field to record one or more ethnic groups for the applicant. Click the **Look up Ethnic Group** button. 🔍
8.	Select the appropriate option. For this example, select the **CHINESE** list item. CHINESE
9.	Information in the **Eligibility** section is effective dated. The **Effective Date** field defaults to the current date but it can be updated if needed.
10.	Click the button to the right of the **Military Status** list. ⌄
11.	Select the appropriate option. For this example, select the **I Am Not A Veteran** list item. I Am Not A Veteran
12.	If the applicant is eligible to work in the U.S., select the check box. For this example, select the **Eligible to Work in U.S.** check box. ☐
13.	Use the **National Identification** page to enter data about the applicant's country-specific national IDs. Click the **Add National Identification** button. Add National Identification
14.	An applicant can have national IDs from multiple countries; however, only one ID per nation is allowed.
15.	Click the **Look up Country** button. 🔍
16.	Select the appropriate country. For this example, select the **USA** list item. USA
17.	The **National ID Type** automatically appears based on the country you selected.
18.	Click in the **National ID** field.
19.	Enter the desired information into the **National ID** field. For this example, enter **540998876**.

Step	Action
20.	The **Primary ID** check box is selected by default. When entering multiple national IDs, you can deselect the check box and specify another national ID as the primary ID.
21.	Click the **OK** button. 
22.	The **National ID** appears in the **National ID** section. You can edit the information as needed using the **Edit** button. You can remove the ID using the **Delete** button.
23.	Click the scroll bar.
24.	Use the **Visa Permit** page to enter visa details for the applicant. For this example, no visa data is required.
25.	Use the **Citizenship** page to enter citizen details for the applicant. Click the **Add Citizenship** button. 
26.	Click the **Look up Country** button. 🔍
27.	Enter the desired information into the **begins with** field. For this example, enter **usa**.
28.	Click the **Look Up** button. 
29.	Select the appropriate option. For this example, select the **USA** list item. 
30.	Click in the **Passport Number** field. 
31.	Enter the desired information into the **Passport Number** field. For this example, enter **87867543212**.
32.	Click in the **Issue Date** field. 
33.	Enter the desired information into the **Issue Date** field. For this example, enter **08132014**.
34.	Click in the **Expiration Date** field. 

Step	Action
35.	Enter the desired information into the **Expiration Date** field. For this example, enter **08122020**.
36.	Click in the **Country** field. 
37.	Enter the desired information into the **Country** field. For this example, enter **usa**.
38.	Click the **USA** list item. 
39.	Click in the **State** field. 
40.	Enter the desired information into the **State** field. For this example, enter **ca**.
41.	Click the **CA** list item. 
42.	Click in the **City** field. 
43.	Enter the desired information into the **City** field. For this example, enter **San Diego**.
44.	Click the **OK** button. 
45.	Click the **Expand Applicant Disability** button. 
46.	Click the scroll bar.
47.	Use the **Applicant Disability** section to enter data about an applicant's disability status. For this example, no entry is needed.
48.	Click the **Expand Accommodation Request** button. 
49.	Use the **Accommodation Request** section to enter information about a disabled applicant's accommodation requests. For this example, accommodations are not needed.
50.	Click the scroll bar.
51.	Click the **Expand Accommodation Option** button. 
52.	Click the scroll bar.

Step	Action
53.	Use the **Accommodation Option** section to enter options for a disabled applicant. In this example, no entry is needed.
54.	Click the **Save** button. 
55.	You have successfully added eligibility and identity details for a new applicant. **End of Procedure.**

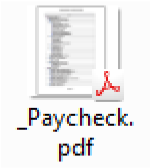
Submit Case to UCPath Center

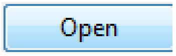
Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
56.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
57.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
58.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 

Step	Action
59.	Click the button to the right of the **Category** field. 
60.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
61.	Click in the **Subject** field.
62.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
63.	Click in the **Description** field.
64.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
65.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
66.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
67.	Click in the **Best Contact Phone Number** field.
68.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
69.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
70.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
71.	Click the **Add Attachment** link.  Add Attachment
72.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
73.	For this example, click the **_Paycheck.pdf** list item. 

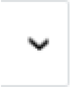
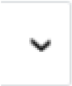
Step	Action
74.	Click the **Open** button. 
75.	The file name appears in the **Attachments** box.
76.	Click the **Submit** button.
77.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
78.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
79.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
80.	Click the scroll bar.
81.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
82.	Click the scroll bar.
83.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
84.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

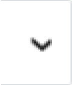
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
85.	Click the **Ask UCPath Center** button. 
86.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
87.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
88.	UCPath returned one result. Click the scroll bar.
89.	Click the **Create an Inquiry** link. 
90.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
91.	Click the button to the right of the **Requested By** field. 
92.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
93.	Click the button to the right of the **Topic** field. 
94.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.

Step	Action
95.	Click the button to the right of the **Category** field. 
96.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
97.	Click in the **Subject** field.
98.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
99.	Click the scroll bar.
100.	Click in the **Description** field.
101.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
102.	In this example, the full **Description** was completed on your behalf.
103.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
104.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
105.	Click the **Submit Inquiry** button. 
106.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
107.	The submitter's name appears.
108.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

Reopen Closed UCPath Center Case

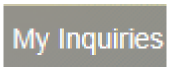
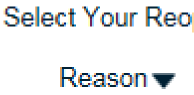
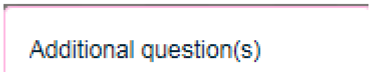
Use this task to reopen a closed inquiry via the UCPath website.

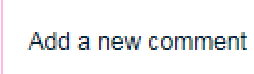
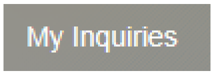
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:

Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
109.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
110.	Click the **My Closed Inquiries** link. 
111.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
112.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
113.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
114.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.

Step	Action
115.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. Add a new comment
116.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
117.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. Submit comment to the UCPath Center
118.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
119.	Click the scroll bar.
120.	Notice the comment now appears in the **Case Comments** section.
121.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
122.	Return to the top of the page. Click the scroll bar.
123.	Click the **My Inquiries** link. My Inquiries
124.	The new inquiry appears in the **My Open Inquires** list.
125.	You have reopened a closed inquiry. **End of Procedure.**

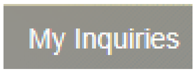
Monitor UCPath Center Cases

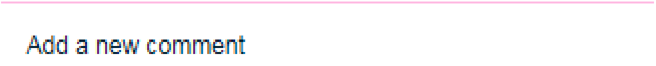
Use this task to review the status of an existing inquiry via the UCPath website.

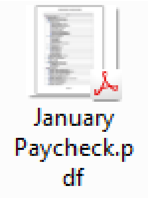
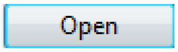
Dashboard Navigation:
Ask UCPath Center
or

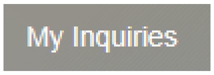
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
126.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
127.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
128.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
129.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
130.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 
131.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 

Step	Action
132.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 
133.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field. 
134.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
135.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
136.	Click the **Submit comment to the UCPath Center** button. 
137.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button.
138.	Click the scroll bar.
139.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. 
140.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button.
141.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.

Step	Action
142.	To return to the case details, click the **00180573** link. 
143.	Click the scroll bar.
144.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
145.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
146.	Click the **Open** button. 
147.	A message confirms the file was uploaded. Click the **Done** button. 
148.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
149.	You can view all attachments in a list. Click the **View All** link. 
150.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 

Step	Action
151.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. ▼
152.	Click the **00180573** link. 00180573
153.	Click the scroll bar.
154.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
155.	Click the **Email** link. Sandbox: UCPath Center: Inquir.
156.	Review the email information as you scroll down the page. Click the scroll bar.
157.	Review the email from the UCPath Center. Click the scroll bar.
158.	Click the case number to return to the details of the case. Click the **00180573** link. 00180573
159.	To review closed inquiries, click the **My Inquiries** link. My Inquiries
160.	Click the **My Closed Inquiries** tab. My Closed Inquiries
161.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**

Step	Action
162.	Click the **00180567** link.  00180567
163.	Click the scroll bar.
164.	Notice the **Status** is **Closed/Resolved**.
165.	Click the scroll bar.
166.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. ⌂
167.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMTAM210: Manage Applicants

View Applicant Lists

Use this task to view applicant lists. Private lists are visible only for the user who created the list. Public lists are marked as visible for all users regardless of who created the list.

Navigation: PeopleSoft Menu > Recruiting > **Applicant Lists**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	The **Display** option in this example shows only lists that you created. You can change the option to display **All Lists**, which includes your lists and those created for public use.
2.	Select the applicant list you want to view. For this example, click the **Analyst Position** link.  Analyst Position
3.	The **Applicants** section displays the applicants who are assigned to the list. You can perform various actions for the applicants using the buttons provided. In this example, you will add a note to the applicant record.
4.	Click the **Add Note** button for the first applicant.

Step	Action
5.	Use the **Notes** page to document applicant notes and to add attachments to the applicant's record.
6.	The **Contact Method** identifies the type of communication with the applicant. This field is not required. For this example, leave this field blank.
7.	Click in the **Subject** field.
8.	Enter the desired information into the **Subject** field. For this example, enter **new email address**.
9.	Click in the **Details** field.
10.	For this example, assume you received and entered a new email address on the applicant's information, and now you want to record that change in the notes. Enter the desired information into the **Details** field. For this example, enter **Applicant provided new email address**.
11.	Use the **Add Attachment** button to attach documents to the applicant record. For this example, no attachments are needed.
12.	Click the **Add Note** button. 
13.	The note is available on the **Manage Applicant Notes** tab.
14.	You have successfully viewed an applicant list. **End of Procedure.**

Manage Applicant Lists

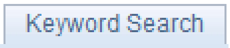
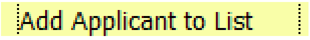
Use this task to create and manage an applicant list. An applicant list is a manual grouping of applicants that allows you to perform applicant and recruiting actions for any or all of the applicants included in the list.

Navigation: PeopleSoft Menu > Recruiting > **Applicant Lists**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Use the **Applicant Lists** page to view and manage manually compiled applicant lists. Lists can be public or private. The creator of the list is the owner of the list. Only the list owner can edit primary list information for public lists.

Step	Action
2.	The **Display** option in this example shows only lists that you created. You can change the option to display **All Lists**, which includes your lists and those created for public use.
3.	Use the **Find List** field to search for a specific list.
4.	Use the **Delete** button to delete an applicant list that is no longer needed.
5.	Use the **List** name link to open the list and view the applicants that it contains.
6.	In this example, create a new applicant list. Click the **Create New List** link. 
7.	Use the **Create New List** page to enter basic information about a new list. In this example, create a list of applicants that have management skills.
8.	Click the **List Name** field. 
9.	Enter the desired information into the **List Name** field. For this example, enter **Managers**.
10.	Click in the **Description** field. 
11.	Enter the desired information into the **Description** field. For this example, enter **Management Skills**.
12.	For this example, you want to share the applicant list with other users. Click the **Public** check box. ☐
13.	Most users have access to a single business unit in UCPath and the business until defaults in the **Business Unit** field. If you have access to multiple business units, you must specify a business unit for the list. Click the **Look up Business Unit** button. 🔍
14.	For this example, select the **RVCMP** list item. 
15.	Click the **Save** button. 

Step	Action
16.	The **Manage Applicant List** page displays the **Managers** applicant list that you just created. Use the **Edit List Details** link to update the list details you just entered. For example, you might edit the list to make it private instead of public, or change the name of the list.
17.	Notice that the list contains no applicants. For this example, perform a search for applicants with management experience.
18.	Click the **Search Applicants** link. 
19.	Use any of the search tabs to find the applicants for this list. For this example, click the **Keyword Search** tab. 
20.	Click in the **Keywords** field. 
21.	Enter the desired information into the **Keywords** field. For this example, enter **manage**.
22.	Click the **Search** button. 
23.	Three applicants were found with the keyword **manage** in their application or resume. For this example, add all three applicants to the **Managers** applicant list.
24.	Click the **Select All** link. 
25.	The three applicants are selected.
26.	Click the **Group Actions** menu. 
27.	Click the **Add Applicant to List** menu. 
28.	The **Add to Applicant List** page displays the available applicant lists.
29.	Select the list to which you want to add the applicants. For this example, click the **Managers** link. 

Step	Action
30.	The three applicants appear in the **Managers** applicant list. You can perform various actions for one or more of the applicants as needed. You can also delete an applicant from the list using the **Delete** button.
31.	You have successfully created an applicant list. **End of Procedure.**

View Job Opening Screening Levels

Use this task to view the predefined screening levels that are associated with a job opening.

Pre Screening and **Online Screening** levels are processed while an applicant is applying online through the Candidate Gateway. Other screening levels are run manually from within the job opening.

Navigation: PeopleSoft Menu > Recruiting > **Search Job Openings**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
32.	Begin this task by searching for the job opening for which you want to review the screening levels. You can use a variety of criteria to find the job opening. In this example, use the **Job Opening ID**.
33.	Click in the **Job Opening ID** field. 
34.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994539**.
35.	Click the **Search** button. 
36.	The job opening appears in the **Search Results** section. Use the **Job Opening** link to access the **Manage Job Opening** page. For this example, click the **FAC MGT SPEC 3** link. 
37.	Use the **Manage Job Opening** page to manage the job opening and its applicants.

Step	Action
38.	Click the **Applicant Screening** tab. 
39.	Use the **Applicant Screening** tab to review and screen applicants that are linked to a job opening.
40.	The **Screening Levels** section displays the various screening levels that are associated with the job opening. You can modify the requirements for some of the screening levels.
41.	In this example **Pre Screening** and **Online Screening** are used to screen applicants as they apply online to the job opening. The screening name is not a hyperlink because no modifications are allowed to these levels.
42.	Click the **Preliminary** link. 
43.	Use the **Screening Criteria** page to review and modify the specified job opening screening level.
44.	Click the scroll bar.
45.	Modifications can be made to the screening criteria; however, new criteria cannot be added. To add new screening criteria, you must add additional requirements to the job opening details. The **Required** check boxes reject applicants that do not meet the criteria, even if they have enough points to pass the screening level.
46.	Click the scroll bar.
47.	Each row used in the screening criteria must have an associated point value. The **Total Screening Points** appear at the bottom of the page.
48.	Click the scroll bar.
49.	If modifications were made, use the **Apply** button to apply the updates and stay on the **Screening Criteria** page. Use the **OK** button to save the changes and return to the **Manage Job Opening** page.
50.	Click the **OK** button. 
51.	You return to the **Manage Job Opening** page and the **Applicant Screening** tab. Click the **Final** link. 
52.	The **Final** screening level details appear. Review the criteria and point values. Modifications can be made if needed. Click the scroll bar.

Step	Action
53.	Click the **OK** button. 
54.	You have successfully viewed the screening levels associated with a job opening. **End of Procedure.**

Rank Applicants in Job Opening

Use this task to complete the screening of applicants and to perform the ranking process.

During screening you evaluate applicants against the specific job opening qualifications. Applicants receive points for the screening criteria that they meet. Points are totaled and used to determine the applicant's overall score and ranking.

There are three primary steps in the ranking process:
1. Run Screening Levels
2. Review Results
3. Apply Results

Navigation: PeopleSoft Menu > Recruiting > **Search Job Openings**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
55.	In this scenario the Sustainability Officer job opening has four applicants. You will run the screening process and rank the applicants. You can run each of the screening levels multiple times until you are satisfied with the results. In this example, the preliminary and final screening levels are run once.
56.	Begin this task by searching for the job opening. You can use a variety of search criteria to find the job opening. For this example, use the **Job Opening ID**.
57.	Click in the **Job Opening ID** field. 
58.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994510**.
59.	Click the **Search** button. 

Step	Action
60.	The job opening appears in the search results. Use the **Job Opening** link to access the **Manage Job Opening** page. For this example, click the **Sustainability Officer** link. Sustainability Officer
61.	Use the **Manage Job Opening** page to manage activity related to a single job opening. The **Applicants** section lists the applicants for this job opening. Use the **Applicant Name** link to review detailed applicant information.
62.	Click the **Applicant Screening** tab. Applicant Screening
63.	Use the **Applicant Screening** tab to run screening levels for all applicants.
64.	The **Run** field lists the screening levels associated with this job opening. Click the button to the right of the **Run** field. ⌄
65.	Select the screening level that you want to run. For this example, click the **Preliminary** list item. Preliminary
66.	Click the **Go** button to run the process. Go
67.	Click the **Process Monitor** link to open a new browser window where you can check the status of the screening process.
68.	In order to see the results of the completed screening process, you must refresh the page. Click the **Refresh Page** button. ⟳
69.	Notice that an entry now appears in the **Last Run Date**, **Submitted By** and **Results Applied** fields for the **Preliminary** screening level.
70.	After a screening levels process has been run at least once for the job opening, the **Screening Results** link appears. Click the **Screening Results** link. Screening Results
71.	Use the **Screening Results** to view the results of the screening process. You can also run additional screening levels directly from this page.

Step	Action
72.	The **Screening Levels** section displays the screening levels that have been processed. In this example, only the **Preliminary** level has run.
73.	The **Applicants** section displays the results for each applicant.
74.	The **Disposition** column displays the disposition that will be assigned to the applicant if you apply the screening results. This is not the same as the applicant's current disposition.
75.	The **Screening Results** column indicates whether the applicant passed or failed the screening level. In this example, three of the applicants passed the level and one applicant failed.
76.	You can click the applicant's score to review detailed screening results. For this example, click the **33%** link on the first row.  33%
77.	The **Screening Details** page displays the screening results for the applicant.
78.	At the summary level, you can see the points and score for the level, as well as the screening status. If an applicant fails a screening level, the system provides a reason in the **Status Reason** field.
79.	At the detail level, UCPath shows how many points the applicant earned for the various types of screening criteria.
80.	When your review is complete, click the **Return to Previous Page** link.  Return to Previous Page
81.	Click the scroll bar.
82.	Use the **View Rating** button to review an applicant's points for profile-related screening criteria.
83.	Click the scroll bar.
84.	You can run additional screening levels following the same steps. You may need to refine the screening levels before running the remaining screening levels. In this example, no changes are needed before running the **Final** screening level.
85.	Click the button to the right of the **Run** field. 
86.	For this example, select the **Final** list item.  Final
87.	Click the **Go** button.  Go

Step	Action
88.	Click the **Refresh Page** button.
89.	The **Final** screening level now appears in the **Screening Levels** section. You can review the applicants' score and points. If needed, you can adjust the screening levels and run the screening levels again. For this example, no changes are needed and the results can be applied.
90.	Use the **Apply Results** button to update the applicants' disposition based on the results of the screening process. Click the **Apply Results** button. 
91.	Applying results finalizes the screening process and excludes the affected applicants from any subsequent screening processes. Click the **OK** button. 
92.	The **Results Applied** column now displays **Yes** for all applicants.
93.	Click the scroll bar.
94.	After you apply the results, you can review the ranking for each applicant and determine which applicants to move forward in the recruiting process. For those that you want to move forward, you may want to route the applicants to the hiring manager or other individuals for their review and input. You can use the **Select** check box and **Route** button to route the applicants for recommendations from others.
95.	You have successfully run the screening process to rank applicants for a job opening. **End of Procedure.**

View Applicant Activities

Use the **Applicant Activity** tab on the **Manage Applicant** page to view a list of an applicant's applications and the disposition assigned to each application.

Navigation: PeopleSoft Menu > Recruiting > Search Applicants > **Manage Applicant**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Start by searching for the applicant. You can use a variety of search criteria to find the applicant. For this example, use the applicant ID. Click in the **Applicant ID** field. 
2.	Enter the desired information into the **Applicant ID** field. For this example, enter **600202**.
3.	Click the **Search** button. 
4.	The applicant appears in the **Search Results**. Click the **Applicant** name link to see the applicant details. For this example, click the **Aravind Ramal** link. 
5.	The **Manage Applicant** page **Applicant Activity** tab displays the **Current Status** section.
6.	Use the **Job Opening** link to open the job opening record. If **No Job Opening Selected** appears in the **Job Opening** column, it means the applicant submitted an application to UC but it wasn't for a specific job opening.
7.	The **Disposition** column displays the applicant disposition associated with the job opening.
8.	Use the buttons on the page to perform other actions, such as viewing application and resume details, marking the application as reviewed, routing the application, setting up an interview, rejecting the application and printing the application details.
9.	Click the **History** link. 
10.	Use the **History** section to view the application's disposition history. **Draft** dispositions do not appear in the list. After the draft application is finalized, the disposition moves to **Applied** and the disposition history is tracked from this point forward.
11.	In this example, the application for job opening 994489 has moved through dispositions **Applied**, **Interview**, **Offer**, **Offer Accepted**, **Ready to Hire** and **Reject**.
12.	You have successfully viewed applicant activity on the **Manage Applicant** page. **End of Procedure.**

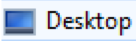
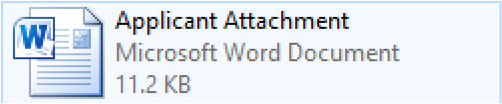
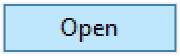
Add Applicant Notes and Attachments

Use this task to enter notes about various types of communication with an applicant. You can also add attachments to the applicant record.

Navigation: PeopleSoft Menu > Recruiting > Search Applicants > **Manage Applicant**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Start by searching for the applicant. You can use a variety of search criteria to find the applicant. For this example, use the applicant's last name. Click in the **Last Name** field. 
2.	Enter the desired information into the **Last Name** field. For this example, enter **ramal**.
3.	Click the **Search** button. 
4.	The applicant appears in the **Search Results**. Click the **Applicant** name link to display the applicant details. For this example, click the **Aravind Ramal** link. 
5.	The **Manage Applicant - Applicant Activity** page appears. Use this page to view the applicant's applications and the application disposition.
6.	Click the **Notes** tab. 
7.	Use this page to view existing notes associated to an applicant and to add new notes and attachments to the applicant record.
8.	Click the scroll bar.
9.	Click the **Add Applicant Note** button. 
10.	Click the button to the right of the **Contact Method** field. 
11.	Select the appropriate method of contact with the applicant. For this example, select the **Inbound Email** list item. 

Step	Action
12.	Click in the **Subject** field.
13.	Enter the desired information into the **Subject** field. For this example, enter **Applicant on vacation**.
14.	Press **[Tab]** to move to the next field.
15.	Enter the desired information into the **Details** field. For this example, enter **Applicant emailed**. The rest of the text will be entered for you.
16.	Next, add the resume attachment provided by the applicant. Click the **Add Attachment** button. 
17.	Click the **Browse** button. 
18.	Locate the file you want to attach. For this example, click the **Desktop** folder. 
19.	Click the scroll bar.
20.	For this example, click the **Applicant Attachment** file. 
21.	Click the **Open** button. 
22.	The path to the file appears. Click the **Upload** button. 
23.	The attachment file name appears in the **Attachments** section. You can click the file name link to open the document. Click the **Add Note** button to finish this note. 
24.	Click the scroll bar.

Step	Action
25.	The note appears at the top of the list in the **Notes Summary** section. Use the **Attachment** (paperclip) button to access the attachment. You can edit or delete the note as needed.
26.	You have successfully added an applicant note and attachment. **End of Procedure.**

Send Applicant Email Correspondence

Use this task to send a correspondence email to an applicant.

You can initiate this task from the following pages:
- **Search Applicants**
- **Manage Applicant**
- **Search Applications**
- **Manage Applications**
- **Manage Job Opening**
- **Manage Applicant List**
- **Recruiting Home**

In this example, you will use the **Search Applicants** page to initiate the task.

Navigation: PeopleSoft Menu > Recruiting > **Search Applicants**

Step	Action
1.	Start by searching for the applicant. You can use a variety of search criteria to find the applicant. For this example, click in the **Last Name** field. 
2.	Enter the desired information into the **Last Name** field. For this example, enter **green**.
3.	Click the **Search** button. 
4.	The applicant appears in the **Search Results**. Click the scroll bar.
5.	Click the **Actions** menu. 

Step	Action
6.	A pop-up menu displays the list of available actions. For this example, click the **Send Correspondence** menu. 
7.	The **Send Correspondence** page appears. There are two **Contact Methods**: **Email** and **Letter**. For this example, accept the default **Email**.
8.	The **Letter** field is not used for email correspondence. Leave it blank.
9.	Notice the applicant's name appears in the **To** field.
10.	You can copy other recipients on the email using the **Cc** and **Bcc** fields. For this example, you will copy one individual. Click in the **Cc** field. 
11.	Enter the desired information into the **Cc** field. For this example, enter **rhonda@ucop.edu**.
12.	Use the **Include Interested Parties** check box if you want people identified as interested parties for this applicant to receive a copy of the email. In this example, the check box is selected and no change is needed.
13.	Click in the **Subject** field. 
14.	Enter the desired information into the **Subject** field. For this example, enter **Phone number**.
15.	Use the **Access** field to identify who can view the correspondence. - Select **Public** to allow any user with access to this applicant to view the correspondence. - Select **Private** if the correspondence is to be viewed by the sender only. **Public** is the default and no change is needed for this example.
16.	Click in the **Message** field.
17.	Enter the desired information into the **Message** field. For this example, enter **Hi Rachel,**. The rest of the text will be entered for you.
18.	Use the **Spell Check** button to check spelling before you send your message.
19.	You can add attachments to the email if needed. For this example, attachments are not needed.

Step	Action
20.	You can preview the message before sending it. Click the **Preview** button. 
21.	Review the message. When your review is complete, click the **Return** button. 
22.	Click the **Send** button. 
23.	A confirmation message appears. Click the **OK** button. 
24.	The **Search Applicants** page appears again. To view the correspondence sent to the applicant, click the applicant name link. 
25.	UCPath adds an entry to the **Notes Summary** for the applicant. To view the entry, click the **Notes** tab. 
26.	The entry appears at the top of the **Notes Summary** section. Use the notes functionality to edit or resend the message, or to delete the note.
27.	Click the scroll bar.
28.	Use the **Edit** button to view and edit the correspondence. Use the **Delete** button to delete the correspondence.
29.	You have successfully sent an email correspondence to an applicant and viewed it on the **Manage Applicant - Notes** tab. **End of Procedure.**

Send Applicant Letter Correspondence

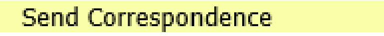
Use this task to send a correspondence letter to an applicant.

You can initiate this task from the following pages:
- **Search Applicants**
- **Manage Applicant**
- **Search Applications**
- **Manage Applications**
- **Manage Job Opening**

- Manage Applicant List
- Recruiting Home

In this example, you will use the **Manage Applicant** page to initiate the task.

Navigation: PeopleSoft Menu > Recruiting > Search Applicants > **Manage Applicant**

Step	Action
1.	Start by searching for the applicant for which you want to send a correspondence. Use the applicant name link to access the **Manage Applicant** page.
2.	Use the **Manage Applicant** page to view the applicant's applications and perform other recruiting actions. For this example, the applicant Rachel Green has been displayed for you.
3.	Click the scroll bar.
4.	Click the **Other Actions** menu.  Other Actions
5.	A pop-up menu displays the list of available actions. For this example, click the **Applicant Actions** menu.  Applicant Actions
6.	The list of applicant actions appear in the pop-up menu. For this example, click the **Send Correspondence** menu.  Send Correspondence
7.	The **Send Correspondence** page appears. There are two **Contact Methods**: **Email** and **Letter**. Click the button to the right of the **Contact Method** field.
8.	For this example, click the **Letter** list item.  Letter
9.	For a letter you must select a letter template. Click the button to the right of the **Letter** field.

Step	Action
10.	Select the appropriate letter template. The letters that appear in UCPath may differ for your Location. For this example, select the **Acknowledgement Letter ACQ1** list item. 
11.	Notice the applicant's name appears in the **To** field.
12.	Use the **Access** field to identify who can view the correspondence. - Select **Public** to allow any user with access to this applicant to view the correspondence. - Select **Private** if the correspondence is to be viewed by the sender only. **Public** is the default and no change is needed for this example.
13.	Use the **Notes** field to enter any comments that should be saved in the contact note UCPath creates when it generates the letter. Click in the **Notes** field.
14.	Enter the desired information into the **Notes** field. For this example, enter **University of California**.
15.	Use the **Spell Check** button to check spelling before you generate your letter.
16.	Click the **Preview** button. 
17.	Review the letter. Select a different letter template if needed and preview again. Click the scroll bar.
18.	The note that you entered in the **Notes** text box appear at the bottom of the letter preview but will not appear in the letter. Click the **Generate** button. 
19.	The letter opens in a new browser window. Review, save or print the letter.
20.	Click the **Manage Applicant** browser tab. 
21.	A confirmation message appears. Click the **OK** button. 
22.	To view the correspondence sent to the applicant, click the **Notes** tab. 

Step	Action
23.	The entry appears at the top of the **Notes Summary** section. Use the notes functionality to edit or resend the message, or to delete the note.
24.	Click the scroll bar.
25.	The letter that you generated for the applicant also appears in the **Attachments** section.
26.	Return to the top of the page. Click the scroll bar.
27.	Use the **Edit** button to view and edit the correspondence. Use the **Delete** button to delete the correspondence.
28.	You have successfully generated a letter correspondence for the applicant and viewed it on the **Manage Applicant - Notes** tab. **End of Procedure.**

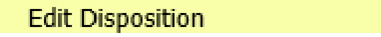
Update Applicant Disposition

Use this task to update an applicant's disposition.

Navigation: PeopleSoft > Recruiting > Search Applicants > **Manage Applicant**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Search for the applicant using a variety of search criteria. For this example, use the **Applicant ID**.
2.	Click in the **Applicant ID** field. 
3.	Enter the desired information into the **Applicant ID** field. For this example, enter **600278**.
4.	Click the **Search** button. 
5.	The applicant appears in the **Search Results**. Click the **Applicant** name link to display the details. For this example, click the **Hasan Minaj** link. 

Step	Action
6.	Use the **Manage Applicant** page to view the applicant activity and perform other recruiting tasks.
7.	Click the scroll bar.
8.	Click the **Other Actions** menu. 
9.	A pop-up menu appears. Click the **Recruiting Actions** menu. 
10.	A pop-up menu appears. Click the **Edit Disposition** menu. 
11.	UCPath displays the current disposition. Click the button to the right of the **New Disposition** field. 
12.	Your local process may include updating an applicant's disposition to **Hold** when a job offer is being made to the selected candidate. If the job offer is rejected, you may want to consider one of the other candidates with the **Hold** disposition for the position.
13.	Select the appropriate disposition. For this example, select the **110 Reject** list item. 
14.	Click the button to the right of the **Status Reason** field. 
15.	Select the appropriate reason for the disposition change. For this example, select the **Candidate pool identified** list item. 
16.	Click the **Save** button. 
17.	The disposition now displays **Reject**.
18.	You have successfully updated an applicant's disposition. **End of Procedure.**

Forward Applicant

Use this task to forward an applicant to one or more recipients for their review and feedback. Recipients receive notification with a link to the applicant's record.

Navigation: PeopleSoft Menu > Recruiting > Search Applicants > **Manage Applicant**

Step	Action
1.	Start by searching for the applicant for which you want to forward to others for their review. Use the applicant name link to access the **Manage Applicant** page.
2.	Forwarding an applicant is similar to routing an applicant. However, when you forward an applicant, the system does not change the applicant's routing status or disposition.
3.	Use the **Manage Applicant** page to view an applicant's applications and perform other actions, such as forwarding an applicant.
4.	Click the scroll bar.
5.	Click the **Forward Applicant** link. 
6.	You can send the forward email to one or more recipients. Click in the **To** field. 
7.	Enter the desired information into the **To** field. For this example, enter **rhonda.olenick@ucop.edu**.
8.	You can copy other recipients on the email using the **Cc** and **Bcc** fields. For this example, no copies are needed.
9.	Click in the **Subject** field. 
10.	Enter the desired information into the **Subject** field. For this example, enter **Applicant for review**.
11.	Use the **Access** field to identify who can view the correspondence. - Select **Public** to allow any user with access to the applicant to view the correspondence. - Select **Private** if the correspondence is to be viewed by the sender only. **Public** is the default. Do not change it for this example.
12.	Click in the **Message** field.

Step	Action
13.	Enter the desired information into the **Message** field. For this example, enter **Hi Rhonda,**. The rest of the text will be entered for you.
14.	Click the scroll bar.
15.	Use the **Spell Check** button to check spelling before you send your message.
16.	You can preview the message before sending it. Click the **Preview** button. 
17.	Review the message. When your review is complete, click the **Return** button. 
18.	Click the **Send** button. 
19.	A confirmation message appears. Click the **OK** button. 
20.	The **Manage Applicant** page appears again. UCPath adds an entry to the **Notes Summary** for the applicant. To view the entry, click the **Notes** tab. 
21.	The entry appears at the top of the **Notes Summary** section. Use the notes functionality to edit or resend the message, or to delete the note.
22.	You have successfully forwarded an applicant. **End of Procedure.**

Route Applicant

Use this task to route top-rated applicants to people that you specify or to the job opening hiring team after the screening process to get feedback about next steps to take with the applicant.

Navigation: PeopleSoft Menu > Recruiting > Search Job Openings > **Manage Job Opening**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
23.	Start by searching for the job opening with applicants for which you want to route to others. Use the job opening name link to access the **Manage Job Opening** page.
24.	Use the **Manage Job Opening** page to manage activity related to a single job opening.
25.	You can perform actions for a single applicant or multiple applicants. In this example, you will route two applicants using **Group Actions**.
26.	Start by selecting the applicants to route. For this example, click the **Select** check box for Sheldon Cooper. ☐
27.	Click the **Select** check box for John Doe. ☐
28.	Click the **Group Actions** link. 
29.	A pop-up menu appears. Click the **Recruiting Actions** menu. 
30.	Click the **Route Applicant** menu. 
31.	Use the **Reason** field to identify the type of routing. For example, you can specify that the routing is for peer review, qualifications review and so on. For this example, leave the **Reason** field blank.
32.	You must identify the recipients for the routing. Add individuals one at a time, or add the entire hiring team associated with the job opening. When adding individuals, add the name of the individual and a due date for their response.
33.	In this example, select the hiring team. Click the **Add Hiring Team** button. 
34.	Two rows appears in the **Recipients** section. The hiring team associated with this job opening consists of two roles: Manager and Interviewer.

Step	Action
35.	Specify the date the response is due. Click the **Choose a date** button for the manager. 31
36.	For this example, click the **19** date link. 19
37.	Click the **Choose a date** button for the interviewer. 31
38.	For this example, click the **19** date link. 19
39.	Add comments that will appear in the notification to the recipients. Click in the **Comments** field.
40.	Enter the desired information into the **Comments** field. For this example, enter **Top applicants after screening**.
41.	Use the **Include Attachments** button to add other documents to send with the routing, if needed. For this example, no attachments are needed.
42.	Preview the notification before submitting the routing. Click the **Preview Notification** button. Preview Notification
43.	Review the routing notification. When your review is completed, click the **OK** button. OK
44.	Click the **Submit and Email Now** button. Submit and Email Now
45.	A message confirms that the applicant routing was successful. Click the **OK** button. OK
46.	Notification is sent to the recipients. Note that the **Disposition** for the selected applicants indicates that the applicants have been routed.
47.	Click the scroll bar.

Step	Action
48.	You can view details of the routing in the applicant's record by navigating to the **Manage Applications** page. Click the **Manage Application** button. 
49.	Use the **Manage Applications** page to review and manage activity related to a single applicant for a single job opening.
50.	Click the **Route** tab. 
51.	Review the **Routing Summary** details. You can also add new routing by clicking the **Add New Routing** button at the bottom of the page.
52.	To return to the **Manage Job Opening** page, click the **Return** button. 
53.	You have successfully routed applicants. **End of Procedure.**

Perform Other Action

Use this task to perform **Other Actions** on an individual applicant record. You can perform actions on a job opening and application, too.

Navigation: PeopleSoft Menu > Recruiting > Search Applicants > **Manage Applicant**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	In this example an applicant record has been found already. The **Manage Applicant** page displays activity for Rebecca Slug.
2.	Click the scroll bar.
3.	Use the **Other Actions** menu to view a list of recruiting and applicant actions that can be performed for the record on that row. For this example, click the **Other Actions** menu on the second row. 

Step	Action
4.	A pop-up menu appears. The actions are divided into **Recruiting Actions** and **Applicant Actions**. For this example, you will withdraw an applicant from a job opening, which is a **Recruiting Action**. Click the **Recruiting Actions** menu. 
5.	For this example, click the **Withdraw Application** menu. 
6.	The page(s) required for an action vary based on the action selected. For this example, the **Applications to Withdraw** page appears.
7.	Use the **Reason** field to select a reason for the withdrawal. For this example, accept the default of **Recruiter Withdrawn**.
8.	Click the **Withdraw** button. 
9.	A confirmation message appears. Click the **OK** button. 
10.	Notice that the applicant's application now shows the **Disposition** as **Withdrawn Application**.
11.	You have successfully performed a recruiting action using **Other Actions**. **End of Procedure.**

Perform Group Action

Use this task to perform a group action on multiple applicant records. You can perform group actions on job opening and application records, too.

Navigation: PeopleSoft Menu > Recruiting > **Search Applicants**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Begin this task with a search for applicants. In this example, you will search for all active applicants, which is the default search criteria, and change the status of two applicants to inactive.

Step	Action
2.	Click the **Search** button. Search
3.	The **Search Results** section displays all active applicants.
4.	Click the scroll bar.
5.	You must select the applicant records for the group action. For this example, click the **Select** check box for David Slug. ☐
6.	For this example, also click the **Select** check box for James Bond. ☐
7.	Click the **Group Actions** menu. Group Actions
8.	The list of actions varies based on the page you are on when you initiate the group action. In this example the actions pertain to applicants. For this example, select the **Change Applicant Status** menu. Change Applicant Status
9.	The page(s) required for an action vary based on the action selected. For this example, you are changing the applicant status from active to inactive.
10.	Click the button to the right of the **Status Code** field. ⌄
11.	Select the appropriate status. For this example, select the **030 Inactive** list item. 030 Inactive
12.	Click the **Change Status** button. Change Status
13.	A confirmation message appears. Click the **OK** button. OK
14.	The displayed status still reflects **Active** for both applicants. The status will update when you refresh the page or open the applicant's record.
15.	Click the **David Slug** applicant link. David Slug
16.	The **Manage Applicant** page appears. The applicant's status is **Inactive**.

Step	Action
17.	Note that the **Disposition** for each of the applicant's applications now displays **Withdrawn**.
18.	You have successfully performed a group action on multiple applicant records. **End of Procedure.**

Link Applicant to Job Opening

Use this task to link an applicant to a job opening.

Applicants can submit applications that are not tied to a particular job opening. If the applicant has the qualifications for an open position, you can invite the applicant to apply to a specific job opening.

Navigation: PeopleSoft Menu > Recruiting > **Search Applicants**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	If an applicant has multiple applications (by applying to other job openings), the linked job opening is added to the most recent application. Changes to the application in the Candidate Gateway are not permitted and the applicant must reapply to the job opening or work with the recruiter. The recruiter can update the application within TAM. If an applicant has an application without any job openings, it is not affected by the linking action and the applicant continues to have an application without a job opening. To add the job opening to the application, you can use the **Edit Application Details** action instead or wait for the applicant to apply to the job opening included in the notification.
2.	Applicants registered on the Candidate Gateway can view a list of their applications on the **My Activities** page, including linked job openings. An applicant who wishes to provide additional information for a linked job opening can reapply.
3.	Begin this task by searching for applicants. You can search for applicants using a variety of search criteria. In this example, you will search for all active applicants, which is the default search criteria.
4.	Click the **Search** button. 
5.	Locate the applicant you want to link to a job opening. For this example, you will link Mickey Mouse to a food services job opening. Click the scroll bar.

Step	Action
6.	Click the **Actions** menu for **Applicant ID 600285**. ▾ Actions
7.	A pop-up menu appears. Click the **Link Applicant to Job** menu. Link Applicant to Job
8.	The selected applicant appears in the **Applicants to be Linked** section. You can add other applicants to link to the job opening or you can remove previously linked applicants.
9.	Enter or search for the job opening to which you want to link the applicant(s). In this example, search for the job opening ID. Click the **Look up Job Opening ID** button. 🔍
10.	Select the job opening. For this example, select the **994562** list item. 994562
11.	The system determines if the job opening includes screening questions. If it does, the system sends an email inviting the applicant to use Candidate Gateway to submit a new application for the job opening so that the applicant can answer the questions. The applicant sees these notifications within the Candidate Gateway. The applicant can click the **Apply** button in the notification to begin the application process. If the job opening contains a questionnaire, it is embedded in the online application.
12.	The **Disposition** defaults to **Linked to Job Opening**. Select a different disposition from the list, if necessary. Click the button to the right of the **Disposition** field. ⌄
13.	The **Disposition** defaults to **Linked to Job Opening**. Select a different disposition from the list, if necessary. Click the button to the right of the **Disposition** field. ⌄
14.	Select the appropriate disposition. For this example, select the **Applied** list item. 010 Applied

Step	Action
15.	Click the **Link** button. 
16.	A confirmation message appears. Click the **OK** button. 
17.	An email notification is sent to the applicant asking the applicant to apply to a job opening.
18.	A sample email notification has been provided for your review. Keep in mind that each location may have different email text.
19.	You are returned to the applicant search results. Click the **Mickey Mouse** applicant link. 
20.	The **Manage Applicant** page appears. Note that the **Applicant Activity** section shows the applicant linked to the food service job opening with the **Applied** disposition. This application can be processed through the remaining recruiting phases for the job opening.
21.	If you are on the job opening's hiring team, you can access **Recruiting Home** page, **Alerts** section to view the number of applicants who have not submitted new applications after being invited to do so. Click the number to access the **Questionnaire Request** page, which lists each outstanding request and you can enable the option to send reminder notifications to selected applicants.
22.	You have successfully linked an applicant to a job opening. **End of Procedure.**

Print Applications

Use this topic to print applications for a group of applicants.

Navigation: PeopleSoft Menu > Recruiting > Search Job Openings > **Manage Job Opening**

Note: This page may also be accessible from the **Recruiting Home** page. You can also initiate this task from the **Manage Applicant** page.

Step	Action
1.	Begin this task by searching for the job opening with the applicants and applications you want to print. You can use a variety of criteria to locate the desired job opening. In this example, use the **Job Opening ID**.
2.	Click in the **Job Opening ID** field. 
3.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994539**.
4.	Click the **Search** button. 
5.	The job opening appears in the **Search Results**. Click the **Job Opening** name link to see the details. For this example, click the **FAC MGT SPEC 3** link. 
6.	Use the **Mange Job Opening** page to view applicant activity, the applicant's disposition, and to perform other recruiting and applicant tasks.
7.	Select the applicants for whom you want to print applications. - Use the **Select All** link to select all applicants. - Use the **Deselect All** link to clear all selections. For this example, click the **Select All** link. 
8.	All **Select** checkboxes are selected.
9.	Use **Group Actions** to perform recruiting and applicant tasks for multiple records at the same time. Click the **Group Actions** menu. 
10.	A pop-up menu appears. Click the **Recruiting Actions** menu. 
11.	A pop-up menu appears. For this example, click the **Print Applications** menu. 

Step	Action
12.	Use the **Print Applications** page to identify the sections and information to print from the application. Select individual sections or use the **Select All** link to select all sections in the **Application Details** list. For this example, click the **Select All** link. Select All
13.	All checkboxes for the **Application Details** are selected. You can deselect any items that are not required for printing.
14.	You can also select sections to print from the **Questionnaire Type** list. Again, you can select individual sections or use the **Select All** link. For this example, you will select a few sections.
15.	For this example, select the **Final** section. ☐
16.	Click the scroll bar.
17.	For this example, select the **Additional Questions** section. ☐
18.	Specify any attachments you also want to print. Select attachment types individually or use the **Select All** link to select all **Attachment Types**. In this example, you will include the **Resume**, **References**, **Transcripts** and **Cover Letters** attachments.
19.	Click the **Resume** option. ☐
20.	Click the **References** option. ☐
21.	Click the **Transcripts** option. ☐
22.	Click the **Cover Letter** option. ☐
23.	Use the other check boxes on the page to exclude sections that have no content, generate a separate PDF report for each application or exclude separator pages.
24.	Click the scroll bar.
25.	Click the **Run** button. Run

Step	Action
26.	Click the **OK** button. 
27.	The **Print Applications** page displays the **Process Instance** number.
28.	Click the **Process Monitor** link to review the status while the print process is running. 
29.	Use the **Process Monitor** page to monitor the status of your process request. Refresh the page every fifteen seconds until the **Run Status** for your job is **Success**, **No Success** or **Error**. Click the **Refresh** button. 
30.	The **Run Status** is **Success**. Contact your supervisor if the **Run Status** is **No Success** or **Error**.
31.	The **Distribution Status** of **Posted** means that you can view process reports and output logs, if applicable, for the process.
32.	Click the **Details** link. 
33.	Click the **View Log/Trace** link on the **Process Detail** page to navigate to the processed output file. Click the **View Log/Trace** link. 
34.	Process reports appear in the **File List** group box. Report filenames generally end with .PDF, .XLS, or .CSV. Click the file with the .PDF extension to display the report.
35.	For this example, click the **Applications_Report_08-07-2018_311787.pdf** link. 
36.	The applications report opens in a new window. Scroll through the report to view the application details online. Use the **Print** button to print a hard copy. Close the browser window when you are done with the applications report.
37.	You have successfully printed applications for a group of applicants. **End of Procedure.**

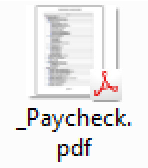
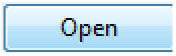
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
38.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
39.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
40.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
41.	Click the button to the right of the **Category** field. 
42.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
43.	Click in the **Subject** field.
44.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
45.	Click in the **Description** field.
46.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.

Step	Action
47.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
48.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
49.	Click in the **Best Contact Phone Number** field.
50.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
51.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
52.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
53.	Click the **Add Attachment** link. 
54.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
55.	For this example, click the **_Paycheck.pdf** list item. 
56.	Click the **Open** button. 
57.	The file name appears in the **Attachments** box.
58.	Click the **Submit** button.
59.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
60.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
61.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
62.	Click the scroll bar.

Step	Action
63.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
64.	Click the scroll bar.
65.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
66.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
67.	Click the **Ask UCPath Center** button. 
68.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
69.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.

Step	Action
70.	UCPath returned one result. Click the scroll bar.
71.	Click the **Create an Inquiry** link. 
72.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
73.	Click the button to the right of the **Requested By** field. ⌄
74.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
75.	Click the button to the right of the **Topic** field. ⌄
76.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
77.	Click the button to the right of the **Category** field. ⌄
78.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
79.	Click in the **Subject** field.
80.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
81.	Click the scroll bar.
82.	Click in the **Description** field.

Step	Action
83.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
84.	In this example, the full **Description** was completed on your behalf.
85.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
86.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
87.	Click the **Submit Inquiry** button. 
88.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
89.	The submitter's name appears.
90.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

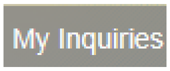
Reopen Closed UCPath Center Case

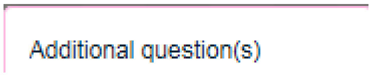
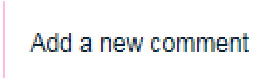
Use this task to reopen a closed inquiry via the UCPath website.

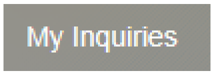
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
91.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 

Step	Action
92.	Click the **My Closed Inquiries** link. 
93.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
94.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
95.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
96.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
97.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
98.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
99.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 

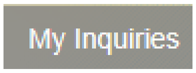
Step	Action
100.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
101.	Click the scroll bar.
102.	Notice the comment now appears in the **Case Comments** section.
103.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
104.	Return to the top of the page. Click the scroll bar.
105.	Click the **My Inquiries** link. 
106.	The new inquiry appears in the **My Open Inquires** list.
107.	You have reopened a closed inquiry. **End of Procedure.**

Monitor UCPath Center Cases

Use this task to review the status of an existing inquiry via the UCPath website.

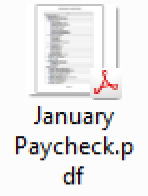
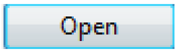
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

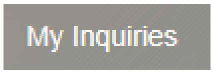
Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
108.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 

Step	Action
109.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
110.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
111.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
112.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. Date/Time Opened ▲
113.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. Date/Time Opened ▼
114.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 00180573
115.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field. Add a new comment
116.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.

Step	Action
117.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
118.	Click the **Submit comment to the UCPath Center** button. 
119.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
120.	Click the scroll bar.
121.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. 
122.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▾
123.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
124.	To return to the case details, click the **00180573** link. 
125.	Click the scroll bar.
126.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 

Step	Action
127.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
128.	Click the **Open** button. 
129.	A message confirms the file was uploaded. Click the **Done** button. 
130.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
131.	You can view all attachments in a list. Click the **View All** link. 
132.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 
133.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 
134.	Click the **00180573** link. 
135.	Click the scroll bar.

Step	Action
136.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
137.	Click the **Email** link.  Sandbox: UCPath Center: Inquir.
138.	Review the email information as you scroll down the page. Click the scroll bar.
139.	Review the email from the UCPath Center. Click the scroll bar.
140.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
141.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
142.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
143.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
144.	Click the **00180567** link.  00180567
145.	Click the scroll bar.
146.	Notice the **Status** is **Closed/Resolved**.
147.	Click the scroll bar.

Step	Action
148.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. ⌂
149.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMTAM220: Manage Applicant Interviews

Schedule Applicant Interview

Use this task to schedule an applicant for an interview. An interview can be scheduled with or without a job opening. This task is typically performed after applicant screening and rating.

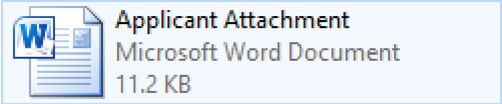
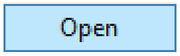
Navigation: PeopleSoft Menu > Recruiting > Search Job Openings > **Manage Job Opening**

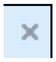
Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Start by searching for the job opening with applicants for which you want to schedule an interview. Use the job opening name link to access the **Manage Job Opening** page.
2.	The **Manage Interviews** action is available on the following pages: • **Manage Job Opening** page: **Applicants** tab • **Manage Applicant** page: **Applicant Activity** page: **Current Status** section • **Search Applications** • **Manage Application** You can also access the page using buttons and links on other pages throughout the system, including: • **Manage Interviews** page • **Manage Applican**t page: **Applicant Activity** tab: **Interview Schedule/Evaluation** section • **Select Job Opening for Interview** page • **Interview Calendar** page • **Interview Team Schedule** page For this example, use the **Manage Job Opening** page.
3.	You can schedule an interview for a group of applicants using **Group Actions** or for a single applicant. In this example, schedule an interview for a single applicant.
4.	Click the scroll bar.

Step	Action
5.	Locate the applicant that you want to interview. Click the **Manage Interviews** button.
6.	Use the **Interview Schedule** page to set up the applicant's interview. You can specify the date, time and location for the interview, as well as the interviewers.
7.	You can schedule applicants for multiple interviews. Each interview has a date, time and location. The system displays a section for **Interview 1**. If other interviews are scheduled for the applicant, UCPath increments the interview number.
8.	Click in the **Date** field. 
9.	Enter the desired information into the **Date** field. For this example, enter **08/16/2018**.
10.	Click in the **Start Time** field. 
11.	Enter the desired information into the **Date** field. For this example, enter **10:00AM**.
12.	Click in the **End Time** field. 
13.	Enter the desired information into the **Date** field. For this example, enter **11:00AM**.
14.	The **Interview Type** provides information about the nature of the interview. Click the button to the right of the **Interview Type** field. 
15.	Select the interview type. For this example, select the **Inhouse1** list item.  Inhouse1
16.	Click the scroll bar.
17.	Use the **Notify Applicant** and **Notify Interview Team** check boxes to initiate and send an email interview notification. After the notification is sent, the system automatically deselects the check boxes.
18.	Click the **Notify Applicant** option. ☐
19.	Click the **Notify Interview Team** option. ☐

Step	Action
20.	The **Interviewers** section lists the interviewers defined on the job opening. You can add additional interviewers and remove interviewers as needed. In this example two interviewers are assigned from the job opening.
21.	You can enter interviewer-specific comments if needed. Click the **Comments** button.
22.	Click in the **Comments** field.
23.	Enter the desired information into the **Comments** field. For this example, enter **Applicant has strong customer service skills.**.
24.	Use the **Spell Check** button to check the spelling of the comment.
25.	Click the **OK** button.  OK
26.	Click the scroll bar.
27.	Use the **Venue Information** section to identify the location of the interview. You can select a venue from the list of locations or you can enter the location details into the **Location** text box. For this example, add the location details.
28.	Click in the **Location** field. 
29.	Enter the desired information into the **Location** field. For this example, enter **UCPath Center**.
30.	In this example, the location address will be added for you.
31.	Use the **Interview Materials** section to add notes and attachments for the interview. You must save the interview as a draft or submit it before notes and attachments can be added.
32.	Click the **Save as Draft** button.  Save as Draft
33.	Click the scroll bar.
34.	Click the **Add Note** button.  Add Note

Step	Action
35.	Click in the **Note Date** field. 
36.	Enter the desired information into the **Note Date** field. For this example, enter **07/24/2018**.
37.	Click in the **Subject** field.
38.	Enter the desired information into the **Subject** field. For this example, enter **Applicant Info**.
39.	Click in the **Details** field.
40.	Enter the desired information into the **Details** field. For this example, enter **Applicant is available to start asap.**.
41.	Click the **Add Note** button. 
42.	The note subject and date appear in the **Notes** section. You can edit the note or delete the note using the applicable buttons.
43.	You can add attachments to the interview, such as interview questions.
44.	Click the **Add Attachment** button. 
45.	Click the **Browse** button. 
46.	Locate the file to attach to the interview. Click the scroll bar.
47.	For this example, click the **Applicant Attachment** file. 
48.	Click the **Open** button. 
49.	The path to the file appears. Click the **Upload** button. 
50.	The attachment appears in the **Attachments** list.
51.	Use the **Letter** section to optionally generate a template-based letter to send to the applicant. You have the option to email the letter to the applicant.

Step	Action
52.	Click the button to the right of the **Letter** field. 
53.	For this example, select the **Interview Letter IS1-RVCMP** list item. 
54.	You cannot generate the letter if the interview has not been saved. In this example, the interview was saved before entering the interview note so the **Generate Letter** button is active.
55.	Click the **Generate Letter** button. 
56.	The letter opens in a new window. You can save the letter locally if you want to modify the default text. Click the **Close** button. 
57.	If you save and modify the letter locally, use the **Upload Letter** button to replace the original version of the letter.
58.	When the interview scheduling is complete, submit the interview. Upon submission, UCPath updates the applicant's disposition to **Interview**. Click the **Submit** button. 
59.	A confirmation message appears. Click the **OK** button. 
60.	After submitting the interview, the **Manage Job Opening** page appears. Notice that the applicant's disposition now displays **Interview**.
61.	Use the **Interviews** button to access a summary of all the interviews.
62.	You have successfully scheduled an interview for an applicant. **End of Procedure.**

View Interview Summary

Use this task to view the interviews scheduled for a job opening.

Navigation: PeopleSoft Menu > Recruiting > Search Job Openings > **Manage Job Opening**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Start by searching for the job opening for which you want to view the interview summary. Use the job opening name link to access the **Manage Job Opening** page.
2.	Use the **Manage Job Opening** page to view the applicants that have applied to the job opening and perform various recruiting and applicant activities.
3.	To view the **Interview Summary** page, click the **Interviews** button. Interviews
4.	The **Interview Summary** page provides interview details for each applicant scheduled to interview for the job opening. In this example, there are two applicants scheduled to interview.
5.	Expand the **Interview Details** section to see details about the interview. For this example, click the **Expand Interview Details** button for the first applicant. ▶
6.	Review the interview details, including the interview date and time, and a list of the interviewers. In this example, the date and time have been set, but interviewers have not been confirmed.
7.	Click the **Expand Interview Details** button for the second applicant. ▶
8.	Again, the date and time have been sent, but interviewers are not confirmed.
9.	Click the **Print Interviews** link to generate a document with interview information. Print Interviews
10.	The **Interview Summary** document opens in a new browser tab. You can print the document.
11.	Click the **Close** button. ×
12.	The **Interview Summary** page appears again. Click the **Return** link. Return
13.	You have successfully viewed interviews scheduled for a job opening **End of Procedure.**

Enter Applicant Interview Evaluation

Use this task to evaluate the applicant's interview. Evaluations may include predefined categories and free-form comments. The evaluation also includes an overall rating and recommendation on how to proceed.

Use the **Create Interview Evaluation** action to create the evaluation. You can also access the **Interview Evaluation** page from the **Self Service** menu.

In this example, use the **Self Service** menu.

Navigation: Recruiting Workcenter > Employee Self Service > **Interview Evaluations**

Note: This page may also be accessible from the **Manage Job Opening**, **Manage Applicant**, **Manage Application** and **Search Applications** pages.

Step	Action
1.	An interviewer may participate in multiple interviews. Use the date range fields to display the interviews that are scheduled and require your participation. In this example, the interviewer has one evaluation awaiting completion.
2.	Click the **Evaluate Applicant** link.  Evaluate Applicant
3.	The **Interview Evaluation** page provides the evaluation categories on the right side of the page and the recommendation section on the left side of the page. The evaluation categories are defined on the evaluation template that is part of the job opening's recruitment template. Complete the **Interview Ratings** section first.
4.	Click the scroll bar.
5.	For each category, select a rating and provide comments, if applicable. For this example, click the button to the right of the **Interview Rating** field for the first category. 
6.	For this example, click the **Excellent** list item.  Excellent

Step	Action
7.	Comments are optional. Click in the **Comment** field. 
8.	Enter the desired information into the **Comment** field. For this example, enter **Clear responses to answers.**.
9.	Use the **Spell Check** button to check the spelling of the comments.
10.	Complete the rating for the second category. Click the button to the right of the **Interview Rating** field. 
11.	For this example, click the **Average** list item. 
12.	Click in the **Comment** field. 
13.	Enter the desired information into the **Comment** field. For this example, enter **Only 2 years higher ed.**.
14.	Complete the rating for the third category. Click the button to the right of the **Interview Rating** field. 
15.	For this example, click the **Excellent** list item. 
16.	Click the scroll bar.
17.	Click the button to the right of the **Interview Rating** field. 
18.	For this example, click the **Average** list item. 
19.	Click the scroll bar.

Step	Action
20.	After completing the evaluation categories, provide the recommendation, overall rating and comments.
21.	Click the button to the right of the **Overall Rating** field. 
22.	For this example, click the **Average** list item. 
23.	Click the button to the right of the **Recommendation** field. 
24.	For this example, click the **100 Hold** list item. 
25.	Click in the **Comments** field. 
26.	Enter the desired information into the **Comments** field. For this example, enter **Average skills**.
27.	For this example, additional comments text was completed for you. The interview evaluation is complete and can now be submitted. Submission of the evaluation posts the rating and recommendation on the evaluation row on the **Manage Interviews** page. The hiring manager can review all interviewer evaluations and enter a final recommendation for the applicant.
28.	Click the **Submit** button. 
29.	You have successfully completed an interview evaluation for an applicant. **End of Procedure.**

View Applicant Interview Evaluations

Use this task to view applicant interview evaluations completed by interviewers.

Navigation: PeopleSoft Menu > Recruiting > Search Applicants > **Manage Applicant**

Note: This page may also be accessible from the **Manage Job Opening** page by clicking the **Applicant** link or from the **Recruiting Home** page.

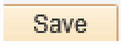
Step	Action
1.	Start by searching for the applicant for which you want to view the interview evaluation and use the applicant name link to access the **Manage Applicant** page.
2.	Use the **Manage Applicant** page to view the applicant's applications, the application disposition and to perform other applicant activities.
3.	Click the **Interview Schedule/Evaluation** link.  Interview Schedule/Evaluation
4.	Applicant interviews appear in the **Interviews** section, along with the date, time, location and job opening.
5.	The **Interview Evaluations** section displays the list of evaluations to be completed by the assigned interviewers.
6.	Click the scroll bar.
7.	An incomplete evaluation displays **Evaluate Applicant** in the **Action** column. In this example the first two evaluations are incomplete. Completed evaluations display the **Interview Rating**, **Recommendation** and **Score**. Click the **View Evaluation** link in the **Action** column to display the **Interview Evaluation** page. **Note:** For TAM administrators the link is **Edit Evaluation** instead of **View Evaluation**.
8.	For this example, click the **View Evaluation** link for the last interview.  View Evaluation
9.	Review the completed interview evaluation, ratings, comments and the recommendation.
10.	Click the scroll bar.
11.	Click the **Return** link.  Return
12.	You have successfully viewed a completed interview evaluation. **End of Procedure.**

Enter Final Applicant Interview Recommendation

Use this task to record the final interview recommendation after the interview evaluations have been submitted. This task requires the appropriate status and reason code.

Navigation: PeopleSoft Menu > Recruiting > Search Applicants > **Manage Applicant**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Start by searching for the applicant for which you want to enter interview recommendations. Use the applicant name link to access the **Manage Applicant** page.
2.	The **Manage Applicant** page displays the applicant activity and the job openings for which the applicant has applied. In this example, the applicant applied for two job openings; one with an **Applied** disposition and the second with an **Interview** disposition.
3.	Locate the job opening row with the **Interview** disposition. Click the **Manage Interview** button.
4.	The **Manage Interviews** page displays the **Interview Summary** and **Interview Details** sections. You can also review the interviewers' evaluations at the bottom of the page.
5.	Click the scroll bar.
6.	The **Final Recommendation** group box allows you to enter a final recommendation for the applicant. The **Final Recommendation** field displays the current interview status.
7.	Click the button to the right of the **Final Recommendation** field.  005 Interview
8.	Select the appropriate recommendation. For this example, select the **110 Reject** list item.  110 Reject
9.	Click the button to the right of the **Reason** field. 
10.	Select the appropriate reason. For this example, select the **Insufficient Skills** list item.  Insufficient Skills
11.	Click the **Save** button.  Save

Step	Action
12.	The next steps for the other applicants on the job opening depend on the final recommendation. In this example, the applicant was rejected because of insufficient skills. You may want to take a look at the other applicants that interviewed for the job to re-evaluate their skills. Or you may want to repost the job opening and start the recruiting process again.
13.	Click the **Return** button. 
14.	You have successfully recorded a final interview recommendation for an applicant. **End of Procedure.**

Submit Case to UCPath Center

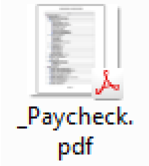
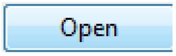
Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
15.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
16.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 

Step	Action
17.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
18.	Click the button to the right of the **Category** field. 
19.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
20.	Click in the **Subject** field.
21.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
22.	Click in the **Description** field.
23.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
24.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
25.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
26.	Click in the **Best Contact Phone Number** field.
27.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
28.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
29.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
30.	Click the **Add Attachment** link. 
31.	Navigate to the document you want to attach. In this example, the document is located on the desktop.

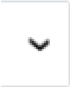
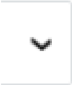
Step	Action
32.	For this example, click the **_Paycheck.pdf** list item. 
33.	Click the **Open** button. 
34.	The file name appears in the **Attachments** box.
35.	Click the **Submit** button.
36.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
37.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
38.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
39.	Click the scroll bar.
40.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
41.	Click the scroll bar.
42.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
43.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

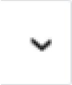
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
44.	Click the **Ask UCPath Center** button. 
45.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
46.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
47.	UCPath returned one result. Click the scroll bar.
48.	Click the **Create an Inquiry** link. 
49.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
50.	Click the button to the right of the **Requested By** field. 
51.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
52.	Click the button to the right of the **Topic** field. 
53.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.

Step	Action
54.	Click the button to the right of the **Category** field. 
55.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
56.	Click in the **Subject** field.
57.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
58.	Click the scroll bar.
59.	Click in the **Description** field.
60.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
61.	In this example, the full **Description** was completed on your behalf.
62.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
63.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
64.	Click the **Submit Inquiry** button. 
65.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
66.	The submitter's name appears.
67.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

Reopen Closed UCPath Center Case

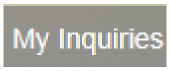
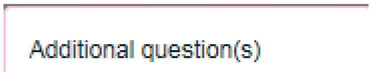
Use this task to reopen a closed inquiry via the UCPath website.

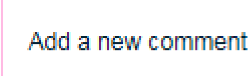
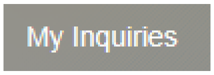
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:

Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
68.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
69.	Click the **My Closed Inquiries** link. 
70.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
71.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
72.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
73.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.

Step	Action
74.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
75.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
76.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
77.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button.
78.	Click the scroll bar.
79.	Notice the comment now appears in the **Case Comments** section.
80.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
81.	Return to the top of the page. Click the scroll bar.
82.	Click the **My Inquiries** link. 
83.	The new inquiry appears in the **My Open Inquires** list.
84.	You have reopened a closed inquiry. **End of Procedure.**

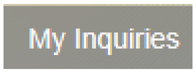
Monitor UCPath Center Cases

Use this task to review the status of an existing inquiry via the UCPath website.

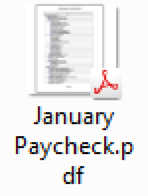
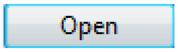
Dashboard Navigation:
Ask UCPath Center
or

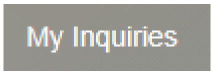
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
85.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
86.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
87.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
88.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
89.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 
90.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 

Step	Action
91.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link.  00180573
92.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field.  Add a new comment
93.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
94.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
95.	Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center
96.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
97.	Click the scroll bar.
98.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link.  View All
99.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. 
100.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.

Step	Action
101.	To return to the case details, click the **00180573** link. 
102.	Click the scroll bar.
103.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
104.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
105.	Click the **Open** button. 
106.	A message confirms the file was uploaded. Click the **Done** button. 
107.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
108.	You can view all attachments in a list. Click the **View All** link. 
109.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 

Step	Action
110.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. ▾
111.	Click the **00180573** link.  00180573
112.	Click the scroll bar.
113.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
114.	Click the **Email** link.  Sandbox: UCPath Center: Inquir.
115.	Review the email information as you scroll down the page. Click the scroll bar.
116.	Review the email from the UCPath Center. Click the scroll bar.
117.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
118.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
119.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
120.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**

Step	Action
121.	Click the **00180567** link.  00180567
122.	Click the scroll bar.
123.	Notice the **Status** is **Closed/Resolved**.
124.	Click the scroll bar.
125.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. ⌂
126.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMTAM230: Manage Applicant Job Offers

Enter Applicant References

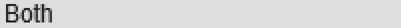
Use this task to request applicant references and to enter reference details for an applicant.

Navigation: PeopleSoft > Recruiting > Search Applicants > **Manage Applicant**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Applicants can provide references in Candidate Gateway, you can request references in UCPath, or you may receive reference information outside of UCPath. In this example, the applicant provided references and contact information during a phone conversation. You will enter the reference contact details, as well as the discussion notes from the reference calls.
2.	Begin by searching for the applicant. You can use a variety of search criteria to locate the applicant. In this example, use the **Applicant ID**.
3.	Click in the **Applicant ID** field. 
4.	Enter the desired information into the **Applicant ID** field. For this example, enter **600307**.

Step	Action
5.	Click the **Search** button. 
6.	The applicant appears in the **Search Results**. Click the **Applicant** link to access the **Manage Applicant** page. For this example, click the **Christine Medina Garcia** link. 
7.	Use the **Manage Applicant** page to view and update applicant details. In this example, the applicant applied to two job openings.
8.	Click the **Applicant Data** tab. 
9.	UCPath displays the applicant data and several sub-tabs that contain other relevant applicant details. Click the **References** tab. 
10.	The **References** section displays reference information. In this example, the applicant has no references.
11.	If you want to send the applicant a request for reference contacts, click the **Request Reference** button. After you receive the reference list from the applicant, click the **Add Reference** button to enter the reference information and reference discussion comments.
12.	Click the **Add Reference** button. 
13.	UCPath automatically numbers each reference. In this example, you are entering **Reference Number 1**. Use the **Date Contacted** field to record the date that you spoke to the reference. The field defaults to the current date. For this example, accept the default date.
14.	The fields that you complete depend on the reference details provided by the applicant. The required fields are **Date Contacted**, **Reference Type** and **Reference Name**.
15.	Click the button to the right of the **Reference Type** field. 

Step	Action
16.	Identify the reference as personal, professional or both. For this example, select the **Both** list item. 
17.	Click in the **Reference Name** field. 
18.	Enter the desired information into the **Reference Name** field. For this example, enter **Mary Thomas**.
19.	Click in the **Title** field. 
20.	Enter the desired information into the **Title** field. For this example, enter **VP of Operations**.
21.	Click in the **Employer** field. 
22.	Enter the desired information into the **Employer** field. For this example, enter **Snack Time**.
23.	Click in the **Email Address** field. 
24.	Enter the desired information into the **Email Address** field. For this example, enter **mary.thomas@st.com**.
25.	Click the **Edit Address** button if you have the mailing address for the reference. For this example, the address was not provided.
26.	Click in the **Contact Phone** field. 
27.	Enter the desired information into the **Contact Phone** field. For this example, enter **7025556789**.
28.	Click in the **Comment** field. 
29.	Enter the desired information into the **Comment** field. For this example, enter **Strong resource, ethical, loyal, and very talented.**.
30.	Click the **OK** button. 

Step	Action
31.	The **Manage Applicant** page appears again. The reference appears in the **References** section.
32.	Click the scroll bar.
33.	Use the **Edit** button to update the reference details, including discussion comments. Use the **Delete** button to delete the reference.
34.	Click the scroll bar.
35.	Click the **Save** button. 
36.	You have successfully entered reference information for an applicant. **End of Procedure.**

Request Applicant Work Experience

Use this task to request work experience information from an applicant. The work experience is used to calculate the step and salary for a job offer.

Navigation: PeopleSoft > Recruiting > Search Job Openings > **Manage Job Opening**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Begin this task by searching for the job opening that requires work experience information for applicants. You can request work experience for applicants with a disposition set to **Interview** or a subsequent disposition. You can search for the job opening using a variety of search criteria. For this example, use the **Job Opening ID**.
2.	Click in the **Job Opening ID** field. 
3.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994539**.
4.	Click the **Search** button. 
5.	The job opening appears in the **Search Results**. Click the **Job Opening** link to access the **Manage Job Opening** page. For this example, click the **VOC NURSE** link. 

Step	Action
6.	Use the **Manage Job Opening** page to manage the job opening and its applicants. The applicant status dashboard displays the number of applicants per disposition.
7.	Click the scroll bar.
8.	In this example, there is one applicant for which you can request work experience details.
9.	Click the **UC Work Experience** link.  UC Work Experience (1)
10.	The applicant appears in the **Applicants** section. In this example, the applicant has not yet provided their work experience details. This is indicated by the **Experience Status** of **Not Submitted**.
11.	Click the scroll bar.
12.	In the **Expiration Date** field, to provide the applicant a deadline for providing the work experience details. Click in the **Expiration Date** field. 
13.	Enter the desired information into the **Expiration Date** field. For this example, enter **09012018**.
14.	Press **[Tab]**.
15.	Click the **Verify Experience** button.  Verify Experience
16.	UCPath sends a notification requesting the work experience to the applicant's Candidate Gateway account. The notification includes a link to the page.
17.	You have successfully requested work experience from an applicant. **End of Procedure.**

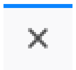
Calculate Experience-Banded Pay and Generate Letter

Use this task to calculate the pay for an experience-banded position and to generate the experience-banded letter to send to the applicant.

Navigation: PeopleSoft > Recruiting > Search Job Openings > **Manage Job Opening**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Begin this task by searching for the job opening that is an experience-banded position. The applicant must have the disposition set to **Interview** or a subsequent disposition. You can search for the job opening using a variety of search criteria. For this example, use the **Job Opening ID**.
2.	Click in the **Job Opening ID** field. 
3.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994539**.
4.	Click the **Search** button.  Search
5.	The job opening appears in the **Search Results**. Click the **Job Opening** link to access the **Manage Job Opening** page. For this example, click the **VOC NURSE** link.  VOC NURSE
6.	Use the **Manage Job Opening** page to manage the job opening and its applicants. The applicant status dashboard displays the number of applicants per disposition.
7.	Click the scroll bar.
8.	In this example, there is one applicant for which you can calculate work experience details. Click the **UC Work Experience** link.  UC Work Experience (1)
9.	The applicant appears in the **Applicants** section. In this example, the applicant has not yet provided their work experience details. Notice the **Disposition** displays **Interview** and the **Experience Status** displays **Submitted**.
10.	Click the scroll bar.
11.	Click the **Goto Experience Link**.  Goto Experience Link
12.	The **UC Work Experience** page displays the work experience provided by the applicant. Click the **Add a new row** button to add additional work experience for the applicant, if needed. In this example, additional experience is not needed.

Step	Action
13.	The recruiter or other designated team member selects the **Relevant Experience (Recruiter)** check box if the experience is relevant to the position. For this example, select the **Relevant Experience (Recruiter)** option. ☐
14.	If the work experience was worked at UC, select the **UC Relevant Service** option. For this example, do not select the option.
15.	The **Relevant Experience Percent** field defaults to **100**. Adjust the percent, if necessary. The **Relevant Experience in Months** field is calculated based on the date fields and percent. For this example, no change is needed.
16.	The **Experience Totally Overlapped** field defaults to **No**.
17.	Use the **Total Experience and Rate** section to calculate the experience and generate the related letter.
18.	Click the **Calculate Experience** button. 
19.	The **Total Experience and Rate** section is updated based on the information in the **Work Experience** section at the top of the page. The **Step** and **Rate** fields populate based on the position requirements. This is the step and rate that is recommended for the job offer.
20.	Click the **Generate Letter** button to create a letter to send to the applicant. The applicant must sign and return a copy of the letter, acknowledging their acceptance of the proposed step and rate, and verifying the accuracy of the information. UCPath does not automatically send the letter. You must save the letter to your hard drive, and then mail or email the letter to the applicant. Click the **Generate Letter** button. 
21.	The letter opens in a new browser tab. Save the letter to send to the applicant for their signature. You must attach a copy of the letter to the job offer, if an offer is extended to the applicant.
22.	Return to the **UC Work Experience** page. Click the **Close** button for the letter. 

Step	Action
23.	Add comments as needed in the **Recruiter Comments** text box. No comments are needed for this example.
24.	You can save and release the work experience record back to the applicant for additional information, if needed.
25.	If necessary, click the **View Resume** link to open the applicant's resume for your review.
26.	You can save the completed work experience as a draft if additional changes are needed. For this example, no additional information is needed. Click the **Save** button. 
27.	The record is saved. Click the **Return to Previous Page** link. 
28.	You have successfully calculated experience-banded pay for an applicant and generated the experience-banded letter. **End of Procedure.**

Prepare Job Offer

Use this task to prepare a job offer for an applicant.

Navigation: PeopleSoft Menu > Recruiting > Search Job Openings > **Manage Job Opening**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Begin this task by searching for the job opening that has an applicant ready for a job offer. You may also search for the applicant in the **Search Applicants** page. For this example, use the **Job Opening ID**.
2.	Click in the **Job Opening ID** field. 
3.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994498**.
4.	Click the **Search** button. 

Step	Action
5.	The job opening appears in the **Search Results**. Click the **Job Opening** link to access the **Manage Job Opening** page.
6.	The job opening appears in the **Search Results**. Click the **Job Opening** link to access the **Manage Job Opening** page. For this example, click the **Policy Analyst Manager - Level 1** link. 
7.	Use the **Manage Job Opening** page to manage activity related to a single job opening. The **Applicants** section lists the applicants associated with this job opening. Click the **Applicant Name** link to review detailed applicant information. For this example, applicant **600275** has a **Disposition** set to **Interview** and the decision was made to offer the job to this applicant.
8.	Click the scroll bar.
9.	To initiate the job offer process, use the **Other Actions** menu. Click the **Other Actions** menu. 
10.	Click the **Recruiting Actions** menu. 
11.	Click the **Prepare Job Offer** menu. 
12.	Use the **Prepare Job Offer** page to enter information for the offer.
13.	The **Offer Details** section displays information about the job opening. Most of this information defaults from the job opening. A few fields can be edited.
14.	Job offers require approval in UCPath. The levels of approval are based on your Location business process. The **Status** field defaults to **Pending Approval**.
15.	The **Registered Online** field indicates whether the applicant applied through the Candidate Gateway.
16.	Specify the first day of work for the applicant, if the offer is accepted. Click in the **Start Date** field. 
17.	Enter the desired information into the **Start Date** field. For this example, enter **10152018**.

Step	Action
18.	Use the **Notify Applicant** check box to post the offer to the Candidate Gateway. The check box is editable only if there is an email address in the applicant's Candidate Gateway record. If the applicant's preferred notification method is email, the check box is automatically selected and cannot be changed. For this example, select the **Notify Applicant** option. ☐
19.	Use the **Job Offer Components** section to enter the detailed terms of the salary.
20.	Click the button to the right of the **Component** field. 
21.	Select the appropriate compensation component. For this example, click the **Base Salary** list item.  Base Salary
22.	When you select the component, UCPath automatically populates the **Currency** and **Frequency** fields. You can update them, if needed.
23.	Click in the **Offer Amount** field. 
24.	Enter the desired information into the **Offer Amount** field. For this example, enter **6666.66**.
25.	Click the **Add Offer Component** button if you must add rows for other job offer components. For this example, no additional components are needed.
26.	Click in the **Comments** field.
27.	Enter the desired information into the **Comments** field. For this example, enter **No bonus offered**.
28.	Click the scroll bar. 
29.	Use the **Offer Letter** section to select an offer letter to send to the applicant. Click the button to the right of the **Letter** field. 
30.	For this example, select the **Offer Letter OF1-UCOP1** list item.  Offer Letter OF1-UCOP1
31.	You cannot generate the offer letter until the offer is submitted for approval and all approvals are complete.

Step	Action
32.	The job offer is ready to submit for approval. Click the **Submit for Approval** link. 
33.	A confirmation message appears. Click the **OK** button. 
34.	After the job offer is approved, you can access the **Prepare Job Offer** page again to generate the offer letter and post the offer to the Candidate Gateway. Refer to the *Generate Offer Letter* simulation for details on those tasks.
35.	You have successfully prepared a job offer for an applicant. **End of Procedure.**

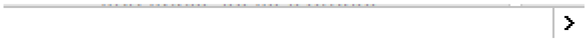
Generate Offer Letter

Use this task to generate an offer letter and post it to the applicant's Candidate Gateway account after the job offer is approved.

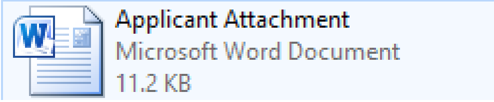
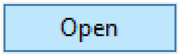
Navigation: PeopleSoft Menu > Recruiting > Search Job Openings > **Manage Job Opening**

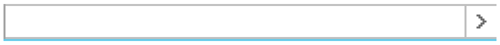
Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Begin this task by searching for the job opening for which a job offer was prepared and approved. You also can search for the applicant in the **Search Applicants** page. For this example, use the **Job Opening ID**.
2.	Click in the **Job Opening ID** field. 
3.	Enter the desired information into the **Job Opening ID** field. For this example, enter **994498**.
4.	For this example, remove the value in the **Status** field. Click the button to the right of the **Status** field. 
5.	For this example, select the **Blank** list item. 

Step	Action
6.	Click the **Search** button. 
7.	The job opening appears in the **Search Results**. Click the **Job Opening** link to access the **Manage Job Opening** page. Click the **Policy Analyst Manager - Level 1** link. 
8.	Use the **Manage Job Opening** page to manage activity related to a single job opening. The **Applicants** section displays the applicants for this job opening. Click the **Applicant Name** link to review detailed applicant information. In this example, applicant **600275** has an approved job offer and you must generate the offer letter.
9.	Click the scroll bar.
10.	Click the **Other Actions** menu. 
11.	Click the **Recruiting Actions** menu. 
12.	Click the **Prepare Job Offer** list item. 
13.	Use the **Prepare Job Offer** page to enter information for the job offer and to generate the offer letter. In this example, the job offer details were approved and you must generate the offer letter.
14.	Click the scroll bar. 
15.	The buttons in the **Offer Letter** section are enabled after approval is received. Click the **Generate Letter** button. 
16.	The letter opens in a new browser tab. Review the letter and then close it. Click the **Close** button. 
17.	Click the scroll bar. 
18.	Notice that UCPath updated the **Date Printed** field.

Step	Action
19.	If saved and changed the offer letter, click the **Upload Letter** button to upload the updated version.
20.	You can email a copy of the offer letter to the applicant. For this example, click the **Email Applicant** button. 
21.	Use the **Send Correspondence** page to enter the email details. UCPath populates the **To** and **Cc** fields in the **Recipient Information** section with the applicant's name and email address.
22.	Click in the **Subject** field. 
23.	Enter the desired information into the **Subject** field. For this example, enter **UC Offer Letter**.
24.	Click in the **Message** field.
25.	Enter the desired information into the **Message** field. For this example, enter **Please see attached.**.
26.	Click the scroll bar.
27.	The offer letter appears in the **Attachments** section. Click the **Add Attachment** button to add other attachments, such as the experience-banded letter, to send to the applicant.
28.	Use the **Preview** button to view the formatted email before sending it to the applicant.
29.	For this example, click the **Send** button. 
30.	The **Attachments** section now includes the offer letter. If you need to view the letter, click the link in the **Details** column to open the letter.
31.	You can add additional attachments to the offer before posting it to the Candidate Gateway. You must put the offer in an editable state. Click the **Edit Offer** button. 
32.	Click the scroll bar.
33.	Click the **Add Applicant Attachment** button. 
34.	Click the **Browse** button. 

Step	Action
35.	Locate the file you must attach. Click the scroll bar.
36.	For this example, click the **Applicant Attachment** document.  Applicant Attachment Microsoft Word Document 11.2 KB
37.	Click the **Open** button. 
38.	Click the **Upload** button. 
39.	The attachment appears in the list. You can add a description of the attachment in the **Description** field, if necessary.
40.	Click the **Add Organizational Attachment** button to attach documents from the UC document library, if necessary.
41.	Click the scroll bar. 
42.	Click the **Submit** link to save the changes. 
43.	A confirmation message appears. Click the **OK** button. 
44.	Click the scroll bar. 
45.	Use the **Post** button to send the completed offer and attachments to the applicant's Candidate Gateway account. Click the **Post** link. 
46.	Use the **Post Online Job Offer** page to review the offer and submit it to the Candidate Gateway.
47.	Click the scroll bar. 

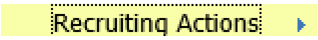
Step	Action
48.	Click the **Submit** button. 
49.	A confirmation message appears. Click the **OK** button. 
50.	Notice that the **Post** link is disabled and the **Unpost** link is available. If necessary, click the **Unpost** link to remove the offer from the Candidate Gateway.
51.	Click the scroll bar. 
52.	Click the **Return** link. 
53.	The applicant's **Disposition** displays **Offer**. Click the **Other Actions** menu to access the **Prepare Job Offer** page again, if needed.
54.	Click the scroll bar.
55.	You can also review the offer and other recruiting activities for this applicant on the **Manage Application** page. Click the **Application** button.
56.	Use the **Manage Application** page to view all recruiting activity related to a single applicant and a specific job.
57.	If the applicant has received a job offer, the **Offer** tab is available. Click the **Offer** tab. 
58.	Click the scroll bar.
59.	The **Offer Details** section displays a summary of the applicant's job offer.
60.	Click the scroll bar. 
61.	If necessary, click the **Edit Offer** link to access the **Prepare Job Offer** page to edit or delete the offer. You can also accept or reject the offer from this page.
62.	You have successfully generated an offer letter and posted it to the applicant's Candidate Gateway account. **End of Procedure.**

Update Applicant Disposition

Use this task to update an applicant's disposition.

Navigation: PeopleSoft > Recruiting > Search Applicants > **Manage Applicant**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Search for the applicant using a variety of search criteria. For this example, use the **Applicant ID**.
2.	Click in the **Applicant ID** field. 
3.	Enter the desired information into the **Applicant ID** field. For this example, enter **600278**.
4.	Click the **Search** button. 
5.	The applicant appears in the **Search Results**. For this example, click the **Hasan Minaj** link. 
6.	Use the **Manage Applicant** page to view the applicant activity and perform other recruiting tasks for the applicant record.
7.	Click the scroll bar.
8.	Click the **Other Actions** menu. 
9.	Click the **Recruiting Actions** menu. 
10.	Click the **Edit Disposition** menu. 
11.	The current disposition appears. Click the button to the right of the **New Disposition** field. 
12.	Your local process may include updating an applicant's disposition to **Hold** when a job offer is made to the selected candidate. If the job offer is rejected, you may want to consider one of the other candidates with the **Hold** disposition.

Step	Action
13.	Select the appropriate disposition. For this example, select the **110 Reject** list item.  110 Reject
14.	Click the button to the right of the **Status Reason** field. 
15.	Select the reason for the selected disposition. For this example, select the **Candidate pool identified** list item.  Candidate pool identified
16.	Click the **Save** button. 
17.	The disposition now displays **Reject**.
18.	You have successfully updated an applicant's disposition. **End of Procedure.**

Record Job Offer Acceptance or Rejection

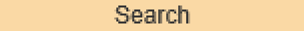
Use this task to record the acceptance or rejection of a job offer on an applicant's behalf.

Applicants with an account in Candidate Gateway can accept or reject a job offer within the Candidate Gateway. Perform this task when an applicant communicates their job offer decision to you and the applicant is unable to use Candidate Gateway to record the acceptance or rejection.

Navigation: PeopleSoft > Recruiting > Search Applicants > **Manage Applicant**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Begin this task by searching for the applicant who received the job offer. You can search for the applicant using a variety of search criteria. For this example, use the **Applicant ID**.
2.	Click in the **Applicant ID** field. 
3.	Enter the desired information into the **Applicant ID** field. For this example, enter **600204**.

Step	Action
4.	Click the **Search** button. 
5.	The applicant appears in the **Search Results**. Click the applicant link to access the **Manage Applicant** page. For this example, click the **Rajesh Koothrapalli** link. 
6.	Use the **Manage Applicant** page to view applicant activities and data, and to perform various recruiting and applicant tasks.
7.	Click the scroll bar.
8.	Click the **Other Actions** menu. 
9.	Click the **Recruiting Actions** menu. 
10.	The **Recruiting Actions** menu contains a number of tasks that can be performed in the recruiting process, including the options to record the applicant's acceptance or rejection of the offer. For this example, click the **Accept Offer** menu. 
11.	The **Status** field displays **Accept** because you chose the accept option on the menu. If you chose the **Reject** option from the **Recruiting Actions** menu, the **Status** would display **Reject** and you may want to enter a **Reason**. A reason is not required for acceptance of the offer.
12.	Click the **Accept** button. 
13.	A confirmation message appears. Click the **OK** button. 
14.	The applicant's **Disposition** displays **Offer Accepted**. If the applicant applied to other job openings, UCPath updates the disposition for those job openings to **Hold**. The applicant is ready to move to the next phase in the recruiting process.
15.	You have successfully accepted an applicant's job offer in UCPath. **End of Procedure.**

Record Occupational Health Data

Use this task to record and track an applicant's occupational health screening schedule and status information. This information is typically captured by UC Medical Centers although other locations may have a need for this information as well.

Navigation: PeopleSoft Menu > Recruiting > **Occupational Health Data**

Step	Action
1.	Locations may have certain jobs that require a potential new hire to complete and pass a health screening before being processed as a new hire in the system. The process begins when an applicant accepts a job offer. The applicant's ID is automatically added to the Occupational Health search for the **Occupational Health Data** page. In addition, a daily query report is generated and distributed via email to defined location recipients. The report contains the disposition of applicants for which a health screening is required and helps to provide oversight with needed applicant follow up to ensure applicants are completing the screening requirement. Locations can elect to have a row for applicants in an **Offer Accepted** status automatically inserted on the Occupational Health table so that the applicants appear on the daily query report (this is referred to as the automated process). Locations that don't elect this option won't have applicants appear on the query report until applicant information has been added and saved on the **Occupational Health Data** page (this is referred to as the manual process).
2.	The first part of this task includes the steps to record an applicant's health screening appointment date and health clearance status on the **Occupational Health Data** page. The second part of this task includes the steps to record the applicant's health screening clearance date and final health clearance status on the **Occupational Health Data** page.
3.	Communication with the applicant can be performed via email if the applicant provided an email address in Candidate Gateway. Use the **Send Correspondence** (email) task in TAM to communicate with the applicant (although emails can also be initiated outside of TAM as well) to identify an applicant’s available dates and times for the appointment. An UC resource identifies up to three possible appointment dates and times and communicates them to the applicant. After the applicant confirms an appointment date and time, the **Occupational Health Data** page should be accessed and updated with the appointment date.

Step	Action
4.	Begin by searching for the applicant using the **Applicant ID** or the **Job Opening ID**. For this example, the **Applicant ID** will be used.
5.	Click in the **Applicant ID** field. 
6.	Enter the desired information into the **Applicant ID** field. For this example, enter **600246**.
7.	Click the **Search** button. 
8.	Use the **Occupational Health Data** page to capture health screening schedule and status information for impacted applicants. The information at the top of the page displays information from the job opening and the applicant's application.
9.	Use the **Go** button to access the **Manage Job Opening** page and view details about the job opening and applicant.
10.	If the applicant had a prior health screening and requires another one, use the **Add a New Row [+]** button to record the new screening details.
11.	The **Effective Date** field defaults to the current date but can be updated if needed. For this example, leave the defaulted value.
12.	Use the **Health Scrn Appt Dt** field to enter the applicant's confirmed screening appointment date.
13.	Click in the **Health Scrn Appt Dt** field. 
14.	Enter the desired information into the **Health Scrn Appt Dt** field. For this example, enter **02/06/2019**.

Step	Action
15.	Use the **Health Clearance Status** field to select a status for the health clearance. Valid status options include: - Declined - Delayed - Delinquent - Fail - Final Clearance - Medical Hold - No Show - Pending - Provisional Note that only applicants with a blank **Health Scrn Clearance Dt** and **Health Clearance Status** other than **Final Clearance** or **Provision** will appear on the daily query report.
16.	Click the button to the right of the **Health Clearance Status** field. 
17.	For this example, click the **Pending** list item.  Pending
18.	Use the **Comments** field to enter additional notations and details about the screening.
19.	Click in the **Comment** field.
20.	Enter the desired information into the **Comment** field. For this example, enter **Notified applicant of appointment.**.
21.	Click the **Save** button. 
22.	The first part of the task is complete. After the applicant completes the health screening and the screening results are available, access the **Occupational Health Data** page to record the clearance date and status. Use the same navigation as shown at the start of this simulation.
23.	Begin by searching for the applicant using the **Applicant ID** or the **Job Opening ID**.
24.	Click in the **Applicant ID** field. 
25.	Enter the desired information into the **Applicant ID** field. For this example, enter **600246**.

Step	Action
26.	Click the **Search** button. 
27.	Update the **Health Scrn Appt Dt** if needed. For this example, leave the current value.
28.	Use the **Health Scrn Clearance Dt** field to enter the date for which the applicant has cleared the screening.
29.	Click in the **Health Scrn Clearance Dt** field. 
30.	Enter the desired information into the **Health Scrn Clearance Dt** field. For this example, enter **02/11/2019**.
31.	Update the clearance status now that screening is complete. Click the button to the right of the **Health Clearance Status** field. 
32.	For this example, click the **Final Clearance** list item. 
33.	Record any additional comments. For this example, new notes will be added to the existing notes, although you can delete older comments if needed. Click in the **Comment** field.
34.	Enter the desired information into the **Comment** field. For this example, enter **Applicant notified of pass and final clearance.**.
35.	Click the **Save** button. 
36.	You have successfully recorded an applicant's occupational health screening schedule and status information. **End of Procedure.**

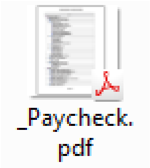
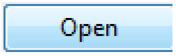
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
37.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link.  Submit An Inquiry
38.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
39.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.  Payroll
40.	Click the button to the right of the **Category** field. 
41.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
42.	Click in the **Subject** field.
43.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
44.	Click in the **Description** field.
45.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
46.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
47.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
48.	Click in the **Best Contact Phone Number** field.
49.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.

Step	Action
50.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
51.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
52.	Click the **Add Attachment** link. 
53.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
54.	For this example, click the **_Paycheck.pdf** list item. 
55.	Click the **Open** button. 
56.	The file name appears in the **Attachments** box.
57.	Click the **Submit** button.
58.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
59.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
60.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
61.	Click the scroll bar.
62.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
63.	Click the scroll bar.
64.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
65.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

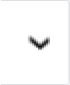
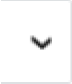
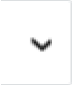
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
66.	Click the **Ask UCPath Center** button. 
67.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
68.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
69.	UCPath returned one result. Click the scroll bar.
70.	Click the **Create an Inquiry** link. 
71.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.

Step	Action
72.	Click the button to the right of the **Requested By** field. 
73.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
74.	Click the button to the right of the **Topic** field. 
75.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
76.	Click the button to the right of the **Category** field. 
77.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
78.	Click in the **Subject** field.
79.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
80.	Click the scroll bar.
81.	Click in the **Description** field.
82.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
83.	In this example, the full **Description** was completed on your behalf.
84.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
85.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.

Step	Action
86.	Click the **Submit Inquiry** button. 
87.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
88.	The submitter's name appears.
89.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

Reopen Closed UCPath Center Case

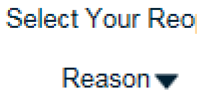
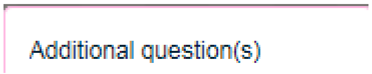
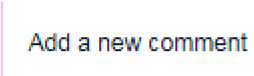
Use this task to reopen a closed inquiry via the UCPath website.

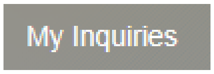
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
90.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
91.	Click the **My Closed Inquiries** link. 
92.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 

Step	Action
93.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
94.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
95.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
96.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
97.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
98.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
99.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
100.	Click the scroll bar.
101.	Notice the comment now appears in the **Case Comments** section.

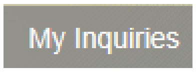
Step	Action
102.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
103.	Return to the top of the page. Click the scroll bar.
104.	Click the **My Inquiries** link. 
105.	The new inquiry appears in the **My Open Inquires** list.
106.	You have reopened a closed inquiry. **End of Procedure.**

Monitor UCPath Center Cases

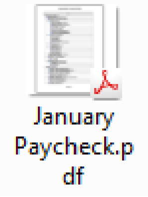
Use this task to review the status of an existing inquiry via the UCPath website.

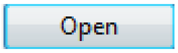
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

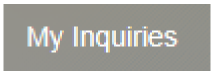
Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
107.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
108.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).

Step	Action
109.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
110.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
111.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link.  Date/Time Opened ▲
112.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again..  Date/Time Opened ▼
113.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link.  00180573
114.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field.  Add a new comment
115.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
116.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.

Step	Action
117.	Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center
118.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
119.	Click the scroll bar.
120.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link.  View All
121.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▾
122.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
123.	To return to the case details, click the **00180573** link.  00180573
124.	Click the scroll bar.
125.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link.  Upload Files
126.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item.  January Paycheck.pdf

Step	Action
127.	Click the **Open** button.  Open
128.	A message confirms the file was uploaded. Click the **Done** button.  Done
129.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
130.	You can view all attachments in a list. Click the **View All** link.  View All
131.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. ▼
132.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. ▼
133.	Click the **00180573** link.  00180573
134.	Click the scroll bar.
135.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
136.	Click the **Email** link.  Sandbox: UCPath Center: Inquir.
137.	Review the email information as you scroll down the page. Click the scroll bar.

Step	Action
138.	Review the email from the UCPath Center. Click the scroll bar.
139.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
140.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
141.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
142.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
143.	Click the **00180567** link.  00180567
144.	Click the scroll bar.
145.	Notice the **Status** is **Closed/Resolved**.
146.	Click the scroll bar.
147.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
148.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

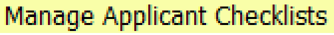
PHCMTAM240: Prepare for Hire

Create New Hire Checklist

Use this task to create a checklist to manage hiring activities for an applicant.

Navigation: PeopleSoft Menu> Recruiting > Search Applicants > **Manage Applicant**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Begin this task by searching for the applicant using a variety of search criteria. In this example, use the **Applicant ID**.
2.	Click in the **Applicant ID** field. 
3.	Enter the desired information into the **Applicant ID** field. For this example, enter **600202**.
4.	Click the **Search** button. 
5.	The employee appears in the **Search Results**. Click the employee name link. For this example, click the **Aravind Ramalingom** link. 
6.	Use the **Manage Applicant** page to view the applicant activity and perform other recruiting tasks on the applicant record.
7.	In this example, the applicant is in the **Ready for Hire** status for the Executive Adviser job opening. Click the scroll bar.
8.	Click the **Other Actions** menu. 
9.	Click the **Applicant Actions** menu. 
10.	Click the **Manage Applicant Checklists** menu. 
11.	Use the **Applicant Checklist** page to create and manage task checklists for a specific applicant and job opening. You can use a predefined checklist or create an individualized checklist for a particular applicant. In this example, you will select a predefined checklist.
12.	The **Checklist Date** defaults to the current date. Update the date as needed. For this example, accept the default date.

Step	Action
13.	You can select a predefined checklist in the **Checklist** field or you can manually enter tasks in the **Checklist Item** section. For this example, select a predefined new hire checklist. Click the **Look up Checklist** button. 🔍
14.	Select the appropriate checklist. For this example, select the **UCHIR1** list item. UCHIR1 UC New Hire Checklist
15.	UCPath updates the **Checklist Item** section with the items associated with the predefined checklist. If an item does not apply for the applicant, you can use the **Delete** button to remove the item.
16.	Use the **Briefing Status** field to update the item status as you work activities on the list. The status defaults to **Initiated**. Update the status to **Complete** or **Not Applicable** as you address each item.
17.	In this example, mark the first item as completed and the second item not applicable. Click the button to the right of the **Briefing Status** field on the first row. ⌄
18.	Select the appropriate status. For this example, select the **Completed** list item. Completed
19.	Click the button to the right of the **Briefing Status** field on the second row. ⌄
20.	For this example, select the **Not Applicable** list item. Not Applicable
21.	Click the scroll bar.
22.	At the bottom of the page you can add additional checklist items and add additional checklists, if needed. For this example, add a checklist item. Click the **Add Checklist Item** button. Add Checklist Item
23.	Click the scroll bar.

Step	Action
24.	A new row appears at the bottom of the list. Click in the **Sequence** field. 
25.	Enter the desired information into the **Sequence** field. For this example, enter **3300**.
26.	Click the **Look up Item Code** button.
27.	Click the scroll bar.
28.	Select the appropriate task. For this example, select the **Update Employee Personal Data** list item.  Update Employee Personal Data
29.	UCPath defaults **Initiated** as the **Briefing Status** and the current date for the **Status Date**. Update these fields if needed. For this example, accept the defaults.
30.	Click the **Save** button.  Save
31.	When you want to update the checklist, access the **Manage Application** page **Other** tab to view and manage a checklist already assigned to an applicant.
32.	You have successfully created a new hire checklist for an applicant. **End of Procedure.**

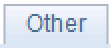
Maintain New Hire Checklist

Use this task to maintain a new hire checklist. Maintenance activities include updating checklist item statuses, as well as adding or deleting checklist items.

Navigation: PeopleSoft Menu > Recruiting > Search Applicants > **Manage Applicant**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	Begin this task by searching for the applicant using a variety of search criteria. In this example, use the applicant's last name.
2.	Click in the **Last Name** field. 
3.	Enter the desired information into the **Last Name** field. For this example, enter **ramalingom**.

Step	Action
4.	Click the **Search** button.  Search
5.	The applicant appears in the **Search Results**. Click the applicant name link to access the **Manage Applicant** page. For this example, click the **Aravind Ramalingom** link.  Aravind Ramalingom
6.	Use the **Manage Applicant** page to view the applicant activity and perform other recruiting tasks on the applicant record.
7.	In the **Applicant Activity** section select the job opening row for which you want to open the checklist. In this example, the checklist is associated with the **Executive Adviser - Level 3** job opening. Click the **Application** button. 
8.	Use the **Manage Application** page to review and manage activity for an individual applicant and job opening.
9.	Click the **Other** tab.  Other
10.	The **Supplemental Applicant Information** section contains various applicant items. In this example, the applicant has a pre-employment check and an applicant checklist.
11.	Click the checklist link in the **Summary** column to open the checklist. For this example, click the **UC New Hire Checklist** link.  UC New Hire Checklist
12.	The **Applicant Checklist** page displays the checklist. Update the checklist items as needed. In this example, two checklist items require an update.
13.	For the first example, click the button to the right of the **Briefing Status** field for the **Visa/Permit & Citizenship** row. 

Step	Action
14.	Select the appropriate status. For this example, select the **Completed** list item. 
15.	UCPath updates the **Status Date** to the current date. Change the date if needed. For this example, accept the default date.
16.	For the second example, click the button to the right of the **Briefing Status** field for the **Designated Official - Form 700** row. 
17.	Select the appropriate status. For this example, select the **Completed** list item. 
18.	UCPath updates the **Status Date** to the current date. Change the date if needed. For this example, accept the default date.
19.	Click the scroll bar.
20.	You can add additional checklist items and other checklists, if needed.
21.	Save the checklist updates. Click the **Save** button. 
22.	You have successfully maintained a new hire checklist for an applicant. **End of Procedure.**

Process Prepare for Hire

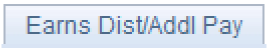
Use this task to prepare an applicant for hire. This task includes reviewing and updating the **Prepare for Hire** page, adding attachments to the hire record and submitting the hire to the UCPath Center for processing.

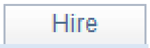
Navigation: PeopleSoft Menu > Recruiting > Search Applicants > **Manage Applicant**

Note: This page may also be accessible from the **Recruiting Home** page. You can also start this task by searching for the job opening.

Step	Action
1.	Begin this task by searching for the applicant that you want to hire using a variety of search criteria. In this example, use the applicant ID.
2.	Click in the **Applicant ID** field. 
3.	Enter the desired information into the **Applicant ID** field. For this example, enter **600307**.
4.	Click the **Search** button. 
5.	The applicant appears in the **Search Results**. Use the Applicant name link to access the **Manage Applicant** page. Click the **Christine Medina Garcia** link. 
6.	Use the **Manage Applicant** page to view the applicant activity and perform other recruiting tasks on the applicant record. In this example, the applicant applied to two job openings and accepted a job offer for the facility management position.
7.	Click the scroll bar.
8.	For the job accepted by the applicant, click the **Other Actions** menu. 
9.	Click the **Recruiting Actions** menu. 
10.	Click the **Prepare for Hire** menu. 
11.	Use the **Prepare for Hire** page to view and enter hiring information, and to submit the request to hire to the UCPath Center. Review both tabs, **Prepare for Hire** and **Earns Dist/Addl Pay**, for accuracy.
12.	The first section of the **Prepare for Hire** page contains applicant details for your review.
13.	The second section contains job information pulled from the job opening.
14.	In this example, the applicant's Social Security number is missing and must be entered. Click in the **SSN** field. 

Step	Action
15.	Enter the desired information into the **SSN** field. For this example, enter **565135341**.
16.	If necessary, complete the probation fields based on the job requirements.
17.	Click the scroll bar.
18.	Click the button to the right of the **Type of Hire** field. ▼
19.	Select the appropriate hire type. For this example, select the **Hire** list item.  Hire
20.	Click the button to the right of the **Action Reason** field. ▼
21.	Select the appropriate type of hire. For this example, select the **Hire - No Prior UC Affiliation** list item.  Hire - No Prior UC Affiliation
22.	If a start date was entered on the job offer, UCPath displays the date and you can update it, if necessary. In this example, the start date must be entered. Click in the **Start Date** field.
23.	Enter the desired information into the **Start Date** field. For this example, enter **09172018**.
24.	Use the **Verify Employee ID** link to search UCPath to determine if the applicant is a former employee, contingent worker or person of interest already entered in UCPath. Performing this verification reduces the risk of entering the same person into the system more than once.
25.	Click the **Verify Employee ID** link.  Verify Employee ID
26.	Use the **Search Results** page to view people are already in UCPath who might be the same as the applicant you are hiring.
27.	The **Match Criteria** section displays the search criteria that the system used when looking for a match. Click the **Expand Match Criteria Section** button. ▶
28.	You can view the match criteria, but you cannot change it.

Step	Action
29.	Click the scroll bar.
30.	Review the list of potential matches. If you find that the applicant already exists in UCPath, click the **Carry ID** button to bring the existing employee ID back to the **Prepare for Hire** page. For this example, a new employee ID will be assigned because the applicant was not a match in the list.
31.	Click the **Return** button. 
32.	The **Employee ID Verified** field indicates you ran the search.
33.	Use the **Hire Comments** field to provide the UCPath Center with specific instructions for the hire, if needed. Click in the **Hire Comments** field.
34.	Enter the desired information into the **Hire Comments** field. For this example, enter **Notes to UCPath Center**.
35.	Use the **Attachments** section to upload attachments that you must submit to UCPath. Attachments can include the offer letter, benefit forms, the UC Work Experience letter and more. For this example, no attachments are needed.
36.	Click the scroll bar.
37.	Click the **Earns Dist/Addl Pay** tab. 
38.	Use the **Earns Dist/Addl Pay** page to verify and update the applicant's compensation. Information defaults from the job offer. For this example, no change is needed.
39.	Use the **Pre Hire Audit Report** to verify the pre hire data. Print the report as needed. The UCPath Center uses this report to validate the hire information. If hire details are missing or incorrect, the **Prepare for Hire** transaction is sent back to you for update.
40.	Click the **Print Pre Hire Audit Report** button. 
41.	The **Pre Hire Data Audit Report** opens in a separate window. The information contained in the report comes from the **Prepare for Hire** page. Scroll through the pages online to verify the data.
42.	If necessary, you can save or print the report.

Step	Action
43.	When your review is complete, return to the **Prepare for Hire** page. Click the **Search Applicants** browser tab. 
44.	Click the **Submit Request To UCPC** button. 
45.	A confirmation message appears. Click the **OK** button. 
46.	The **Manage Job Opening** page appears again. Notice that the applicant's disposition displays **Ready** (for hire).
47.	Click the scroll bar.
48.	You can view the hire details in the applicant's record by navigating to the **Manage Application** page. Click the **Application** button.
49.	Use the **Manage Application** page to review and manage activity related to a single applicant for a single job opening.
50.	The **Hire** tab has been added to the page for this applicant. Click the **Hire** tab. 
51.	Click the scroll bar.
52.	Review the hire information.
53.	You have prepared an applicant for hire in UCPath and submitted the hire request to the UCPath Center for processing. **End of Procedure.**

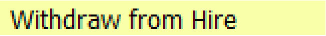
Withdraw Applicant from Hire

Use this task to withdraw an applicant from hire. The applicant's disposition must be **Ready to Hire** before this task can be performed. After this task is completed, the applicant's disposition is **Withdrawn**.

This task can be initiated from several pages. In this example, the **Manage Applicant** page is used.

Navigation: PeopleSoft Menu > Recruiting > Search Applicants > **Manage Applicant**

Note: This page may also be accessible from the **Recruiting Home** page.

Step	Action
1.	In this example, the applicant has decided not to join the UC team after originally accepting the job offer. The applicant must be withdrawn from the hire.
2.	Begin this task by searching for the applicant using a variety of search criteria. In this example, use the applicant's last name.
3.	Click in the **Last Name** field. 
4.	Enter the desired information into the **Last Name** field. For this example, enter **cooper**.
5.	Click the **Search** button. 
6.	The applicant appears in the **Search Results**. Use the applicant name link to access the **Manage Applicant** page. For this example, click the **Sheldon Cooper** link. 
7.	Use the **Manage Applicant** page to view the applicant activity and perform other recruiting tasks on the applicant record.
8.	Find the job opening for which the applicant's disposition is **Ready to Hire**.
9.	Click the scroll bar.
10.	For this example, click the **Other Actions** menu on the second row. 
11.	Click the **Recruiting Actions** menu. 
12.	Click the **Withdraw from Hire** menu. 
13.	A warning message appears. Review the message details. Click the **OK** button. 

Step	Action
14.	The disposition displays **Withdrawn**. If your local business practice requires a reason, select one from the list available in the **Reason** field. For this example, no reason is needed.
15.	Click the **Withdraw** button. Withdraw
16.	The applicant's disposition changes from **Ready to Hire** to **Withdrawn**.
17.	You have successfully withdrawn an applicant from hire. **End of Procedure.**

Submit Case to UCPath Center

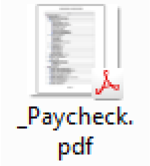
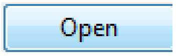
Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
18.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. Submit An Inquiry
19.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 

Step	Action
20.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
21.	Click the button to the right of the **Category** field. 
22.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
23.	Click in the **Subject** field.
24.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
25.	Click in the **Description** field.
26.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
27.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
28.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
29.	Click in the **Best Contact Phone Number** field.
30.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
31.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
32.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
33.	Click the **Add Attachment** link. 
34.	Navigate to the document you want to attach. In this example, the document is located on the desktop.

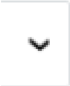
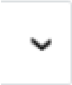
Step	Action
35.	For this example, click the **_Paycheck.pdf** list item. 
36.	Click the **Open** button. 
37.	The file name appears in the **Attachments** box.
38.	Click the **Submit** button.
39.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
40.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
41.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
42.	Click the scroll bar.
43.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
44.	Click the scroll bar.
45.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
46.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

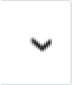
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
47.	Click the **Ask UCPath Center** button. 
48.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
49.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
50.	UCPath returned one result. Click the scroll bar.
51.	Click the **Create an Inquiry** link. 
52.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
53.	Click the button to the right of the **Requested By** field. 
54.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
55.	Click the button to the right of the **Topic** field. 
56.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.

Step	Action
57.	Click the button to the right of the **Category** field. 
58.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
59.	Click in the **Subject** field.
60.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
61.	Click the scroll bar.
62.	Click in the **Description** field.
63.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
64.	In this example, the full **Description** was completed on your behalf.
65.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
66.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
67.	Click the **Submit Inquiry** button. 
68.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
69.	The submitter's name appears.
70.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

Reopen Closed UCPath Center Case

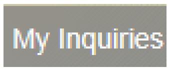
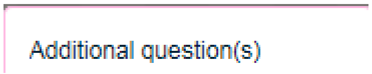
Use this task to reopen a closed inquiry via the UCPath website.

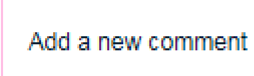
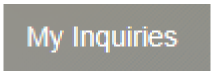
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:

Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
71.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
72.	Click the **My Closed Inquiries** link. 
73.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
74.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
75.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
76.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.

Step	Action
77.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
78.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
79.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
80.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
81.	Click the scroll bar.
82.	Notice the comment now appears in the **Case Comments** section.
83.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
84.	Return to the top of the page. Click the scroll bar.
85.	Click the **My Inquiries** link. 
86.	The new inquiry appears in the **My Open Inquires** list.
87.	You have reopened a closed inquiry. **End of Procedure.**

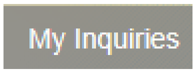
Monitor UCPath Center Cases

Use this task to review the status of an existing inquiry via the UCPath website.

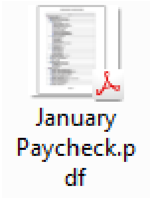
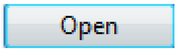
Dashboard Navigation:
Ask UCPath Center
or

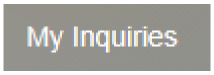
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
88.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
89.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
90.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
91.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
92.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 
93.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 

Step	Action
94.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 00180573
95.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field. Add a new comment
96.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
97.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
98.	Click the **Submit comment to the UCPath Center** button. Submit comment to the UCPath Center
99.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
100.	Click the scroll bar.
101.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. View All
102.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. 
103.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.

Step	Action
104.	To return to the case details, click the **00180573** link. 
105.	Click the scroll bar.
106.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
107.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
108.	Click the **Open** button. 
109.	A message confirms the file was uploaded. Click the **Done** button. 
110.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
111.	You can view all attachments in a list. Click the **View All** link. 
112.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 

Step	Action
113.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 
114.	Click the **00180573** link.  00180573
115.	Click the scroll bar.
116.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
117.	Click the **Email** link.  Sandbox: UCPath Center: Inquir.
118.	Review the email information as you scroll down the page. Click the scroll bar.
119.	Review the email from the UCPath Center. Click the scroll bar.
120.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
121.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
122.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
123.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**

Step	Action
124.	Click the **00180567** link. 00180567
125.	Click the scroll bar.
126.	Notice the **Status** is **Closed/Resolved**.
127.	Click the scroll bar.
128.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
129.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMTAM250: TAM Employee Tasks

Respond to a Routing Request

Use this task when an applicant is routed to you for your review and recommendation on the next steps.

Navigation: Recruiting WorkCenter > Employee Self Service > **Routing Response**

Step	Action
1.	Use the **Routing Response** page to view applicants routed to you for your input. The **Show Applicants Routed Between** dates default to a 30-day period. Update the date range as needed.
2.	Use the **Route Response** field to specify the type of responses you want to see in the list. For example, you can view a list of all responses or only those for which you recommended an interview for the applicant.
3.	Click the button to the right of the **Route Response** field. 000 Pending
4.	Select the appropriate route response. For this example, you want to see pending responses, so no change is needed. Click the **000 Pending** list item. 000 Pending

Step	Action
5.	If you make changes, click the **Refresh** button to update the applicant list. No changes were made in this example, so do not click the button.
6.	The **Applicant List for Routing Response** section displays the routed applicants that match your search criteria. In this example, one response is pending.
7.	Click the **Name** link to open the **Routing Response** details. For this example, click the **Aravind Ramalingom** link.  Aravind Ramalingom
8.	The page header displays information about the applicant and job opening.
9.	The **Response Details** section displays the date that the routing request was sent and the date when the response is due.
10.	The **Attachments** section displays attachments from the applicant's record. Attachments may include the resume, cover letter, transcripts, recommendation letters and more. In this example, the applicant's resume is attached.
11.	Click the **Attachment** link to open the attachment. For this example, click the **a_businessanalyst_pmgr.pdf** link.  a_businessanalyst_pmgr.pdf
12.	The attachment opens in a separate window. Review the information and return to the routing request when your review is complete.
13.	Click the **X** button to close the attachment. 
14.	The **Routing Response** details appear again. You are now ready to select a recommendation and add relevant comments to the routing request.
15.	Click the button to the right of the **Recommendation** field. 
16.	Recommendations include routing the request to another individual, inviting the applicant for an interview, holding or rejecting the applicant, and withdrawing the applicant or application. For this example, select the **020 Invite to Interview** list item.  020 Invite for Interview

Step	Action
17.	Click in the **Comments** field.
18.	Comments added here are available for the routing initiator and may help in determining next steps for the applicant.
19.	Enter the desired information into the **Comments** field. For this example, enter **Applicant has strong analysis skills and appears to be a good fit.**.
20.	When your response is complete, click the **Submit** button. 
21.	UCPath displays a message that the submission was successful. Click the **OK** button. 
22.	UCPath sends a notification to the routing initiator and the response is available for the initiator's review.
23.	The request no longer appears in the **Applicant List for Routing Response** section because the **Route Response** is no longer **000 Pending**. You can view the request again by selecting the appropriate the **Route Response** and then clicking the **Refresh** button.
24.	You have successfully completed a routing request and provided a recommendation for the applicant's next steps. **End of Procedure.**

Enter Applicant Interview Evaluation

Use this task to evaluate the applicant's interview. Evaluations may include predefined categories and free-form comments. The evaluation also includes an overall rating and recommendation on how to proceed.

Use the **Create Interview Evaluation** action to create the evaluation. You can also access the **Interview Evaluation** page from the **Self Service** menu.

In this example, use the **Self Service** menu.

Navigation: Recruiting Workcenter > Employee Self Service > **Interview Evaluations**

Note: This page may also be accessible from the **Manage Job Opening**, **Manage Applicant**, **Manage Application** and **Search Applications** pages.

Step	Action
25.	An interviewer may participate in multiple interviews. Use the date range fields to display the interviews that are scheduled and require your participation. In this example, the interviewer has one evaluation awaiting completion.
26.	Click the **Evaluate Applicant** link. Evaluate Applicant
27.	The **Interview Evaluation** page provides the evaluation categories on the right side of the page and the recommendation section on the left side of the page. The evaluation categories are defined on the evaluation template that is part of the job opening's recruitment template. Complete the **Interview Ratings** section first.
28.	Click the scroll bar.
29.	For each category, select a rating and provide comments, if applicable. For this example, click the button to the right of the **Interview Rating** field for the first category. 
30.	For this example, click the **Excellent** list item. Excellent
31.	Comments are optional. Click in the **Comment** field. 
32.	Enter the desired information into the **Comment** field. For this example, enter **Clear responses to answers.**.
33.	Use the **Spell Check** button to check the spelling of the comments.
34.	Complete the rating for the second category. Click the button to the right of the **Interview Rating** field. 
35.	For this example, click the **Average** list item. Average

Step	Action
36.	Click in the **Comment** field. 
37.	Enter the desired information into the **Comment** field. For this example, enter **Only 2 years higher ed.**.
38.	Complete the rating for the third category. Click the button to the right of the **Interview Rating** field. 
39.	For this example, click the **Excellent** list item.  Excellent
40.	Click the scroll bar.
41.	Click the button to the right of the **Interview Rating** field. 
42.	For this example, click the **Average** list item.  Average
43.	Click the scroll bar.
44.	After completing the evaluation categories, provide the recommendation, overall rating and comments.
45.	Click the button to the right of the **Overall Rating** field. 
46.	For this example, click the **Average** list item.  Average
47.	Click the button to the right of the **Recommendation** field. 
48.	For this example, click the **100 Hold** list item.  100 Hold
49.	Click in the **Comments** field. 

Step	Action
50.	Enter the desired information into the **Comments** field. For this example, enter **Average skills**.
51.	For this example, additional comments text was completed for you. The interview evaluation is complete and can now be submitted. Submission of the evaluation posts the rating and recommendation on the evaluation row on the **Manage Interviews** page. The hiring manager can review all interviewer evaluations and enter a final recommendation for the applicant.
52.	Click the **Submit** button. 
53.	You have successfully completed an interview evaluation for an applicant. **End of Procedure.**

PHCMTAM300: TAM Local Adminstration

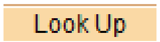
Configure Teams

Use this task to create and maintain teams that you can add to a job opening.

Navigation: PeopleSoft Menu > Recruiting > Administration > **Teams**

Step	Action
1.	Use the **Find an Existing Value** tab to search for an existing Team. Search by **Team ID** or use the **Advanced Search** feature to search by **Description**. For this example, add a new Recruiting Coordinators Team.
2.	Click the **Add a New Value** tab. 
3.	The **Teams** page appears and the **Status** defaults to **Active**. New Teams should remain active but existing Teams may be inactivated if no longer needed.
4.	Click in the **Description** field. 
5.	Enter the desired information into the **Description** field. For this example, enter **Recruiting Coordinator**.
6.	Click in the **Short Description** field. 

Step	Action
7.	Enter the desired information into the **Short Description** field. For this example, enter **RecCoord**.
8.	The **Business Unit** defaults based on your role security. Update it if required. For this example, update the **Business Unit** to UCOP1.
9.	Click the **Look up Business Unit** button. 🔍
10.	Select the appropriate business unit. For this example, click the **UCOP1** link. UCOP1
11.	Add members to the new Team. Click the **Look Up Empl ID** button. 🔍
12.	With a large number of available employees to select from, reduce the search time by entering **Search by** criteria before clicking the **Look Up** button. For this example, search for employee IDs beginning with 1.
13.	Click in the **begins with** field.
14.	Enter the desired information into the **begins with** field. For this example, enter **1**.
15.	Click the **Look Up Empl ID** button. Look Up
16.	The list of employees with an ID beginning with 1 appears. Locate the employee in the list to add to the Team. If the employee does not appear in the list, you may be required to reduce the search by adding additional search criteria.
17.	Select the appropriate team member. For this example, click the **17366076** employee ID link. 17366076
18.	The **Empl ID** field appears with your selection in the **Members** section. Click the **[+]** button to add additional team members. Click the **[-]** button to delete existing team members.

Step	Action
19.	For this example, add another team member. Click the **[+]** button. 
20.	Click the **Look up Empl ID** button. 
21.	Click in the **begins with** field. 
22.	Enter the desired information into the **begins with** field. For this example, enter **1**.
23.	Click the **Look Up** button. 
24.	Select the appropriate team member. For this example, click the **17366313** employee ID link. 
25.	The second employee ID appears in the **Members** section. Click the **Save** button. 
26.	You have successfully created a Team that you can add to a job opening. **End of Procedure.**

Create Award Category Rule

Use this task to define award category rules for an employee referral program. This is the second step in setting up employee referral programs.

Award category rules define the job openings that qualify for awards in the category. It also defines the award amounts and the timing of awards for the category.

Create any number of award categories, each with an award schedule. The job opening that the applicant is hired into determines the award category for the referring employee's award.

Define categories so that each job opening (for which you want to have an employee referral program award) falls into only one category. Job openings that do not fall into any category cannot be processed for employee referrals.

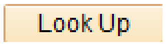
Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Recruiting > Recruitment Sources > **Award Category Rules**

Step	Action
1.	Defining award category rules includes naming and describing the award category rule, creating SQL statements for the employee eligibility rule and defining the amounts, timing and earnings code for the rule.
2.	Use the **Find an Existing Value** tab to search for and maintain existing award category rules. Search by **Rule ID** and **Description**. For this example, create a new award category rule that includes all employees from a specific business unit.
3.	Click the **Add a New Value** tab. 
4.	Assign a **Rule ID** following your Location's naming conventions. Enter the desired information into the **Rule ID** field. For this example, enter **UCR_ER_001**.
5.	Click the **Add** button. 
6.	Use the **Award Category Rules** tab to name and describe the award category rule. The **Rule ID** entered on the prior page appears at the top of the page.
7.	The **Description** field is a required field. Click in the **Description** field. 
8.	Enter the desired information into the **Description** field. For this example, enter **UCR Employee Referral 001**.
9.	The **Short Description** field is a required field. Click in the **Short Description** field. 
10.	Enter the desired information into the **Short Description** field. For this example, enter **UCR ER 001**.
11.	Enter an award category rule description. This description appears on the **Award Category Rule** page in the **Employee Referral Program** component.
12.	Click in the **Long Description** field.
13.	Enter the desired information into the **Long Description** field. For this example, enter **Employee referral for all campus employees including those on military and maternity leave.**.

Step	Action
14.	Click the **Rule SQL** tab.  Rule SQL
15.	Use the **Rule SQL** tab to create SQL statements for the award category rule.
16.	Use the **Open** (field to add parentheses around clauses in your selection criteria. The drop-down list offers separate values with one to five parentheses so that you can create nested groups of clauses. Note: All parentheses must be closed.
17.	Click the button to the right of the **Open (** field. ⌄
18.	Select the appropriate option. For this example, click the **(** list item.  (
19.	Select the record that contains the data that requires evaluation from the **Record** list. There are four available options to select from and each contains a variety of job, HR, company and employment fields: - **HRS_EMPLOYMT_I** - **HRS_JOB_I2** - **HRS_JO_I** - **HRS_JO__POST_I**
20.	Click the button to the right of the **Record** field. ⌄
21.	Select the appropriate record. For this example, click the **HRS_JOB_I2** list item.  HRS_JOB_I2
22.	Select the field that contains the data requiring evalution from the **Field Name** list. The field names that appear in the list are based on the **Record** selected in the earlier step.
23.	Click the **Look up Field Name** button. 🔍
24.	Select the appropriate field name. For this example, click the **BUSINESS_UNIT** link.  BUSINESS_UNIT

Step	Action
25.	Select the operator to indicate how you are going to evaluate the data in the selected field. Options include: - Equal To - Greater Than - Greater Than or Equal to - LIKE - Less Than - Less Than or Equal To - Not Equal To
26.	The **Equal To** option defaults in the **Operator** field. For this example, accept the default.
27.	If setID is a key for the record and field that you selected, select the setID for the value that the clause evaluates. Otherwise, this field does not appear if setID is not a key, as shown in this example.
28.	When evaluating data in the **Action/Reason** field (that is, you selected HRS_JOB_I2 as the record and ACTION_REASON as the field), use this field to select an action. For this example, ACTION REASON is not used so the **Action/Reason** field does not display.
29.	Use the **Value** field to enter a value that corresponds with the selected record, field and operand. You can enter either a static string or select a value from a list of valid values for the field. When selecting from a list, you are limited to values from the setID, if any, that you entered. If you are evaluating the **Action/Reason** field, select a reason that is associated with the selected action.
30.	Click the **Look up Value** button. 🔍
31.	Select the appropriate business unit. For this example, click the **RVCMP** link. RVCMP
32.	For every row except the last one, you must select **AND** or **OR** to link the clauses in the section. For this example, a single row is used so a **Boolean** entry is not required.
33.	Use the **Close)** field to add the close parentheses around clauses in your selection criteria. The drop-down list offers separate values with one to five parentheses so that you can create nested groups of clauses.

Step	Action
34.	Click the button to the right of the **Close)** field. 
35.	Select the appropriate option. For this example, click the **)** list item. 
36.	Click the scroll bar. 
37.	Click the **[+]** button to add a new row to continue building your SQL statement. For this example, do not add a new row.
38.	Click the scroll bar. 
39.	Click the **View SQL** link to display a page where you can view the SQL generated by the values that you entered for this rule definition.
40.	Click the **View SQL** link. 
41.	Review the SQL statement. Click the **Return** button. 
42.	Click the **Award Schedule** tab. 
43.	Use the **Award Schedule** tab to define award schedules.
44.	Click the button to the right of the **Currency Code** field. 
45.	Select the appropriate currency. For this example, click the **US Dollar** list item. 
46.	The **Award Totals** field displays the total of all awards in the schedule. Click the **Refresh** button at the bottom of the page to update the award total. The amount displays 0.00 because the schedule currently has no awards.
47.	Select the **Earnings Code** used for the award payment.

Step	Action
48.	Click the **Look up Earnings Code** button.
49.	Click in the **Earnings Code** field.
50.	Enter the desired information into the field. For this example, enter **E**.
51.	Click the **Look Up** button. 
52.	Select the appropriate code. For this example, click the **ERP** link. 
53.	Use the **Duration** field to enter the time period that the referring employee must wait until the award is payable. Enter the time period in days, months or years. To calculate the date on which the reward is payable, UCPath begins with the applicant hire or rehire date and adds the duration time period to it. This is referred to as the award date and is the date on which the duration requirement is fulfilled; it is not the date on which the award is paid.
54.	Click in the **Duration** field. 
55.	Press **[Delete]**.
56.	Enter the desired information into the **Duration** field. For this example, enter **5**.
57.	Use the **Type** field to define the time period associated with the duration. Options include: - Days - Months - Years The defaulted value is **Days** and for this example, accept the default.
58.	Use the **Award Value** field to enter the amount of a cash award or the value of a noncash award.
59.	Click in the **Award Value** field. 
60.	Enter the desired information into the **Award Value** field. For this example, enter **1000**.
61.	Click in the **Description** field. 

Step	Action
62.	Enter the desired information into the **Description** field. For this example, enter **Employee Referral Program**.
63.	Select the **Gross-Up** check box if the award should be grossed up. For this example, leave the check box unselected.
64.	Click the **Save** button. 
65.	The **Award Total** field displays the new award total for the schedule.
66.	You have successfully defined an award category rule that you use when creating an employee referral program. **End of Procedure.**

Create Employee Eligibility Rule

Use this task to name and describe an employee eligibility rule. This is the first required step in setting up an employee referral program and should be followed by defining award category rules.

Under an employee referral program, the employee eligibility rules define the conditions under which an employee is eligible for award payment. An employee eligibility rule can combine a number of criteria to determine employee eligibility.

Define an employee eligibility rule by naming and describing the rule and creating SQL statements for the eligibility rule.

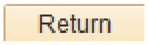
Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Recruiting > Recruitment Sources > **Employee Eligibility Rules**

Step	Action
1.	Use the **Find an Existing Value** tab to search for and maintain existing employee eligibility rules. Search by **Rule ID** and **Description**. For this example, create a new eligibility rule that includes all campus employees including those on military and maternity leave.
2.	Click the **Add a New Value** tab. 
3.	Assign a **Rule ID** following your Location's naming conventions. Enter the desired information into the **Rule ID** field. For this example, enter **UCR_ER_001**.

Step	Action
4.	Click the **Add** button. 
5.	Use the **Employee Eligibility Rules** tab to name the employee eligibility rule. The **Rule ID** entered on the prior page appears at the top of the page.
6.	The **Description** field is a required field. Click in the **Description** field. 
7.	Enter the desired information into the **Description** field. For this example, enter **UCR Employee Referral 001**.
8.	The **Short Description** field is a required field. Click in the **Short Description** field. 
9.	Enter the desired information into the **Short Description** field. For this example, enter **UCRER001**.
10.	Enter an employee eligibility rule description. This description appears on the **Employee Eligibility Rule** page in the **Employee Referral Program** component.
11.	Click in the **Long Description** field.
12.	Enter the desired information into the **Long Description** field. For this example, enter **All campus employees as of referral date. Includes employees on maternity and military leave.**.
13.	Click the **Rule SQL** tab. 
14.	Use the **Rule SQL** tab to create SQL statements for employee eligibility rules.
15.	Use the **Open (** field to add parentheses around clauses in your selection criteria. The drop-down list offers separate values with one to five parentheses so that you can create nested groups of clauses. Note that all parentheses must be closed.
16.	Click the button to the right of the **Open (** field. 
17.	Select the appropriate option. For this example, click the **(** list item. 

Step	Action
18.	Select the record that contains the data requiring evaluation from the **Record** list. There are two options: - **HRS_EMPLOYMT_I:** contains four employment-related fields: hire date, last date worked, rehire date and termination date. **- HRS_JOB_I2:** contains several job-related fields, including (but not limited to) action, action reason, business unit, company, department, employee type, pay group, regulatory region, full time/part time status, regular/temporary status and standard hours.
19.	Click the button to the right of the **Record** field. ⌄
20.	Select the appropriate record. For this example, click the **HRS_JOB_I2** list item.  HRS_JOB_I2
21.	Select the field that contains the data requiring evaluation from the **Field Name** list. Field names that appear in the list are based on the **Record** selected in the earlier step.
22.	Click the **Look up Field Name** button. 🔍
23.	Select the appropriate field name. For this example, click the **EMPL_STATUS** link.  EMPL_STATUS
24.	Select the operator to indicate how you are going to evaluate the data in the selected field. Options include: - Equal To - Greater Than - Greater Than or Equal to - LIKE - Less Than - Less Than or Equal To - Not Equal To
25.	The **Equal To** option defaults in the **Operator** field. For this example, accept the default.
26.	If setID is a key for the record and field that you selected, select the setID for the value that the clause evaluates. Otherwise, this field does not appear if setID is not a key, as shown in this example.

Step	Action
27.	When evaluating data in the **Action/Reason** field (that is, you selected HRS_JOB_I2 as the record and ACTION_REASON as the field), use this field to select an action. For this example, this display in a later step.
28.	Use the **Value** field to enter a value that corresponds with the selected record, field and operand. You can enter either a static string or select a value from a list of valid values for the field. When selecting from a list, you are limited to values from the setID, if any, that you entered. If you are evaluating the **Action/Reason** field, select a reason that is associated with the selected action.
29.	Click the **Look up Value** button.
30.	Select the appropriate field value. For this example, click the **Active** link.  A Active
31.	For every row except the last one, you must select **AND** or **OR** to link the clauses in the section.
32.	Click the button to the right of the **Boolean** field.
33.	Select the appropriate boolean. For this example, click the **AND** list item.  AND
34.	Use the **Close)** field to add the close parentheses around clauses in your selection criteria. The drop-down list offers separate values with one to five parentheses so that you can create nested groups of clauses.
35.	For this example, you will add additional rows a **Close)** is not needed.
36.	Click the **Add a New Row** button.
37.	A new row appears. For this example and to save time with data entry, the additional rows are completed for you. You can review the completed entries on the next page.
38.	Review the completed rows. Notice that the last two rows contain the **ACTION/REASON** option in the **Field Name** and the **Action** field also appears in the same rows.

Step	Action
39.	Click the **View SQL** link to display a page where you can view the SQL generated by the values entered for this rule definition.
40.	Click the **View SQL** link.  View SQL
41.	Review the generated SQL statement. Click the **Return** button.  Return
42.	Click the **Save** button.  Save
43.	You have successfully created an employee eligibility rule that you can use for an employee referral program. **End of Procedure.**

Create Employee Referral Program

Use this task to define an employee referral program. This is the last step in setting up employee referral programs.

To define employee referral programs, name the employee referral program, set up additional criteria and then link employee eligibility and award category rules to the program. Lastly, associate the employee referral program with a recruitment template using the **Recruitment Template** component. By linking a referral program to a recruitment template, UCPath automatically associates a referral program with a job opening when it is created. The employee referral program's rules are then used to evaluate eligibility and pay awards for the job opening.

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Recruiting > Recruitment Sources > **Employee Referral Program**

Step	Action
1.	Use the **Find an Existing Value** tab to search for and maintain existing employee referral programs. Search by **Referral Program ID** or **Description**. In this example, create a new employee referral program for all employees including those on maternity or military leave.
2.	Click the **Add a New Value** tab.  Add a New Value

Step	Action
3.	Assign a **Referral Program ID** following your Location's naming conventions. Enter the desired information into the **Referral Program ID** field. For this example, enter **UCR_ER_001**.
4.	Click the **Add** button. 
5.	Use the **Employee Referral Programs** tab to provide general information about the program.
6.	The effective date is used with the **Use Program As Of** field to determine the rules that are in effect for a referral. The **Effective Date** field defaults to the current system date (today's date) but can be updated if needed. For this example, accept the default.
7.	The **Status** field defaults to **Active**. New programs should remain active but existing programs may be inactivated when no longer needed.
8.	The **Description** field is a required field. Click in the **Description** field. 
9.	Enter the desired information into the **Description** field. For this example, enter **UCR Employee Referral 001**.
10.	Click in the **Short Desc** field. 
11.	Enter the desired information into the **Short Desc** field. For this example, enter **UCRER001**.
12.	Use the **Require Approval for Payment** check box to require approval for an award before the award is sent to payroll. Awards with an **Approved** status can be submitted for payment. If this check box is selected, the system assigns a **Needs Approval** status to an award when it is created and the award requires manual approval on the **Approve Employee Awards** page. By leaving this check box unselected, awards are automatically assigned an **Approved** status when the award is created. For this example, leave the check box unselected.

Step	Action
13.	Use the **Separate Check** check box when you want the award paid separately from the employee's regular paycheck. Note: Grossed-up awards are paid by a separate check. For this example, leave the check box unselected.
14.	Use the **Allow Dups to Exceed Original** check box when the total award can exceed the original award amount when an award is split among several referring employees. For this example, leave the check box unselected.
15.	The **Use Program As Of** field is a required field and identifies which effective-dated program rules apply to the referral. Valid values include: - Applicant's Hire Date - Referral Date The system applies all program rules that are in the effective-dated row that is active as of the **Use Program As Of** date.
16.	Click the button to the right of the **Use Program As Of** field. 
17.	Select the appropriate option. For this example, select the **Applicant's Hire Date** list item.  Applicant's Hire Date
18.	Click in the **Long Description** field.
19.	Enter the desired information into the **Long Description** field. For this example, enter **All campus employees as of hire date. Includes employees on military and maternity leave.**.
20.	Click the **Criteria** tab.  Criteria
21.	Use the **Criteria** tab to define additional criteria not covered by employee eligibility or award category rules.
22.	Use the **Limit Referral Life Span To** section to enter a time limit for how soon after the referral the applicant must be hired (measured in months, years or days). The **Interval Duration** field is the number of months, days or years. For this example, accept the default of **Months** in the **Limit Interval** field.

Step	Action
23.	Click in the **Interval Duration** field.  0
24.	Enter the desired information into the **Interval Duration** field. For this example, enter **2**.
25.	Use the **Disqualify Award if** section to indicate conditions that disqualify the employee from the referral program.
26.	Use the **Applicant Reports to Employee** check box to disqualify employees if the applicant directly or indirectly reports to them based on the UCPath department tree structure as of the applicant's hire date.
27.	For this example, select the **Applicant Reports to Employee** check box. ☐
28.	Use the **Employee Exceeds Manager Level** list to select a value to disqualify employees above the specified level. The system evaluates employee levels as of the applicant's hire date. To make all managers ineligible, select **All Other Positions**.
29.	Click the button to the right of the **Employee Exceeds Manager Level** field. 
30.	Select the appropriate level. For this example, select the **Vice President** list item.  Vice President
31.	Use the **Applicant Criteria** section to identify additional criteria related to the applicant. Some of the fields have defaulted values that can be updated if needed.
32.	Use the **Allow Previous Employees** check box to give referral credit for applicants who are previous employees. When selecting this check box, you must complete the **Termination Interval** and **Interval Duration** fields. For this example, leave the check box selected.
33.	Use the **Allow Family Member Referrals** check box to allow employees to refer members of their family. For this example, leave the check box selected.

Step	Action
34.	Use the **Termination Interval**, **Interval Durations** and **Is Prior To** fields to allow referral credit for previous employees and to define how long the applicant must have been away from UC before being rehired. To allow credit for all rehires, regardless of the length of the break in service, enter 0 in the **Interval Duration** field. To set a minimum duration for the break in service, use the **Termination Interval** field to select months, days or years, and then enter the number of months, days or years in the **Interval Duration** field. For this example, accept the default of **Months** in the **Termination Interva**l field.
35.	Click the **Interval Duration** field. 
36.	Enter the desired information into the **Interval Duration** field. For this example, enter **2**.
37.	Use the **Is Prior To** field to indicate whether the **Applicant's Hire Date** or the **Referral Date** is used as the starting point for the look-back. For this example, accept the default of **Applicant's Hire Date** in the **Is Prior To** field.
38.	Click the **Rules** tab. 
39.	Use the **Rules** tab to select employee eligibility and award category rules that are in effect for the program.
40.	Use the **When to Apply** list to select when to apply each employee eligibility rule that you associate with this program. It enables you to apply different employee eligibility rules at different points in the referral process. Valid values are: - Applicant's Hire Date - Award Date - Referral Date You can select each of the three values only once for a maximum of three rows. The system uses the rule that you associate with the award date to check eligibility before paying any award in the award category schedule.
41.	Click the button to the right of the **When to Apply** field. 

Step	Action
42.	Select the appropriate option. For this example, click the **Applicant's Hire Date** list item. Applicant's Hire Date
43.	Use the **Rule ID** field to select the rule that you want to apply. UCPath populates the **Description** field automatically. Valid values are the rules that you set up in the **Employee Eligibility Rules** component.
44.	Click the **Look up Rule ID** button. 🔍
45.	Select the appropriate rule ID. For this example, select the **UCR_ER_001** link. UCR_ER_001
46.	Click the **View Description** link to display the **Employee Eligibility Rule** page.
47.	Click the **View Rule** link to display the **Employee Eligibility Rules** component.
48.	Click the **[+]** button to add another row. Click the **[-]** button to delete an existing row.
49.	Use the **Priority** field to enter an integer in the field to tell UCPath the order to process the award category rules. The system checks the job opening that the applicant is hired into against the category rules in the priority order. As soon as it finds the job opening in a category, it stops processing that job opening and applies the award schedule for that category.
50.	Click in the **Priority** field. 
51.	Enter the desired information into the field. For this example, enter **100**.
52.	Use the **Rule ID** field to select the award category rule that you want to apply. UCPath populates the **Description** field automatically. Valid values are the rules that you set up in the **Award Category Rules** component. You can assign as many rules to the program as you want, each with a unique priority number. Do not select the same rule more than once.
53.	Click the **Look up Rule ID** button. 🔍
54.	Select the appropriate rule ID. For this example, select the **UCR_ER_001** link. UCR_ER_001

Step	Action
55.	Click the **View Description** link to display the **Award Category Rule** page.
56.	Click the **View Rule** link to display the **Award Category Rules** component.
57.	Click the **[+]** button to add another row. Click the **[-]** button to delete an existing row.
58.	Click the **Save** button. 
59.	You have successfully created a new employee referral program. **End of Procedure.**

Create Flexible Process Template

Use this task to set up job flexible process templates that associate flexible processes with job opening criteria.

You can associae flexible process templates with different flexible process definitions with specific sets of job criteria. Templates enable you to assign flexible processing rules based on the job opening's Business Unit, Job Family, Job Code, Department, and Primary Recruiting Location. UCPath references these as the flexible processing driver fields.

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Recruiting > Templates > **Flexible Process Template**

Step	Action
1.	Consider this example: If the hiring managers in the Legal department typically enter information in a very limited subset of job opening fields, while the hiring managers in the Finance department enter information in a larger subset of job opening fields, then you can create two separate job creation processes and use a flexible process template to choose the appropriate process definition based on the job opening's department.

Step	Action
2.	UCPath evaluates data in a job opening's driver fields and first tries to find an exact match for all of the fields. If no exact match is found, UCPath reevaluates the templates based on the following priority for the criteria fields: 1. Business Unit 2. Primary Recruiting Location 3. Department 4. Job Code 5. Job Family If no template matches all five of the job opening's criteria fields, UCPath looks for a template that matches just the first four fields, then for a template that matches just the first three fields and so forth. If UCPath does not find a match, it uses the UCPath-wide default template specified on the **Recruiting Installation - General** page. If there is no default template, then UCPath does not use any flexible processes for the job. When no flexible process applies, all users have access to all of the options that would otherwise be limited by flexible processing.
3.	Use the **Find an Existing Value** tab to search for and maintain existing flexible process templates. Search by **Flexible Process Template ID** or **Description**. For this example, create a flexible process template and associate it with the job creation flexible process ID 1002 and the recruiting process ID 1002.
4.	Click the **Add a New Value** tab. 
5.	Use the **Flexible Process Template** page to specify job criteria for which the flexible processes are used. The **Flexible Process Template ID** defaults to **NEW**, which is replaced with a UCPath assigned number upon saving the template.
6.	The **Description** field is a required field. Enter the desired information into the **Description** field. For this example, enter **RVCMP Flexible Template 1**.
7.	Click in the **Short Description** field. 
8.	Enter the desired information into the **Short Description** field. For this example, enter **Flex Temp 1**.

Step	Action
9.	The **Status** field defaults to **Active**. New flexible process templates should remain active but existing templates may be inactivated if no longer needed. Only active templates are available for selection in flexible process template groups. Note: If a template is already in use and then you inactivate it or set its active date to the future, the system still enforces the template's flexible processes.
10.	The fields in the **Job Criteria** section are used to define the contexts in which specific flexible processes are used.
11.	The **Business Unit** field defaults based on your security but you can update it if needed. This is a required field. For this example, accept the default.
12.	Enter the job family for this template. If the **Recruiting Installation - General** page does not have job family as the **Template Segmenting Type**, job openings are not associated with a job family and this field should be left blank. At UC, the **Template Segmenting Type** is **Business Unit** so no entry is required. If the segmenting type is job family, you can associate a recruitment template with specific job families. If you specify a job family in a flexible process template, the recruitment template that references the flexible process template is used for the specified job family. For this example, leave the field blank.
13.	Enter the job code for this template. If the **Recruiting Installation - Jobs** page is configured to allow multiple job codes in a job opening, UCPath uses only the primary job code when determining which flexible template to use. At UC, multiple job codes in a single job opening may be allowed in some Locations. This field is optional. For this example, leave this field blank.
14.	Enter the department for this template. This is an optional field. For this example, let this field blank.
15.	Enter the primary recruiting location for this template. Job openings can have multiple recruiting locations, but UCPath uses only the primary recruiting location when determining which flexible template to use.
16.	Click the **Look up Primary Recruiting Location** button. 🔍
17.	Select the appropriate location. For this example, click the **5026** location link.  5026

Step	Action
18.	Use the **Flexible Processes** section to identify the job creation and recruiting processes for which you want to associate to the template. Select the flexible job creation and recruiting processes that are just for job openings that match the specified job criteria.
19.	Click the **Look up Job Creation Process ID** button. 🔍
20.	Select the appropriate ID. For this example, click the **1002** process link. 1002
21.	Click the **Look up Recruiting Process ID** button. 🔍
22.	Select the appropriate ID. For this example, click the **1002** process link. 1002
23.	Click the **Save** button. Save
24.	The **Flexible Process Template** is saved and the **Flexible Process Template ID** changes from **NEW** to **1005**.
25.	You have successfully set up a flexible process template with associated flexible processes. **End of Procedure.**

Create Flexible Template Group

Use this task to define a group of related flexible process templates that you can associate with a recruitment template.

Template groups enable you to associate recruitment templates with multiple flexible process templates. When a single recruitment template is associated with multiple flexible process templates,UCPath applies the correct flexible processes based on the driver fields data (Business Unit, Primary Recruiting, Location, Department, Job Code and Job Family).

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Recruiting > Templates > **Flexible Template Group**

Step	Action
1.	Use the **Find an Existing Value** tab to search for and maintain existing flexible template groups. Search by **Flexible Template Group ID** and **Description**.
2.	Click the **Add a New Value** tab. 
3.	Use the **Flexible Template Group** page to group flexible process templates. The **Flexible Template Group ID** defaults to **NEW**, which is replaced with a UCPath assigned number upon saving the group.
4.	The **Description** field is a required field. Enter the desired information into the **Description** field. For this example, enter **RVCMP Template Group 1**.
5.	Click in the **Short Description** field. 
6.	Enter the desired information into the **Short Description** field. For this example, enter **Temp Group 1**.
7.	The **Status** field defaults to **Active**. New flexible template groups should remain active but existing groups may be inactivated if no longer needed. Only templates that are active as of a recruitment template's effective date are available for selection in the recruitment template.
8.	The **Business Unit** field defaults based on your security but you can update it if needed. For this example, accept the default.
9.	Use the **Flexible Templates** section to select the flexible process templates to use for job openings that are associated with this flexible template group.
10.	Click the **Look up Flexible Process Template ID** button. 🔍
11.	Select the appropriate ID. For this example, click the **1002** template ID link. 
12.	Click the **[+]** button to add additional flexible process templates to the group. Click the **[-]** button to delete an existing flexible process template from the group.
13.	For this example, click the **Add a New Row** button. ⊞

Step	Action
14.	A new row appears. Click the **Look up Flexible Process Template ID** button. 🔍
15.	Select the appropriate ID. For this example, click the **1005** template ID link.  1005
16.	Click the **Save** button. 
17.	The **Flexible Template Group** is saved and the **Flexible Template Group ID** changes from **NEW** to **1004**.
18.	You have successfully created a flexible template group with multiple flexible process templates. **End of Procedure.**

Create Posting Description Library Item

Use this task to create a posting description library content entry.

The posting description library contains various posting description content items that you can use in a job posting. They are categorized by a posting description type. Refer to the *Set Up Job Posting Description Type* simulation for more information about job posting description types.

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Recruiting > **Posting Description Library**

Step	Action
1.	Use the **Find an Existing Value** tab to search for and maintain existing posting description library content items. Search by the **Description Type**, **Description ID**, **Business Unit** or **Description**. For this example, create a new posting description library content entry for a job posting's closing statement.
2.	Click the **Add a New Value** tab. 
3.	Enter or search for the associated posting **Description Type** for which you want to associate a new library content entry.
4.	Enter the desired information into the **Description Type** field. For this example, enter **C**.

Step	Action
5.	Select the appropriate description type. Click the **C** description type link. C
6.	Enter an identifier for the new posting description library content entry. Follow your Location's naming conventions and business practices when creating a new posting library description content item.
7.	Click in the **Description ID** field. ☐
8.	Enter the desired information into the **Description ID** field. For this example, enter **001**.
9.	Posting description library items are created within a specific business unit. Role security restricts who can access and use the library items.
10.	Click the **Look up Business Unit** button. 🔍
11.	Select the appropriate business unit. For this example, select the **RVCMP** business unit link. RVCMP
12.	Click the **Add** button. Add
13.	The header information is carried forward from the prior page and cannot be updated.
14.	Use the **Description Label** field to enter the text to be used as a section label in the job posting. It is a required field.
15.	Enter the desired information into the **Description Label** field. For this example, enter **Visit University of California website**.
16.	Use the **Description** formatting options box to format the presentation of the posting description library entry. There are a variety of options to select from, including the font type and size, text justification requirements and other font characteristics.
17.	Posting description library content items can include attachments and images.
18.	When a posting description library item is added to a job posting, the text formatting and details are carried forward to the job posting. Click the **Spellcheck** button to check for spelling issues.
19.	Click in the **Description** field.
20.	Enter the desired information into the **Description** field. For this example, enter **For additional information, please visit www.universityofcalifornia.edu.**.

Step	Action
21.	Click the scroll bar. 
22.	Click the **Save** button. 
23.	You have successfully created a new posting description library content item. **End of Procedure.**

Create Recruiting Contact

Use this task to set up recruiting contacts and define contact information for recruiting sources in UCPath.

Recruiting contacts are not members of the job opening hiring team; they are people who are associated with specific recruiting sources such as a third-party staffing agency. You can associate a recruiting contact with jobs using the **Recruitment Contact** field in the **Opening Information** section of the **Job Opening** page.

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Recruiting > Recruiting Sources > **Recruiting Contacts**

Step	Action
1.	Use the **Find an Existing Value** tab to search for and maintain existing recruiting contacts. Search by **Code**, **Contact ID**, **Contact Type** or **Primary Contact Name**. For this example, set up a new recruiting contact for a third-party executive recruiter.
2.	Click the **Add a New Value** tab. 
3.	Assign the recruiting contact a contact ID if the ID is not automatically assigned. Follow your Location's business practices and naming conventions. This code appears on search pages and lookup dialog boxes.
4.	Click in the **Contact ID** field. 
5.	Enter the desired information into the **Contact ID** field. For this example, enter **0001**.

Step	Action
6.	Click the **Add** button. 
7.	Use the **Contact Setup** page to define the contact information for a recruiting contact. Assign a contact code (this step is optional). Follow your Location's business practices and naming convention for the **Code** field.
8.	Click in the **Code** field.
9.	Enter the desired information into the **Code** field. For this example, enter **REC**.
10.	Identify the contact type. Options include General, Recruiting Office and Recruiting Source.
11.	Click the button to the right of the **Contact Type** field.
12.	Select the appropriate type. For this example, click the **Recruitment Source** list item. 
13.	Click in the **Description** field.
14.	Enter the desired information into the **Description** field. For this example, enter **Executive Recruiter**.
15.	Click in the **Short Description** field.
16.	Enter the desired information into the **Short Description** field. For this example, enter **ExeRec**.
17.	Click in the **Name** field.
18.	Enter the desired information into the **Name** field. For this example, enter **Marsha Brady**.
19.	The **Business Unit** field defaults based on your role security but can be updated if required. For this example, accept the default.
20.	Click in the **Address 1** field.

Step	Action
21.	Enter the desired information into the **Address 1** field. For this example, enter **2244 Mars Blvd**.
22.	Click in the **City** field. 
23.	Enter the desired information into the **City** field. For this example, enter **Los Angeles**.
24.	Click the button to the right of the **State** field. 
25.	Select the appropriate state. For this example, click the **California** list item.  California
26.	Click in the **Postal** field. 
27.	Enter the desired information into the **Postal** field. For this example, enter **90001**.
28.	Click the scroll bar. 
29.	Click the button to the right of the **Phone Type** field. 
30.	Select the appropriate phone type. For this example, click the **Business - Primary** list item.  Business - Primary
31.	Click in the **Country Code** field. 
32.	Enter the desired information into the field. For this example, enter **1**.
33.	Click in the **Telephone** field. 
34.	Enter the desired information into the **Telephone** field. For this example, enter **555-0099**.
35.	Click the **[+]** button to add additional contact phone numbers. Click the **[-]** button to delete a existing contact phone number.

Step	Action
36.	Click in the **Email Addresses** field. 
37.	Enter the desired information into the **Email Addresses** field. For this example, enter **executiverecruiter@exerec.com**.
38.	Click the **Save** button. 
39.	You have successfully created a recruiting contact for a third-party recruiting source. **End of Procedure.**

Set Up Answer Definition

Use this task to set up answer definitions for multiple choice question definitions that are used in a job opening's screening process.

This task must be completed prior to the set up of the multiple-choice question definition.

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Recruiting > Screening > **Answer Definition**

Step	Action
1.	Use the **Find an Existing Value** tab to search for and maintain existing answer definitions. Search by the **Answer ID**, **Answer Code** and **Description**. For this example, add a new answer definition for years of experience.
2.	Click the **Add a New Value** tab. 
3.	Use the **Answer Code** field to enter a code that identifies this answer. This code appears only on search pages and lookup dialog boxes.
4.	Click in the **Answer Code** field. 
5.	Enter the desired information into the **Answer Code** field. For this example, enter **Years 1-3**.
6.	Use the **Description** field to enter an identifying name for this answer. A descriptive name helps you when you reference the answer definition from within a question definition. Other pages that display answers use the full text of the answer rather than these shorter identifiers.
7.	Click in the **Description** field. 

Step	Action
8.	Enter the desired information into the **Description** field. For this example, enter **Years of Experience 1-3**.
9.	Click in the **Short Description** field. 
10.	Enter the desired information into the **Short Description** field. For this example, enter **Years 1-3**.
11.	The **Long Description** field should contain the complete answer text.
12.	Click in the **Long Description** field. 
13.	Enter the desired information into the **Long Description** field. For this example, enter **1 - 3 years**.
14.	The **Business Unit** defaults based on your role security but can be updated if needed. For this example, accept the default.
15.	Click the **Save** button. 
16.	UCPath assigns an **Answer ID** which appears on search pages and lookup dialog boxes.
17.	You have successfully set up an answer definition for a multiple-choice question. **End of Procedure.**

Set Up Flexible Job Creation Process

Use this task to set up a process that controls which job opening fields are visible to users with different recruiting roles.

This task is a flexible process that accommodates configuration options that let you set up role-based access to certain recruiting options. Different flexible process definitions can be applied based on a job opening’s business unit, job family, job code, department, and primary recruiting location. It helps to limit recruiters and hiring managers to context-appropriate and role-appropriate options that improves usability and streamlines the recruiting process.

Use of a flexible job creation process enables you to hide fields for job openings that are not yet open, including newly created job openings that have not yet been saved, as well as jobs in **Draft** or **Pending** status. When the job opening is no longer in **Draft** status, all users can view the complete job opening data.

Navigation**: PeopleSoft Menu** > Set Up HCM > Product Related > Recruiting > Flexible Processes > **Job Creation Process**

Step	Action
1.	To implement flexible processing rules: 1. Define job creation process definitions. 2. Create recruiting process definitions. 3. Create flexible process templates associating your definitions with specific job criteria. 4. Create a flexible process group that contains all of the flexible process templates that you want to associate with a single recruitment template. 5. Associate the flexible template group with a recruitment template. 6. (Optional) Select default flexible processes to use when a job opening's recruitment template does not find a flexible process based on the job opening data. If you don't specify defaults, job openings that do not use flexible processing are unrestricted. UCPath displays all job opening fields to all users during the job creation process.
2.	This task is the first step in the flexible processing rules implementation. For this example, set up a job creation process definition for the recruiter role.
3.	Use the **Find an Existing Value** tab to search for and maintain existing job creation process definitions. Search by **Job Creation Process ID**, **Description**, **Status** and **Status Date**.
4.	Click the **Add a New Value** tab. 
5.	Use the **Job Creation Process** page to identify the recruiting roles that are impacted by the flexible process. The **Job Creation Process ID** defaults to **NEW**, which is replaced with an UCPath assigned number upon saving the definition.
6.	The **Description** field is a required field. Enter the desired information into the **Description** field. For this example, enter **Recruiter Job Creation Process**.
7.	Click in the **Short Description** field. 
8.	Enter the desired information into the **Short Description** field. For this example, enter **RecJobPro**.

Step	Action
9.	The **Status** field defaults to **Active**. New job creation process definitions should remain active but existing definitions may be inactivated if no longer needed. Only active definitions are available for selection in flexible process templates but an inactive job creation process is still used by any flexible process templates already associated with it.
10.	The **Status Date** defaults to the status assignment date and can be updated if needed. For this example, accept the default.
11.	The **Business Unit** field defaults based on your role security but can be updated if needed. For this example, accept the default.
12.	Use the **Field Visibility of Recruiting Roles** section to identify the impacted recruiting role. For this example, use the recruiter role.
13.	The **Priority** field is used to control which role's settings to use when a person has more than one recruiting role type. Lower numbers have a higher priority.
14.	Click in the **Priority** field. 
15.	Enter the desired information into the field. For this example, enter **1**.
16.	Select a **Recruiting Role Type**. Recruiting role types are functional groups of PeopleTools roles like recruiters and hiring managers. The recruitment administrator role type is not available in the **Recruiting Role Type** list because administrators are never subject to flexible process restrictions.
17.	Click the button to the right of the **Recruiting Role Type** field. 
18.	Select the appropriate type. For this example, select the **Recruiter** list item.  Recruiter
19.	Display the **Configure Field Visibility** page by clicking the available link. The link label displays as **Modify Field Visibility** for a role type previously configured.
20.	Click the **Configure Field Visibility** link.  Configure Field Visibility
21.	Use the **Configure Field Visibility** page to define detailed field visibility settings for a single recruiting role type.

Step	Action
22.	Initially, you see only the first of six groups of fields. You can scroll through the groups or click the **View All** link.
23.	The **Configure Field Visibility** page uses a single check box to represent grids on the **Create Job Opening** page. The labels for these check boxes include the word **Add** before the grid name. When you make a grid available, users can add and delete grid rows and they can access any related detail page to modify the detail data.
24.	The **Job Opening Section** includes fields and grids from the **Opening Information** section on the **Create Job Opening** page. Not all fields from the section are available here. A few examples of those excluded are the **Status** and **Status Date**, **Template ID,** and **Job Opening ID** and **Type**.
25.	Each of the six groups has a **Select Al**l and **Deselect Al**l link used to assist with the check box options.
26.	For this example, click the **Select All** link. Select All
27.	For this example, you do not want the **Establishment ID** to show in the **Job Opening Section**. Deselect the check box. Click the **Establishment ID** check box. ☑
28.	Navigate to the next page. Click the **Next Page** button. ▶
29.	The **Profile Combination Section** has a single check box that controls access to the **Profile Combination** grid, which displays the profiles whose content items were copied into the job opening. For this example, leave the **Add a Profile** check box unselected.
30.	Click the **Next Page** button. ▶
31.	The **Additional Job Details Section** includes check boxes to control the fields and grids from the **Staffing Information**, **Salary Information**, **Screening Questions**, and **Applicant Screening** sections on the **Job Opening** page.
32.	The **Add Additional Jobs** check box controls whether users can add or delete job codes. For this example, leave the check box unselected.

Step	Action
33.	The **Copy Primary Qualifications** check box controls access to the **Copy Qualifications from Primary Job Code** button. For this example, click the **Copy Primary Qualifications** check box. ☐
34.	Continue to mark the check boxes for the **Additional Job Details Section** that you want to make visible for the recruiter role. For this example, select check boxes from each of the sections.
35.	Click the **Begin Date** check box. ☐
36.	Click the **End Date** check box. ☐
37.	Click the **Schedule Type** check box. ☐
38.	Click the **Regular/Temporary** check box. ☐
39.	Click the **Travel Percentage** check box. ☐
40.	Click the **Job Grade and Step** check box. ☐
41.	Click the **Add Screening Question** check box. ☐
42.	Click the **Add Screening Option** check box. ☐
43.	Click the **Next Page** button. ▶
44.	The **Additional Profile Details Section** includes check boxes for the profile content types that are available for use in job openings.
45.	For this example, click the **Select All** link. Select All
46.	Click the **Next Page** button. ▶

Step	Action
47.	The **Assignments Section** includes check boxes for the hiring team grids in the job opening. For example, the **Add Recruiter** and **Add Hiring Manager** check boxes control access to the recruiters and hiring mangers grids. Separate check boxes are available for controlling access to the buttons that enable users to add entire teams to these grids. For this example, select five check boxes for the **Assignments Section.**
48.	Click the **Add Hiring Manager Team** check box. ☐
49.	Click the **Add Interested Party** check box. ☐
50.	Click the **Add Screening Team** check box. ☐
51.	Click the **Add Interviewer** check box. ☐
52.	Click the **Add Interviewer Team** check box. ☐
53.	Click the **Next Page** button. ▶
54.	The **Job Postings Section** has a single check box that controls access to the **Job Postings** grid in the job opening.
55.	For this example, click the **Add Job Posting** check box. ☐
56.	When all of the pages are completed, click **OK** to return to the **Job Creation Process** page. Click the **OK** button. OK
57.	The **Job Creation Process** page appears. Click the **Save** button. Save
58.	A message may appear based on selections made on the **Configure Field Visibility** pages. Review the message and then click **OK**. Click the **OK** button. OK

Step	Action
59.	The **Job Creation Process** definition is saved and the **Job Creation Process ID** changes from **NEW** to **1002**.
60.	You have successfully set up a job creation process definition for the recruiter role. **End of Procedure.**

Set Up Flexible Recruiting Process

Use this task to create recruiting process definitions to specify applicant dispositions for which you will configure allowable actions and allowable disposition transitions.

When using flexible recruiting processes, you can establish different recruiting processes for applicants in specific dispositions. You can set up rules for users who are presented with a limited list of appropriate choices when they:

- Use the **Edit Disposition** action to manually change an applicant’s disposition
- Perform recruiting actions

Rules are role-specific and users with a role that is not specifically configured are always presented with unfiltered lists of options.

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Recruiting > Flexible Processes > **Recruiting Process**

Step	Action
1.	Before setting up flexible recruiting process definitions, you must use the **Status Successors** page to define all acceptable successors for each disposition. Only the successors defined on the **Status Successors** page are available as target dispositions when you define your flexible process. This example assumes that the **Status Successors** page was set up to include all acceptable successors for each disposition.
2.	When setting up a recruiting process, define valid disposition transitions for each recruiting role type. For example, you might allow hiring managers but not recruiters to manually move an applicant from the **Applied** disposition to the **Reject** disposition. In this example, **Applied** is called the source disposition and **Reject** is called the target disposition. You can also configure different transition rules for different types of applicants (internal, external, and non-employees). You cannot have gaps in process when setting up a recruiting process. For example, if the hiring manager cannot transition applicants into the **Interview** disposition, then they cannot manually move applicants out of the **Interview** disposition.

Step	Action
3.	A flexible recruiting process controls action availability based on an applicant's disposition. For example, if an applicant is in an **Offer** disposition, a flexible recruiting process could limit recruiters to the **Accept Offer** and **Reject Offer** actions, while not allowing hiring managers to perform any actions.
4.	The recruiting process applies to only a subset of recruiting actions that have to do with the relationship between an applicant and a job opening: - Marked Reviewed - Route Applicant - Manage Interviews - Create Interview Evaluations - Prepare Job Offer - Accept Job Offer - Reject Job Offer - Prepare for Hire - Withdraw from Hire - Reject Applicants It also applies to a few applicant actions that are not related to a specific job application: - Pre-Employment Check - Manage Applicant Contracts Some actions are available only for applicants in specific dispositions regardless of the flexible processing definition.
5.	Use the **Find an Existing Value** tab to search for and maintain existing recruiting process definitions. Search by **Recruiting Process ID** and **Description**.
6.	Click the **Add a New Value** tab. 
7.	Use the **Recruiting Process** page to specify applicant dispositions for which you will configure allowable actions and allowable disposition transitions. The **Recruiting Process ID** defaults to **NEW**, which is replaced with an UCPath assigned number upon saving the definition.
8.	The **Description** field is a required field. Enter the desired information into the **Description** field. For this example, enter **Analyst Job Opening**.
9.	Click in the **Short Description** field. 
10.	Enter the desired information into the **Short Description** field. For this example, enter **Analyst JO**.

Step	Action
11.	The **Status** field defaults to **Active**. New recruiting process definitions should remain active but existing definitions may be inactivated if no longer needed. Only active definitions are available for selection in flexible process templates but an inactive recruiting process is still used by any flexible process templates that are already associated with it.
12.	The **Status Date** defaults to the status assignment date and can be updated if needed. For this example, accept the default.
13.	The **Business Unit** field defaults based on your role security but can be updated if needed. For this example, accept the default.
14.	The **Filter By** field is used to control the information that appears in the **Disposition Setup** grid, where you can view the dispositions transitions that the recruiting process allows. Filtering by role type helps you see the complete set of transitions allowed for particular types of users. Select a recruiting role type to view the transitions associated with that role type, or select *ALL* to remove the filter and see all available transitions without regard for which users can perform the transitions. For this example, accept the defaulted value of ***All***.
15.	When you manually change an applicant's disposition, the starting disposition is the source disposition and the newly assigned disposition is the target disposition. List the valid targets for each possible source. The **Disposition Setup** section displays a row for each source where you have defined valid transitions. The first row is always the disposition that is configured as the UCPath-wide default on the **Status Area** page and at UC, it's the **Applied** status. This disposition is assumed to be the usual starting point of the recruiting process and you cannot delete this row.
16.	The **Predecessor Dispositions** field displays a list of dispositions that are valid predecessors of the corresponding source disposition. The system derives the list of predecessor dispositions based on settings on the **Dispositions and Roles** page. If the **Filter By** field is **All**, the transition might be allowed for some but not all recruiting role types. To verify that a transition is available for a particular recruiting role type, use the **Filter By** field to show only transitions for that role type.

Step	Action
17.	The **Source Disposition** field displays the disposition whose configuration is shown in the row. UCPath creates a row for the default disposition (the **Applied** disposition at UC). To configure an additional disposition, you must first make sure the disposition appears as a valid successor to an existing disposition. Click the **Add Disposition** button to create a new row for the additional disposition.
18.	The **Available Transitions** field displays the valid targets for the source disposition. If the **Filter By** field is **All**, the transition might be allowed for some but not all recruiting role types. To verify that a transition is available for a particular recruiting role type, use the **Filter By** field to show only transitions for that role type.
19.	Click the **Configure Transitions** link to display the **Dispositions and Roles** page where you can configure context-sensitive disposition assignments that can be made by users with different roles. The link label displays as **Modify Transitions** for a disposition that was previously configured.
20.	Click the **Configure Transitions** link.  Configure Transitions
21.	The **Source Disposition** field displays the disposition that you are configuring. If accessing this page by clicking the **Add Disposition** button on the prior page, you can select the **Source Disposition** that you want to configure. The available values are the dispositions that you have already configured as successors for another disposition.
22.	Define the target dispositions for the current source disposition. Click the button to the right of the **Dispositions** field. ⌄
23.	The available values are those dispositions that are defined as successors on the **Status Successors** page and the source disposition's predecessors within the current flexible recruiting process. Select the appropriate disposition. For this example, select the **020 Reviewed** list item.  020 Reviewed
24.	Select the check boxes for the types of applicants who can be manually transitioned from the source to the specified target. If different roles can perform the transition for different applicant types, create multiple rows for the transition.

Step	Action
25.	Select the check boxes for the recruiting role types that can perform the specified transition. The recruiting administrator role type is not available because administrators are not subject to flexible process restrictions.
26.	For this example, select all of the check boxes except for the **Recruiter** check box.
27.	Click the **External** check box. ☐
28.	Click the **Employee** check box. ☐
29.	Click the **Non-Employee** check box. ☐
30.	Click the **Hiring Manager** check box. ☐
31.	Click the **Interested Parties** check box. ☐
32.	For this example, add a second transition. Click the **Add a New Row** button. ⊞
33.	A new row appears. Click the button to the right of the **Dispositions** field. ⌄
34.	Select the appropriate disposition. For this example, select the **060 Interview** list item.  060 Interview
35.	For this example and to save time with the data entry, the check boxes are selected for you. Review the page entries.
36.	For this example, add a third transition. Click the **Add a New Row** button. ⊞

Step	Action
37.	A new row appears. Click the button to the right of the **Dispositions** field. 
38.	Select the appropriate disposition. For this example, select the **110 Reject** list item.  110 Reject
39.	For this example and to save time with the data entry, the check boxes are selected for you. Review the page entries.
40.	Use the **Configure Available Actions** link to display the **Actions and Roles** page. This link label is **Modify Available Actions** if accessing the page on an existing recruiting process definition.
41.	Click the **Configure Available Actions** link.  Configure Available Actions
42.	Use the **Actions and Roles** page to configure context-sensitive actions that users perform with different recruiting roles. The **Source Disposition** field displays the disposition you are configuring.
43.	The **Configure Available Actions** section lists the actions that you can configure using the flexible recruiting process. This is a subset of the actions that are available on the various recruiting pages. Note that the first row, **Select or Deselect Actions**, is not an action. It provides a data entry shortcut. When you select or deselect this check box, the system selects or deselects all of the check boxes in the column.
44.	There are some actions that are available only for applicants in specific dispositions regardless of the flexible processing definition: - **Accept Offer** and **Reject Offer** are available only for applicants in **Offer** status. (The applicant also must have an open offer.) - **Prepare for Hire** is available only for applicants in **Offer Accepted** status. - **Withdraw from Hire** is available only for applicants in **Ready to Hire** status.
45.	Select the check boxes for the recruiting role types that can perform the specified action. The recruiting administrator role type is not available because administrators are not subject to flexible process restrictions. For this example, select three actions for the recruiter and hiring manager.

Step	Action
46.	Click the **Recruiter** check box. ☐
47.	Click the **Hiring Manager** check box. ☐
48.	Click the **Recruiter** check box. ☐
49.	Click the **Hiring Manager** check box. ☐
50.	Click the **Recruiter** check box. ☐
51.	Click the **Hiring Manager** check box. ☐
52.	Return to the **Dispositions and Roles** page. Click the **OK** button. OK
53.	Return to the **Recruiting Process** page. Click the **OK** button. OK
54.	For this example, add another disposition. Click the **Add Disposition** button. Add Disposition
55.	The **Source Distribution** displays **020 Reviewed**. You can select a different disposition if needed. For this example, accept the default.
56.	Click the button to the right of the **Dispositions** field. ⌄
57.	Select the appropriate disposition. For this example, select the **060 Interview** list item. 060 Interview
58.	To save time with the data entry, the remaining entries on this page have been are completed for you. Review the entries on the next page.

Step	Action
59.	Return to the **Recruiting Process** page. Click the **OK** button. OK
60.	For this example, click the **Add Disposition** button. Add Disposition
61.	Change the **Source Disposition**. Click the button to the right of the **Source Disposition** field. ⌄
62.	Select the appropriate source disposition. For this example, select the **020 Reviewed** list item. 020 Reviewed
63.	Select the available transitions. Click the button to the right of the **Dispositions** field. ⌄
64.	Select the appropriate disposition. For this example, select the **070 Offer** list item. 070 Offer
65.	Click the **External** check box. ☐
66.	Click the **Employee** check box. ☐
67.	Click the **Non-Employee** check box. ☐
68.	Click the **Recruiter** check box. ☐
69.	Click the **Hiring Manager** option. ☐
70.	Configure the available actions for the disposition. Click the **Configure Available Actions** link. Configure Available Actions

Step	Action
71.	Identify and select the actions for the listed roles. For this example, click the **Recruiter** check box. ☐
72.	To save time with the data entry, the remaining entries on this page are completed for you. Review the entries.
73.	Return to the **Dispositions and Roles** page. Click the **OK** button. OK
74.	The **Dispositions and Roles** page appears. Return to the **Recruiting Process** page. Click the **OK** button. OK
75.	The **Recruiting Process** page appears. Identify the priority for the recruiting role types. Use the priority to control which role's settings to use when a person has more than one recruiting role type. Lower numbers have a higher priority.
76.	Click in the **Priority** field.
77.	Enter the desired information into the field. For this example, enter **1**.
78.	Click the button to the right of the **Recruiting Role Type** field. ⌄
79.	Select the appropriate type. For this example, click the **Hiring Manager** list item.
80.	For this example, add another role. Click the **Add Role** button. Add Role
81.	Click in the **Priority** field.
82.	Enter the desired information into the **Priority** field. For this example, enter **2**.

Step	Action
83.	Click the button to the right of the **Recruiting Role Type** field. 
84.	Select the appropriate type. For this example, select the **Recruiter** list item.
85.	Click the **Save** button. 
86.	The **Recruiting Process** definition is saved and the **Recruiting Process ID** changes from **NEW** to **1004**.
87.	You have successfully set up a flexible recruiting process. **End of Procedure.**

Set Up Interview Facility

Use this task to set up an interview facility that you can use when scheduling applicant interviews onsite at an UC location.

Interview facilities, also referred to as venues, are specific locations such as meeting rooms where interviews take place.

Navigation: PeopleSoft Menu > Recruiting > Administration > **Interview Facilities**

Step	Action
1.	Search for an existing interview facility using the **Find an Existing Value** tab or add a new facility using the **Add a New Value** tab. For this example, add a new facility.
2.	Click the **Add a New Value** tab. 
3.	Assign a **Venue ID** following your Location's business practices and naming conventions. Click in the **Venue ID** field. 
4.	Enter the desired information into the **Venue ID** field. For this example, enter **1**.
5.	Click the **Add** button. 

Step	Action
6.	Use the **Interview Facilities** page to set up and maintain information about interview venues.
7.	The **Status** defaults to **Active**. Only active venues are available for use on the **Interview Schedule** page. If the venue is no longer needed, you can inactivate it.
8.	Click in the **Description** field.
9.	The description entered here is viewable when selecting this venue to use for an interview.
10.	Enter the desired information into the **Description** field. For this example, enter **UCPath Center Large Conference Room**.
11.	The email address is informational only. Click in the **Email** field.
12.	Enter the desired information into the **Email** field. For this example, enter **ronda.olen@ucop.edu**.
13.	The **Business Unit** defaults based on your role security but can be updated if needed. For this example, accept the default.
14.	Enter the location of the venue. The information provided here is copied to the interview schedule. Applicants can see the location information on the **Interview Detail** page in Candidate Gateway. If the interview scheduler modifies the location text in the actual interview schedule, the changes are replicated to the venue definition.
15.	Click in the **Location** field.
16.	Enter the desired information into the **Location** field. For this example, enter **14350 Meridian Parkway**.
17.	For this example, the remaining location information is entered for you to save time with data entry.
18.	Enter directions to the venue. Applicants can see the directions on the **Interview Detail** page in Candidate Gateway. Click in the **Directions** field.
19.	Enter the desired information into the **Directions** field. For this example, enter **Add directions here**.

Step	Action
20.	Enter additional notes about the venue. Notes entered here do not appear on the **Interview Schedule** page. Click in the **Notes** field.
21.	Enter the desired information into the **Notes** field. For this example, enter **Projector not in room**.
22.	Enter additional room details about the venue. Information entered here does not appear on the **Interview Schedule** page. Click in the **Room Details** field.
23.	Enter the desired information into the **Room Details** field. For this example, enter **Seats 12**.
24.	Upload useful attachments such as maps or room-specific instructions. The **Attachments** section includes a link to the document along with information about who uploaded the file and when it was uploaded. Attachments do not appear on the **Interview Schedule** page. For this example, attachments are not needed.
25.	Click the **Save** button. 
26.	You have successfully set up a new interview facility that you can use when scheduling an applicant interview. **End of Procedure.**

Workforce Administration

PHCMWFA100: Employee Data Inquiry

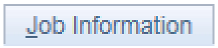
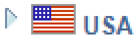
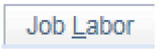
View Job Data

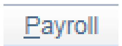
Use this task to view an employee's job data in UCPath.

Navigation: PeopleSoft Menu > Workforce Administration > Job Information > **Job Data**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **Job Data** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	The fastest way to locate the employee is to enter the **Empl ID**. Click in the **Empl ID** field. 
3.	Enter the employee's ID into the **Empl ID** field. For this example, enter **10073583**.
4.	Click the **Search** button. 
5.	The **Work Location** page displays position and location information for the employee's job.
6.	The employee's name, **Empl ID** and **Empl Record** number appear at the top of all tabs within the **Job Data** component.
7.	The **Effective Date** represents the "as of" date of the employee's job **Action** (in this case, **Pay Rate Change**). The **Effective Sequence** field identifies the number of job data row entries for the same **Effective Date**; 0 for the first entry, 1 for the second entry, 2 for the third entry and so forth.
8.	The **HR Status** and **Payroll Status** appear for the employee's **Future** or **Current** job data record.
9.	The **Action** field indicates what personnel action took place on the **Effective Date**. The **Reason** field describes the **Action**.
10.	The **Job Indicator** field identifies if this job (Empl Record) is the employee's **Primary Job** or **Secondary Job**.
11.	Below the **Action** and **Reason** fields, you can see if the job record you are viewing is the employee's **Future, Current** or **History** job record.
12.	Click the **Note** icon to display notes that were: • entered by UCPC WFA Production. • transferred from the comments field for data rows added from an approved PayPath transaction.
13.	The **Position Number** field identifies the employee's position information. The **Business Unit** field displays the 5-character campus/location code and a description. The **Department** field is the employee's appointing department.
14.	The **Department Entry Date** field displays the date the employee was assigned to the Job Code.

Step	Action
15.	The **Expected Job End Date** field displays the date the job is expected to end, if applicable. If the **End Job Automatically** check box is selected, the employee's job is automatically terminated as of the **Expected Job End Date**.
16.	Click the **Job Information** tab. 
17.	The **Job Information** page displays information about the employee's job, including job code and description, employee class, shift or standard hours and the position to whom the employee reports.
18.	The **Entry Date** field displays the date on which the person was first assigned to the job code.
19.	The **Reports To** field displays the position number, title and name of the manager associated with this position.
20.	The **Standard Hours** field displays the standard hours for the job. The **Work Period** field identifies the time period during which the employee must complete the standard hours. The **FTE** field displays the full-time equivalency for the job.
21.	If the employee has more than one active job, the **Combined Standard Hours** and **FTE** fields appear at the bottom of the **Standard Hours** section. UCPath calculates and displays the combined standard hours and FTE of all active jobs (Employee and CWR).
22.	The **As of Date** field appears next to the **FTE** field and displays the last date that the FTE was updated on the Position. If the FTE was not updated, the field does not display.
23.	Click the scroll bar.
24.	Click the **Expand Regional section (USA)** button. 
25.	The employee's **FLSA Status** appears in the **Regional** section of this page. The **EEO Class** and **Work Day Hours** fields are not used by UC.
26.	**FLSA Status** indicates whether this job is exempt or non-exempt according to the Fair Labor Standards Act. FLSA status also helps determine benefits eligibility in UCPath Benefits Administration. The FLSA status defaults from the position number.
27.	Click the scroll bar.
28.	Click the **Job Labor** tab. 
29.	There are two fields used by UC on the **Job Labor** page, **Union Code** and **Union Seniority Date**.

Step	Action
30.	The **Bargaining Unit** field is not used by UC. Union dues and fees are based on the **Union Code** (below) which defaults from the **Job Code**. However, for record keeping purposes, the union codes are mapped to the respective bargaining unit behind the scenes in UCPath.
31.	The **Union Code** field defaults from the job code associated with the employee.
32.	The **Union Seniority Date** is the date on which the employee enters the union and is populated when applicable at the time of hire.
33.	Click the **Payroll** tab. 
34.	The **Payroll** page displays payroll processing data, the employee's pay group, employee type and other payroll information.
35.	The **Payroll System** is the system that is used to process this person's paycheck. The **Absence System** identifies the absence system used to process the employees absences.
36.	The following fields relate to payroll processing. The **Pay Group** field displays the pay group to which this employee belongs. The **Employee Type** value depends on the pay group selected. The **Tax Location Code** field identifies the valid tax location for the employee's state and work location. The **FICA Status** field identifies whether the employee is Exempt, Subject or Medicare only. The **Holiday Schedule** field is not used by UC.
37.	The **Absence System** that is selected for this employee determines what value appears in the Absence Management System **Pay Group** field.
38.	Based on the Absence Management pay group, the **Setting** check boxes are automatically selected.
39.	The **Eligibility Group** field is blank if the **Use Pay Group Eligibility** check box is selected. The information in this field specifies earnings, deduction and absence elements that a payee might be eligible to receive.
40.	The **Exchange Rate Type** and **Use Rate As Of** fields are not used by UC.
41.	Click the **Salary Plan** tab. 

Step	Action
42.	The **Salary Plan** page displays information about an employee's salary admin plan, grade and step.
43.	The **Salary Admin Plan** field displays the salary administration plan code. This field defaults from the position number associated with the employee.
44.	The **Grade** field displays the grade if one is associated with the employee's job code. Certain grades include **Steps** based on the type of job. Compensation changes when an employee’s step changes. The **Includes Wage Progression Rule** check box is not used by UC.
45.	Click the **Compensation** tab. Compensation
46.	The **Compensation** page displays employee compensation information including rate code, compensation rate and frequency.
47.	The **Rate Code** field identifies the type of pay for payroll purposes.
48.	The **Comp Rate** displays the compensation rate for the employee.
49.	The **Frequency** field identifies the compensation frequency for the compensation rate.
50.	Expand the **Comparative Information** group box. ▶
51.	The **Change Amount** and **Change Percent** fields display the difference in previous and current pay when there is a pay rate change.
52.	Expand the **Pay Rates** group box. ▶
53.	The **Pay Rates** group box displays the employee's compensation at a daily, weekly, monthly and annual rate.
54.	Click the **UC Job Data** tab. UC Job Data
55.	The **UC Job Data** page displays UC-specific information, such as probation code, probation end date, trial employment end date, academic duration of appointment, ERIT/phased retirement end date, post docs anniversary date and partial year career duration.
56.	The **Eligibility Group Override** field is used to override the system generated eligibility group so an employee can be placed in the appropriate eligibility group.
57.	From any of the **Job Data** tabs, use the hyperlinks at the bottom of the page to navigate to three additional employee data pages: **- Employment Data** **- Earnings Distribution** **- Benefits Program Participation**

Step	Action
58.	Click the **Employment Data** link. Employment Data
59.	The **Employment Information** page displays employee information, such as original start date at UC, termination date if applicable and seniority dates.
60.	Click the **Earnings Distribution** link. Earnings Distribution
61.	The **Job Earnings Distribution** page displays the employee's compensation distributed for one job among different Earnings Codes. (For example, workers compensation.)
62.	Click the **Benefits Program Participation** link. Benefits Program Participation
63.	The **Benefit Program Participation** page displays the benefit program in which an employee is enrolled for benefits in UCPath Benefits Administration.
64.	Click the **Job Data** link to return to the **Job Data** component. Job Data
65.	You have reviewed an employee's job data in UCPath. **End of Procedure.**

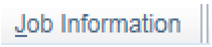
View Workforce Job Summary

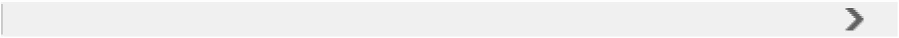
Use this task to view a summary of an employee's job information – including current, future and historical data – using the **Workforce Job Summary** page.

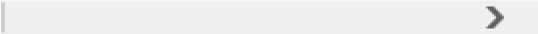
Navigation: PeopleSoft Menu > Workforce Administration > Job Information > Review Job Information > **Workforce Job Summary**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **Workforce Job Summary** page, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	The fastest way to locate the employee is to enter the **Empl ID**. Click in the **Empl ID** field. 

Step	Action
3.	Enter the employee's ID into the **Empl ID** field. For this example, enter **10132021**.
4.	Click the **Search** button. 
5.	The **Workforce Job Summary** page displays a summary of the employee's work history. Each row of information relates to a change (**Action**) in the employee's job. The rows of information appear in chronological order, according to **Effective Date**, with the most recent action (or future actions) at the top.
6.	Review the information on the **General** tab, which includes personnel **Actions**, **Action Reasons** and the **Effective Date** of each action.
7.	**Organizational Relationship** Indicates the type of organizational relationship the employee has with UC: **EMP** (employee), **CWR** (contingent worker) or **POI** (person of interest). **Empl Record** (employment record) is the sequential number of the employment instances (jobs).
8.	**Effective Date** and **Seq** (sequence) display the effective date and effective date sequence, if any, for each personnel action. The sequence creates a sequential order for actions that occur on the same effective date.
9.	**Action** and **Action Reason** display the action taken and reason for the action.
10.	**Job Indicator** defines whether the employee's job is the primary or secondary job.
11.	Click the **Job Information** tab. 
12.	Instead of displaying each tab one at a time, you also can display fields for all tabs. Click the **Show all columns** button. 
13.	Notice that the tabs have disappeared and all details appear on the page. **Job Code** and **Description** display the employee's job code and description after each personnel action.
14.	**Classified Ind** displays the code used to group job codes.
15.	Click the scroll bar.
16.	**Empl Status** (employee status) displays the employee's status after each personnel action.
17.	**Full/Part Time** indicates whether the employee is **Fixed**, **Variable** or **Not Applicable** according to the employee's work schedule.
18.	**Standard Hours** displays the standard hours per work period.
19.	The **FTE** is the full-time equivalency for the position.

Step	Action
20.	**FLSA Status** indicates whether this job is exempt or nonexempt according to the Fair Labor Standards Act. FLSA status also helps determine benefits eligibility in Benefits Administration. The FLSA status defaults from the position associated with the employee.
21.	**Expected Job End Date** displays the date the employee's job will end, if applicable.
22.	**Expected Return Date** displays the date the employee is expected to return from leave of absence, if applicable.
23.	**Position Number**, **Description** and **Company** display the employee's position and company code after each personnel action. Currently there is only one company in UCPath, **UCS**.
24.	Click the scroll bar.
25.	**Location** displays the physical location of the job.
26.	**Business Unit** displays the business unit code.
27.	**Reports To** displays the person to which the employee's position reports.
28.	**Sal Plan**, **Grade**, **Step** and **UC Half Step** display the salary plan for the employee. If applicable, UCPath also displays the grade, step and UC half step.
29.	**Pay Group** and **Frequency** display the payroll group for which the employee is paid and the pay frequency.
30.	**Union Code** displays the union code for the employee.
31.	**Annual Rate** displays the employee's annual rate of pay.
32.	Click the scroll bar. 
33.	**Monthly Rate**, **Daily Rate** and **Hourly Rate** are the employee's pay rate according to month, day or hour.
34.	**Change Percent** displays the percent of pay rate change from the previous row.
35.	Click the **Earnings Distribution** link to view details about any job earnings distribution for the row. Click the **Components** link to display the **Salary Components** page.
36.	**Probation Code** identifies if the employee falls within a probation status period. **Probation End Date** identifies when the probation period is over or has been completed.
37.	**Trial Employment End Date** displays the date the trial employment period ends.
38.	**Academic Duration of Appointment** allows Locations to track additional academic information relating to the selection made in the **Expected Job End Date** field.
39.	**ERIT/Phased Retirement End Date** displays the end date for the employee's reduction in time or phased retirement date.

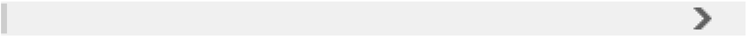
Step	Action
40.	Click the scroll bar. 
41.	**Location Use End Date** and **Location Use Type** allows Locations to track funding expiration and other location specific dates separate from the **Expected Job End Date** field.
42.	**Post Docs Anniversary Date** is used to help maintain years of experience for Post Docs and assists with calculating accruals for vacation and sick leave for Post Docs.
43.	**PY Career Duration** is used to track the duration for Partial Year Career employees. This field will be referenced in the ABBR business rules and is required to determine how many months an employee will work and furloughed.
44.	**Eligibility Group Override** displays the eligibility group that was manually entered and which overrides the system generated eligibility group.
45.	**Pay Group Override** displays the pay group that was manually entered and which overrides the system generated pay group.
46.	**Alternate Work Week** displays the work schedule. Options include 7/40 or 8/80.
47.	**Termination Override:** If **Yes**, the job record will be excluded from the End Job Automatically job process.
48.	**HR Primary Job Override:** If **Y** (Yes) the system will override the Primary Job determined by a set of rules executed when Primary Job process is run.
49.	You have reviewed a summary of an employee's job information using the **Workforce Job Summary** page. **End of Procedure.**

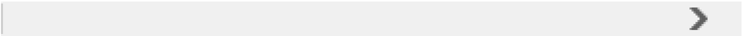
View Person Organizational Summary

Use this task to view all current organizational relationships for a person: Employee, Contingent Worker (CWR) and/or Person of Interest (POI). This page does not display historical or future-dated employment details.
For example, you can view a summary of an employee's current job assignments and associated details.

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > **Person Organizational Summary**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **Person Organizational Summary** page, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	The fastest way to locate the employee is to enter the employee's ID. Click in the **Empl ID** field. 
3.	Enter the employee's ID number into the **Empl ID** field. For this example, enter **10066206**.
4.	Click the **Search** button. 
5.	The **Person Organizational Summary** page displays the current organizational relationships for the selected employee. This example displays **Employment Instances** and **Assignments** for an Employee. To display all current assignments, click the **View All** link.
6.	Click the scroll bar to display the **View All** link. 
7.	Click the **View All** link. 
8.	The **Employment Instances** section displays a separate **Assignments** section for each of the employee's jobs. Each **Assignments** header displays the employee's **HR Status** and **Payroll Status**, his or her **Last Hire** date and, if applicable, **Termination Date**.
9.	If the employee has multiple assignments, one of the assignments must be indicated as the **Primary Job**.
10.	The **Assignments** section displays the employee's job assignment details for each **Empl Record**.
11.	The **Business Unit** field displays the 5-character campus/location code. The **Position Number** field identifies the employee's position number. The **Dept ID** field displays the employee's appointing department and the **Department Description**.
12.	The **Job Code** field displays the job code associated with the employee. The **Description** field displays the description of the job code.

Step	Action
13.	The **Expected Job End Date** field displays the appointment end date for this job, if applicable.
14.	The **FTE** field displays the full-time equivalency associated with the employee's job.
15.	The **Employee Class** field defines the class type to which the employee belongs.
16.	The **Union Code** field defaults from the position number associated with the employee.
17.	The **FLSA Status** indicates whether this job is exempt or non-exempt according to the Fair Labor Standards Act (FLSA). The FLSA status also helps determine benefits eligibility in Benefits Administration. The FLSA status defaults from the position number associated with this employee.
18.	The **Pay Group** displays the pay group to which this employee belongs.
19.	Click the scroll bar. 
20.	The **Employee Type** value depends on the pay group selected.
21.	The **Probation Code** field identifies the current status of the employee's probation, if applicable.
22.	If the employee is currently on probation status, the **Probation End Date** field specifies the date the employee's probation ends.
23.	You have reviewed a summary of an employee’s current organizational relationship data. **End of Procedure.**

View Position Information

Use this task to view position information in UCPath.

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Maintain Positions/Budgets > **Add/Update Position Info**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	When you navigate to the **Add/Update Position Info** component, the system displays the **Find an Existing Value** tab, which you use to search for existing positions. Enter known search criteria to find the position. Or, if known, enter the **Position Number**.

Step	Action
2.	Click in the **Position Number** field. 
3.	Enter the desired position number into the **Position Number** field. For this example, enter **40078651**.
4.	Click the **Search** button. 
5.	The **Description** page displays header-level information about the position as well as **Job Information**, **Work Location** information and **Salary Plan Information**. This component is effective dated and captures the history of all changes to the position.
6.	Positions can be set up with multiple head counts or a single head count. This example displays a **Current Head Count** of **1**, which is currently filled by an employee as indicated by the **Headcount Status** field.
7.	Review the **Job Information** associated with the position. The **Union Code**, **Title** and **Short Title** fields are attributes of the **Job Code**. These fields default from the job code when the position is created. The **Reg/Temp** and **Regular Shift** fields are not used by UC.
8.	Review the **Work Location** information associated with the position. These fields identify the **Department** and physical **Location** of the position, as well as the position to which this position reports (**Reports To** field). The **Supervisor Lvl** field is not used by UC.
9.	Click the scroll bar.
10.	Review the **Salary Plan Information** associated with the position. These fields identify the position's **Salary Admin Plan** and the **Grade**. You also can view the **Standard Hours** within the **Work Period**. The **Step** field is not used at the position level.
11.	The daily hours indicated are inconsequential and are not used to determine an employee’s time/pay.
12.	If the section below is not visible, click the **USA** flag to expand the section.

Step	Action
13.	Review the position's **FLSA Status**. **FLSA Status** options include: **Exempt**, **Nonexempt, Nonexempt Alt Overtime** and **No FLSA Required**. **Note:** The **Nonexempt Alt Overtime** option is used to track whether someone is eligible for an alternate overtime calculation when working in states that do not use the federal overtime guidelines. This status enables the calculation of double overtime using the regular rate of pay.
14.	The **Bargaining Unit** field is not used by UC. Union dues and fees are based on the **Union Code** (above) which defaults from the **Job Code**. However, for record keeping purposes, the union codes are mapped to the respective bargaining unit behind the scenes in UCPath.
15.	Click the **Specific Information** link.  Specific Information
16.	The **Specific Information** page displays the **Max Head Count** for the position, a series of check boxes, as well as a section specific to **Education and Government**.
17.	The **Incumbents** check boxes become available when the position has at least one incumbent.
18.	The **Update Incumbents** check box is selected when the position has incumbents. When selected, any updates to the position automatically update the position-related **Job Data** fields for the assigned incumbents.
19.	The **Include Salary Plan/Grade** check box is selected when the grade is not configured to include steps and the **Update Incumbents** check box is selected.
20.	The **Force Update for Title Changes** check box is selected when there is a requirement for the title on the position to be different for the **Business Title** on the job.
21.	The **Include FTE** check box is selected when there is a requirement for the full time equivalency (FTE) on the position to be different from the FTE on the job.
22.	If the position is approved, then the **Budgeted Position** check box is selected. If this check box is not selected, the budgeted position reports cannot be run for this position.
23.	UC is not using the following fields: **Signature Authority** **Confidential Position** **Job Sharing Permitted** **Available for Telework**

Step	Action
24.	The **Education and Government** section identifies the position's **Classified Indicator** and the **FTE**. UC is not using the following fields: **Pre-Encumbrance Indicator** **Encumber Salary Option** **Calc Group (Flex Service)** **Academic Rank**
25.	The **FTE** field displays the maximum FTE that a single incumbent in the position can have. The **Adds to FTE Actual Count** check box indicates whether the position counts against the department's FTE maximum, if established.
26.	Click the **UC Position Data** tab. 
27.	The **UC Position Data** page displays employee relations information, such as the **Employee Relations Code**, **Representation Code** and if there are any special training or security clearances required for the position. The **HR Group** field is not used by UC.
28.	Click the **Budget and Incumbents** tab. 
29.	The **Budget and Incumbents** page displays the current incumbent(s) assigned to the position. The **Current Budget** section is not used by UC.
30.	This is an example of a filled position, so the **Current Incumbent** section displays incumbent information. If the position is a multi-headcount position, all incumbents assigned to the position appear. To view additional information about an employee's job, click the **Job Data** link. You must have the appropriate security access to view the **Job Data** component.
31.	Click the **Supporting Documents** tab. 
32.	The **Supporting Documents** page stores any attachments associated with the position record. Attachments can be opened and viewed but cannot be deleted. This example does not have any supporting documents.
33.	You have reviewed position information in UCPath. **End of Procedure.**

Job Aid: UCPath Workforce Administration Employee Data Inquiry

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMWFA100JA_EmployeeDataInquiry_D1Rev01.pdf) to open the **UCPath Workforce Administration Employee Data Inquiry** job aid in a new web browser window/tab.

Search for Employees

Use this task to search for employees in UCPath. Performing a search for employee information is similar, regardless of the page you are using. In this example, the **Job Data** component is used.

Navigation: PeopleSoft Menu > Workforce Administration > Job Information > **Job Data**

Step	Action
1.	The **Find an Existing Value** page displays multiple fields that can be used to search for an employee record. In the **Search Criteria** section, enter search criteria to search for an employee.
2.	**Empl ID** refers to employee ID, which is a unique system generated numerical ID assigned to each employee. Each UC employee is assigned a unique **Empl ID** regardless of how many positions or breaks in service they may have during their association with UC. When retrieving a record, searching on the **Empl ID** field is the most direct method.
3.	If the **Empl ID** is not known, you can search using the employee's name. Click in the **Last Name** field. 
4.	Enter the desired information into the **Last Name** field. For this example, enter **White**.
5.	Select the **Include History** check box to include historical information for the employee as well as the current information.
6.	Click the **Search** button. 
7.	The records that match the search criteria display in the **Search Results**. Click the record you want to view.
8.	For this example, click the **10000561** link. 
9.	The job data record for the selected employee appears.
10.	Click the **Return to Search** button to return to the previous page to enter new search criteria.

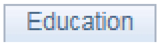
Step	Action
11.	Use the **Previous in List** and **Next in List** buttons to display the employee record for the previous or next person that is listed in the search results.
12.	You have searched for an employee in UCPath. **End of Procedure.**

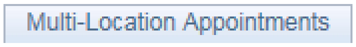
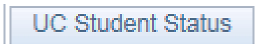
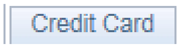
View Person Profile

Use this task to view person profile information in UCPath.

Navigation: PeopleSoft Menu > Workforce Development > Profile Management > Profiles > **Person Profiles**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **Person Profiles** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10033264**.
4.	Click the **Search** button. 
5.	Use the **Person Profile** component to view information about an employee's qualifications, education, oath and patent signature dates, multi-location agreements, UC student status, UC-issued credit card, employment status and I-9 verification.
6.	The **Qualifications** page displays information about honors and awards, as well as licenses and certifications.
7.	Click the **Education** tab. 
8.	The **Education** page displays records of an employee’s degrees, any UC specialty codes they may qualify for and additional UC prior or future service codes. Degrees information is copied to this page if the information was entered on the academic hire template.

Step	Action
9.	Click the **Oath / Patent Signature Date** tab. 
10.	The **Oath / Patent Signature Date** page displays the date an employee signed their oath and patent acknowledgment documents. This information is mandatory and employees are not granted access to the UC system without updated information. The oath and patent information is copied to this page if the information was entered on the hire template.
11.	Click the **Multi-Location Appointments** tab. 
12.	The **Multi-Location Appointments** page identifies employees who have multiple and concurrent work assignments. The host location is responsible for maintaining this information.
13.	Click the **UC Student Status** tab. 
14.	The **UC Student Status** page identifies employees that are also UC students.
15.	To display additional tabs, click the **Scroll Tabs Right** button. ▶
16.	Click the **Credit Card** tab. 
17.	The **Credit Card** page displays information about the employee's UC-issued credit card, if applicable.
18.	Click the **Employment Verification** tab. 

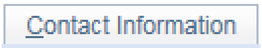
Step	Action
19.	The **Employment Verification** page displays the **Student Opt-In** and **Non-Student Opt-Out** sections. **Student Opt-In**: Students are not included in the daily update sent to UC's external partner that performs employment verification activities. This section displays **Opt-In** information if the student has indicated the information should be included in the employment verification file. **Non-Student Opt-Out**: Faculty, academic personnel and staff are automatically included in the daily update sent to UC's external partner that performs employment verification activities. This section displays **Opt-Out** information if the employee (faculty, academic or staff) has indicated the information should not be included in the verification of employment data file. The Opt-In / Opt-Out information is copied to this page if the student or employee entered the information on the Portal.
20.	Click the **UC I-9 Information** tab. 
21.	The **UC I-9 Information** page displays the employee's **Tracker Profile ID**. The **Tracker Porfile ID** is copied to this page if it was entered on the hire template.
22.	When you are finished reviewing the selected employee's profile details, click the **Return to Search** button. 
23.	You have viewed person profile information in UCPath. **End of Procedure.**

View Personal Information

Use this task to view an employee's personal information using the **Modify a Person** page.

Navigation: Peoplesoft Menu > Workforce Administration > Personal Information > **Modify a Person**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **Personal Information** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field.
4.	Click the **Search** button. 
5.	The **Biographical Details** page displays the employee's name and other biographical information.
6.	The following fields use **Effective Dates** to keep a history of changes: Name, address, biographical (such as education, marital status, and language) and some regional fields. Current, historical, or future information can be viewed for these fields. When new information takes effect, the system stores the old data so that you can track the changes that occur over time. The employee's National ID (SSN) is partially masked for most users, with the exception of few UCPath Center users.
7.	Click the **Contact Information** tab. 
8.	The **Contact Information** page displays the employee's address, phone and email information.
9.	Click the **Regional** tab. 
10.	The **Regional** page displays country-specific personal information such as ethnic group and military status.
11.	The values in the **Ethnic Group** section are based on U.S. Federal Equal Employment Opportunities ethnic categories.
12.	Click the **UC Personal Data** tab. 
13.	The **UC Personal Data** page displays the employee's disclosure preferences for campus offerings and university mailings.
14.	You have viewed employee personal information in UCPath. **End of Procedure.**

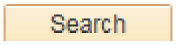
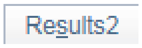
Search for Employees Using Search Match

Use this task to access the **Search/Match** page to search for specific employees in UCPath.

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > **Search for People**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
15.	In the **Search Type** field, select the **Person** option. Click the button to the right of the **Search Type** field.
16.	Click the **Person** list item. 
17.	Click the **Search** button. 
18.	In the **Search Results** list, select the **Custom Search for UCPath** option to open the search template. Click the **Custom Search for UCPath** list item. 
19.	In the **Search Result Code** field, select the **PSHR_GENERAL** option. Click the **Look up Search Result Code** button.
20.	Click the **General Core HR Results** list item. 
21.	You must enter search criteria to enable the **Search** button.
22.	Click in the **First Name Search** field.
23.	Enter the desired information into the **First Name Search** field. For this example, enter **Megan**.
24.	Click in the **Last Name Search** field.
25.	Enter the desired information into the **Last Name Search** field. For this example, enter **Sutherland**.

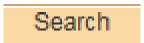
Step	Action
26.	Click in the **Gender** field. 
27.	Enter the desired information into the **Gender** field. For this example, enter **F**.
28.	Click the **Search** button. 
29.	The **Search Results** page displays a list of employees that match the search criteria.
30.	The **Show all columns** button displays the information from all three **Search Results** tabs on one page.
31.	The **Carry ID** button captures the person's ID and carries it to the ID search field on any other pages to which you navigate. If you want to "forget" the person ID, click the **Carry ID Reset** button on the search criteria page.
32.	The **Return to Search Criteria** link closes the search results and starts a new search.
33.	Click the **Results2** tab to review additional information. Click the **Results2** tab. 
34.	Review the information on the **Results2** tab. Click the **Additional Information** tab. 
35.	This tab provides access to the **Person Organizational Summary** page. Click the **Person Organizational Summary** link. 
36.	The **Person Organizational Summary** page provides detailed information about the employees job or assignment at UC.
37.	You have searched for employees using the **Search/Match** page. **End of Procedure.**

View Additional Names

Use this task to view the **Additional Names** page.

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > Biographical > **Additional Names**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	The **Find an Existing Value** page displays multiple fields that can be used to search for an employee record. In the **Search Criteria** section, enter search criteria to search for an employee.
2.	Click in the **Empl ID** field.
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10075363**.
4.	Click the **Search** button. 
5.	The names associated with the employee appear in the **Current Names** section.
6.	You have reviewed the **Additional Names** page. **End of Procedure.**

View Contract Payment Details Page

Use this task to view an employee’s contract pay information -- including projected and actual earnings -- using the **Contract Payment Details** page.

Navigation: PeopleSoft Menu > Payroll for North America > Employee Pay Data USA > **Contract Payment Details**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Click in the **Empl ID** field.
2.	Enter the desired information into the **Empl ID** field.
3.	Click the **Search** button. 
4.	The **Contract Payment Details** page includes several sections. The top of the page displays the employee's name, ID and employee record number.

Step	Action
5.	The top of the page also displays the contract ID, status and the contract recalculation status. The **Recalculate Contract** field displays **Yes** if: • UCPath detects changes to job data or contract pay settings that could affect the contract payments. • A UCPath Center WFA Production user manually selects the **Recalculate Pay** button on the **Contract Pay** page. If the contract is marked for recalculation, the **Contract Projected Payment Process** recalculates the contract pay the next time it processes this contract.
6.	The **Contract Payment Sequence** section displays the contract sequence number and effective date if contract data changes were made since the contract begin date. In this example, there have not been updates entered for the contract payment rate as indicated by the **Contract Sequence** value of **0**.
7.	The **Contract Information** section displays details about the contract, including the value of the contract as of the last recalculation, the contract term and the payment term.
8.	The **Contract Calendar** section displays the data used to determine work days during the contract term. To view the employee's individual work schedule, select the **Work Schedule** link to view the link.
9.	Click to expand the **Pay Rates** section. ▶
10.	The **Pay Rates** section displays the employee's annual, monthly, daily pay rates based on the total contract pay amount.
11.	Click to expand the **Payment Summary** section. ▶
12.	If necessary, scroll down to display additional fields and page functions.
13.	If the employee's contract pay has been recalculated, the **Carry Over Amounts** group box displays the contract regular, paid not earned, earned not paid, and actual worked amounts from the previous contract sequence. The **Adjustments to Carry Over Amts** group box allows users with the appropriate system security to enter positive or negative adjustments (not overrides) for any of the amounts. The **Carry Over Amounts** group box also displays the amount of leave from the previous contract sequence, but that amount cannot be updated.

Step	Action
14.	The **Projected Payment Totals** group box displays projected totals for the payment term, including totals for contract regular, paid not earned, earned not paid, total paid, leave of absence and worked earnings. The **Actual Earnings Totals** group box displays the same earnings types, but only for the actual amounts to date.
15.	The **Projected Payments and Actual Earnings** details are displayed across two tabs.
16.	The **Projected Earnings** tab displays the status of the contract earnings for the given pay period. In this example, the Status field value is **Payroll Confirmed**. This indicates that the earnings have been confirmed and paid.
17.	Review the details on the **Projected Earnings** tab.
18.	If necessary, scroll right to display additional fields on the **Projected Earnings** tab.
19.	When you are finished reviewing the projected earnings details, click the **Actual Earnings** tab. 
20.	The **Actual Earnings** tab displays the contract pay amounts for confirmed payments. Active rows for payments that haven't been confirmed show zero earnings in all columns. In this example, there is only one active row, which displays the contract pay for the indicated pay period end date.
21.	If necessary, scroll right to display additional fields on the **Actual Earnings** tab.
22.	The **Actual Earnings** tab includes all of the same columns as the **Projected Earnings** tab, and also includes two additional columns related to actual leave taken: • **Paid Leave** displays the amount of paid leave earnings for the pay period. • **Unpaid Leave** displays the earnings that were not paid due to unpaid leave during the pay period.
23.	You have viewed an employee's contract pay information using the **Contract Payment Details** page. **End of Procedure.**

View Disabilities

Use this task to view the **Disabilities** page.

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > Disability > **Disabilities**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	The **Find an Existing Value** page displays multiple fields that can be used to search for an employee record. In the **Search Criteria** section, enter search criteria to search for an employee.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10075363**.
4.	Click the **Search** button. 
5.	Click the **Expand section** button. 
6.	Review the employee's **Disability Status**.
7.	You have reviewed the **Disabilities** page. **End of Procedure.**

View Emergency Contacts

Use this task to view the **Emergency Contact** page.

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > Personal Relationships > **Emergency Contact**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	The **Find an Existing Value** page displays multiple fields that can be used to search for an employee record. In the **Search Criteria** section, enter search criteria to search for an employee.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10127762**.

Step	Action
4.	Click the **Search** button. 
5.	Review the employee's emergency contacts including name, address and phone number.
6.	If the employee has more than one emergency contact, click the **Show next row** button. ▶
7.	Then second emergency contact appears.
8.	Click the **Other Phone Numbers** tab. 
9.	If the emergency contact has multiple contact numbers they appears in the **Other Phone Numbers for Emergency Contact** section.
10.	You have reviewed the **Emergency Contact** page. **End of Procedure.**

View Employee Details

Use this task to view the **Employee Details Page**.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Employee Details Page**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use one or more of the **Employee Selection Criteria** fields to find a single employee or a list of employees to choose from.
2.	For this example, click in the **Empl ID** field to search for a specific employee. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10073583**.
4.	Click the **Get Employees** button. 
5.	The employees that match your search criteria appear in the **Employee Details** section.
6.	Click the **Employee Details Page** link to clear previously entered criteria. 

Step	Action
7.	Click the **Look up Business Unit** button. 🔍
8.	Choose the appropriate business unit. For this example, click the **MECMP** list item.  MECMP
9.	Click the **Get Employees** button.  Get Employees
10.	The list of employees that match your search criteria appears in the **Employee Details** section. Remember that UCPath displays a maximum of 300 records in search results. Notice that there are more than 3,000 employees that match the search criteria.
11.	To narrow your results, enter criteria in additional fields. For this example, click the **Look up Department** button. 🔍
12.	Choose the appropriate department. For this example, click the **Earth Systems Science** link.  Earth Systems Science
13.	Click the **Get Employees** button.  Get Employees
14.	Notice that the list of employees that match your additional search criteria is 53.
15.	You have reviewed the **Employee Details Page**. **End of Procedure.**

View Identification Data

Use this task to view an employee's identification information. For example, employees who live and work outside the US have the **NRA Working Outside the US** citizenship status.

Locations can view information on this page; however, if the information needs to be updated for an employee, you can add a comment during the hire template process or submit a request by submitting an inquiry/case.

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > Citizenship > **Identification Data**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	The **Find an Existing Value** page displays multiple fields that can be used to search for an employee record. In the **Search Criteria** section, enter search criteria to search for an employee.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10003014**.
4.	Click the **Search** button. 
5.	Review the information on the **Citizenship/Passport** page.
6.	Click the **Visa/Permit Data** tab. 
7.	Review the information on the **Visa/Permit Data** page.
8.	You have viewed an employee's identification information. **End of Procedure.**

View Security Clearance

Use this task to view an employee's security clearance information, including I-9 information.

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > **Security Clearance**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	The **Find an Existing Value** page displays multiple fields that can be used to search for an employee record. In the **Search Criteria** section, enter search criteria to search for an employee.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10075363**.

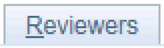
Step	Action
4.	Click the **Search** button.  Search
5.	The system displays the **Security Clearance** page. In this example, the employee has two security clearance types.
6.	Click the **Show next row** button. ▶
7.	Review the **Clearance Information** for the displayed security clearance type. In this example, **I9 Completion**.
8.	You have reviewed the **Security Clearance** page. **End of Procedure.**

View UC Employee Review

Use this task to view the **UC Employee Review** page.

Navigation: PeopleSoft Menu > Compensation > Base Compensation > Group Increases > **UC Employee Review**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	The **Find an Existing Value** page displays multiple fields that can be used to search for an employee record. In the **Search Criteria** section, enter criteria to search for an employee.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10000406**.
4.	Click the **Search** button.  Search
5.	The **Review Details** for the employee are displayed, if applicable.
6.	Click the **Reviewers** tab.  Reviewers
7.	The **Reviews** page provides a summary of the information from previous tab as well as the **Evaluation Type** and **Reviewer ID**.

Step	Action
8.	You have viewed the **UC Employee Review** page. **End of Procedure.**

View UC External System IDs

Use this task to view the IDs that have been added to the **UC External System IDs** page. The External System IDs are populated on this page after a hire or rehire Smart HR template is processed by UCPC WFA Production. The External System IDs are also updated on this page by I-262 (IDM).

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **UC External System IDs**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Click in the **Empl ID** field. 
2.	Enter the desired information into the **Empl ID** field. For this example, enter **10023044**.
3.	Click the **Search** button. 
4.	The **UC External System IDs** page identifies the **External System** and the associated **External System ID**.
5.	You have viewed the **UC External System IDs** page. **End of Procedure.**

View Update Contract Pay NA Component

Use this task to view a summary of an employee’s contract pay details, including any updates made by the UCPath Center (UCPC) using the **Update Contract Pay NA** page.

Navigation: PeopleSoft Menu > Workforce Administration > Job Information > Contract Administration > **Update Contract Pay NA**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Enter the desired information into the **Empl ID** field.
2.	Click the **Include History** option. 
3.	Click the **Search** button. 
4.	The **Contract Pay** page displays the employee's name, employee ID and employee record at the top of the page. The top of the page also displays the employee's system-generated **Contract ID** number and the contract status.
5.	The **Contract Information** section displays the contract details that were set up for the employee, including the effective date, the payment term, the pay frequency, and the contract begin and end dates.
6.	The **Payment Term** field displays how the employee is paid for their contract word. The **Pay Over Contract** option, as shown in this example, indicates the contract amount is paid over the length of the contract, as defined in the **Contract Begin Date** and **Contract End Date** fields.
7.	The **Payment Begin Date** and **Payment End Date** fields display the payment period. This period must begin on or before the contract begin date and must end on or after the contract end date.
8.	The **Actual Start Date** displays the date the employee began or will begin work with UC. The default is the contract begin date. A common reason for changing this default is if the employee starts working later than originally contracted.
9.	The **Termination Date** field indicates when the employee terminated or terminates the contract, if different from the contract end date. A common reason a date is displayed here is if the employee stops working earlier than originally contracted.
10.	If the employee's contract pay for the selected contract has been updated since originally entered, this page displays multiple rows to correspond with each update. In this example there is only one row, which indicates no updates have been made since the data was entered.
11.	Click the **Contract Pay Options** tab. 
12.	The **Contract Pay Options** page displays the pay annualization and funding options that were set up for the employee's contract pay. In this example, the **Annualize Over Payment Periods** is selected, which indicates the earnings are annualized over the number of pay periods in the payment term.

Step	Action
13.	You have viewed a summary of an employee’s contract pay updates using the **Update Contract Pay NA** page. **End of Procedure.**

Generate Employment Verification Summary - Admin View

Use this task to generate an employee's employment summary, including dates of employment and earnings.

Note: The **Admn-Verification of Employmnt** page is available only for Employee Services at UCPath Center.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Admn-Verification of Employmnt**

Step	Action
1.	Search for the employee by ID or name. Click in the **Empl ID** field. 
2.	Enter the desired information into the **Empl ID** field. For this example, enter **10004721**.
3.	Click the **Search** button. 
4.	The **Verification of Employment** page provides information about **The Work Number**, which is a third-party provider of employment and income verification. If the employee needs verification of employment for a bank, future employer or others, instruct the employee to follow the instructions on this page to get the information from **The Work Number**.
5.	If the employee wants a summary of their employment information for their own records, you can generate a one-page document from this page. The employee also has access to this information on the UCPath portal: Employee Actions > Income and Taxes > **Verification of Employment**.
6.	Click the scroll bar.
7.	Click the **Generate Summary Report** link. 
8.	The employment summary appears in a new tab in your browser as a PDF document.
9.	Click the scroll bar.

Step	Action
10.	The employee's original hire date and current employment status appear. Current and prior year earnings also appear. If the employee had no earnings in the past two years, no amounts appear.
11.	The employee's current UC assignment(s) also appear. **Note:** Job **Begin Date** may reflect the date of HR/Paryoll systems conversion.
12.	You can save or print the document as needed.
13.	Click the scroll bar.
14.	Click the **Close Tab** button. ×
15.	You have generated the employee's employment summary. **End of Procedure.**

PHCMWFA110: WFA Overview

Employee Lifecycle - Add Position and Funding

This simulation provides an overview of how to enter a request for a new position and funding for the position in UCPath.

This simulation is for informational purposes only. The tasks included in this simulation are performed by those with the appropriate UCPath security role.

Step	Action
1.	The following tasks are covered in this demonstration: - Enter a **Position Control Request** (Position Control Initiator) - Enter position funding (Funding Initiator)
2.	Location Position Control Initiators use the **Position Control Request** page to request that a position be added (or to update a vacant position) in UCPath. After the position request is entered and saved, the request is automatically routed to the appropriate person(s) for approval. After the position is approved, funding can be entered for the position. The funding entry is also routed for approval.
3.	Click the **Add New Position** option. ○ Add New Position
4.	Click the **Next >>** button. Next >>

Step	Action
5.	Use the **Description** page to enter header-level information about the position as well as **Job Information**, **Work Location** information and **Salary Plan Information**. This component is effective dated and captures history of any changes to the position.
6.	Use the **Job Information** section to identify the position's **Business Unit** and **Job Code**.
7.	The **Union Code**, **Title** and **Short Title** fields automatically populate based on the selected job code.
8.	Use the **Work Location** section to identify the location details and the position to which this job reports.
9.	The **Company** and **Location** fields automatically populate based on the selected department.
10.	Use the **Salary Plan Information** section to identify the **Salary Admin Plan** and the **Salary Grade** related to the position. **Step** is not defined at the position level.
11.	The **FLSA Status** field defaults based on the job code.
12.	Click the **Specific Information** tab. 
13.	Use the **Specific Information** page to identify the **Max Head Count** and **FTE** (full-time equivalency) for the position.
14.	The **Update Incumbents**, **Include Salary Plan/Grade** and **Include FTE** check boxes are not available when adding or updating positions using the **Position Control Request** page. These options (updated in the Position Management) allow updates to the position to automatically update the position-related fields in **Job Data** for the assigned incumbents.
15.	Click the **UC Position Data** tab. 
16.	Use the **UC Position Data** page to enter the **Employee Relations Code** and if there are any special training or security clearances required for the position.
17.	Click the **Supporting Documents** tab. 
18.	Use the **Supporting Documents** page to add attachments to the position record, if needed.
19.	When the position entry is complete, click the **Save and Submit** button. 

Step	Action
20.	The position request is automatically routed to the appropriate person(s) for approval.
21.	After the position is entered and approved, the funding can be entered for the position. The next task demonstrates how a Location Funding Initiator enters the funding.
22.	Location Funding Initiators use the **Funding Entry** page to enter funding for new positions.
23.	Click the **Add a New Value** tab. 
24.	Enter the **Set ID, Fiscal Year**, and **Budget Level** fields. Also enter the **Department** and **Position Number** fields for the funding entry.
25.	Click the **Add** button. 
26.	The funding entry can be completed prior to or after hiring the employee. If the position is for an employee with capped salary, above cap salary or Multiple Components of Pay (MCOP), then the **Salary Cap / MCOP Funding Worksheet** link becomes available on this page to complete the appropriate funding.
27.	The position details appear at the top of the page, including the **Budget Begin Date** and **Budget End Date**.
28.	The **Job Data Snapshot** section is blank, which indicates there is not an incumbent employee in the position at this time.
29.	Enter the **Funding Effective Date** and the **Earnings Distribution** information.
30.	Scroll to the right to view additional fields.
31.	There are a variety of distributions for earnings. The total distribution percentage by earn code must equal 100 percent. In this example, all earnings are funded by a single source. To enter funding details for multiple funds and allocation percentages, you can insert additional rows as necessary.
32.	Attachments can be added to the funding entry, if needed.
33.	Click the **Save** button. 
34.	After saving the transaction and when there are no errors, the system displays the **Submit** button. Click the **Submit** button. 

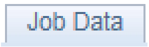
Step	Action
35.	The request is automatically routed to the appropriate person(s) for approval.
36.	You have viewed a simulation of how to enter a request for a new position and funding for the position in UCPath. **End of Procedure.**

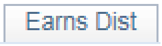
Employee Lifecycle - Initiate, Approve and Process New Hire Template Transaction

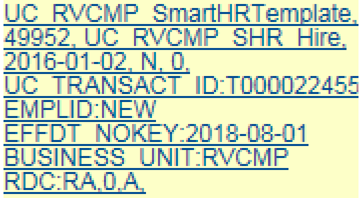
This simulation provides an overview of how to initiate, approve and process a new hire template transaction in UCPath for an employee named Jose Merced.

This simulation is for informational purposes only. The tasks included in this simulation are performed by those with the appropriate UCPath security role.

Step	Action
1.	The following tasks are covered in this demonstration: - Initiate a new hire template (Location Template Initiator). - Approve a new hire template (Location Template Approver). - Process a new hire template (UCPC WFA Production).
2.	Location Template Initiators use the **Smart HR Transactions** page to initiate a new hire template in UCPath.
3.	Click the **Look up Select Template** button. 🔍
4.	Select the appropriate hire template. Notice there are two full hire templates, one for staff and one for academic. This example uses the **UC_FULL_HIRE** template.  UC_FULL_HIRE
5.	Enter the **Effective Date** (hire date). Click in the **Effective Date** field. 
6.	Click the **Create Transaction** button. 
7.	The **Employee ID** field defaults to **NEW**. The system automatically generates the next sequential UC Employee ID after the UCPC WFA Production team processes the new hire template.
8.	Select the appropriate **Reason Code**.

Step	Action
9.	Click the **Continue** button. 
10.	The new hire template appears. Five tabs are available on this template: **Personal Data**, **Job Data**, **Earns Dist**, **Addl Pay** and **Employee Experience**. Fields that are required by the system are indicated with an asterisk (*****).
11.	Complete the fields on the **Personal Data** page.
12.	Scroll down to complete additional **Personal Information** fields. Click the scroll bar.
13.	Complete the additional **Personal Information** fields.
14.	Scroll down to complete the remaining **Personal Information** fields. Click the scroll bar.
15.	The Location Template Initiator can use the **Comments** field to enter specific details or explanation regarding the hire transaction. This field is referenced by UCPC WFA Production during their processing of the transaction.
16.	Scroll to the top of the page to navigate to the next tab. Click the scroll bar.
17.	Click the **Job Data** tab. 
18.	Use the **Job Data** page to add the employee's position, job details and compensation.
19.	After the **Position Number** field is entered, the system automatically populates many of the **Job Data** fields based on the data from the position record.
20.	Click the scroll bar.
21.	Complete the remaining **Job Data** fields.
22.	For academic hires, the **Employee Classification** field is automatically populated based on the job code and cannot be changed. For this example, the employee is a staff member, so the field must be entered manually.
23.	**Probation Code** and **Probation End Date** are required if the class indicator is **Professional and Support Staff** and the employee class is either **Career** or **Partial Year Career**.
24.	Some jobs require a **Step**. After the **Step** is entered for the job, the compensation fields are automatically populated.

Step	Action
25.	Scroll down to complete the remaining **Job Data** fields. Click the scroll bar.
26.	If a **Step** is not associated with the job, the **Comp Rate Code**, **Compensation Rate** and **Compensation Frequency** fields must be entered manually, as in this example.
27.	If the employment is a short-term assignment or temporary hire, enter the date the job ends in the **Expected Job End Date** field. The employee will be automatically terminated on this date. An expected end date is required for the following employee classes: -Staff: Contract -Student: Casual/Restricted -Staff: Floater -Staff: Rehired Retiree -Academic: Post Docs -Academic: Recall -Academic: Academic Student
28.	The payroll-related **Compensation Frequency** field automatically populates based on the job code.
29.	Scroll up to navigate to the next tab. Click the scroll bar.
30.	Click the **Earns Dist** tab. 
31.	Use the fields in the **Job Earnings Distribution** section if the standard earnings for the employee must be distributed.
32.	Click the **Addl Pay** tab. 
33.	Use the fields in the **Additional Pay** section if the hire offer includes incentive pay or additional pay.
34.	Click the **Employee Experience** tab. 
35.	Use the fields in the **Employee Experience** section to add details about any previous job experience for the employee.
36.	The **Supporting documents** link can be used to attach documents to the new hire transaction, if needed.
37.	Click the **Save and Submit** button. 

Step	Action
38.	Click the **OK** button. 
39.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is approved.
40.	The next task demonstrates how a Location Template Approver reviews and approves the new hire template transaction.
41.	The Location Template Approver can access transactions that need approval from the email notification or by navigating to their **Worklist**. For this example, the template transaction is accessed from the **Worklist**.
42.	Click the **Worklist** link. 
43.	The **Worklist** page displays all transactions that require action.
44.	Click the appropriate worklist item. For this example, click the **UC_RVCMP_SmartHRTemplate, 49952, UC_RVCMP_SHR_Hire** link.  UC_RVCMP_SmartHRTemplate, 49952, UC_RVCMP_SHR_Hire, 2016-01-02, N, 0, UC_TRANSACT_ID:T000022455 EMPLID:NEW EFFDT_NOKEY:2018-08-01 BUSINESS_UNIT:RVCMP RDC:RA,0,A,
45.	For template transactions that require approval, the **SS Smart HR Transactions** page appears. This page displays some **Hire Details**, as well as a link to the hire template transaction so the transaction can be reviewed in detail before approving.
46.	Click the **Jose Merced** link to review the template transaction details. 
47.	Review the **Transaction Details** page, which identifies the new hire's **Name**, the type of **Template**, the **Organizational Relationship**, the **Effective Date** and the **Reason Code** for the hire.
48.	Click the **Continue** button. 
49.	The Location Approver reviews the information on each tab of the template transaction to ensure it is complete and accurate. **Date of Birth** and **National ID** fields are masked for the Location Approver.
50.	Click the scroll bar.
51.	When the review is complete, click the **Cancel** button to return to the approval page. 

Step	Action
52.	If the hire template is completed accurately, click the **Approve** button. Approve
53.	If there are multiple approvers, the transaction moves to the **Worklist** of the next approver.
54.	Click the **Worklist** link. Worklist
55.	After the template transaction is approved, it is removed from the approver's **Worklist**.
56.	The next task demonstrates how UCPC WFA Production processes the new hire template transaction.
57.	UCPC WFA Production uses the **Manage Transactions** page to access template transactions that have completed the Location AWE process. WFA Production reviews the template transaction, reviews each of the employee data components and saves the data to UCPath.
58.	To access the template transaction, click the employee's first name. For this example, click the **Jose** link. Jose
59.	Review the details of the transaction, including **Template**, **Effective Date** and **Action Reason**.
60.	Perform a search to ensure the person does not already exist in UCPath. Click the **Search for Matching Persons** link. Search for Matching Persons
61.	Click the **OK** button. OK
62.	Next, the new hire template is reviewed. Click the **Open Template** button. Open Template
63.	Review the **Manage Transaction Details** page, which includes the new hire's **Name**, the type of **Template**, the **Organizational Relationship**, the **Effective Date** and the **Reason Code** for the hire.
64.	Click the **Continue** button. Continue
65.	This page displays the template in view-only format. UCPC WFA Production reviews each tab of the template.
66.	Click the scroll bar.

Step	Action
67.	Click the scroll bar.
68.	Review the **Comments** field. Comments can be entered by the Location Initiator and are used to clarify or explain the template transaction in more detail, if needed.
69.	When the template review is complete, return to the **Transaction Details** page to begin processing the transaction. Click the **Cancel** button. 
70.	Next, review the staged employee information and save the data to the UCPath tables in the following order: **1. Personal Data** **2. Job Data** **3. Profile Data**
71.	Click the **Add Personal Data** button. 
72.	The employee information is pulled from the template staging tables. Review each tab of the employee's **Personal Data** before saving the information to the component tables. When the **Personal Data** is saved, the employee ID is assigned and the personal information becomes available for other users (who have the appropriate security access) to view in UCPath.
73.	Click the **OK** button. 
74.	At this point the employee's **Personal Data** is saved, and the **Employee ID** appears.
75.	Next, review and save the employee's **Job Data**. Click the **Add Job Data** button. 
76.	The job information is pulled from the template staging tables. Review each tab of the employee's **Job Data** before saving the information to the component tables.
77.	Click the **OK** button. 
78.	Click the scroll bar.
79.	Finally, review and save the employee's **Profile Data**. Click the **Add Profile Data** button. 

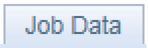
Step	Action
80.	Review each tab of the employee's **Profile Information** before saving the information to the component tables.
81.	Click the **Save** button. 
82.	The new hire has been processed into UCPath.
83.	You have viewed a simulation of how to initiate, approve and process a new hire template transaction in UCPath. **End of Procedure.**

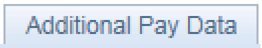
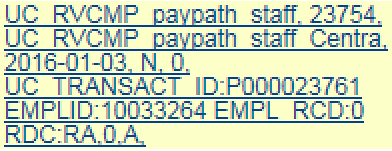
Employee Lifecycle - Initiate and Approve Pay Change PayPath Transaction

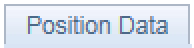
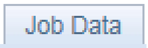
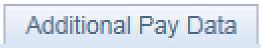
This simulation provides an overview of how to initiate and approve a pay change PayPath transaction in UCPath for an employee named Jose Merced.

This simulation is for informational purposes only. The tasks included in this simulation are performed by those with the appropriate UCPath security role.

Step	Action
1.	The following tasks are covered in this demonstration: - Initiate a pay change PayPath transaction (Location PayPath Initiator). - Approve a pay change PayPath transaction (Location PayPath Approver). **Note:** PayPath transactions are not reviewed by UCPC WFA Production. After the Location approval process is complete, the change is saved in UCPath.
2.	Location PayPath Initiators use the **PayPath Actions** page to initiate various position, job data and additional pay changes. This example demonstrates a pay rate change.
3.	Enter search criteria to locate the employee. For this example, search by last name. Click in the **Last Name** field. 
4.	Enter the desired information into the **Last Name** field. For this example, enter **merced**.
5.	Click the **Search** button. 

Step	Action
6.	The **PayPath Actions** component appears and displays the employee's current information. The fields and values displayed on these pages are slightly different depending if the employee is Staff or Academic. This component provides access to three pages where employee updates can be entered: **- Position Data** **- Job Data** **- Additional Pay Data** This example demonstrates a change to a staff employee's pay, which is completed on the **Job Data** page.
7.	Click the **Job Data** tab. 
8.	The **Job Data** page displays the employee's current job information. You can click the **Workforce Job Summary** link to view all job data actions (historical, current and future-dated rows) for this employee. You can click the **Person Org Summary** link to view all current organizational relationships and assignments this employee has with UC, across all Business Units.
9.	Changes can be made by indicating when the change should occur (**Effective Date**), the type of change (**Action**) and the reason for the change (**Action Reason**), and then updating the appropriate field(s).
10.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect.
11.	Click the **Look up Action** button. 🔍
12.	Select the appropriate **Job Data Action** code. For this example, click the **PAY** link to indicate this is a pay rate change. 
13.	Click the **Look up Action Reason** button. 🔍
14.	Select the appropriate **Action Reason** code. For this example, click the **MIN** link to indicate this is a pay rate change to increase the employee's pay to meet the minimum. 
15.	Click the scroll bar.
16.	Click in the **Comp Rate** field. 110,000.000000

Step	Action
17.	Enter the desired information into the **Comp Rate** field. For this example, enter **115000**.
18.	Add **Job Data Comments** to describe the changes that were entered. These comments are copied to the **Note Pad** within the employee's **Job Data**. Click in the **Job Data Comments** field. 
19.	Enter the desired information into the **Job Data Comments** field. For this example, enter **Pay increase to bring to minimum.**.
20.	Click the scroll bar.
21.	Click the **Additional Pay Data** tab. 
22.	Scroll down to display the **Save And Submit** button.
23.	You can attach supporting documents, if needed.
24.	You can also enter notes to the Approver to further explain the data change.
25.	Click the **Save And Submit** button. 
26.	The pay change PayPath transaction has been **Submitted** for approval.
27.	The next task demonstrates how a Location PayPath Approver reviews and approves the pay change PayPath transaction.
28.	The Location PayPath Approver can access transactions that need approval from the email notification or by navigating to the **Worklist**. For this example, the PayPath transaction is accessed from the **Worklist**.
29.	Click the **Worklist** link. 
30.	The **Worklist** page displays all transactions that require action.
31.	Click the **UC_RVCMP_paypath_staff** link to access the PayPath transaction.  UC_RVCMP_paypath_staff, 23754, UC_RVCMP_paypath_staff_Centra, 2016-01-03, N, 0, UC_TRANSACT_ID:P000023761 EMPLID:10033264 EMPL_RCD:0 RDC:RA,0,A,
32.	For PayPath transactions that require approval, the **Additional Pay Data** page appears. This is the third tab of the **PayPath Actions** component, where the approve action is performed. However, the PayPath transaction must be reviewed before it is approved.

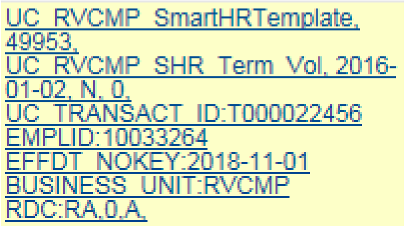
Step	Action
33.	Click the **Position Data** tab. 
34.	There is no **Action** or **Position Change Reason** displayed for this page, therefore there are no updates on the page.
35.	Click the **Job Data** tab. 
36.	Updated information appears in blue text. Review the updated information starting with the **Effective Date**, **Action** and **Action Reason** fields.
37.	Click the scroll bar.
38.	Review any blue updated fields. In this example, review the two **Comp Rate** fields.
39.	Click the scroll bar.
40.	Click the **Additional Pay Data** tab. 
41.	Click the scroll bar.
42.	Review any **Supporting Documents** and **Initiator's Comments**, if applicable. You can also enter **Approver's Comments**, if needed.
43.	If the pay change is complete and accurate, click the **Approve** button. 
44.	The pay change PayPath transaction is approved.
45.	Click the **Worklist** link. 
46.	The approved template transaction is removed from the **Worklist**.
47.	You have viewed a simulation of how to initiate and approve a pay change PayPath transaction in UCPath for Jose Merced. **End of Procedure.**

Employee Lifecycle - Initiate, Approve and Process Termination Template Transaction

This simulation provides an overview of how to initiate, approve and process a termination template transaction in UCPath for Jose Merced.

This simulation is for informational purposes only. The tasks included in this simulation are performed by those with the appropriate UCPath security role.

Step	Action
1.	The following tasks are covered in this demonstration: - Initiate a termination template (Location Template Initiator). - Approve a termination template (Location Template Approver). - Process a termination template (UCPC WFA Production).
2.	Location Template Initiators use the **Smart HR Transactions** page to initiate a termination template in UCPath.
3.	Click the **Select Template** button. **Note:** The **Transaction Type** fields are not used by UC. 🔍
4.	Select the appropriate termination template. Notice there are two termination templates, one for voluntary termination and one for involuntary termination. This example uses the **UC_VOL_TERM** template. UC_VOL_TERM
5.	Click in the **Effective Date** field.
6.	Enter the desired information into the **Effective Date** field. For this example, enter **11/1/2018**.
7.	Click the **Create Transaction** button. Create Transaction
8.	Perform a search for the employee to terminate, or type the employee's ID in the **Employee ID** field.
9.	Select the appropriate **Employment Record Number** if the employee has multiple jobs. Then enter the termination **Effective Date** and **Reason Code**.
10.	Click the **Continue** button. Continue
11.	The termination template appears with the employee's **Position Number**, **Business Unit**, **Department**, **Location Code** and **Last Date Worked**. **Note:** The **Last Date Worked** field is automatically populated with a date that is one day prior to the **Effective Date** that was entered. This field can be updated if necessary. Changing the **Last Date Worked** does not change the **Effective Date**; however, the **Last Date Worked** must be prior to the **Effective Date**.
12.	Enter comments for the termination transaction, if needed.
13.	Click the **Save and Submit** button. Save and Submit

Step	Action
14.	Click the **OK** button. 
15.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is approved.
16.	The next task demonstrates how a Location Template Approver reviews and approves the termination template transaction.
17.	The Location Template Approver can access transactions that require approval from the email notification or by navigating to the **Worklist**. For this example, the template transaction is accessed from the **Worklist**.
18.	Click the **Worklist** link. 
19.	The **Worklist** page displays all transactions that require action.
20.	Click the **UC_RVCMP_SmartHRTemplate** link.  UC_RVCMP_SmartHRTemplate, 49953, UC_RVCMP_SHR_Term_Vol, 2016- 01-02, N, 0, UC_TRANSACT_ID:T000022456 EMPLID:10033264 EFFDT_NOKEY:2018-11-01 BUSINESS_UNIT:RVCMP RDC:RA,0,A,
21.	For template transactions that require approval, the **SS Smart HR Transactions** page appears. This page provides a link to the template transaction so the transaction can be reviewed in detail before approving.
22.	Click the **Jose Merced** link. 
23.	Review the **Transaction Details** page, which identifies the employee's **Name**, the type of **Template**, the **Organizational Relationship**, the **Employee ID**, the **Employment Record Number**, the **Effective Date**, the **Action** and the **Reason Code** for the termination.
24.	Click the **Continue** button. 
25.	The Location Approver reviews the information on the template transaction to ensure it is complete and accurate.
26.	Click the scroll bar.
27.	When the review is complete, click the **Cancel** button to return to the approval page. 
28.	If the termination template is completed accurately, click the **Approve** button. 

Step	Action
29.	The transaction is approved.
30.	Click the **Worklist** link. Worklist
31.	The approved template transaction is removed from the **Worklist**.
32.	The next task demonstrates how UCPC WFA Production processes the termination template transaction.
33.	UCPC WFA Production uses the **Manage Transactions** page to access template transactions that have completed the Location approval process. WFA Production reviews the template transaction, reviews the applicable employee data components and saves the data to UCPath.
34.	To access the template transaction, click the employee's name. For this example, click the **Jose** link. Jose
35.	Click the **Person Organizational Summary** link to view the employee's organizational relationships and assignments. If the employee has multiple assignments, those jobs may need to be terminated as well. UCPC WFA Production will research and work with the Location to determine appropriate processing.
36.	Next, review the termination template. Click the **Open Template** button. Open Template
37.	Review the **Transaction Details** page, which identifies the employee's **Name**, the type of **Template**, the **Organizational Relationship**, the **Employee ID**, the **Employment Record Number**, the **Job Effective Date**, the **Action** and the **Reason Code** for the termination.
38.	Click the **Continue** button. Continue
39.	This page displays the template in view-only format. UCPC WFA Production reviews each field of the template.
40.	When the template review is complete, return to the **Transaction Details** page to begin processing the transaction. Click the **Cancel** button. Cancel
41.	Finally, review the staged employee information and save the updated **Job Data** to the UCPath tables.
42.	Click the **Update Job Data** button. Update Job Data

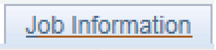
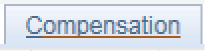
Step	Action
43.	Review the information added to the employee's **Job Data** before saving the information to the component tables.
44.	Review the **Effective Date**, **Action** and **Action Reason** to ensure they copied from the template accurately.
45.	Review the **Last Date Worked**, which is typically one day prior to the effective date of the termination.
46.	Click the scroll bar.
47.	Click the **OK** button to save the termination row in **Job Data**. 
48.	The employee termination has been processed into UCPath.
49.	You have viewed a simulation of how to initiate, approve and process a termination template transaction in UCPath for Jose Merced. **End of Procedure.**

Employee Lifecycle - View Workforce Job Summary

This simulation reviews how to view a summary of Jose Merced's job data actions in UCPath.

This simulation is for informational purposes only. The task included in this simulation is performed by those with the appropriate UCPath security role.

Step	Action
1.	The following task is covered in this demonstration: - View a summary of Jose Merced's job data actions.
2.	Many HR roles use the **Workforce Job Summary** page to view the job data actions for an employee. Let's take a look at Jose Merced's job summary.
3.	Click in the **Last Name** field. 
4.	Enter the desired information into the **Last Name** field. For this example, enter **merced**.
5.	Click the **Search** button. 

Step	Action
6.	The three actions completed for Jose Merced appear in the **Workforce Job Summary** page: **1. Hire** (bottom of the list) **2. Pay Rate Change** (middle of the list) **3. Termination** (top of the list) Typically, there are many actions for an employee during their career at UC.
7.	Click the **Job Information** tab. 
8.	Click the **Work Location** tab. 
9.	Click the **Salary Plan** tab. 
10.	Click the **Compensation** tab. 
11.	Click the **UC Job** tab. 
12.	You have viewed a summary of Jose Merced's job data actions in UCPath. **End of Procedure.**

PHCMWFA210: Allocate Compensation

Review and Update Proposed Compensation Transactions

Use this task to review and update proposed salary increases using the **Allocate Compensation** process and page. Your UCPath employee ID must be defined in the compensation cycle with the **Cycle Role** of **Submitter** in order to both review and update proposed salary increases.

The **Allocate Compensation** process in the UCPath Administer Compensation module is used to administer large scale step and percentage-based salary increases using a compensation cycle for certain Staff and Academic employees.

Navigation: PeopleSoft Menu > Manager Actions > Compensation and Stock > **Allocate Compensation**

Step	Action
1.	This example shows how to review and update data on the **Allocate Compensation** page. It also shows how to exclude an employee from the compensation cycle. Your **Role** for each compensation cycle appears on this page. The role of **Submitter** allows you to review and update proposed increases. The **Role** of **Reviewer** allows you only to review the proposed salary increases.
2.	The **Select a Compensation Activity** page displays compensation cycles for your UC Location that you are configured to see. Open and closed compensation cycles appear. The compensation cycle **Status** options include **In Progress**, **Calculated**, **Submitted**, **Approved**, **Denied**, **Pushed Back**, **Ready to Load**, **Completed** and **Completed with Errors**. The **Push Back** status can also mean an approver denied the approval request. (Each Location can have up to three approval levels for this process). Note that you can use the **Push Back** function only if you have more than one approver level.
3.	Select the compensation **Cycle Name** in the first column to review. For this example, review the non-represented hourly cycle at the top of the list. Click the **NR Hourly Cycle 1** list item.  NR Hourly Cycle 1
4.	The **Allocate Compensation** page appears. The page format is based on the compensation **Cycle Type**, such as, represented hourly, non-represented hourly, represented monthly and non-represented monthly. Employees appear in the **Name** column.
5.	Select **Exclude** to remove an employee from the compensation cycle. Note that you cannot add an employee to an existing compensation cycle on this page.
6.	The **New Hourly Rate** and **Proposed Percent** columns are open for editing. Note that this is a non-represented hourly employee cycle. If this were a monthly non-represented employee cycle, different columns would appear.
7.	The **Organization Summary Data** section provides totals for your direct reports included in the compensation cycle: **Plan**, **Total Eligible Employees**, **Total Eligible Salaries, Total Funded Amount**, **Total Proposed Amount** and **Balance**. These totals update automatically as you review and change data for the compensation cycle.
8.	Click the scroll bar.
9.	The **Reports To Position Number**, **Manager Name**, **Employee Status** and **Exclude Reason** appear on this side of the page.
10.	Click the scroll bar.

Step	Action
11.	Return to the **Select a Compensation Activity** page. Click the **Return to Message & Alerts** link. Return to Message & Alerts
12.	The **Select a Compensation Activity** page appears again.
13.	Return to the non-represented hourly compensation cycle. Click the **NR Hourly Cycle 1** list item. NR Hourly Cycle 1
14.	Enter merit increases for the employees. Click in the **Proposed Percent** field. 0.00
15.	Delete the zero. Press **[Backspace]**.
16.	Give this employee a five percent increase. Enter the desired information into the **Proposed Percent** field. For this example, enter **5**.
17.	Select the next employee. Click in the **Proposed Percent** field. 0.00
18.	Delete the zero. Press **[Backspace]**.
19.	Give another five percent increase. Enter the desired information into the **Proposed Percent** field. For this example, enter **5**.
20.	Give a five percent increase to the third employee. Click in the **Proposed Percent** field. 0.00
21.	Delete the zero. Press **[Backspace]**.
22.	Enter the desired information into the **Proposed Percent** field. For this example, enter **5**.

Step	Action
23.	Give an increase to the last employee. Click in the **Proposed Percent** field. 0.00
24.	Delete the zero. Press **[Backspace]**.
25.	Enter the desired information into the **Proposed Percent** field. For this example, enter **5**.
26.	All four employees have a **Proposed Percent** increase of five percent. Note that the **Total Proposed Amount** value increased to reflect your entries.
27.	Now exclude an employee. In this example, Jessica Rosen is going on a leave of absence. Select the **Exclude** option. ☐
28.	A warning message appears stating that you must specify an **Exclusion Reason**. Click the **OK** button. OK
29.	Click the button to the right of the **Exclude Reason** field. 
30.	For this example, click the **Employee on Leave** list item. Employee on Leave
31.	Click the scroll bar.
32.	Use **Save for Later** to save your updates if you are not ready to submit for approval. Click the **Save for Later** button. Save for Later
33.	Use **Discard Changes** to delete your changes.
34.	Now review other compensation cycles. Click the **Return to Message & Alerts** link. Return to Message & Alerts
35.	For this example, click the **NR Monthly Cycle 1** list item. NR Monthly Cycle 1

Step	Action
36.	The **Allocate Compensation** page displays monthly non-represented employees. Note that for monthly non-represented employees, the **Change Amount** and **Proposed Percent** columns appear instead of the **New Hourly Rate** column that appeared for non-represented hourly employees.
37.	Review another compensation cycle example. Click the **Return to Message & Alerts** link.  Return to Message & Alerts
38.	For this example, click the **R Hourly Cycle 1** list item.  R Hourly Cycle 1
39.	The **Allocate Compensation** page displays represented hourly employees. Note that for represented hourly employees, the **Proposed Step** column appears. The **Change Amount**, **Proposed Percent** and **New Hourly Rate** columns do not appear for represented hourly employees.
40.	Return to the **Select a Compensation Activity** page. Click the **Return to Message & Alerts** link.  Return to Message & Alerts
41.	You have reviewed and updated proposed salary increases using the **Allocate Compensation** process and page. **End of Procedure.**

Submit Proposed Compensation Transactions

Use this task to submit proposed salary changes for approval. Your UCPath employee ID must be defined in the compensation cycle with the **Cycle Role** of **Submitter** in order to submit proposed salary increases.

Navigation: PeopleSoft Menu > Manager Actions > Compensation and Stock > **Allocate Compensation**

Step	Action
1.	The **Select a Compensation Activity** page displays compensation cycles for your UC Location that you are configured to see. Open and closed compensation cycles appear.

Step	Action
2.	The compensation cycle **Status** options are **In Process**, **Calculated**, **Submitted**, **Approved**, **Denied**, **Push Back**, **Ready to Load**, **Completed** and **Completed with Errors**. The **Pushed Backed** status can also mean an approver denied the approval request. (Each Location can have up to three approval levels for this process). Note that you can use the **Push Back** function only if you have more than one approver level.
3.	Select the compensation **Cycle Name** in the first column to submit. For this example, click the **NR Hourly Cycle 1** list item. NR Hourly Cycle 1
4.	Review the details to verify no further changes are needed. After you **Submit**, you cannot unsubmit.
5.	Click the **Submit** button. Submit
6.	A warning message appears. Click **Yes** to submit or click **No** to cancel the submit request. Click the **Yes** button. Yes
7.	A **Comments** box appears. Click in the **Comments** field.
8.	Enter the desired information into the **Comments** field. For this example, enter **Submit proposed salary changes for approval on 8/30/17.**.
9.	Click the **OK** button. OK
10.	The compensation cycle is submitted for approval. Click the **View Approvals Monitor** link. View Approvals Monitor
11.	Review the approval status for the compensation cycle. This example shows that approval is pending from multiple approvers. The submitter receives an email confirming that the compensation cycle was submitted for approval. Approvers receive approval workflow emails prompting for their review and approval. Click the **OK** button to return to the previous page. OK

Step	Action
12.	Return to the **Select a Compensation Activity** page. Click the **Return to Message & Alerts** link.  Return to Message & Alerts
13.	You have submitted proposed salary changes for approval. **End of Procedure.**

Review Proposed Compensation Transactions

Use this task to review proposed salary increases using the **Allocate Compensation** process and page. Your UCPath employee ID must be defined in the compensation cycle with the **Cycle Role** of **Reviewer** in order to review proposed salary increases.

The **Allocate Compensation** process in the UCPath Administer Compensation module administers large scale step and percentage-based salary increases using a compensation cycle for certain Staff and Academic employees.

Navigation: PeopleSoft Menu > Manager Actions > Compensation and Stock > **Allocate Compensation**

Step	Action
1.	This simulation demonstrates how to review data on the **Allocate Compensation** page. Your **Role** for each compensation cycle appears on this page. The role of **Reviewer** allows you to review proposed salary increases. The **Role** of **Reviewer** does not allow you to updated proposed salary increases.
2.	The **Select a Compensation Activity** page displays compensation cycles for your UC Location that you are configured to see. Open and closed compensation cycles appear. The compensation cycle **Status** options are **In Process**, **Calculated**, **Submitted**, **Approved**, **Denied**, **Pushed Back**, **Ready to Load**, **Completed** and **Completed with Errors**. The **Push Back** status can also mean an approver denied the approval request. (Each Location can have up to three approval levels for this process). Note that you can use the **Push Back** function only if you have more than one approver level.
3.	Select the compensation **Cycle Name** to review. For this example, click the **NR Hourly Cycle 1** list item.  NR Hourly Cycle 1

Step	Action
4.	The **Allocate Compensation** page appears. The page format that appears is based on the compensation **Cycle Type**, such as, represented hourly, non-represented hourly, represented monthly and non-represented monthly.
5.	Employees to review appear in the **Name** column.
6.	The **New Hourly Rate** and **Proposed Percent** columns appear for non-represented hourly employee cycles. If this were a monthly non-represented employee cycle, different columns would appear.
7.	Note that **Exclude** is selected for Jessica Rosen, indicating she is excluded from the compensation cycle. Employees are excluded from compensation cycles if the following occurs after the cycle is created: the employee terminates employment, the employee goes on a leave, the employee promotes or transfers to another position, the employee receives a merit with hire, the employee does not meet expectations or the employee is not eligible for the increase. Excluded employees require an **Exclude Reason**, which appears on this page. Note that you cannot add an employee to an existing compensation cycle.
8.	This page shows a list of the possible **Exclude Reasons**. Jessica terminated her employment after the compensation cycle was created, thus she was excluded from the compensation cycle.
9.	Note that the **Reports To Position Number**, **Manager Name** and **Employee Status** also appear on this side of the page.
10.	The **Organization Summary Data** section provides totals for your direct reports included in the compensation cycle: **Plan**, **Total Eligible Employees**, **Total Eligible Salaries, Total Funded Amount**, **Total Proposed Amount** and **Balance**. These totals update automatically when updates are made on the page.
11.	Review another compensation cycle example. Click the **Return to Message & Alerts** link. Return to Message & Alerts
12.	For this example, click the **NR Monthly Cycle 1** list item. NR Monthly Cycle 1
13.	The **Allocate Compensation** page appears for the example non-represented monthly cycle. Note that for monthly non-represented employees, the **Change Amount** and **Proposed Percent** columns appear. The **Change Amount** column appears instead of the **New Hourly Rate** column that appeared for non-represented hourly employees.
14.	Review another compensation cycle example. Click the **Return to Message & Alerts** link. Return to Message & Alerts

Step	Action
15.	For this example, click the **R Hourly Cycle 1** list item.  R Hourly Cycle 1
16.	The **Allocate Compensation** page displays represented hourly employees. Note that for represented hourly employees, the **Proposed Step** and **Proposed Hourly Rate** columns appear. The **Change Amount**, **Proposed Percent** and **New Hourly Rate** column do not appear for represented hourly employees.
17.	Review another compensation cycle example. Click the **Return to Message & Alerts** link.  Return to Message & Alerts
18.	For this example, click the **R Monthly Cycle 1** list item.  R Monthly Cycle 1
19.	The **Allocate Compensation** page displays represented monthly employees. Note that for represented monthly employees, the **Proposed Step, Proposed Annual Rate** and **Proposed Monthly Rate** columns appear. The **Change Amount**, **Proposed Percent** and **New Hourly Rate** columns do not appear for represented monthly employees.
20.	Click the **Return to Message & Alerts** link.  Return to Message & Alerts
21.	You have reviewed proposed salary increases using the **Allocate Compensation** process and page. **End of Procedure.**

Approve or Deny Proposed Compensation Cycle

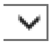
Use this task to approve or deny a proposed compensation cycle.

Navigation: PeopleSoft Menu > Manager Actions > Compensation and Stock > **Approve Compensation Proposals**

Step	Action
1.	The **Approve Compensation Proposals** page shows approval transactions that require your review, approval or denial. Pending transactions appear when you first open this page.
2.	Click the button to the right of the **Transactions** field. 

Step	Action
3.	Select another transaction status to see transactions in other statuses. For this example, click the **Approved** list item. Approved
4.	Click the **Refresh** button. Refresh
5.	For this example UCPath displays a message that you have not approved other compensation cycles.
6.	Click the button to the right of the **Transactions** field. ⌄
7.	For this example, click the **Denied** list item. Denied
8.	Click the **Refresh** button. Refresh
9.	For this example UCPath displays a message that you have not denied other compensation cycles.
10.	Click the button to the right of the **Transactions** field. ⌄
11.	For this example, click the **Pending (Approve, Deny)** list item. Pending (Approve, Deny)
12.	Click the **Refresh** button. Refresh
13.	UCPath again displays the pending compensation cycles requiring your review. For locations using multiple levels of AWE approvals, second and third level approvers must select the **Pending (Approve**, **Deny**, **PB)** value from **Transactions** dropdown and then click on the **Refresh** button to view their pending transactions.
14.	Review the compensation cycle. Click the **View Allocation Status** link. View Allocation Status
15.	The **Allocate Compensation** page appears. This page displays the proposed salary changes for the compensation cycle. Review the information on this page.
16.	Click the **Return to Message & Alerts** link. Return to Message & Alerts

Step	Action
17.	Click the **Approve Compensation Proposals** menu. Approve Compensation Proposals
18.	The **Approve Compensation Proposals** page appears again.
19.	You can view approval history and comments related to the compensation cycle in **Approval Status**. Click the **Approval Status** link. Approval Status
20.	You can click the arrow to the left of **Comments** to expand the **Comments** section.
21.	You can click the **Multiple Approvers** link to see other compensation cycle approvers and the approval status.
22.	Return to the approval page. Click the **Cancel** button. Cancel
23.	First you will practice the steps to deny the transaction. Select the compensation cycle to **Deny**. ☐
24.	Click the **Deny** button. Deny
25.	Enter the desired information into the **Comments** field. For this example, enter **comments are required to deny approval.**.
26.	Click **OK** to deny the compensation cycle or click **Cancel** to return. For this example, click **Cancel** so that you can approve the compensation cycle instead. Click the **Cancel** button. Cancel
27.	Now approve the compensation cycle. Click the **Approve** button. Approve
28.	Enter the desired information into the **Comments** field. For this example, enter **comments are optional to approve compensation proposals**.
29.	Click the **OK** button. OK

Step	Action
30.	The compensation cycle is approved and routed to the next approval level, if applicable. Click the button to the right of the **Transactions** field. 
31.	Click the **Approved** list item. 
32.	Click the **Refresh** button. 
33.	Your approval of the compensation cycle appears.
34.	You have approved or denied a proposed compensation cycle. **End of Procedure.**

Submit Case to UCPath Center

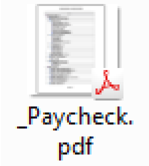
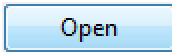
Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
35.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
36.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 

Step	Action
37.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.  Payroll
38.	Click the button to the right of the **Category** field. 
39.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
40.	Click in the **Subject** field.
41.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
42.	Click in the **Description** field.
43.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
44.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
45.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
46.	Click in the **Best Contact Phone Number** field.
47.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
48.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
49.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
50.	Click the **Add Attachment** link.  Add Attachment
51.	Navigate to the document you want to attach. In this example, the document is located on the desktop.

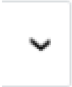
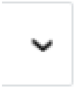
Step	Action
52.	For this example, click the **_Paycheck.pdf** list item. 
53.	Click the **Open** button. 
54.	The file name appears in the **Attachments** box.
55.	Click the **Submit** button.
56.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
57.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
58.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
59.	Click the scroll bar.
60.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
61.	Click the scroll bar.
62.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
63.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

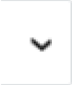
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
64.	Click the **Ask UCPath Center** button. 
65.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
66.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
67.	UCPath returned one result. Click the scroll bar.
68.	Click the **Create an Inquiry** link. 
69.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
70.	Click the button to the right of the **Requested By** field. 
71.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
72.	Click the button to the right of the **Topic** field. 
73.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.

Step	Action
74.	Click the button to the right of the **Category** field. 
75.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
76.	Click in the **Subject** field.
77.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
78.	Click the scroll bar.
79.	Click in the **Description** field.
80.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
81.	In this example, the full **Description** was completed on your behalf.
82.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
83.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
84.	Click the **Submit Inquiry** button. 
85.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
86.	The submitter's name appears.
87.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

Reopen Closed UCPath Center Case

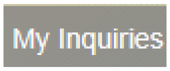
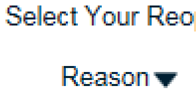
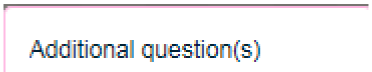
Use this task to reopen a closed inquiry via the UCPath website.

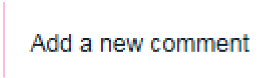
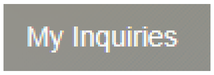
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:

Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
88.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
89.	Click the **My Closed Inquiries** link. 
90.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
91.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
92.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
93.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.

Step	Action
94.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field.  Add a new comment
95.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
96.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center
97.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button.
98.	Click the scroll bar.
99.	Notice the comment now appears in the **Case Comments** section.
100.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
101.	Return to the top of the page. Click the scroll bar.
102.	Click the **My Inquiries** link.  My Inquiries
103.	The new inquiry appears in the **My Open Inquires** list.
104.	You have reopened a closed inquiry. **End of Procedure.**

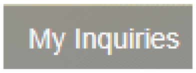
Monitor UCPath Center Cases

Use this task to review the status of an existing inquiry via the UCPath website.

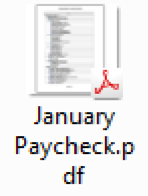
Dashboard Navigation:
Ask UCPath Center
or

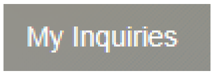
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
105.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
106.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
107.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
108.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
109.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 
110.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 

Step	Action
111.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 
112.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field. 
113.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
114.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
115.	Click the **Submit comment to the UCPath Center** button. 
116.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
117.	Click the scroll bar.
118.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. 
119.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. 
120.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.

Step	Action
121.	To return to the case details, click the **00180573** link. 00180573
122.	Click the scroll bar.
123.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. Upload Files
124.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
125.	Click the **Open** button. Open
126.	A message confirms the file was uploaded. Click the **Done** button. Done
127.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
128.	You can view all attachments in a list. Click the **View All** link. View All
129.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. ▾

Step	Action
130.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. ▼
131.	Click the **00180573** link.  00180573
132.	Click the scroll bar.
133.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
134.	Click the **Email** link.  Sandbox: UCPath Center: Inquir.
135.	Review the email information as you scroll down the page. Click the scroll bar.
136.	Review the email from the UCPath Center. Click the scroll bar.
137.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
138.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
139.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
140.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**

Step	Action
141.	Click the **00180567** link. 00180567
142.	Click the scroll bar.
143.	Notice the **Status** is **Closed/Resolved**.
144.	Click the scroll bar.
145.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link.
146.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMWFA215: Mass Hires

Job Aid: Complete the CSV File Templates for Mass Hires

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMWFA215JA_CompleteCSVFileTemplateMassHires_D1Rev00.pdf) to open the **Complete the CSV File Templates for Mass Hires** job aid in a new web browser window/tab.

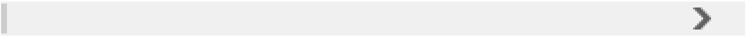
PHCMWFAL205: Person of Interest

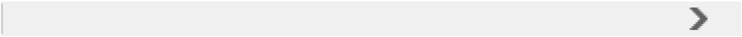
View Person Organizational Summary

Use this task to view all current organizational relationships for a person: Employee, Contingent Worker (CWR) and/or Person of Interest (POI). This page does not display historical or future-dated employment details.
For example, you can view a summary of an employee's current job assignments and associated details.

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > **Person Organizational Summary**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
147.	After you navigate to the **Person Organizational Summary** page, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
148.	The fastest way to locate the employee is to enter the employee's ID. Click in the **Empl ID** field. 
149.	Enter the employee's ID number into the **Empl ID** field. For this example, enter **10066206**.
150.	Click the **Search** button. 
151.	The **Person Organizational Summary** page displays the current organizational relationships for the selected employee. This example displays **Employment Instances** and **Assignments** for an Employee. To display all current assignments, click the **View All** link.
152.	Click the scroll bar to display the **View All** link. 
153.	Click the **View All** link. 
154.	The **Employment Instances** section displays a separate **Assignments** section for each of the employee's jobs. Each **Assignments** header displays the employee’s **HR Status** and **Payroll Status**, his or her **Last Hire** date and, if applicable, **Termination Date**.
155.	If the employee has multiple assignments, one of the assignments must be indicated as the **Primary Job**.
156.	The **Assignments** section displays the employee’s job assignment details for each **Empl Record**.
157.	The **Business Unit** field displays the 5-character campus/location code. The **Position Number** field identifies the employee's position number. The **Dept ID** field displays the employee's appointing department and the **Department Description**.
158.	The **Job Code** field displays the job code associated with the employee. The **Description** field displays the description of the job code.

Step	Action
159.	The **Expected Job End Date** field displays the appointment end date for this job, if applicable.
160.	The **FTE** field displays the full-time equivalency associated with the employee's job.
161.	The **Employee Class** field defines the class type to which the employee belongs.
162.	The **Union Code** field defaults from the position number associated with the employee.
163.	The **FLSA Status** indicates whether this job is exempt or non-exempt according to the Fair Labor Standards Act (FLSA). The FLSA status also helps determine benefits eligibility in Benefits Administration. The FLSA status defaults from the position number associated with this employee.
164.	The **Pay Group** displays the pay group to which this employee belongs.
165.	Click the scroll bar. 
166.	The **Employee Type** value depends on the pay group selected.
167.	The **Probation Code** field identifies the current status of the employee's probation, if applicable.
168.	If the employee is currently on probation status, the **Probation End Date** field specifies the date the employee's probation ends.
169.	You have reviewed a summary of an employee’s current organizational relationship data. **End of Procedure.**

Add Person of Interest

Use this task to create a **Person ID** and a Person of Interest instance in UCPath for someone who is not currently in UCPath.

Use this task after you confirm on the **Person Organizational Summary** page that the person is not in UCPath.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Person of Interest - Add**

Step	Action
1.	A person of interest (POI) is someone who is tracked by Locations for various reasons, such as a potential hire or potential external resource.
2.	Click the **Add a New Value** tab. 

Step	Action
3.	The **Effective Date** defaults to the current system date. The date can be modified. Click the **Choose a date** button.
4.	For this example, keep the same month and year, but change the day. Click **3**. 3
5.	Click in the **First Name** field. 
6.	Enter the desired information into the **First Name** field. For this example, enter **Lucy**.
7.	Click in the **Last Name** field. 
8.	Enter the desired information into the **Last Name** field. For this example, enter **Rask**.
9.	The **Middle Name** field is optional. Required fields are identified with an asterisk (*).
10.	The **Alternate ID** field is an optional field. Data entered in this field appears on the **Modify a Person** page.
11.	Click the button to the right of the **Gender** field.
12.	For this example, click the **Female** list item.  Female
13.	The **Comment** field is an optional field. Click in the **Comment** field. 
14.	Enter the desired information into the **Comment** field. For this example, enter **these are example comments.**.
15.	Click the **Contact Information** tab.  Contact Information
16.	An address is required for the POI. The **Address Information** section is formatted for US addresses only.

Step	Action
17.	Enter the home address for the person. Click in the **Address 1** field. 
18.	Enter the desired information into the **Address 1** field. For this example, enter **15 Main St**.
19.	Click in the **City** field. 
20.	Enter the desired information into the **City** field. For this example, enter **Redlands**.
21.	Click in the **State** field. 
22.	Enter the desired information into the **State** field. For this example, enter **CA**.
23.	Click in the **Postal** field. 
24.	Enter the desired information into the **Postal** field. For this example, enter **92373**.
25.	The **County** field is an optional field. Click in the **County** field. 
26.	Enter the desired information into the **County** field. For this example, enter **San Bernardino**.
27.	Note that the **Address 2** and the **Address 3** fields are extra fields for long addresses. The **Address 2** and **Address 3** fields are not used to enter a second or third address for the POI.
28.	Click the **Add a New Row** button to add an additional address for the person of interest.
29.	**Phone Information** is required for a person of interest. Click the button to the right of the **Phone Type** field. 
30.	Enter at least one phone number for the person of interest. For this example, click the **Mbl Per** list item.  Mbl Per
31.	Click in the **Telephone** field. 

Step	Action
32.	Enter the desired information into the **Telephone** field. For this example, enter **9095551211**.
33.	Select the **Preferred** option. ☐
34.	If necessary, click the **Add a New Row** button to insert an additional **Phone Number**.
35.	Email addresses are optional for persons of interest.
36.	Click the **POI Data** tab. POI Data
37.	Click the **Look up Person of Interest Type** button. 🔍
38.	Select the POI type for your UC Location. For this example, click the **LAMED Potential Hire -Staff** list item. LAMED Potential Hire -Staff
39.	**POI Department** is optional. If used at your Location, select a department from the list of values.
40.	Click the button to the right of the **Security Access Type** field. ⌄
41.	Click the **BUSINESS UNIT** list item. BUSINESS UNIT
42.	Click the **Look up Value 1** button. 🔍
43.	Select your UC Location. For this example, click the **UCLA Campus** list item. UCLA Campus
44.	The **Status** field is a required field. Click the button to the right of the **Status** field. ⌄
45.	For this example, click the **Active** list item. Active

Step	Action
46.	The **Planned Exit** date is a required field. Click in the **Planned Exit** field. 
47.	Enter the desired information into the **Planned Exit** field. For this example, enter **11062017**.
48.	The **More Information** field is an optional field for additional comments specific to the current row. For this example, do not enter anything in this field.
49.	Submit the request for approval. The **Person ID** and the POI instance are not created until the POI request is approved. Click the **Submit** button. 
50.	You have created a **Person ID** and a person of interest instance in UCPath for someone who is not currently in UCPath. **End of Procedure.**

Add Person of Interest Relationship

Use this task to add a new person of interest (POI) instance for someone that already has a **Person ID** (**Empl ID**) in UCPath.

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > Organizational Relationships > **Add POI Relationship**

Step	Action
1.	Note that the **Empl ID** field is also known as the **Person ID** field. Click in the **Empl ID** field. 
2.	Enter the desired information into the **Empl ID** field. For this example, enter **10132858**.
3.	Click the **Look up Empl ID** button. 🔍
4.	You also can search by name if you do not know the **Empl ID**. Click the button to the right of the **Search by** field. ⌄

Step	Action
5.	Click the **Last Name** list item. Last Name
6.	Click in the **begins with** field.
7.	Enter the desired information into the **begins with** field. For this example, enter **Craigen**.
8.	Click the **Look Up** button. Look Up
9.	Records that match your criteria appear in the **Search Results** list. For this example, click the **10132858** link. 10132858
10.	Click the **Look up Person of Interest Type** button. 🔍
11.	Select the applicable **Person of Interest Type**. For this example, click the **00403** list item. 00403
12.	Click the **Add Relationship** button. Add Relationship
13.	The **Add a POI Relationship** page appears.
14.	The **POI Department** field is an optional field. Click in the **POI Department** field.
15.	Click the **Look up POI Department** button. 🔍
16.	For this example, do not add a department. Click the **Cancel** button. Cancel
17.	**Security Access Type** is required. Click the button to the right of the **Security Access Type** field. ⌄

Step	Action
18.	Click the **BUSINESS UNIT** list item. BUSINESS UNIT
19.	**Value 1** is a required field in which you will select your location business unit. Click the **Look up Value 1** button. 🔍
20.	Select the appropriate location. For this example, click the **UCLA Campus** list item. UCLA Campus
21.	Select the current row in the **Person of Interest History** section. Click in the **Effective Date** field. 07/20/2017
22.	Click the **Choose a date** button. 📅
23.	Enter the effective date for the new person of interest relationship. For this example, click **10**. 10
24.	The **Status** defaults to **A** for **Active**.
25.	**Planned Exit** is a required field. Click in the **Planned Exit** field. ☐
26.	Click the **Choose a date** button. 📅
27.	Enter the date the relationship is planned to end. Click the button to the right of the **Month** field. ⌄
28.	Select the appropriate month. For this example, click the **October** list item. October
29.	For this example, click **31**. 31

Step	Action
30.	Comments are not required. Click in the **More Information** field. 
31.	Enter the desired information into the **More Information** field. For this example, enter **New POI instance added**.
32.	Click the **Save** button.  Save
33.	You have added a new POI instance for someone who already has a **Person ID** (**Empl ID**) in UCPath. **End of Procedure.**

Approve POI

Use this task to review and approve (or deny) a person of interest (POI) request.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Person of Interest Approval**

Step	Action
1.	Search for the person of interest to review and approve. Use the **Empl ID**, **First Name** or **Last Name** fields to search for the POI, or click the **Search** button to see all approvals.
2.	For this example, search for all approvals. Click the **Search** button.  Search
3.	The **Search Results** list appears. This list contains POIs that await your approval or have been approved. You can sort this list using the column headings. Click the **First Name** column header.  First Name
4.	The list is now sorted by **First Name**. Locate the POI that you need to approve. For this example, approve Lucy Rask. Click the **Approve** link for Lucy Rask.  Approve
5.	The **Biographical Details** page appears. Review the information on the page.

Step	Action
6.	Click the **Contact Information** tab. 
7.	Review the information on the **Contact Information** page. Click the **POI Data** tab. 
8.	Review the information on the **POI Data** page.
9.	Return to the first tab to perform the approval. Click the **Biographical Details** tab. 
10.	Click the **Approve** button to approve the POI request. Click the **Deny** button to deny the POI request. For this example, approve the request. Click the **Approve** button. 
11.	The POI request is approved, and the **Person ID** is assigned to the POI. Click the scroll bar.
12.	Note that the workflow shows **Approved**.
13.	Click the **Return** button to return to the **Search** page. 
14.	You have reviewed and approved a person of interest request. **End of Procedure.**

Extend or Inactivate POI

Use this task to extend the **Planned Exit** date for a person of interest (POI), or to inactivate a POI instance.

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > Organizational Relationships > **Maintain POI Relationship**

Step	Action
1.	Search for the POI using the **Empl ID**, **Name** or **Last Name** field. For this example, click in the **Last Name** field. 

Step	Action
2.	Enter the desired information into the **Last Name** field. For this example, enter **Craigen**.
3.	Historic and future-dated POI data appears when you select the **Include History** option. Click the **Include History** option.  ☐ Include History
4.	Click the **Search** button.  Search
5.	The **Maintain POI Relationship** page appears.
6.	Locate the **Person of Interest History** section and the current row. Click the **Add a new row** button.
7.	A new row appears at the top of the grid. The **Effective Date** defaults to the current system date.
8.	For this example, change the effective date. Click the **Choose a date** button.
9.	For this example click **18**.  18
10.	Click in the **Planned Exit** field.  09/30/2017
11.	For this example, extend the **Planned Exit** date for the POI. Click the **Choose a date** button.
12.	Click the button to the right of the **Month** field.
13.	For this example, click the **October** list item.  October
14.	For this example click **31**.  31
15.	Click in the **More Information** field.

Step	Action
16.	Comments are not required. Note that if comments were entered on previous rows, they copy to the current row when you add a new row. You must delete prior row comments that copied forward before you enter new comments. Enter the desired information into the **More Information** field. For this example, enter **Extended end date**.
17.	Click the **Save** button. Save
18.	You have extended the **Planned Exit** date for a POI. Now, inactivate a POI instance.
19.	To inactivate a POI instance, insert a new row in the **Person of Interest History** section. Click the **Add a new row** button. ⊞
20.	In this example, change the **Effective Date** of the new row to a future date. Click the **Choose a date** button. 31
21.	Click the button to the right of the **Month** field. ⌄
22.	For this example, click the **October** list item. October
23.	For this example click **31**. 31
24.	Click the **Look up Status** button. 🔍
25.	Click the **Inactive** list item. Inactive
26.	Remember that you should delete prior row comments if they copied forward when you added a new row. Click in the **More Information** field.
27.	Enter the desired information into the **More Information** field. For this example, enter **Inactivate POI instance**.

Step	Action
28.	Click the **Save** button. 
29.	You have extended the **Planned Exit** date for a POI and inactivated a POI. **End of Procedure.**

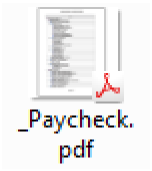
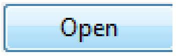
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
30.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
31.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
32.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
33.	Click the button to the right of the **Category** field. 

Step	Action
34.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
35.	Click in the **Subject** field.
36.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
37.	Click in the **Description** field.
38.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
39.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
40.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
41.	Click in the **Best Contact Phone Number** field.
42.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
43.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
44.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
45.	Click the **Add Attachment** link.  Add Attachment
46.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
47.	For this example, click the **_Paycheck.pdf** list item.  _Paycheck.pdf
48.	Click the **Open** button.  Open
49.	The file name appears in the **Attachments** box.

Step	Action
50.	Click the **Submit** button.
51.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
52.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
53.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
54.	Click the scroll bar.
55.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
56.	Click the scroll bar.
57.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
58.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

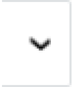
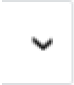
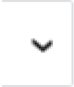
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
59.	Click the **Ask UCPath Center** button. 

Step	Action
60.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
61.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
62.	UCPath returned one result. Click the scroll bar.
63.	Click the **Create an Inquiry** link. 
64.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
65.	Click the button to the right of the **Requested By** field. 
66.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
67.	Click the button to the right of the **Topic** field. 
68.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
69.	Click the button to the right of the **Category** field. 

Step	Action
70.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
71.	Click in the **Subject** field.
72.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
73.	Click the scroll bar.
74.	Click in the **Description** field.
75.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
76.	In this example, the full **Description** was completed on your behalf.
77.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
78.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
79.	Click the **Submit Inquiry** button. 
80.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
81.	The submitter's name appears.
82.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

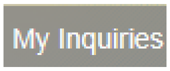
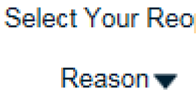
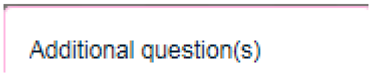
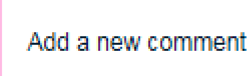
Reopen Closed UCPath Center Case

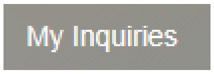
Use this task to reopen a closed inquiry via the UCPath website.

A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
83.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. My Inquiries
84.	Click the **My Closed Inquiries** link. My Closed Inquiries
85.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 00180567
86.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. Select Your Reopen Reason
87.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. Additional question(s)
88.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
89.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. Add a new comment

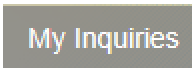
Step	Action
90.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
91.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center
92.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
93.	Click the scroll bar.
94.	Notice the comment now appears in the **Case Comments** section.
95.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
96.	Return to the top of the page. Click the scroll bar.
97.	Click the **My Inquiries** link.  My Inquiries
98.	The new inquiry appears in the **My Open Inquires** list.
99.	You have reopened a closed inquiry. **End of Procedure.**

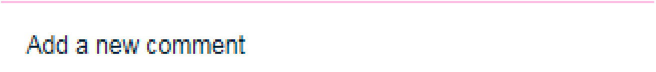
Monitor UCPath Center Cases

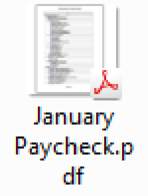
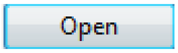
Use this task to review the status of an existing inquiry via the UCPath website.

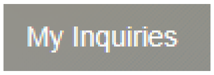
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
100.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
101.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
102.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
103.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
104.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 
105.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 
106.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 

Step	Action
107.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field. 
108.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
109.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
110.	Click the **Submit comment to the UCPath Center** button. 
111.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ⟳
112.	Click the scroll bar.
113.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. 
114.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▾
115.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
116.	To return to the case details, click the **00180573** link. 
117.	Click the scroll bar.

Step	Action
118.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
119.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
120.	Click the **Open** button. 
121.	A message confirms the file was uploaded. Click the **Done** button. 
122.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
123.	You can view all attachments in a list. Click the **View All** link. 
124.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 
125.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 

Step	Action
126.	Click the **00180573** link. 
127.	Click the scroll bar.
128.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
129.	Click the **Email** link. 
130.	Review the email information as you scroll down the page. Click the scroll bar.
131.	Review the email from the UCPath Center. Click the scroll bar.
132.	Click the case number to return to the details of the case. Click the **00180573** link. 
133.	To review closed inquiries, click the **My Inquiries** link. 
134.	Click the **My Closed Inquiries** tab. 
135.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
136.	Click the **00180567** link. 
137.	Click the scroll bar.
138.	Notice the **Status** is **Closed/Resolved**.
139.	Click the scroll bar.

Step	Action
140.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
141.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMWFAL220: Experience Based Pay

Enter Employee's Work Experience

Use this task to enter prior work experience for experience-based pay positions for an employee who does not have prior work experience in UCPath for the employee record (job).

Navigation: PeopleSoft Menu > Workforce Administration > Job Information > Experience Based Pay > **UC Employee Experience Page**

Step	Action
1.	Click in the **Empl ID** field. 
2.	Enter the desired information into the **Empl ID** field. For this example, enter **100005678**.
3.	You can enter the **Empl Record** if you know the value for the applicable appointment. (An employee has an **Empl Record** for each appointment in UCPath.) Use the **Job Data** page or the **Workforce Job Summary** page to determine if the employee has more than one appointment in UCPath. Leave this field blank to display all appointments in UCPath for the employee. Leave this field blank for this example.
4.	Click the **Search** button. 
5.	The **UC Employee Experience** page appears.
6.	In the **Employee Experience** section click in the **Employer Name** field. 

Step	Action
7.	Enter the oldest prior work experience first. Enter the desired information into the **Employer Name** field. For this example, enter **St. Joe's Medical Center**.
8.	Enter the desired information into the **Start Date** field. Use the MM/DD/YYYY format. You can, but are not required, to enter dashes or slashes in the date. UCPath formats the date for you when you exit the field. Click in the **Start Date** field. 
9.	Enter the desired information into the **Start Date** field. For this example, enter **01/01/2009**.
10.	Click in the **End Date** field. 
11.	You also can use the calendar tool to enter a date. Let's use the calendar tool to enter the **End Date**. Click the **Choose a date** button to the right of the **End Date** field. 
12.	The current month and year appear. For this example, do not change the year. Click the button to the right of the **Month** field. 
13.	For this example, click the **January** list item.  January
14.	Specify the date. For this example, click **2**.  2
15.	Click in the **Job Title** field. 
16.	Enter the desired information into the **Job Title** field. For this example, enter **Nurse 3**.
17.	Select the **UC Relevant Experience** option. ☐

Step	Action
18.	You can add additional rows to enter more recent work experience, such as a row for the new UC position. Click the **Add a new row** button. ⊞
19.	Enter the new position information into the second row in the **Employer Name** field. For this example, enter **UCR-Student Health Services**.
20.	Click in the **Start Date** field.
21.	This time, do not enter slashes when you enter the date. For this example, enter **01032018**.
22.	For this example, leave the **End Date** field blank because the employee is currently in this position.
23.	Click in the **Job Title** field.
24.	Enter the desired information into the **Job Title** field. For this example, enter **Clin Nurse 3**.
25.	Select the **UC Relevant Experience** option. ☐
26.	Select the **UC Relevant Service** option. ☐
27.	For this example, add one more row to practice the delete option. Click the **Add a new row** button. ⊞
28.	A new blank row appears. Now let's delete the row. Click the **Delete row** button. ⊟
29.	A warning message appears when you delete rows. Click the **Cancel** button to stop the deletion. Click the **OK** button to delete the row. Click the **OK** button. OK

Step	Action
30.	Click the **Save** button. 
31.	Use the **Notepad** feature to add comments on this page. Click the **Comments: Please Use Notepad** button.
32.	The **UC Experience Notes** page appears. The **Instructions** section is currently collapsed. Click the **Expand** arrow to expand this section and reveal the page instructions, if desired.
33.	Click the **Add a New Note** button. 
34.	The **Selected Note** page appears.
35.	Click in the **Subject** field.
36.	Enter the note subject into the **Subject** field. For this example, enter **Sample note**.
37.	Enter the note details into the **Note Text** field. You can enter up to 16,000 characters in this field. Click in the **Note Text** field.
38.	Enter the desired information into the **Note Text** field. For this example, enter **This is a sample note. Be sure to enter objective notes, and not subjective notes, in the notepad.**.
39.	Click the **Save** button. 
40.	After saving the note, click the **Return to UC Experience Note Selection** link. 
41.	After entering a note, a new page section called **Existing Notes** appears.
42.	Click the **Return to UC Experience Page** link. 
43.	After you complete the experience and note entries, click the **Save** button. 
44.	Click the **Return to Search** button. 
45.	Click the **Clear** button to search for another employee. 

Step	Action
46.	You have entered an employee's prior work experience for experience-based pay positions. **End of Procedure.**

Update Employee's Work Experience

Use this process to update an existing work experience row or to add an additional work experience row for an employee.

Navigation: PeopleSoft Menu > Job Information > Experience Based Pay > **UC Employee Experience Page**

Step	Action
1.	In the first example, a current UC employee has moved into a new experience-based pay position. You must perform two actions: enter an **End Date** for the prior UC position and insert a new row for the new UC position.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **100005678**.
4.	Click the **Search** button. 
5.	The **UC Employee Experience** page appears.
6.	In the **Employee Experience** section, locate the row you must update. For this example, click in the **End Date** field for **Row 2**. 
7.	Enter the desired information into the **End Date** field. For this example, enter **04/06/2018**.
8.	You also update the current row with an **End Date** if the employee transferred out of the experience-based pay position or terminated their UC employment.
9.	Now insert a new row to record the new UC experience-based pay position. Click the **Add a new row** button. 

Step	Action
10.	A new blank row appears. Enter the desired information into the **Employer Name** field. For this example, enter **UCR-Off Campus Health Center**.
11.	Click in the **Start Date** field. 
12.	Enter the desired information into the **Start Date** field. For this example, enter **04/07/2018**.
13.	Leave the **End Date** field blank because this is the new current position.
14.	Click in the **Job Title** field. 
15.	Enter the desired information into the **Job Title** field. For this example, enter **Clin Nurse 3**.
16.	Select the **UC Relevant Experience** option. ☐
17.	Select the **UC Relevant Service** option. ☐
18.	Click the **Save** button. 
19.	You may want to enter notes, using the optional **Notepad** feature, about the data you just entered.
20.	To use the **NotePad** feature, click the **Comments: Please Use Notepad** button.
21.	The **UC Experience Notes** page appears. A note already exists for the employee in the **Existing Notes** section. The **Instructions** section is currently collapsed. If necessary, click the **Expand** arrow to expand this section and reveal the page instructions.
22.	Click the **Add a New Note** button. 
23.	The **Selected Note** page appears.
24.	Click in the **Subject** field.
25.	Enter the desired information into the **Subject** field. For this example, enter **New note**.

Step	Action
26.	Enter the note details into the **Note Text** field. You can enter up to 16,000 characters in the note. Click in the **Note Text** field.
27.	Enter the desired information into the **Note Text** field. For this example, enter **This is a new objective note. Do not enter subjective notes.**.
28.	Click the **Return to UC Experience Note Selection** link. Return to UC Experience Note Selection
29.	This message only appears if you attempt to leave the page without first saving your note. Click the **OK** button. OK
30.	Click the **Save** button. Save
31.	Click the **Return to UC Experience Note Selection** link. Return to UC Experience Note Selection
32.	Your new note appears in the **Existing Notes** section. You can click the note **Subject** to access the note.
33.	Click the **Return to UC Experience Page** link. Return to UC Experience Page
34.	After you enter/update all lines and notes, click the **Save** button. Save
35.	Click the **Return to Search** button. Return to Search
36.	Let's review another example. The employee has transferred into an experience-based pay position from a non-experience-based pay position. You must add an additional work experience row without updating a current row on the page.
37.	Enter the desired information into the **Empl ID** field. For this example, enter **100005678**.
38.	Click the **Search** button. Search
39.	The **UC Employee Experience** page appears.
40.	In the **Employee Experience** section notice that the most recent row, **Row 2**, has an **End Date**. The end date is the date that the employee left the previous experience-based pay position.

Step	Action
41.	Because the employee has now hired back into an experience-based pay position, you must add a new row. Click the **Add a new row** button. +
42.	A new blank row (3) appears. Enter the desired information into the **Employer Name** field. For this example, enter **UCR-Student Health Services**.
43.	Click in the **Start Date** field.
44.	Enter the desired information into the **Start Date** field. For this example, enter **04/19/2018**.
45.	Do not enter an **End Date** because this is the employee's new current position.
46.	Click in the **Job Title** field.
47.	Enter the desired information into the **Job Title** field. For this example, enter **Clin Nurse 3**.
48.	Select the **UC Relevant Experience** option. ☐
49.	Select the **UC Relevant Service** option. ☐
50.	Verify that the information entered is correct. Update as needed. Click the **Save** button. Save
51.	Click the **Return to Search** button. Return to Search
52.	Click the **Clear** button if you want to update another employee's work experience. Clear
53.	You have updated an existing work experience row for an employee and added an additional work experience row for an employee. **End of Procedure.**

Approve or Override Proposed Step

Use this task to review the proposed step for experience based pay employees and to approve or override the proposed step. Note that the **UC Calculate Experience Steps** process must run and successfully complete before you perform this task. UCPath Center-Information Technology works with UC Locations and runs the **UC Calculate Experience Steps** process when advised.

Navigation: PeopleSoft Menu > Workforce Administration > Job Information > Experience Based Pay > **UC Experience Steps**

Step	Action
1.	**Business Unit** is a required field. Click in the **Business Unit** field.
2.	Click the **Look up Business Unit** button. 🔍
3.	For this example, click the **RVCMP** list item. RVCMP
4.	**Union Code** is a required field. Click the **Look up Union Code** button. 🔍
5.	Click the scroll bar.
6.	For this example, click the **NX** list item. NX
7.	Click the **Refresh** button. Refresh
8.	UCPath displays employees that match the search criteria.
9.	Let's review the right side of the page. Click the scroll bar.
10.	Notice the **Approved** and **Override Flag** check boxes. For our first example, let's override the proposed step for this employee. Select the **Override Flag** option. ☐

Step	Action
11.	The **Override Step** field becomes available for data entry. Click in the **Override Step** field. 
12.	Enter the desired information into the **Override Step** field. For this example, enter step **19**.
13.	Notice that the **Proposed Step** is **18**. The **Override Step** is now **19**.
14.	Let's delete the override step. Click in the **Override Step** field and delete the field value.  19
15.	After you delete the step, deselect the **Override Flag** option. ☑
16.	Deselecting the **Override Flag** changes the **Override Step** field so that you cannot edit it.
17.	Let's approve the proposed step. Note that after you select **Approved**, you cannot deselect **Approved** and un-approve the proposed step. Click the **Approved** option. ☐
18.	The **Proposed Step** is now approved for the employee and employment record. Make sure to click **Save** when you finish your review and updates. Click the **Save** button. 
19.	You have reviewed the proposed next step for experience based pay employees. **End of Procedure.**

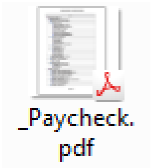
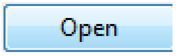
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
20.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
21.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
22.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
23.	Click the button to the right of the **Category** field. 
24.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
25.	Click in the **Subject** field.
26.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
27.	Click in the **Description** field.
28.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
29.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
30.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
31.	Click in the **Best Contact Phone Number** field.
32.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.

Step	Action
33.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
34.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
35.	Click the **Add Attachment** link. 
36.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
37.	For this example, click the **_Paycheck.pdf** list item. 
38.	Click the **Open** button. 
39.	The file name appears in the **Attachments** box.
40.	Click the **Submit** button.
41.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
42.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
43.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
44.	Click the scroll bar.
45.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
46.	Click the scroll bar.
47.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
48.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

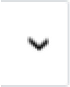
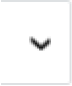
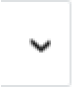
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
49.	Click the **Ask UCPath Center** button. 
50.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
51.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
52.	UCPath returned one result. Click the scroll bar.
53.	Click the **Create an Inquiry** link. 
54.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.

Step	Action
55.	Click the button to the right of the **Requested By** field. 
56.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
57.	Click the button to the right of the **Topic** field. 
58.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
59.	Click the button to the right of the **Category** field. 
60.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
61.	Click in the **Subject** field.
62.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
63.	Click the scroll bar.
64.	Click in the **Description** field.
65.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
66.	In this example, the full **Description** was completed on your behalf.
67.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
68.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.

Step	Action
69.	Click the **Submit Inquiry** button. 
70.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
71.	The submitter's name appears.
72.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

Reopen Closed UCPath Center Case

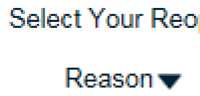
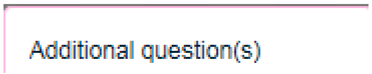
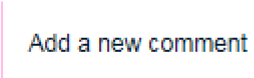
Use this task to reopen a closed inquiry via the UCPath website.

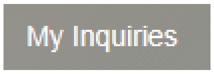
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
73.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
74.	Click the **My Closed Inquiries** link. 
75.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 

Step	Action
76.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
77.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
78.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
79.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
80.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
81.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
82.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
83.	Click the scroll bar.
84.	Notice the comment now appears in the **Case Comments** section.

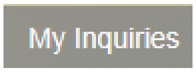
Step	Action
85.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
86.	Return to the top of the page. Click the scroll bar.
87.	Click the **My Inquiries** link. 
88.	The new inquiry appears in the **My Open Inquires** list.
89.	You have reopened a closed inquiry. **End of Procedure.**

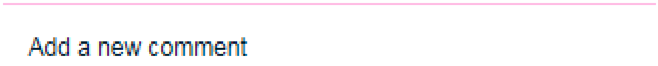
Monitor UCPath Center Cases

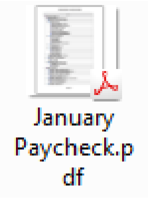
Use this task to review the status of an existing inquiry via the UCPath website.

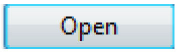
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

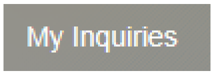
Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
90.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
91.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).

Step	Action
92.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
93.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
94.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 
95.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 
96.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 
97.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field. 
98.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
99.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.

Step	Action
100.	Click the **Submit comment to the UCPath Center** button. 
101.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
102.	Click the scroll bar.
103.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. 
104.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. 
105.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
106.	To return to the case details, click the **00180573** link. 
107.	Click the scroll bar.
108.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
109.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 

Step	Action
110.	Click the **Open** button. Open
111.	A message confirms the file was uploaded. Click the **Done** button. Done
112.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
113.	You can view all attachments in a list. Click the **View All** link. View All
114.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. ▼
115.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. ▼
116.	Click the **00180573** link. 00180573
117.	Click the scroll bar.
118.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
119.	Click the **Email** link. Sandbox: UCPath Center: Inquir.
120.	Review the email information as you scroll down the page. Click the scroll bar.

Step	Action
121.	Review the email from the UCPath Center. Click the scroll bar.
122.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
123.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
124.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
125.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
126.	Click the **00180567** link.  00180567
127.	Click the scroll bar.
128.	Notice the **Status** is **Closed/Resolved**.
129.	Click the scroll bar.
130.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
131.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMWFAL225: Mass Update of PayPath Actions

Job Aid: Complete the CSV File Template for PayPath Actions

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMWFAL225JA_CompletingthecsvFileTemplateForPayPath_D1Rev00.pdf) to open the **Complete the CSV File Template for PayPath Actions** job aid in a new web browser window/tab.

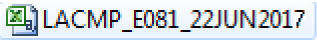
Upload and Save Mass Update of PayPath Actions File

Use this task to upload and save a Mass Update of PayPath Actions CSV file into UCPath. In order to perform this task, you must have the **Mass PayPath Actions Initiator** role assigned to your UCPath **User Profile**.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Mass Update of PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	In this example the **Run Control ID** does not exist. Click the **Add a New Value** tab. 
2.	Processes and reports require a **Run Control ID**. Click in the **Run Control ID** field. 
3.	Enter the desired information into the **Run Control ID** field. For this example, enter **PayPath_Mass_Update**.
4.	Click the **Add** button to create the **Run Control ID**. 
5.	The **Mass Update of PayPath Changes** page appears. Use this page to upload and save the Mass Update of PayPath Actions file. Click the **Add Attachment** button.
6.	Click the **Browse** button. 
7.	Uploaded files must be CSV files and use the correct file naming convention. The correct format is: **BusinessUnit_E081_DDMONYYYY**. **BusinessUnit** is the UCPath **Business Unit** code, **E081** is the name of the process, **DD** is day, **MON** is the first three letters of the month and **YYYY** is the century and year. Note that this example uses the UCLA campus Business Unit (**LACMP**) and the year of **2017**.

Step	Action
8.	Locate the file that you want to upload. For this example, click the **LACMP_E081_22JUN2017** file. LACMP_E081_22JUN2017
9.	Click the **Open** button. Open
10.	Click the **Upload** button. Upload
11.	Click the **Save** button. Save
12.	The file is uploaded into UCPath for processing. Only UCPath users with the **Mass PayPath Actions Processor** role may process an uploaded file. Mass Update of PayPath Actions does not use approval workflow engine (AWE).
13.	You have uploaded and saved a Mass Update of PayPath Actions file into UCPath. **End of Procedure.**

Deny Mass Update of PayPath Actions File

Use this task to review and deny a Mass Update of PayPath Actions CSV file uploaded into UCPath. In order to perform this task, you must have the **Mass PayPath Actions Processor** role assigned to your UCPath **User Profile**.

Denying an uploaded Mass Update of PayPath Actions CSV file invalidates the entire CSV File. No updates for any employee on the file are loaded into UCPath. After denying an uploaded file, work with the initiator at your location to resolve the file issue(s).

Navigation: Main Menu > HCM Home > UC Customizations > UC Extensions > **Mass Update of PayPath-Approve**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Click in the **User ID** field.
2.	Enter the desired information into the **User ID** field. For this example, enter **UC_PayPath**.

Step	Action
3.	Click the **Search** button. Search
4.	The **Mass Update of PayPath-Approve** page appears and displays the files that have been uploaded. Files are uploaded by another user at your location who has the **Mass PayPath Actions Initiator** role assigned to their UCPath **User Profile**.
5.	Locate the uploaded file to review. Click the **View Attachment** button.
6.	Click the **Open** button to review the uploaded CSV file. Open
7.	The file opens in Excel. Expand the page, rows or columns as needed to review the file. Refer to the *Complete the CSV File Template* job aid to understand how to read and review the uploaded file.
8.	Click the **Close** button to close the uploaded file. X
9.	Click the **Don't Save** button. If you find issues with the uploaded file, deny the uploaded file and then work with the initiator at your location to resolve the file issue(s). Don't Save
10.	Select the **Select** option. ☐
11.	A **Reason to Deny** is required when you deny an uploaded file. Click in the **Reason to Deny** field.
12.	Enter the desired information into the **Reason to Deny** field. For this example, enter **Incorrect data on the file**.
13.	Click the **Deny Selected** button. Deny Selected
14.	A warning message appears. Click **No** to stop the deny process. Click the **Yes** button deny the file. Click the **Yes** button. Yes

Step	Action
15.	You have reviewed and denied a Mass Update of PayPath Actions CSV file uploaded into UCPath. Be sure to work with the initiator at your location to resolve the file issue(s) and upload a new file if needed. **End of Procedure.**

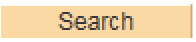
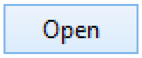
Submit Mass Update of PayPath Actions File

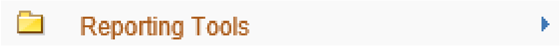
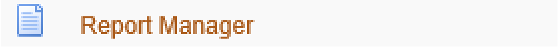
Use this task to review and submit a Mass Update of PayPath Actions CSV file into UCPath. In order to perform this task, you must have the **Mass PayPath Actions Processor** role assigned to your UCPath **User Profile**.

Submitting a Mass Update of PayPath Actions CSV file immediately loads the file into UCPath **Position Data** and **Job Data** if no errors are found during the submit process. **Additional Pay** rows load to the custom E-330 staging table and then load to UCPath during UCPath Center (UCPC) Payroll processing.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Mass Update of PayPath-Approve**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Click in the **User ID** field. 
2.	Enter your **User ID** into the **User ID** field. For this example, enter **UC_PayPath**.
3.	Click the **Search** button. 
4.	The **Mass Update of PayPath-Approve** page appears and displays the files that have been uploaded. Files are uploaded by another user at your location who has the **Mass PayPath Actions Initiator** role assigned to their UCPath **User Profile**.
5.	Click the **View Attachment** button. 
6.	Click the **Open** button to review the uploaded CSV file. 
7.	The file opens in Excel. Expand the page, rows or columns as needed to review the file. Refer to the *Complete the CSV File Template* job aid to understand how to read and review the uploaded file.

Step	Action
8.	Click the **Close** button to close the uploaded file. 
9.	Click the **Don't Save** button. If you find issues with the uploaded file, deny the uploaded file and then work with the initiator at your location to resolve the file issue(s). Refer to the *Deny a Mass Update of PayPath Actions File* topic for step-by-step instructions. 
10.	Select the **Select** option for the file you want to submit. ☐
11.	The **Run Selected** button immediately loads the CSV file into UCPath <u>if</u> no errors are found. Data records are loaded in the following order: **Position Data**, **Job Data** and then **Additional Pay**. Additional Pay rows load to the E-330 staging table and then load into UCPath during UCPC Payroll processing. <u>Be cognizant of the UCPC Payroll Processing Calendar when submitting Mass Update of PayPath Actions CSV files.</u> Click the **Run Selected** button. 
12.	A warning message appears. Click the **No** button to stop the submit process. Click the **Yes** button to submit the file for processing. For this example, click the **Yes** button. 
13.	The file is submitted for processing. Do <u>not</u> click the **Process Monitor** link. Instead, navigate to **Report Manager** to monitor the status of the process. 
14.	Click the **Main Menu** menu. 
15.	Click the **Reporting Tools** menu. 
16.	Click the **Report Manager** menu. 

Step	Action
17.	**Report Manager** appears. Note that you also can access this page from Main PeopleSoft Menu > **UCPath Workcenter**. Click the **Administration** tab. 
18.	Find your submitted process in the **Reports List**. Click the **Refresh** button. 
19.	When the **Status** is **Posted**, click the **Mass Update of PayPath Actions** link. Submit a ServiceNow Incident if the status is **Error** or **No Success**. 
20.	The Mass Update of PayPath Actions process produces an **stdout** and an **Output Log** for you to review. The **stdout** lists invalid codes and employee identification numbers found in the CSV file, and indicates whether the Mass Update of PayPath Actions submit process completed successfully. The **Output Log** lists the total number of submitted records, the number of successfully updated records and the records with errors and warnings. Be sure to review and save the **stdout** and the **Output Log** to a secured drive for research and audit purposes.
21.	Click the **AE_UC_MASS_UPLD_94422.stdout** link. 
22.	The **stdout** log appears. Items that appear on this log require research and resolution. This example shows an invalid employee identification number. Research and resolve this issue. This example also shows that the process ended normally.
23.	Click the **Close Tab** button. 
24.	The **Report Detail** page appears again.
25.	Click the **E081_MassUpdate_94422_20170706071000.log** link. 
26.	Click the **Maximize** button. 

Step	Action
27.	The **Output Log** appears in a Notepad format that is not easy to read online. Save and print the log for easier review. This **Output Log** example shows no warnings, but three errors. Review and resolve all errors and warnings.
28.	Click the **Close** button to close the **Output Log**.  X
29.	This printed sample of an **Output Log** is easier to read. This example shows no warnings, but four errors.
30.	You have reviewed and submitted a Mass Update of PayPath Actions file into UCPath. **End of Procedure.**

Submit Case to UCPath Center

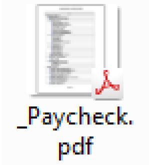
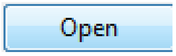
Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
31.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link.  Submit An Inquiry
32.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. ▾

Step	Action
33.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. Payroll
34.	Click the button to the right of the **Category** field. 
35.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
36.	Click in the **Subject** field.
37.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
38.	Click in the **Description** field.
39.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
40.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
41.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
42.	Click in the **Best Contact Phone Number** field.
43.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
44.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
45.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
46.	Click the **Add Attachment** link. Add Attachment
47.	Navigate to the document you want to attach. In this example, the document is located on the desktop.

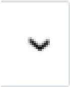
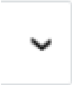
Step	Action
48.	For this example, click the **_Paycheck.pdf** list item. 
49.	Click the **Open** button. 
50.	The file name appears in the **Attachments** box.
51.	Click the **Submit** button.
52.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
53.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
54.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
55.	Click the scroll bar.
56.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
57.	Click the scroll bar.
58.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
59.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

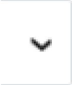
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
60.	Click the **Ask UCPath Center** button. 
61.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
62.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
63.	UCPath returned one result. Click the scroll bar.
64.	Click the **Create an Inquiry** link. 
65.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
66.	Click the button to the right of the **Requested By** field. 
67.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
68.	Click the button to the right of the **Topic** field. 
69.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.

Step	Action
70.	Click the button to the right of the **Category** field. 
71.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
72.	Click in the **Subject** field.
73.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
74.	Click the scroll bar.
75.	Click in the **Description** field.
76.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
77.	In this example, the full **Description** was completed on your behalf.
78.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
79.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
80.	Click the **Submit Inquiry** button. 
81.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
82.	The submitter's name appears.
83.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

Reopen Closed UCPath Center Case

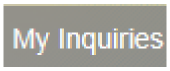
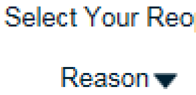
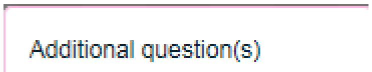
Use this task to reopen a closed inquiry via the UCPath website.

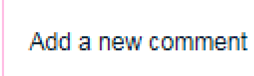
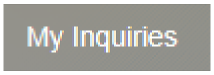
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:

Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
84.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
85.	Click the **My Closed Inquiries** link. 
86.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
87.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
88.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
89.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.

Step	Action
90.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
91.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
92.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
93.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
94.	Click the scroll bar.
95.	Notice the comment now appears in the **Case Comments** section.
96.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
97.	Return to the top of the page. Click the scroll bar.
98.	Click the **My Inquiries** link. 
99.	The new inquiry appears in the **My Open Inquires** list.
100.	You have reopened a closed inquiry. **End of Procedure.**

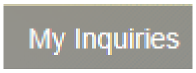
Monitor UCPath Center Cases

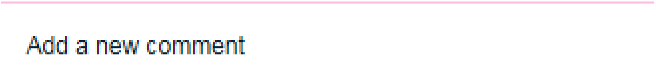
Use this task to review the status of an existing inquiry via the UCPath website.

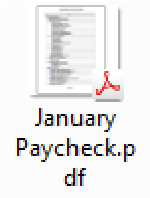
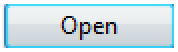
Dashboard Navigation:
Ask UCPath Center
or

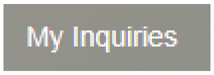
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
101.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
102.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
103.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
104.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
105.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 
106.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 

Step	Action
107.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 
108.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field. 
109.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
110.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
111.	Click the **Submit comment to the UCPath Center** button. 
112.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
113.	Click the scroll bar.
114.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. 
115.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▾
116.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.

Step	Action
117.	To return to the case details, click the **00180573** link. 
118.	Click the scroll bar.
119.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
120.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
121.	Click the **Open** button. 
122.	A message confirms the file was uploaded. Click the **Done** button. 
123.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
124.	You can view all attachments in a list. Click the **View All** link. 
125.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 

Step	Action
126.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 
127.	Click the **00180573** link.  00180573
128.	Click the scroll bar.
129.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
130.	Click the **Email** link.  Sandbox: UCPath Center: Inquir.
131.	Review the email information as you scroll down the page. Click the scroll bar.
132.	Review the email from the UCPath Center. Click the scroll bar.
133.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
134.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
135.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
136.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**

Step	Action
137.	Click the **00180567** link. 00180567
138.	Click the scroll bar.
139.	Notice the **Status** is **Closed/Resolved**.
140.	Click the scroll bar.
141.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. ⌂
142.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMWFAL250: Template Transactions - Part I

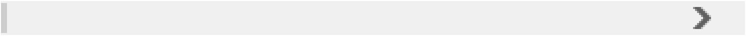
View Person Organizational Summary

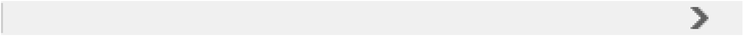
Use this task to view all current organizational relationships for a person: Employee, Contingent Worker (CWR) and/or Person of Interest (POI). This page does not display historical or future-dated employment details.
For example, you can view a summary of an employee’s current job assignments and associated details.

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > **Person Organizational Summary**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
143.	After you navigate to the **Person Organizational Summary** page, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
144.	The fastest way to locate the employee is to enter the employee's ID. Click in the **Empl ID** field.
145.	Enter the employee's ID number into the **Empl ID** field. For this example, enter **10066206**.

Step	Action
146.	Click the **Search** button. Search
147.	The **Person Organizational Summary** page displays the current organizational relationships for the selected employee. This example displays **Employment Instances** and **Assignments** for an Employee. To display all current assignments, click the **View All** link.
148.	Click the scroll bar to display the **View All** link. 
149.	Click the **View All** link. View All
150.	The **Employment Instances** section displays a separate **Assignments** section for each of the employee's jobs. Each **Assignments** header displays the employee's **HR Status** and **Payroll Status**, his or her **Last Hire** date and, if applicable, **Termination Date**.
151.	If the employee has multiple assignments, one of the assignments must be indicated as the **Primary Job**.
152.	The **Assignments** section displays the employee's job assignment details for each **Empl Record**.
153.	The **Business Unit** field displays the 5-character campus/location code. The **Position Number** field identifies the employee's position number. The **Dept ID** field displays the employee's appointing department and the **Department Description**.
154.	The **Job Code** field displays the job code associated with the employee. The **Description** field displays the description of the job code.
155.	The **Expected Job End Date** field displays the appointment end date for this job, if applicable.
156.	The **FTE** field displays the full-time equivalency associated with the employee's job.
157.	The **Employee Class** field defines the class type to which the employee belongs.
158.	The **Union Code** field defaults from the position number associated with the employee.
159.	The **FLSA Status** indicates whether this job is exempt or non-exempt according to the Fair Labor Standards Act (FLSA). The FLSA status also helps determine benefits eligibility in Benefits Administration. The FLSA status defaults from the position number associated with this employee.

Step	Action
160.	The **Pay Group** displays the pay group to which this employee belongs.
161.	Click the scroll bar. 
162.	The **Employee Type** value depends on the pay group selected.
163.	The **Probation Code** field identifies the current status of the employee's probation, if applicable.
164.	If the employee is currently on probation status, the **Probation End Date** field specifies the date the employee's probation ends.
165.	You have reviewed a summary of an employee’s current organizational relationship data. **End of Procedure.**

Job Aid: Template Transactions – Action Reason Codes and Descriptions

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMWFAL250JA_TemplateTransactions_ActionReasonCodesDescriptions_D1Rev00.pdf) to open the **Template Transactions - Action Reason Codes and Descriptions** job aid in a new web browser window/tab.

View Template Transaction Status - SS Smart HR Transactions Page

Use this task to view the status of a template transaction within Approval Workflow Engine (AWE).

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **SS Smart HR Transactions**

Step	Action
166.	Use the **SS Smart HR Transaction Status** page to search for Smart HR Template transactions that have been submitted. You can view all transactions within your business unit; this page is not restricted by department security. Enter search criteria in one or more search fields. You can also leave all fields blank to display the 300 most recent transactions entered within your business unit. You can then sort through the search results to locate the transaction you want to view.
167.	In this example, enter an employee ID. Click in the **Empl ID** field. 
168.	Enter the desired information into the **Empl ID** field. For this example, enter **10000248**.

Step	Action
169.	Click the **Search** button. Search
170.	The **Transaction Details** page displays summary information about the transaction.
171.	The **Transaction Status** indicates the current status of the template transaction in AWE.
172.	The **Name** field display's the name of the person or employee on the template transaction. Click the **Name** link to review the template transactions details. If you need to review the template transaction details, click the **Name** link. This example does not review the template transaction details. For more information on reviewing and approving an HR template transaction, refer to *Approve HR Template Transaction*.
173.	The **Type of Hire** field identifies whether the person is an employee or contract worker.
174.	The **Start Date** is the effective date of the template transaction.
175.	The **Action** is the action code for the template transaction. In this example, **RET** is the retirement template.
176.	The **Initiator Comment** field is used by the Template Initiator to communicate information to the Template Approver.
177.	The **Requester ID** field displays the employee ID and name of the Template Initiator. The **Requested** field displays the date and time the template transaction was submitted to AWE.
178.	Click the **Expand** button. ▶
179.	The **Campus approvers** section shows where the template transaction is within AWE, who approved the transaction and the date and time the transaction was approved.
180.	You have viewed the status of a template transaction within AWE. **End of Procedure.**

View Template Transaction Status - Transaction Status Page

Use this task to view the status of **Smart HR Template** transactions that have completed Location approval workflow (AWE) and have moved into UCPC WFA Production's queue. This page displays template transactions that are pending or that have been processed or cancelled by WFA Production. You can view all transactions submitted within the department(s) to which you have access.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Transaction Status**

Step	Action
181.	Use the **Transaction Status** page to view the status of template transactions as well as other summary transaction information. The default filters are set to **All** with a **Start Date From** that is 10 days prior to the current date and a **To** date that is 10 days after the current date.
182.	The **Download** button allows you to export the template transaction grid information into an Excel spreadsheet, including any comments entered by WFA Production.
183.	The **Transaction Status** grid displays the transactions that match the filters.
184.	The **Template** column identifies the template that was initiated.
185.	The **Effective Date** column identifies the effective date entered on the template.
186.	The values you might see in the **Transaction Status** column include: • **Requested:** Transaction was submitted but not yet processed by WFA Production. • **Completed:** Transaction was processed by WFA Production. • **Hired/Added:** New hire was processed by WFA Production. • **Cancel:** Transaction was cancelled by WFA Production. • **Denied:** Transaction was denied by Location Approver.
187.	The **Person ID** column identifies the employee associated with the template transaction. This column displays **NEW** for hire transactions that are pending or cancelled.
188.	The **Empl Record** column identifies the employee job record to which the template applies.
189.	The **Action** column displays the action code for the template.
190.	The **Clone** button appears for template transactions that are cancelled by WFA Production.
191.	The **Business Unit** column identifies the employee's business unit.
192.	The **Name** columns identify the employee associated with the template transaction.
193.	For this example, update the **HR Review Status** to display all **Cancelled** template transactions. Click the button to the right of the **HR Review Status** field. ⌄
194.	Click the **Cancelled** list item.  Cancelled

Step	Action
195.	Click the **Refresh** button. Refresh
196.	The filter displays only one template transaction that has been cancelled within the dates indicated.
197.	Click the scroll bar.
198.	In some cases, WFA Production may need to cancel a template transaction. When a transaction in cancelled, WFA Production enters a comment to explain why the transaction was cancelled. Template Initiators can **View Comments** and, if needed, **Clone** the transaction to resubmit it with necessary corrections.
199.	The **View Email Text** column displays a **View** link if WFA Production sent an email to the Location Template Initiator about a template transaction. Click the **View** link to review the email text.
200.	Click the scroll bar.
201.	For the next example, update the **HR Review Status** to display **Processed** template transactions. Click the button to the right of the **HR Review Status** field. ⌄
202.	Click the **Processed** list item. Processed
203.	Click the **Refresh** button. Refresh
204.	The filter displays all the template transactions that have been processed by WFA Production. This filter allows you to quickly view the new UCPath Employee ID (**Person ID**) for a new hire.
205.	Click the scroll bar.
206.	Be cautious using the **Delete Selected Transactions** button. If you select the check box for a transaction and then click this button, the transaction will be deleted from the system. If the transaction has not been processed, it is deleted from WFA Production's queue and cannot be retrieved.
207.	You have viewed the status of **Smart HR Template** transactions. **End of Procedure.**

Job Aid: Template Transactions – Status Pages

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMWFAL250JA_TemplateTransactions_StatusPages_D1Rev00.pdf) to open the **Template Transactions - Status Pages** job aid in a new web browser window/tab.

Initiate Full Hire Template Transaction (Staff)

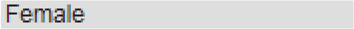
Use this task to initiate a full hire template transaction for a staff employee.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

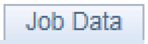
Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to initiate a full hire template transaction.
2.	Click the **Look Up Select Template** button. **Note:** The **Transaction Type** field is not used by UC. 🔍
3.	Select the appropriate full hire template. Notice there are two full hire templates, one for staff and one for academic. Click the **UC_FULL_HIRE** list item. UC_FULL_HIRE
4.	Click in the **Effective Date** field.
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field. For this example, enter **11/1/2018**.
6.	Click the **Create Transaction** button. Create Transaction
7.	In the **Employee ID** field, accept the default value of **NEW**. After UCPC WFA Production processes the full hire template, the system automatically generates the next sequential UC Employee ID number for the employee.
8.	The **Effective Date** is populated based on your entry on the previous page. Ensure that you entered the correct hire date or the date the employee begins the job. For this example, accept the default.

Step	Action
9.	Click the button to the right of the **Reason Code** field. 
10.	Select the appropriate **Reason Code**. For this example, click the **Hire - No Prior UC Affiliation** list item. 
11.	In the **Address Format** field, accept the default of **United States** or select the **Global** option, if applicable.
12.	Click the **Continue** button. 
13.	The full hire template appears. There are five tabs on this template: **Personal Data**, **Job Data**, **Earns Dist**, **Addl Pay** and **Employee Experience**. Fields that are required by the system are indicated with an asterisk *****.
14.	For this example, click the **Click here to Hide Header Details** link to hide the header details. 
15.	Click in the **First Name** field. 
16.	Enter the desired information into the **First Name** field. For this example, enter **Cassandra**.
17.	Click in the **Last Name** field. 
18.	Enter the desired information into the **Last Name** field. For this example, enter **Perry**.
19.	Click in the **Date of Birth** field. 
20.	Enter the desired information into the **Date of Birth** field. For this example, enter **4/1/1970**.
21.	Click the **Look up Ethnic Group** button. 
22.	Select the appropriate ethnicity. For this example, click the **EUROPEAN** list item. 
23.	If the individual identifies with more than one ethnic group, click the **Add a row** button and enter the additional ethnic group.

Step	Action
24.	Select the appropriate **Military Status**, if known, or leave the field blank. Click the button to the right of the **Military Status** field. ⌄
25.	Click the **I Am Not A Veteran** list item. I Am Not A Veteran
26.	Select the new hire's **Highest Education Level**, if known, or accept the default of **A** (**Not Indicated**). Click the **Look up Highest Education Level** button. 🔍
27.	For this example, click the **I** list item. I
28.	Click the scroll bar.
29.	Click the button to the right of the **Gender** field. ⌄
30.	Select the appropriate **Gender**. For this example, click the **Female** list item. Female
31.	In the **National ID Type** field, accept the default of **PR** for Social Security Number (SSN).
32.	Every effort should be taken to include the SSN (**National ID**) before submitting the template. Leaving the **National ID** field blank has downstream impacts. For example, it impacts the employees ability to enroll in benefits plans (including retirement).
33.	Click in the **National ID** field.
34.	Enter the Social Security number into the **National ID** field. For this example, enter **548906567**.
35.	Click in the **Address Line 1** field.
36.	Enter the desired information into the **Address Line 1** field. For this example, enter **5634 Oak Drive**.
37.	Click in the **City** field.
38.	Enter the desired information into the **City** field. For this example, enter **Riverside**.

Step	Action
39.	Click in the **State** field. 
40.	Enter the desired information into the **State** field. For this example, enter **CA**.
41.	Click in the **Postal Code** field. 
42.	Enter the desired information into the **Postal Code** field. For this example, enter **92501**.
43.	Enter the date the new hire signed the UC oath agreement. This date cannot be later than the current date. Click in the **Oath Signature Date** field. 
44.	Enter the desired information into the **Oath Signature Date** field. For this example, enter **11/1/2018**.
45.	Click the button to the right of the **Phone Type** field. 
46.	Select the appropriate phone type. For this example, click the **Mobile - Personal** list item. Mobile - Personal
47.	Click in the **Telephone** field. 
48.	Enter the desired information into the **Telephone** field. For this example, enter **5902348787**.
49.	A **Preferred** phone number must be identified by selecting the check box. Click the **Preferred** option. ☐
50.	Click the button to the right of the **Email Type** field. 
51.	Select the appropriate email type. For this example, click the **Home** list item. Home
52.	Click in the **Email Address** field. 

Step	Action
53.	Enter the desired information into the **Email Address** field. For this example, enter **cperry@gmail.com**.
54.	Enter the date on which the individual signed the UC patent acknowledgment. This date cannot be later than the current date. Click in the **Patent Acknowledgment Sign Dt** field. 
55.	Enter the desired information into the **Patent Acknowledgment Sign Dt** field. For this example, enter **11/1/2018**.
56.	Select the **Modified Patent Ackmnt Sign Dt** check box to indicate the employee did not originally sign the standard Patent Acknowledgment form.
57.	Click the scroll bar.
58.	If the new hire has an existing tracker profile, then you can add their **Tracker Profile ID** and indicate whether their I-9 section 2 needs to be completed remotely. This information is copied to the employee's **Person Profile** component.
59.	Click in the **Tracker Profile ID** field. 
60.	Enter the desired information into the **Tracker Profile ID** field. For this example, enter **1234567**.
61.	If applicable, use the **UC External System ID** section to enter external system information to facilitate matching of IDs with IDM systems. If providing the information, you must enter values for all three fields. The **Business Unit** in this section must match the **Business Unit** associated with the **Position Number** you enter on the **Job Data** tab (the next tab).
62.	Use the **Comments** field to enter specific details or an explanation regarding the transaction. For example, this field can be used to indicate that the employee lives and works outside the US. For these employees, UCPC WFA Production will add the **NRA Working Outside the US** citizenship status on the **Identification Data** page. This field is referenced by UCPC WFA Production to assist with the processing of the transaction.
63.	Click the scroll bar.
64.	Click the **Job Data** tab. 

Step	Action
65.	Enter the position number or search for it using the look up. You only have access to position numbers within your business unit or related business unit. Click in the **Position Number** field. 
66.	Enter the desired information into the **Position Number** field. For this example, enter **40000043**.
67.	Press **[Tab]** to automatically populate the position-related fields.
68.	Click the scroll bar.
69.	For staff hires, the **Employee Classification** field must be entered. Click the **Look up Employee Classification** button. 🔍
70.	Select the appropriate **Employee Classification**. For this example, click the **2** (**Staff: Career**) list item.  2
71.	In the **UC Job Data** section, enter or select the appropriate values as applicable.
72.	The **Probation Code** field is required if: • the **Classified/Unclassified Ind** field is **Professional and Support Staff**, and • the **Employee Class** is **Career** or **Partial Year Career**. The **Probation End Date** field is required if the **Probation Code** value is something other than **Completed** or **Probation Completed, Other Job**.
73.	Click the button to the right of the **Probation Code** field. ⌄
74.	Select the appropriate **Probation Code**. For this example, click the **Within Probation** list item.  Within Probation
75.	Click in the **Probation End Date** field. 
76.	Enter the desired information into the **Probation End Date** field. For this example, enter **5/1/2019**.

Step	Action
77.	**Location Use Type** and the associated **Location Use End Date** are used for reporting purposes. **Location Use Types** include: • Funding End Date • NSTP Review • Review Job • Review Remaining Budget • Temporary Off-Scale • Temporary Reduction in Time
78.	Enter **UC Employee Review** information, if applicable.
79.	Some job codes have steps associated with them. When a **Step** is entered, UCPath automatically updates the **Job Compensation - Pay Components** fields and the compensation information cannot be changed. Some job codes do not have steps associated with them, in which case the **Job Compensation - Pay Components** fields must be manually entered. If the job has above scale component of pay, then step does not need to be selected. Enter applicable above scale comp rate codes in **Job Compensation- Pay Components** section.
80.	For this example, click the **Look up Comp Rate Code** button. 🔍
81.	Select the appropriate **Rate Code**. For this example, click the **UCANNL** list item. UCANNL
82.	Click in the **Compensation Rate** field. 
83.	Enter the desired information into the **Compensation Rate** field. For this example, enter **75000**.

Step	Action
84.	If the employment is a short term assignment or temporary hire, enter the date the position ends in the **Expected Job End Date** field. Non-Academic employees are automatically terminated in UCPath on this date. An expected end date is required for following employee classes: • Staff: Contract • Staff: Floater • Staff: Rehired Retiree • Academic: Post Docs • Academic: Recall • Academic: Academic Student • Student: Casual/Restricted
85.	Click the scroll bar.
86.	The payroll-related **Compensation Frequency** field automatically populates based on the job code. If the **Compensation Frequency** in the **Job Compensation - Pay Components** section is **A**, then the **Compensation Frequency** in the **Job Compensation - Payroll Currency and Frequency** section can be any of the following: **B**, **M**, **UC912**, **UC_10**, **UC_11**, **UC_12**, **UC_9M** or **UC_FY**. If the **Compensation Frequency** in the **Job Compensation - Pay Components** section is **H**, then the **Compensation Frequency** in the **Job Compensation - Payroll Currency and Frequency** section should be **H**.
87.	Click the scroll bar.
88.	Click the **Earns Dist** tab. 
89.	In most cases, the **Job Earnings Distribution** section is automated. If the **Comp Rate** code entered on the **Job Data** tab has a mapped **Earnings Code**, the **Job Earnings Distribution** section is updated automatically.
90.	The **Job Earnings Distribution** section also can be used to manually enter distribution information. Use the **Earnings Distribution Type** field to enter distribution **By Amount** or **By Percent**. After the **Earnings Distribution Type** is selected, the **Aggregate Comp Rate** field is populated with the monthly amount. • If **By Amount** is selected, the total of all compensation rates entered must add up to the monthly comp rate. • If **By Percent** is selected, the total of all percentages entered must add up to 100%.
91.	Click the **Addl Pay** tab. 

Step	Action
92.	There may be cases where an employee is paid a recurring flat amount. For recurring flat amount entry, the compensation section is not populated on the **Job Data** tab. Instead, the **Additional Pay** section is used. There may also be cases where neither compensation rate nor additional pay is entered. In those cases, it is recommended that you enter a comment to explain how the employee is to be paid. It is recommended not to use this template for one time additional pay. Instead, use payroll's one time payments page.
93.	In this example, you'll enter a new hire's bonus. Click in the **Effective Date** field. 
94.	Enter the desired information into the **Effective Date** field. For this example, enter **11/1/2018**.
95.	Click the **Look up Earnings Code** button.
96.	Select the appropriate **Earnings Code**. For this example, click the **BON** list item.  BON
97.	Click in the **Add'l Pay Amount** field.  0
98.	Enter the desired information into the **Add'l Pay Amount** field. For this example, enter **1000**.
99.	Click the scroll bar.
100.	Click in the **Goal Amount** field.  0
101.	Enter the desired information into the **Goal Amount** field. For this example, enter **1000**.
102.	Click the **Employee Experience** tab.  Employee Experience
103.	For represented staff, use the fields on this page to enter data related to the employee's prior work experience. Having this information is helpful in determining new compensation rates for the new hire. After the template is processed by UCPC WFA Production, the information is populated to fields within the employee's **Person Profile** component.

Step	Action
104.	Use the **Supporting documents** link to attach supporting documents for the new hire. Click the **Supporting documents** link. 
105.	Click the **Upload** button. 
106.	Click the **Browse...** button. 
107.	Select the appropriate document to attach. For this example, double-click the **Approval for Addl Pay** list item. 
108.	Click the **Upload** button. 
109.	You also can view and delete the attachments from this page.
110.	Click the **OK** button. 
111.	Enter comments for the Approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not appear on the employee’s record after the transaction is processed to completion. You can enter **Initiator Comments** on any of the tabs within this template.
112.	The **Save and Submit** button is not available until all required fields on each tab are completed. Click the **Save and Submit** button. 
113.	Click the **OK** button. 
114.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
115.	You have initiated a full hire template transaction for a staff employee. **End of Procedure.**

Initiate Full Hire Template Transaction (Acad)

Use this task to initiate a full hire template transaction for an academic employee.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

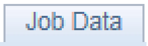
Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to initiate a full hire template transaction.
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC. 🔍
3.	Select the appropriate full hire template. Notice there are two full hire templates, one for staff and one for academic. Click the **UC_FULL_HIRE_AC** list item. UC_FULL_HIRE_AC
4.	Click in the **Effective Date** field.
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field. For this example, enter **11/1/2018**.
6.	Click the **Create Transaction** button. Create Transaction
7.	In the **Employee ID** field, accept the default value of **NEW**. After UCPC WFA Production processes the full hire template, the system automatically generates the next sequential UC Employee ID number for the employee.
8.	The **Effective Date** is populated based on your entry on the previous page. Ensure that you entered the correct hire date or the date the employee begins the job. For this example, accept the default.
9.	Click the button to the right of the **Reason Code** field. ⌄

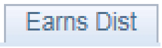
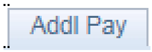
Step	Action
10.	Select the appropriate **Reason Code**. For this example, click the **Hire - No Prior UC Affiliation** list item. Hire - No Prior UC Affiliation
11.	In the **Address Format** field, accept the default of **United States** or select the **Global** option, if applicable.
12.	Click the **Continue** button. Continue
13.	The academic full hire template appears. There are five tabs on this template, **Personal Data**, **Job Data**, **Earns Dist**, **Addl Pay** and **Person Profile**. Fields that are required by the system are indicated with an asterisk *****.
14.	Header details appear above the tabs. You can show/hide the header information as needed.
15.	Click in the **First Name** field.
16.	Enter the desired information into the **First Name** field. For this example, enter **Gus**.
17.	Click in the **Last Name** field.
18.	Enter the desired information into the **Last Name** field. For this example, enter **Gonzalez**.
19.	Click in the **Date of Birth** field.
20.	Enter the desired information into the **Date of Birth** field. For this example, enter **7/12/1975**.
21.	Click the **Look up Ethnic Group** button. 🔍
22.	Select the appropriate ethnicity. For this example, click the **LATINAMR** list item. LATINAMR
23.	If the individual identifies with more than one ethnic group, click the **Add a row** button.
24.	Select the appropriate **Military Status**, if known, or leave the field blank. Click the button to the right of the **Military Status** field.

Step	Action
25.	For this example, click the **I Am Not A Veteran** list item.  I Am Not A Veteran
26.	Select the **Highest Education Level**, if known, or accept the default of **A** (**Not Indicated**). Click the **Look up Highest Education Level** button. 🔍
27.	For this example, click the **I** (**I-Master's Level Degree**) list item.  I
28.	Click the scroll bar.
29.	Click the button to the right of the **Gender** field. ▾
30.	Select the appropriate **Gender**. For this example, click the **Male** list item.  Male
31.	Click the button to the right of the **Phone Type** field. ▾
32.	Select the appropriate **Phone Type**. For this example, click the **Mobile - Personal** list item.  Mobile - Personal
33.	Click in the **Telephone** field.
34.	Enter the desired information into the **Telephone** field. For this example, enter **5095143675**.
35.	A **Preferred** phone number must be identified by selecting the check box. Click the **Preferred** option. ☐
36.	Click the button to the right of the **Email Type** field. ▾
37.	Select the appropriate **Email Type**. For this example, click the **Home** list item.  Home

Step	Action
38.	Click in the **Email Address** field. 
39.	Enter the desired information into the **Email Address** field. For this example, enter **ggonzalez@gmail.com**.
40.	In the **National ID Type** field, accept the default of **PR** for Social Security Number (SSN).
41.	Every effort should be taken to include the SSN (**National ID**) before submitting the template. Leaving the **National ID** field blank has downstream impacts. For example, it impacts the employees ability to enroll in benefits plans (including retirement).
42.	Click in the **National ID** field. 
43.	Enter the Social Security number into the **National ID** field. For this example, enter **548264530**.
44.	Click in the **Address Line 1** field. 
45.	Enter the desired information into the **Address Line 1** field. For this example, enter **543 Juniper Dr**.
46.	Click in the **City** field. 
47.	Enter the desired information into the **City** field. For this example, enter **Riverside**.
48.	Click in the **State** field. 
49.	Enter the desired information into the **State** field. For this example, enter **CA**.
50.	Click in the **Postal Code** field. 
51.	Enter the desired information into the **Postal Code** field. For this example, enter **92501**.
52.	Click the scroll bar.
53.	If applicable, use the **UC External System ID** section to enter external system information to facilitate matching of IDs with IDM systems. If providing the information, you must enter values for all three fields. The **Business Unit** in this section must match the **Business Unit** associated with the **Position Number** you enter on the **Job Data** tab (the next tab).

Step	Action
54.	If the new hire has an existing tracker profile, then you can add their **Tracker Profile ID** and indicate whether their I-9 section 2 needs to be completed remotely. This information is copied to the employee's **Person Profile** component.
55.	Click in the **Tracker Profile ID** field. 
56.	Enter the desired information into the **Tracker Profile ID** field. For this example, enter **1234567**.
57.	Use the **Comments** field to enter specific details or an explanation regarding the transaction. For example, this field can be used to: - Enter details about a contract pay transaction, such as contract begin date and contract end date. - Indicate that the employee lives and works outside the US. For these employees, UCPC WFA Production will add the **NRA Working Outside the US** citizenship status on the **Identification Data** page. This field is referenced by UCPC WFA Production to assist with the processing of the transaction.
58.	Click the scroll bar.
59.	Click the **Job Data** tab. 
60.	Enter the position number or search for it using the look up. You only have access to position numbers within your business unit or related business unit. Click in the **Position Number** field. 
61.	Enter the desired information into the **Position Number** field. For this example, enter **40004376**.
62.	Press **[Tab]** to automatically populate the position-related fields.
63.	Click the scroll bar.
64.	For academic hires, the **Employee Classification** field automatically populates based on the job code and cannot be changed.
65.	In the **UC Job Data** section, enter or select the appropriate values as applicable.

Step	Action
66.	Some job codes have steps associated with them. When a **Step** is entered, UCPath automatically updates the **Job Compensation - Pay Components** fields and the compensation information cannot be changed. Some job codes do not have steps associated with them, in which case the **Job Compensation - Pay Components** fields must be manually entered. If the job has above scale component of pay, then step does not need to be selected. Enter applicable above scale comp rate codes in **Job Compensation- Pay Components** section. For contract-based pay hires, refer to the *Initiate Contract Pay Template Transaction* topic for specific steps on contract pay entries.
67.	For this example, the job code is associated with steps. Click the **Look up Step** button. 🔍
68.	Select the appropriate **Step**. For this example, click the **1** list item. 1
69.	The **Comp Rate Code**, **Compensation Rate** and **Compensation Frequency** fields are automatically populated based on the **Step** that was entered.
70.	You can add additional compensation rows by clicking the **add a row** (+) button. For example, if you need to add an offscale component.
71.	The payroll-related **Compensation Frequency** field automatically populates based on the job code. The payroll-related **Compensation Frequency** field automatically populates based on the job code. If the **Compensation Frequency** in the **Job Compensation - Pay Components** section is **A**, then the **Compensation Frequency** in the **Job Compensation - Payroll Currency and Frequency** section can be any of the following: **B**, **M**, **UC912**, **UC_10**, **UC_11**, **UC_12**, **UC_9M** or **UC_FY**. If the **Compensation Frequency** in the **Job Compensation - Pay Components** section is **H**, then the **Compensation Frequency** in the **Job Compensation - Payroll Currency and Frequency** section should be **H**. This field can be changed for specific exceptions, such as contract based pay or to change to an academic frequency. Any time this field is changed from the default enter a **Comment** (on the first tab) to explain why the field was changed.
72.	Click the scroll bar.

Step	Action
73.	If the employment is a short term assignment or temporary hire, enter the date the position ends in the **Expected Job End Date** field. An expected end date should be entered for all academic employee classes, <u>except</u>: **3** - Academic Recall **9** - Faculty **10** - Non-Faculty **11** - Academic Student **14** - Academic Contingent Worker **21** - Emeriti **22** - Deans/Faculty Administrators **23** - Post Docs
74.	If the **End Job Automatically** check box is selected the UCPath Center will run a process to terminate the employee as of the **Expected Job End Date**.
75.	Click the scroll bar.
76.	Click the **Earns Dist** tab. 
77.	In most cases, the **Job Earnings Distribution** section is automated. If the **Comp Rate** code entered on the **Job Data** tab has a mapped **Earnings Code**, the **Job Earnings Distribution** section is updated automatically.
78.	The **Job Earnings Distribution** section also can be used to manually enter distribution information. Use the **Earnings Distribution Type** field to enter distribution **By Amount** or **By Percent**. After the **Earnings Distribution Type** is selected, the **Aggregate Comp Rate** field is populated with the monthly amount. • If **By Amount** is selected, the total of all compensation rates entered must add up to the monthly comp rate. • If **By Percent** is selected, the total of all percentages entered must add up to 100%.
79.	For certain academic comp rate codes, such as Health Science Comp Plan, earnings codes are defaulted based on the **Comp Rate Code** entered on the **Job Data** tab. Also in those cases, earning distribution type is **By Amount** and amounts are automatically calculated.
80.	Click the **Addl Pay** tab. 

Step	Action
81.	There may be cases where an employee is paid a recurring flat amount. In these types of cases, the compensation section is not populated on the **Job Data** tab. Instead, the **Additional Pay** section is used. There may also be cases where neither compensation rate nor additional pay is entered. In those cases, it is recommended that you enter a comment to explain how the employee is to be paid. It is recommended not to use this template for one time additional pay. Instead, use payroll's one time payments page.
82.	In this example, you'll enter additional compensation details for the new hire. Click in the **Effective Date** field. 
83.	Enter the desired information into the **Effective Date** field. For this example, enter **11/1/2018**.
84.	Click the **Look up Earnings Code** button. 🔍
85.	Select the appropriate **Earnings Code**. For this example, click the **AFR** list item.  AFR
86.	Click in the **Earnings End Date** field. 
87.	Enter the desired information into the **Earnings End Date** field. For this example, enter **5/1/2019**.
88.	Click in the **Add'l Pay Amount** field.  0
89.	Enter the desired information into the **Add'l Pay Amount** field. For this example, enter **1000**.
90.	Click the **Person Profile** tab. 
91.	Use the **Person Profile** page to enter the employee's **Degrees**, **Oath Signature Date** and **Patent Acknowledgement** signature date. The information entered on this page is copied to the employee's **Person Profile** component after the template is processed by UCPC WFA Production.

Step	Action
92.	Enter the date the employee signed the UC oath agreement. This date cannot be later than today's date. Click in the **Oath Signature Date** field. 
93.	Enter the desired information into the **Oath Signature Date** field. For this example, enter **11/1/2018**.
94.	Enter the date on which the individual signed the UC patent acknowledgement. This date cannot be later than today's date. Click in the **Patent Acknowledgment Sign Dt** field. 
95.	Enter the desired information into the **Patent Acknowledgment Sign Dt** field. For this example, enter **11/1/2018**.
96.	Click the scroll bar.
97.	Use the **Supporting documents** link to attach supporting documents for the new hire. Click the **Supporting documents** link. 
98.	Click the **Upload** button. 
99.	Click the **Browse...** button. 
100.	Select the appropriate document to attach. For this example, double-click the **Approval for Addl Pay** list item. 
101.	Click the **Upload** button. 
102.	You also can view and delete the attachments from this page.
103.	Click the **OK** button. 

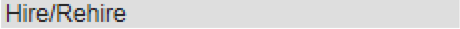
Step	Action
104.	Enter comments for the Approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not appear on the employee's record after the transaction is processed to completion. You can enter **Initiator Comments** on any of the tabs within this template.
105.	The **Save and Submit** button is not available until all required fields on each tab are completed. Click the **Save and Submit** button.  Save and Submit
106.	Click the **OK** button.  OK
107.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
108.	You have initiated a full hire template transaction for an academic employee. **End of Procedure.**

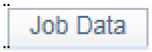
Clone Template Transaction

Use this task to clone a template transaction that has been cancelled.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Transaction Status**

Step	Action
1.	Use the **Template Status** page to search for cancelled template transactions that you can clone, update and resubmit for processing. Template transactions must have a **Transaction Status** of **Cancel** to be cloned.
2.	You can narrow the search by the **HR Review Status**. Click the button to the right of the **HR Review Status** field. 
3.	Click the **Cancelled** list item.  Cancelled

Step	Action
4.	You can also narrow the list by the transaction type. Click the button to the right of the **Transaction Type** field. 
5.	For this example, click the **Hire/Rehire** list item. 
6.	The **Start Date From** field defaults a date that is 10 days prior to the current date. The **Start Date To** field defaults a date that is 10 days after the current date. The **Effective Date** of the transaction you are searching for must fall within these dates.
7.	Click the **Refresh** button. 
8.	The template transactions that meet the search criteria appear. The **Clone** button is available only for transactions with a **Transaction Status** of **Cancel**.
9.	Click the scroll bar.
10.	UCPC WFA Production enters an explanation for a template transaction that they cancel. To view the comment, click the **View Comments** link. 
11.	Review the comment. This is helpful information for correcting the template transaction or identifying the supporting documentation that is needed.
12.	Click the **Return** button. 
13.	Click the scroll bar.
14.	Use the **Clone** button to copy the existing template information into a new template. For this example, clone the concurrent hire (academic) template for **Estela Hintgen**. Click the **Clone** button. 
15.	After the template transaction is cloned, the **Clone** button is no longer available.
16.	Click the scroll bar.

Step	Action
17.	To access the cloned template navigate to the **Smart HR Transactions** page. Click the **Smart HR Transactions** link.  Smart HR Transactions
18.	The cloned template appears in the **Transactions in Progress** section. Click the **Name** link to open the template and update as needed. For this example, click the **Hintgen,Estela Martin** link.  Hintgen,Estela Martin
19.	Update the fields on the **Enter Transaction Details** page as needed. For this example, the **Effective Date** must be updated.
20.	Click in the **Effective Date** field.  10/01/2018
21.	Enter the desired information into the **Effective Date** field. For this example, enter **11/1/2018**.
22.	Click the **Continue** button.  Continue
23.	Click the **OK** button.  OK
24.	Update the employee's **Personal Data** as needed.
25.	Click the scroll bar.
26.	Click in the **Comments** field.
27.	Enter the desired information into the **Comments** field. For this example, enter **Resubmit cancelled transaction with correct hire date of 11/1/18.**.
28.	Click the scroll bar.
29.	Click the **Job Data** tab.  Job Data
30.	Update the employee's **Job Data** as needed.
31.	Click the scroll bar.
32.	Click the scroll bar.
33.	Click the **Earns Dist** tab.  Earns Dist
34.	Update the employee's **Job Earnings Distribution** information as needed.

Step	Action
35.	Click the **Addl Pay** tab. 
36.	Update the employee's **Additional Pay** information as needed.
37.	Use the **Supporting Documents** link to add attachments as needed.
38.	Click the **Save and Submit** button. 
39.	Click the **OK** button. 
40.	You have cloned a template transaction that has been cancelled or denied. **End of Procedure.**

Update Person Profile Information

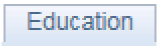
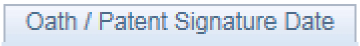
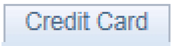
Use this task to update person profile information.

Navigation: PeopleSoft Menu > Workforce Development > Profile Management > Profiles > **Person Profiles**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **Person Profiles** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10055983**.
4.	Click the **Search** button. 

Step	Action
5.	The **Person Profile** page appears for the selected employee. There are several tabs available where you can update various types of information. For this example, the following updates are made: • Add a license • Add I-9 tracker information
6.	Click the **Add New Licenses and Certifications** button. ⊞
7.	Use this page to add various types of licenses and certifications.
8.	The **Issue Date** defaults to the system date (today's date). Enter the date when the employee acquired the license or certificate.
9.	Click in the **Issue Date** field. 10/10/2018
10.	Enter the desired information into the **Issue Date** field. For this example, enter **9/1/18**.
11.	Click the **Look up License** button. 🔍
12.	Search for and select the appropriate license. For this example, click the scroll bar.
13.	For this example, click the **BLS** link. BLS
14.	Complete the remaining fields as applicable.
15.	Click in the **Country** field. 
16.	Enter the desired information into the **Country** field. For this example, enter **USA**.
17.	Click in the **State** field. 
18.	Enter the desired information into the **State** field. For this example, enter **CA**.
19.	Click the **License Verified** option. ☐
20.	Click in the **Expiration Date** field. 
21.	Enter the desired information into the **Expiration Date** field. For this example, enter **10/1/19**.

Step	Action
22.	When you are finished entering data, click the **OK** button. 
23.	The license appears in the **Licenses and Certification** section.
24.	Click the **Education** tab. 
25.	The **Education** page displays an employee's degree and UC specialty code details. Use this page to update existing degree information or add a new degree.
26.	Click the **Oath / Patent Signature Date** tab. 
27.	View or update **Oath Signature Date**, **Patent Acknowledgment Date** or **Patent Amendment Date** information as needed. This information is mandatory. Employees are not granted access to the UC system without updated information.
28.	Click the **Multi-Location Appointments** tab. 
29.	The **Multi-Location Appointments** page is an option for Locations to track MLAs (it is not required to use this page). This page can be used to identify employees who have multiple and concurrent work assignments. The host location is responsible for maintaining this information. View or update the **Multi-Location Appointments** information as needed.
30.	Click the **UC Student Status** tab. 
31.	The **UC Student Status** page identifies employees that are also UC students. View or update **UC Student Status** information as needed.
32.	Click the **Scroll Tabs Right** button to view the remaining tabs. ▶
33.	Click the **Credit Card** tab. 
34.	View or update **UC Corporate Credit Card** information as needed.
35.	Click the **Employment Verification** tab. 
36.	View or update **Student Opt-In** or **Non-Student Opt-Out** information as needed.

Step	Action
37.	Click the **UC I-9 Information** tab. 
38.	If the employee has an existing tracker profile, you can add their information on this page.
39.	Click the **Add New UC I-9 Information** button. ⊞
40.	Click in the **Tracker Profile ID** field. 
41.	Enter the desired information into the **Tracker Profile ID** field. For this example, enter **5644522**.
42.	If the employee's I-9 section 2 needs to be completed remotely, click the **Remote I-9 Section 2** check box.
43.	Click the **OK** button. 
44.	When you are finished updating the person's profile information, click the **Save** button. 
45.	
46.	You have updated person profile information. **End of Procedure.**

Initiate Concurrent Hire Template Transaction (Staff)

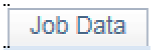
Use this task to initiate a concurrent hire template transaction for a staff employee.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to initiate a concurrent hire template transaction.

Step	Action
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC. 🔍
3.	Select the appropriate concurrent hire template. Notice there are two concurrent hire templates, one for staff and one for academic. Click the **UC_CONC_HIRE** list item. UC_CONC_HIRE
4.	Click in the **Effective Date** field.
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field. For this example, enter **11/1/18**.
6.	Click the **Create Transaction** button. Create Transaction
7.	In the **Employee ID** field, enter the employee's ID number or use the lookup to search for and select it. Click in the **Employee ID** field.
8.	Enter the desired information into the **Employee ID** field. For this example, enter **10087236**.
9.	The **Effective Date** is populated based on your entry on the previous page. Ensure that you entered the correct **Effective Date**.
10.	Click the button to the right of the **Reason Code** field. ⌄
11.	Select the appropriate **Reason Code**. For this example, click the **Concurrent Hire - Dual Empl** list item. Concurrent Hire - Dual Empl
12.	In the **Address Format** field, accept the default of **United States** or select the **Global** option, if applicable.
13.	Click the **Continue** button. Continue

Step	Action
14.	UCPath displays a message indicating the individual already exists in the system. Verify that the displayed employee ID and name correspond with the individual you are hiring into a concurrent job. Click the **OK** button. 
15.	The concurrent hire template appears. Four tabs are available on this template: **Personal Data**, **Job Data**, **Earns Dist** and **Addl Pay**. The employee's personal data automatically populates from the employee's existing personal data information. If a change is required for personal data, it should be submitted using Employee Self Service or the **Personal Data Change Template**.
16.	Header details appear above the tabs. You can show/hide the header information as needed.
17.	Click the scroll bar.
18.	Use the **Comments** field to enter specific details or an explanation regarding the transaction. For example, this field can be used to indicate that the employee lives and works outside the US. For these employees, UCPC WFA Production will add the **NRA Working Outside the US** citizenship status on the **Identification Data** page. This field is referenced by UCPC WFA Production to assist with the processing of the transaction.
19.	Click the scroll bar.
20.	Click the **Job Data** tab. 
21.	Enter the position number of the concurrent job or search for it using the look up. You only have access to position numbers within your business unit or related business unit. Click in the **Position Number** field. 
22.	Enter the desired information into the **Position Number** field. For this example, enter **40123130**.
23.	Press **[Tab]** to automatically populate the position-related fields.
24.	Click the scroll bar.
25.	For staff hires, the **Employee Classification** field must be entered. Click the **Look up Employee Classification** button. 🔍

Step	Action
26.	Select the appropriate **Employee Classification**. For this example, click the **5** (**Student: Casual/Restricted**) list item. 5
27.	In the **UC Job Data** section, enter or select the appropriate values as applicable. The **Probation Code** field is required if: • the **Classified/Unclassified Ind** field is **Professional and Support Staff**, and • the **Employee Class** is **Career** or **Partial Year Career**. The **Probation Date** field is required if the **Probation Code** field value is something other than **Completed** or **Probation Completed, Other Job**.
28.	Some job codes have steps associated with them. When a **Step** is entered, UCPath automatically updates the **Job Compensation - Pay Components** fields and the compensation information cannot be changed. Some job codes do not have steps associated with them, in which case the **Job Compensation - Pay Components** fields must be manually entered. If the job has above scale component of pay, then step does not need to be selected. Enter applicable above scale comp rate codes in the **Job Compensation - Pay Components** section.
29.	Click the scroll bar.
30.	For this example, the job code is not associated with steps so the compensation fields must be entered manually. Click the **Look up Comp Rate Code** button. 🔍
31.	Select the appropriate **Comp Rate Code** value. For this example, select the **UCHRLY** list item. UCHRLY
32.	Click in the **Compensation Rate** field. 
33.	Enter the desired information into the **Compensation Rate** field. For this example, enter **13.25**.

Step	Action
34.	If the employment is a short term assignment or temporary hire, enter the date the position ends in the **Expected Job End Date** field. Non-Academic employees are automatically terminated in UCPath on this date. An **Expected Job End Date** is required for following employee classes: **1** - Contract **4** - Limited **5** - Casual/Restricted **6** - Per Diem (If applicable) **8** - Floater **15** - Staff - Rehired Retiree
35.	Click in the **Expected Job End Date** field. 
36.	Enter the desired information into the **Expected Job End Date** field. For this example, enter **6/30/19**.
37.	The payroll-related **Compensation Frequency** field automatically populates based on the job code. This field defines how the total compensation is paid out to the employee per paycheck.
38.	Click the scroll bar.
39.	Click the **Earns Dist** tab. 
40.	In most cases, the **Job Earnings Distribution** section is automated. If the **Comp Rate** code entered on the **Job Data** tab has a mapped **Earnings Code**, the **Job Earnings Distribution** section is updated automatically.
41.	The **Job Earnings Distribution** section also can be used to manually enter distribution information. Use the **Earnings Distribution Type** field to enter distribution **By Amount** or **By Percent**. After the **Earnings Distribution Type** is selected, the **Aggregate Comp Rate** field is populated with the monthly amount. - If **By Amount** is selected, the total of all compensation rates entered must add up to the monthly comp rate. - If **By Percent** is selected, the total of all percentages entered must add up to 100%.
42.	Click the **Addl Pay** tab. 

Step	Action
43.	There may be cases where an employee is paid a recurring flat amount. In this case, the compensation section is not populated on the **Job Data** tab. Instead, the **Additional Pay** section is used. There also may be cases where neither compensation rate nor additional pay is entered. In those cases, it is recommended that you enter a comment that explains how the employee will be paid. It is recommended not to use this template for one time additional pay. Instead, use payroll's one time payments page.
44.	Use the **Supporting documents** link to attach supporting documents for the concurrent hire.
45.	Enter comments for the Approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not appear on the employee's record after the transaction is processed to completion. You can enter **Initiator Comments** on any of the tabs within this template.
46.	The **Save and Submit** button is not available until all required fields on each tab are completed. Click the **Save and Submit** button. Save and Submit
47.	Click the **Save and Submit** button. Save and Submit
48.	Click the **OK** button. OK
49.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
50.	You have initiated a concurrent hire template transaction. **End of Procedure.**

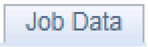
Initiate Concurrent Hire Template Transaction (Acad)

Use this task to initiate a concurrent hire template transaction for an academic employee.

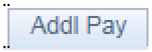
Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to initiate a concurrent hire template transaction.
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC. 🔍
3.	Select the appropriate concurrent hire template. Notice there are two concurrent hire templates, one for staff and one for academic. Click the **UC_CONC_HIRE_AC** list item. UC_CONC_HIRE_AC
4.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Click in the **Effective Date** field.
5.	Enter the desired information into the **Effective Date** field. For this example, enter **11/1/18**.
6.	Click the **Create Transaction** button. Create Transaction
7.	In the **Employee ID** field, enter the employee's ID number or use the lookup to search for and select it. Click in the **Employee ID** field.
8.	Enter the desired information into the **Employee ID** field. For this example, enter **10000008**.
9.	The **Effective Date** is populated based on your entry on the previous page. Ensure that you entered the correct **Effective Date**.
10.	Click the button to the right of the **Reason Code** field. ⌄
11.	Click the **Academic Concurrent Hire** list item. Academic Concurrent Hire
12.	In the **Address Format** field, accept the default of **United States** or select the **Global** option, if applicable.

Step	Action
13.	Click the **Continue** button. 
14.	UCPath displays a message indicating the individual already exists in the system. Verify that the displayed employee ID and name correspond with the individual you are hiring into a concurrent job. Click the **OK** button. 
15.	The concurrent hire template appears. Four tabs are available on this template: **Personal Data**, **Job Data**, **Earns Dist** and **Addl Pay**. The employee's personal data automatically populates from the employee's existing personal data information. If a change is required for personal data, it should be submitted using Employee Self Service or the **Personal Data Change Template**.
16.	Header details appear above the tabs. You can show/hide the header information as needed.
17.	Click the scroll bar.
18.	Use the **Comments** field to enter specific details or an explanation regarding the transaction. For example, this field can be used to: - Enter details about a contract pay transaction, such as contract begin date and contract end date. - Indicate that the employee lives and works outside the US. For these employees, UCPC WFA Production will add the **NRA Working Outside the US** citizenship status on the **Identification Data** page. This field is referenced by UCPC WFA Production to assist with the processing of the transaction.
19.	Click the scroll bar.
20.	Click the **Job Data** tab. 
21.	Enter the position number of the concurrent job or search for it using the look up. You only have access to position numbers within your business unit or related business unit. Click in the **Position Number** field. 
22.	Enter the desired information into the **Position Number** field. For this example, enter **40004677**.
23.	Press **[Tab]** to automatically populate the position-related fields.

Step	Action
24.	Click the scroll bar.
25.	For academic hires, the **Employee Classification** field automatically populates based on the job code and cannot be changed.
26.	In the **UC Job Data** section, enter or select the appropriate values as applicable.
27.	Some job codes have steps associated with them. When a **Step** is entered, UCPath automatically updates the **Job Compensation - Pay Components** fields and the compensation information cannot be changed. Some job codes do not have steps associated with them, in which case the **Job Compensation - Pay Components** fields must be manually entered. If the job has above scale component of pay, then step does not need to be selected. Enter applicable above scale comp rate codes in the **Job Compensation - Pay Components** section. For contract-based pay hires, refer to the *Initiate Contract Pay Template Transaction* simulation for specific steps on contract pay entries.
28.	For this example, the job code is associated with steps. Click the **Look up Step** button. 🔍
29.	Select the appropriate **Step**. For this example, click the **1** list item. 1
30.	The **Comp Rate Code**, **Compensation Rate** and **Compensation Frequency** fields are automatically populated based on the **Step** that was entered.
31.	The payroll-related **Compensation Frequency** field automatically populates based on the job code. This field defines how the total compensation is paid out to the employee per paycheck. This field is changed only for specific exceptions, such as contract based pay. Any time this field is changed from the default enter a **Comment** (on the first tab) to explain why the field was changed.
32.	Click the scroll bar.

Step	Action
33.	If the employment is a short term assignment or temporary hire, enter the date the position ends in the **Expected Job End Date** field. An expected end date should be entered for all academic employee classes, except: **3** - Academic Recall **9** - Faculty **10** - Non-Faculty **11** - Academic Student **14** - Academic Contingent Worker **21** - Emeriti **22** - Deans/Faculty Administrators **23** - Post Docs
34.	Click in the **Expected Job End Date** field. 
35.	Enter the desired information into the **Expected Job End Date** field. For this example, enter **6/30/20**.
36.	If you select the **End Job Automatically** check box, the UCPath Center runs a process to terminate the employee as of the **Expected Job End Date**.
37.	Click the scroll bar.
38.	Click the **Earns Dist** tab. 
39.	In most cases, the **Job Earnings Distribution** section is automated. If the **Comp Rate** code entered on the **Job Data** tab has a mapped **Earnings Code**, the **Job Earnings Distribution** section is updated automatically.
40.	The **Job Earnings Distribution** section also can be used to manually enter distribution information. Use the **Earnings Distribution Type** field to enter distribution **By Amount** or **By Percent**. After the **Earnings Distribution Type** is selected, the **Aggregate Comp Rate** field is populated with the monthly amount. - If **By Amount** is selected, the total of all compensation rates entered must add up to the monthly comp rate. - If **By Percent** is selected, the total of all percentages entered must add up to 100%.
41.	For certain academic comp rate codes, such as Health Science Comp Plan, earnings codes are defaulted based on the **Comp Rate Code** entered in **Job Compensation - Pay Components** section. Also, in those cases, earning distribution type is **By Amount** and amounts are automatically calculated.
42.	Click the **Addl Pay** tab. 

Step	Action
43.	There may be cases where an employee is paid a recurring flat amount. In this case, the compensation section is not populated on the **Job Data** tab. Instead, the **Additional Pay** section is used. There also may be cases where neither compensation rate nor additional pay is entered. In those cases, it is recommended that you enter a comment that explains how the employee will be paid. It is recommended not to use this template for one time additional pay. Instead, use payroll's one time payments page.
44.	Use the **Supporting documents** link to attach supporting documents for the concurrent hire.
45.	Enter comments for the Approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not appear on the employee's record after the transaction is processed to completion. You can enter **Initiator Comments** on any of the tabs within this template.
46.	The **Save and Submit** button is not available until all required fields on each tab are completed. Click the **Save and Submit** button. 
47.	Click the **OK** button. 
48.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
49.	You have initiated a concurrent hire template transaction for an academic employee. **End of Procedure.**

Initiate Rehire Template Transaction (Staff)

Use this task to initiate a rehire template transaction for a staff employee.

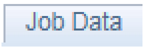
Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

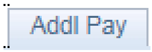
Step	Action
1.	Use the **Smart HR Transactions** page to initiate a rehire template transaction.

Step	Action
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC. 🔍
3.	Select the appropriate rehire template. Notice there are two rehire templates, one for staff and one for academic employees. Click the **UC_REHIRE** list item. UC_REHIRE
4.	Click in the **Effective Date** field.
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field. For this example, enter **11/1/18**.
6.	Click the **Create Transaction** button. Create Transaction
7.	In the **Employee ID** field, enter the employee’s ID number or use the lookup to search for and select it. You have access to employee records only within your business unit. Click in the **Employee ID** field.
8.	Enter the desired information into the **Employee ID** field. For this example, enter **10000023**.
9.	The **Effective Date** is populated based on your entry on the previous page. Ensure that you entered the correct date on which employment begins.
10.	Click the button to the right of the **Reason Code** field. ⌄
11.	Select the appropriate **Reason Code**. It is important to select an accurate reason as it may impact the employee’s benefits. For this example, click the **Rehire, < 120 days break** list item. Rehire, < 120 days break
12.	In the **Address Format** field, accept the default of **United States** or select the **Global** option, if applicable.

Step	Action
13.	Click the **Continue** button. Continue
14.	UCPath displays a message indicating the individual already exists in the system. Verify that the displayed employee ID and name correspond with the individual you are rehiring. Click the **OK** button. OK
15.	The rehire template appears. Five tabs are available on this template: **Personal Data**, **Job Data**, **Earns Dist**, **Addl Pay** and **Employee Experience**.
16.	Header details appear above the tabs. You can show/hide the header information as needed.
17.	The employee's personal data automatically populates from the employee's existing personal data information. The **Diversity - United States**, **Personal Phone Number** and **Person Email Address** sections do not display the employee's existing data. You must enter the information for these sections as necessary. Any new information entered in these sections will override the employee's existing personal data information.
18.	Click the scroll bar.
19.	Click the button to the right of the **Phone Type** field. ⌄
20.	For this example, click the **Mobile - Personal** list item. Mobile - Personal
21.	Click in the **Telephone** field.
22.	Enter the desired information into the **Telephone** field. For this example, enter **5904531313**.
23.	Click the **Preferred** option. ☐
24.	Click the button to the right of the **Email Type** field. ⌄
25.	For this example, click the **Home** list item. Home
26.	Click in the **Email Address** field.

Step	Action
27.	Enter the desired information into the **Email Address** field. For this example, enter **mmarci@gmail.com**.
28.	Confirm that the **National ID** field is populated with the employee's Social Security Number (SSN). If it is blank, every effort should be taken to include the SSN before submitting the template. Leaving the **National ID** field blank has downstream impacts.
29.	Click the scroll bar.
30.	If the rehire has an existing tracker profile, then you can add their **Tracker Profile ID** and indicate whether their I-9 section 2 was completed.
31.	If applicable, use the **UC External System ID** section to enter external system information to facilitate matching of IDs with IDM systems. You must enter values for all three fields in this section. The **Business Unit** in this section must match the **Business Unit** associated with the **Position Number** you enter on the **Job Data** tab (the next tab).
32.	Use the **Comments** field to enter specific details or an explanation regarding the transaction. For example, this field can be used to indicate that the employee lives and works outside the US. For these employees, UCPC WFA Production will add the **NRA Working Outside the US** citizenship status on the **Identification Data** page. This field is referenced by UCPC WFA Production to assist with the processing of the transaction.
33.	Click the scroll bar.
34.	Click the **Job Data** tab. 
35.	Enter the position number or search for it using the look up. You have access only to position numbers within your business unit or related business unit. Click in the **Position Number** field.
36.	Enter the desired information into the **Position Number** field. For this example, enter **40004853**.
37.	Press **[Tab]** to automatically populate the position-related fields.
38.	Enter **UC Employee Review** information, if applicable.
39.	Click the scroll bar.
40.	For staff hires, you must enter an **Employee Classification** value. Click the **Look up Employee Classification** button.

Step	Action
41.	Select the appropriate **Employee Classification**. For this example, click the **2** list item. 2
42.	In the **UC Job Data** section, enter or select the appropriate values as applicable. The **Probation Code** field is required if: • the **Classified/Unclassified Ind** field is **Professional and Support Staff**, and • the **Employee Class** is **Career** or **Partial Year Career**. The **Probation Date** field is required if the **Probation Code** field value is something other than **Completed** or **Probation Completed, Other Job**.
43.	Click the button to the right of the **Probation Code** field. ▾
44.	For this example, click the **Probation Completed** list item.  Probation Completed
45.	Click in the **Probation End Date** field.
46.	Enter the desired information into the **Probation End Date** field. For this example, enter **5/1/17**.
47.	Click the scroll bar.
48.	Some job codes have steps associated with them. When a **Step** is entered, UCPath automatically updates the **Job Compensation - Pay Components** fields and the compensation information cannot be changed. Some job codes do not have steps associated with them, in which case the **Job Compensation - Pay Components** fields must be manually entered. If the job has above scale component of pay, then step does not need to be selected. Enter applicable above scale comp rate codes in the **Job Compensation- Pay Components** section.
49.	For this example, the job code is not associated with steps so the compensation fields must be entered manually. Click the **Look up Comp Rate Code** button. 🔍
50.	Select the appropriate **Comp Rate Code**. For this example, click the **UCANNL** link. UCANNL

Step	Action
51.	Click in the **Compensation Rate** field. 
52.	Enter the desired information into the **Compensation Rate** field. For this example, enter **76000**.
53.	If the employment is a short term assignment or temporary hire, enter the date the position ends in the **Expected Job End Date** field. Non-Academic employees are automatically terminated in UCPath on this date. An expected end date is required for following employee classes: • Staff: Contract • Staff: Floater • Staff: Rehired Retiree • Academic: Post Docs • Academic: Recall • Academic: Academic Student • Student: Casual/Restricted
54.	The payroll-related **Compensation Frequency** field automatically populates based on the job code. This field defines how the total compensation is paid out to the employee per paycheck.
55.	Click the scroll bar.
56.	Click the scroll bar.
57.	Click the **Earns Dist** tab. 
58.	In most cases, the **Job Earnings Distribution** section is automated. If the **Comp Rate** code entered on the **Job Data** tab has a mapped **Earnings Code**, the **Job Earnings Distribution** section is updated automatically.
59.	The **Job Earnings Distribution** section also can be used to manually enter distribution information. Use the **Earnings Distribution Type** field to enter distribution **By Amount** or **By Percent**. After the **Earnings Distribution Type** is selected, the **Aggregate Comp Rate** field is populated with the monthly amount. - If **By Amount** is selected, the total of all compensation rates entered must add up to the monthly comp rate. - If **By Percent** is selected, the total of all percentages entered must add up to 100%.
60.	Click the **Addl Pay** tab. 

Step	Action
61.	There may be cases where an employee is paid a recurring flat amount. In this case, the compensation section is not populated on the **Job Data** tab. Instead, the **Additional Pay** section is used. There may also be cases where neither compensation rate nor additional pay is entered. In those cases, it is recommended that you enter a comment to explain how the employee is to be paid. It is recommended not to use this template for one time additional pay. Instead, use payroll's one time payments page.
62.	Click the **Employee Experience** tab. 
63.	For represented staff, use the fields on this page to enter data related to the employee's prior work experience. Having this information is helpful in determining new compensation rates for the employee who is being rehired. After the template is processed by UCPC WFA Production, the information is populated to fields within the **Person Profile** component.
64.	Use the **Supporting documents** link to attach supporting documents for the rehire.
65.	Enter comments for the Approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not appear on the employee’s record after the transaction is processed to completion. You can enter **Initiator Comments** on any of the tabs within this template.
66.	The **Save and Submit** button is not available until all required fields on each tab are completed. Click the **Save and Submit** button. 
67.	Review the rehire warning message, which indicates this employee's record already exists in UCPath.
68.	If the employee has only one inactive employee record within your business unit, then that number is defaulted. If the employee has more than one inactive employee record within your business unit, then the lowest number defaults. If needed, select the record to add rehire action. For this example, accept the default.
69.	Click the **Save and Submit** button. 
70.	Click the **OK** button. 

Step	Action
71.	You have initiated a rehire template transaction for a staff employee. **End of Procedure.**

Initiate Rehire Template Transaction (Acad)

Use this task to initiate a rehire template transaction for an academic employee.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

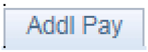
Step	Action
1.	Use the **Smart HR Transactions** page to initiate a rehire template transaction.
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC. 🔍
3.	Select the appropriate rehire template. Notice there are two rehire templates, one for staff and one for academic employees. Click the **UC_REHIRE_AC** list item. 
4.	Click in the **Effective Date** field. 
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field. For this example, enter **11/1/18**.
6.	Click the **Create Transaction** button. 

Step	Action
7.	In the **Employee ID** field, enter the employee's ID number or use the lookup to search for and select it. You have access to employee records only within your business unit. Click in the **Employee ID** field. 
8.	Enter the desired information into the **Employee ID** field. For this example, enter **10000098**.
9.	The **Effective Date** is populated based on your entry on the previous page. Ensure that you entered the correct date on which employment begins.
10.	Click the button to the right of the **Reason Code** field. 
11.	Select the appropriate **Reason Code**. It is important to select an accurate reason as it may impact the employee's benefits. For this example, click the **Rehire, > or = 120 days break** list item. 
12.	Click the **Continue** button. 
13.	UCPath displays a message indicating the individual already exists in the system. Verify that the displayed employee ID and name correspond with the individual you are rehiring. Click the **OK** button. 
14.	The rehire template appears. Five tabs are available on this template: **Personal Data**, **Job Data**, **Earns Dist**, **Addl Pay** and **Person Profile**.
15.	Header details appear above the tabs. You can show/hide the header information as needed.
16.	The employee's personal data automatically populates from the employee's existing personal data information. The **Diversity - United States**, **Personal Phone Number** and **Person Email Address** sections do not display the employee's existing data. You must enter the information for these sections as necessary. Any new information entered in these sections will override the employee's existing personal data information.
17.	Click the scroll bar.
18.	Click the button to the right of the **Phone Type** field. 

Step	Action
19.	For this example, click the **Mobile - Personal** list item.  Mobile - Personal
20.	Click in the **Telephone** field. 
21.	Enter the desired information into the **Telephone** field. For this example, enter **5097685766**.
22.	Click the **Preferred** option. 
23.	Click the button to the right of the **Email Type** field. 
24.	For this example, click the **Home** list item.  Home
25.	Click in the **Email Address** field. 
26.	Enter the desired information into the **Email Address** field. For this example, enter **randy@gmail.com**.
27.	Confirm that the **National ID** field is populated with the employee's Social Security Number (SSN). If it is blank, every effort should be taken to include the SSN before submitting the template. Leaving the **National ID** field blank has downstream impacts.
28.	Click the scroll bar.
29.	If the rehire has an existing tracker profile, then you can add their **Tracker Profile ID** and indicate whether their I-9 section 2 was completed.
30.	If applicable, use the **UC External System ID** section to enter external system information to facilitate matching of IDs with IDM systems. You must enter values for all three fields in this section. The **Business Unit** in this section must match the **Business Unit** associated with the **Position Number** you enter on the **Job Data** tab (the next tab).
31.	Use the **Comments** field to enter specific details or an explanation regarding the transaction. For example, this field can be used to: - Enter details about a contract pay transaction, such as contract begin date and contract end date. - Indicate that the employee lives and works outside the US. For these employees, UCPC WFA Production will add the **NRA Working Outside the US** citizenship status on the **Identification Data** page. This field is referenced by UCPC WFA Production to assist with the processing of the transaction.

Step	Action
32.	Click the scroll bar.
33.	Click the **Job Data** tab. Job Data
34.	Enter the position number or search for it using the look up. You have access only to position numbers within your business unit or related business unit. Click in the **Position Number** field.
35.	Enter the desired information into the **Position Number** field. For this example, enter **40004647**.
36.	Press **[Tab]** to automatically populate the position-related fields.
37.	Click the scroll bar.
38.	For academic hires, the **Employee Classification** field automatically populates based on the job code and cannot be changed.
39.	In the **UC Job Data** section, enter or select the appropriate values as applicable.
40.	Some job codes have steps associated with them. When a **Step** is entered, UCPath automatically updates the **Job Compensation - Pay Components** fields and the compensation information cannot be changed. Some job codes do not have steps associated with them, in which case the **Job Compensation - Pay Components** fields must be manually entered. If the job has above scale component of pay, then step does not need to be selected. Enter applicable above scale comp rate codes in **Job Compensation- Pay Components** section. For contract-based pay hires, refer to the *Initiate Contract Pay Template Transaction* simulation for specific steps on contract pay entries.
41.	For this example, the job code is associated with steps. Click the **Look up Step** button. 🔍
42.	Select the appropriate Step. For this example, click the **1** list item. 1

Step	Action
43.	The **Comp Rate Code**, **Compensation Rate** and **Compensation Frequency** fields are automatically populated based on the **Step** that was entered. If necessary, you can enter additional pay components, if the employee has multiple components of pay (MCOP). Certain employees have MCOP because they have either an off-scale or negotiated/incentive component.
44.	If the employment is a short term assignment or temporary hire, enter the date the position ends in the **Expected Job End Date** field. An **Expected Job End Date** should be entered for all academic employee classes, <u>except</u>: **3 -** Academic Recall **9 -** Faculty **10 -** Non-Faculty **11 -** Academic Student **14 -** Academic Contingent Worker **21 -** Emeriti **22 -** Deans/Faculty Administrators **23 -** Post Docs
45.	The payroll-related **Compensation Frequency** field automatically populates based on the job code. This field defines how the total compensation is paid out to the employee per paycheck. This field can be changed for specific exceptions, such as contract based pay or to change to an academic frequency. Any time this field is changed from the default enter a **Comment** (on the first tab) to explain why the field was changed.
46.	Click the scroll bar.
47.	Click the **Earns Dist** tab. 
48.	In most cases, the **Job Earnings Distribution** section is automated. If the **Comp Rate** code entered on the **Job Data** tab has a mapped **Earnings Code**, the **Job Earnings Distribution** section is updated automatically.
49.	The **Job Earnings Distribution** section also can be used to manually enter distribution information. Use the **Earnings Distribution Type** field to enter distribution **By Amount** or **By Percent**. After the **Earnings Distribution Type** is selected, the **Aggregate Comp Rate** field is populated with the monthly amount. **-** If **By Amount** is selected, the total of all compensation rates entered must add up to the monthly comp rate. **-** If **By Percent** is selected, the total of all percentages entered must add up to 100%.
50.	For certain academic comp rate codes, such as Health Science Comp Plan, earnings codes are defaulted based on the **Comp Rate Code** entered in the **Job Compensation - Pay Components** section. Also in those cases, the earning distribution type is **By Amount** and amounts are automatically calculated.

Step	Action
51.	Click the **Addl Pay** tab. 
52.	There may be cases where an employee is paid a recurring flat amount. In this case, the compensation section is not populated on the **Job Data** tab. Instead, the **Additional Pay** section is used. There may also be cases where neither compensation rate nor additional pay is entered. In those cases, it is recommended that you enter a comment to explain how the employee is to be paid. It is recommended not to use this template for one time additional pay. Instead, use payroll's one time payments page.
53.	Click the **Person Profile** tab. 
54.	Use the **Person Profile** page to enter the employee's **Degrees**, **Oath Signature Date** and **Patent Acknowledgement** signature date. If the degree is unknown at this time: • In the **Effective Date** field enter the effective date of the hire. • In the **Degree** field, enter or select **UNKNOWN**.
55.	Click the scroll bar.
56.	Enter the date the employee signed the UC oath agreement. This date cannot be later than today's date. Click in the **Oath Signature Date** field. 
57.	Enter the desired information into the **Oath Signature Date** field. For this example, enter **11/1/18**.
58.	Enter the date on which the individual signed the UC patent acknowledgement. This date cannot be later than today's date. Click in the **Patent Acknowledgment Sign Dt** field. 
59.	Enter the desired information into the **Patent Acknowledgment Sign Dt** field. For this example, enter **11/1/18**.
60.	For post docs, use the fields in the **Employee Experience** section to enter data related to the employee's prior work experience. Having this information is helpful in determining new compensation rates for the employee who is being rehired.
61.	Use the **Supporting documents** link to attach supporting documents for the rehire.

Step	Action
62.	Enter comments for the Approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not appear on the employee's record after the transaction is processed to completion. You can enter **Initiator Comments** on any of the tabs within this template.
63.	The **Save and Submit** button is not available until all required fields on each tab are completed. Click the **Save and Submit** button. 
64.	Review the rehire warning message, which indicates this employee's record already exists in UCPath.
65.	If the employee has only one inactive employee record within your business unit, then that number is defaulted. If the employee has more than one inactive employee record within your business unit, then the lowest number defaults. If needed, select the record to add rehire action. For this example, accept the default.
66.	Click the **Save and Submit** button. 
67.	Click the **OK** button. 
68.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
69.	You have initiated a rehire template transaction for an academic employee. **End of Procedure.**

Initiate Reinstatement Template Transaction (Staff)

Use this task to initiate a reinstatement template transaction for a staff employee.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to initiate a reinstatement template transaction.

Step	Action
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC. 🔍
3.	Select the appropriate reinstatement template. Notice there are two reinstatement templates, one for staff and one for academic employees. Click the **UC_REHIRE_REI** link. UC_REHIRE_REI
4.	The **Effective Date** of the reinstatement must be the same date as the **Effective Date** of the termination to ensure there is not gap in service.
5.	Click in the **Effective Date** field.
6.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field. For this example, enter **9/29/18**.
7.	Click the **Create Transaction** button. Create Transaction
8.	In the **Employee ID** field, enter the employee's ID number or use the lookup to search for and select it. You have access to employee records only within your business unit. Click in the **Employee ID** field.
9.	Enter the desired information into the **Employee ID** field. For this example, enter **10130925**.
10.	The **Effective Date** is populated based on your entry on the previous page. Ensure that you entered the correct date on which employment begins.
11.	Click the **Continue** button. Continue

Step	Action
12.	UCPath displays a message indicating the individual already exists in the system. Verify that the displayed employee ID and name correspond with the individual you are reinstating. Click the **OK** button. 
13.	The reinstatement template appears. Header details appear at the top of the page. You can show/hide the header information as needed.
14.	The **Position Number** must be the same position the employee held before they were terminated.
15.	Click in the **Position Number** field. 
16.	Enter the desired information into the **Position Number** field. For this example, enter **40069931**.
17.	Click in the **Expected Job End Date** field. 
18.	Enter the desired information into the **Expected Job End Date** field. For this example, enter **9/30/19**.
19.	Use the **Comments** field to enter specific details or an explanation regarding the transaction. This field is referenced by UCPC WFA Production to assist with the processing of the transaction.
20.	Click the **Save and Submit** button. 
21.	Review the rehire warning message, which indicates this employee's record already exists in UCPath.
22.	If the employee has only one inactive employee record within your business unit, then that number is defaulted. If the employee has more than one inactive employee record within your business unit, then the lowest number defaults. If needed, select the record to add reinstatement action. For this example, accept the default.
23.	Click the **Save and Submit** button. 

Step	Action
24.	Click the **OK** button. OK
25.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
26.	You have initiated a reinstatement template transaction for a staff employee. **End of Procedure.**

Initiate Reinstatement Template Transaction (Acad)

Use this task to initiate a reinstatement template transaction for an academic employee.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to initiate a reinstatement template transaction.
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC. 🔍
3.	Select the appropriate reinstatement template. Notice there are two reinstatement templates, one for staff and one for academic employees. Click the **UC_REHIRE_REI_AC** link. UC_REHIRE_REI_AC
4.	The **Effective Date** of the reinstatement must be the same date as the **Effective Date** of the termination to ensure there is not gap in service.
5.	Click in the **Effective Date** field.
6.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field. For this example, enter **10/1/18**.

Step	Action
7.	Click the **Create Transaction** button. 
8.	In the **Employee ID** field, enter the employee's ID number or use the lookup to search for and select it. You have access to employee records only within your business unit. Click in the **Employee ID** field. 
9.	Enter the desired information into the **Employee ID** field. For this example, enter **10130745**.
10.	The **Effective Date** is populated based on your entry on the previous page. Ensure that you entered the correct date on which employment begins.
11.	Click the **Continue** button. 
12.	UCPath displays a message indicating the individual already exists in the system. Verify that the displayed employee ID and name correspond with the individual you are reinstating. Click the **OK** button. 
13.	The reinstatement template appears. Header details appear at the top of the page. You can show/hide the header information as needed.
14.	The **Position Number** must be the same position the employee held before they were terminated.
15.	Click in the **Position Number** field. 
16.	Enter the desired information into the **Position Number** field. For this example, enter **40069235**.
17.	Click in the **Expected Job End Date** field. 
18.	Enter the desired information into the **Expected Job End Date** field. For this example, enter **9/30/19**.
19.	Click the **End Job Automatically** option. ☐

Step	Action
20.	Use the **Comments** field to enter specific details or an explanation regarding the transaction. This field is referenced by UCPC WFA Production to assist with the processing of the transaction.
21.	Click the **Save and Submit** button. 
22.	Review the rehire warning message, which indicates this employee's record already exists in UCPath.
23.	If the employee has only one inactive employee record within your business unit, then that number is defaulted. If the employee has more than one inactive employee record within your business unit, then the lowest number defaults. If needed, select the record to add reinstatement action. For this example, accept the default.
24.	Click the **Save and Submit** button. 
25.	Click the **OK** button. 
26.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
27.	You have initiated a reinstatement template transaction for an academic employee. **End of Procedure.**

Initiate Full Hire Contract Pay Template Transaction (Acad)

Use this task to initiate a full hire template transaction for an academic employee with prorated contract pay.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

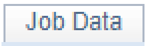
Note: This page also may be available in **Workcenter** depending on your security access.

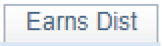
Step	Action
1.	Use the **Smart HR Transactions** page to initiate a full hire contract pay template transaction.

Step	Action
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC. 🔍
3.	Click the **UC_FULL_HIRE_AC** list item. UC_FULL_HIRE_AC
4.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Click in the **Effective Date** field.
5.	Enter the desired information into the **Effective Date** field.
6.	Click the **Create Transaction** button. Create Transaction
7.	In the **Employee ID** field, accept the default value of **NEW**. After UCPC WFA Production processes the transaction, the system automatically generates the next sequential UC Employee ID number for the employee.
8.	The **Effective Date** is populated based on your entry on the previous page. Ensure that you entered the correct **Effective Date**.
9.	Click the button to the right of the **Reason Code** field. ▼
10.	Click the **Academic Hire w/ Contract Pay** list item. Academic Hire w/ Contract Pay
11.	In the **Address Format** field, accept the default of **United States** or select the **Global** option, if applicable.
12.	Click the **Continue** button. Continue
13.	The full hire template appears. This template includes five tabs: **Personal Data**, **Job Data**, **Earns Dist**, **Addl Pay** and **Person Profile**. Fields that are required by the system are indicated with an asterisk *.
14.	Header details appear above the tabs. You can show/hide the header information as needed.

Step	Action
15.	Click in the **First Name** field. 
16.	Enter the desired information into the **First Name** field.
17.	Click in the **Last Name** field. 
18.	Enter the desired information into the **Last Name** field.
19.	Click in the **Date of Birth** field. 
20.	Enter the desired information into the **Date of Birth** field.
21.	Click the **Look up Ethnic Group** button. 🔍
22.	Select the appropriate ethnicity.  MEXAMER
23.	If the individual identifies with more than one ethnic group, click the **Add a row** button and select the additional ethnic group.
24.	Select the appropriate **Military Status**, if known, or leave the field blank. Click the button to the right of the **Military Status** field. ▼
25.	Select the **Highest Education Level**, if known, or accept the default of **A** (**Not Indicated**). Click in the **Highest Education Level** field.  A
26.	Enter the desired information into the **Highest Education Level** field.
27.	Click the button to the right of the **Gender Assigned at Birth** field. ▼
28.	Select the appropriate gender.  Male
29.	If necessary, scroll down to display additional fields and page functions.
30.	Click the button to the right of the **Phone Type** field. ▼
31.	Select the appropriate **Phone Type**.  Mobile - Personal

Step	Action
32.	Click in the **Telephone** field. 
33.	Enter the desired information into the **Telephone** field.
34.	A **Preferred** phone number must be identified by selecting the check box. Click the **Preferred** option. 
35.	Click the button to the right of the **Email Type** field. 
36.	Select the appropriate **Email Type**.  Home
37.	Click in the **Email Address** field. 
38.	Enter the desired information into the **Email Address** field.
39.	In the **National ID Type** field, accept the default of **PR** (for Social Security number).
40.	Click in the **National ID** field. 
41.	Enter the desired information into the **National ID** field.
42.	Click in the **Address Line 1** field. 
43.	Enter the desired information into the **Address Line 1** field.
44.	Click in the **City** field. 
45.	Enter the desired information into the **City** field.
46.	Click in the **State** field. 
47.	Enter the desired information into the **State** field.
48.	Click in the **Postal Code** field. 
49.	Enter the desired information into the **Postal Code** field.

Step	Action
50.	Use the **Comments** field to enter specific details or an explanation regarding the transaction. For this example, enter details about the contract pay transaction, such as contract begin date and contract end date. This field is referenced by UCPC WFA Production to assist with the processing of the transaction. Click in the **Comments** field.
51.	Enter the desired information into the **Comments** field.
52.	If necessary, scroll down to display additional fields and page functions.
53.	Use the **Supporting documents** link to attach supporting documents for the new hire, if needed.
54.	If necessary, scroll up to the display the **Job Data** tab.
55.	Click the **Job Data** tab. 
56.	Enter the position number or search for it using the look up button. You have access only to position numbers within your business unit or related business unit. Click in the **Position Number** field. 
57.	Enter the desired information into the **Position Number** field. For this example, enter **40002610**.
58.	Press **[Tab]** to automatically populate the position-related fields.
59.	Scroll down to display additional fields and page functions.
60.	For academic hires, the **Employee Classification** field automatically populates based on the job code and cannot be changed.
61.	Some job codes have steps associated with them. You should always check to see if a step exists in the list of values. When you enter or select a step, UCPath automatically populates the **Job Compensation - Pay Components** fields. If the contract pay must be prorated, you must override the **Comp Rate Code** by entering **UCCNTR** in the **Comp Rate Code** field. Some job codes do not have steps associated with them, in which case the **Job Compensation - Pay Components** fields must be manually entered. For this example, a step must be entered and the default **Compensation Rate** must be prorated for a late start contract pay.
62.	Click in the **Step** field. 
63.	Enter the desired information into the **Step** field. For this example, enter **1**.

Step	Action
64.	After you enter the **Step**, the **Comp Rate Code** and **Compensation Rate** fields default. Delete the default compensation to enter the prorated contract pay: 1. Delete the existing compensation row. 2. Enter **Comp Rate Code** as **UCCNTR**. 3. Enter the prorated **Compensation Rate**. 4. Enter **Compensation Frequency** of **C**. **Note:** If the employee is to receive the full compensation during the contract period, leave the default compensation and only change the **Compensation Frequency** to **C**.
65.	Click the **Delete Row** button. ⊟
66.	Click the **OK** button.  OK
67.	Click in the **Comp Rate Code** field.
68.	Enter **UCCNTR** into the **Comp Rate Code** field.
69.	Click in the **Compensation Rate** field.
70.	Enter the prorated compensation into the **Compensation Rate** field.
71.	The **Compensation Frequency** must be **C** for contract. Click the **Look up Compensation Frequency** button. 🔍
72.	Click the **C** (**Contract**) list item.  C
73.	If necessary, scroll up to display the **Earns Dist** tab.
74.	Click the **Earns Dist** tab.  Earns Dist
75.	The system displays a message prompting you to confirm the comp frequency update you made. Click the **OK** button.  OK

Step	Action
76.	In most cases, the **Job Earnings Distribution** section is automated. If the **Comp Rate** code entered on the **Job Data** tab has a mapped **Earnings Code**, the **Job Earnings Distribution** section is updated automatically.
77.	The **Job Earnings** page can be used to manually enter distribution information. Use the **Earnings Distribution Type** field to enter distribution **By Amount** or **By Percent**. After the **Earnings Distribution Type** is selected, the **Aggregate Comp Rate** field is populated with the monthly amount. - If **By Amount** is selected, the total of all compensation rates entered must add up to the monthly comp rate. - If **By Percent** is selected, the total of all percentages entered must add up to 100%.
78.	Click the **Addl Pay** tab. 
79.	There may be cases where an employee is paid a recurring flat amount. In these types of cases, the compensation section is not populated on the **Job Data** tab. Instead, the **Additional Pay** section is used. There may also be cases where neither compensation rate nor additional pay is entered. In those cases, it is recommended that you enter a comment to explain how the employee is to be paid. It is recommended not to use this template for one time additional pay. Instead, use payroll's one time payments page.
80.	Click the **Person Profile** tab. 
81.	Use the **Person Profile** page to enter the new hire's degree information, as well as their oath and patent acknowledgment signature dates. Degree information is optional. The Graduate Divisions may want to enter this information for Post Docs at the time of hire.
82.	Click in the **Effective Date** field. 
83.	Enter the desired information into the **Effective Date** field. For this example, enter **6/1/1995**.
84.	Click in the **Degree** field. 
85.	Enter the desired information into the **Degree** field.

Step	Action
86.	Enter the date the new hire signed the UC oath agreement. This date cannot be later than the current date. Click in the **Oath Signature Date** field. 
87.	Enter the desired information into the **Oath Signature Date** field.
88.	Enter the date on which the individual signed the UC patent acknowledgement. This date cannot be later than the current date. Click in the **Patent Acknowledgment Sign Dt** field. 
89.	Enter the desired information into the **Patent Acknowledgment Sign Dt** field.
90.	If necessary, scroll down to display the **Save and Submit** button.
91.	The **Save and Submit** button is not available until all required fields on each tab are completed. Click the **Save and Submit** button. 
92.	Click the **OK** button. 
93.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
94.	You have initiated a full hire template transaction for an academic employee with prorated contract pay. **End of Procedure.**

Job Aid: Pay Group Assignment, Configuration and Code List

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMPAY102JA_PayGroupConfig_Assignment_D1Rev01.pdf) to open the **Pay Group Configuration and Code List** job aid in a new web browser window/tab.

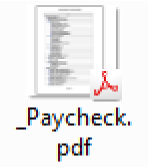
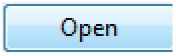
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
95.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
96.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
97.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
98.	Click the button to the right of the **Category** field. 
99.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
100.	Click in the **Subject** field.
101.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
102.	Click in the **Description** field.
103.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
104.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
105.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
106.	Click in the **Best Contact Phone Number** field.

Step	Action
107.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
108.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
109.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
110.	Click the **Add Attachment** link. 
111.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
112.	For this example, click the **_Paycheck.pdf** list item. 
113.	Click the **Open** button. 
114.	The file name appears in the **Attachments** box.
115.	Click the **Submit** button.
116.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
117.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
118.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
119.	Click the scroll bar.
120.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
121.	Click the scroll bar.
122.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.

Step	Action
123.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

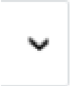
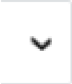
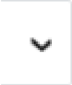
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
124.	Click the **Ask UCPath Center** button. 
125.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
126.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
127.	UCPath returned one result. Click the scroll bar.
128.	Click the **Create an Inquiry** link. 

Step	Action
129.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
130.	Click the button to the right of the **Requested By** field. 
131.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
132.	Click the button to the right of the **Topic** field. 
133.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
134.	Click the button to the right of the **Category** field. 
135.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
136.	Click in the **Subject** field.
137.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
138.	Click the scroll bar.
139.	Click in the **Description** field.
140.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
141.	In this example, the full **Description** was completed on your behalf.

Step	Action
142.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
143.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
144.	Click the **Submit Inquiry** button. 
145.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
146.	The submitter's name appears.
147.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

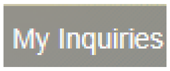
Reopen Closed UCPath Center Case

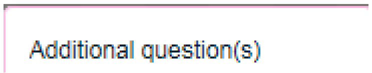
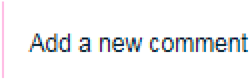
Use this task to reopen a closed inquiry via the UCPath website.

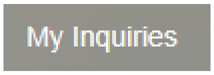
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
148.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
149.	Click the **My Closed Inquiries** link. 

Step	Action
150.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
151.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
152.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
153.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
154.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
155.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
156.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 

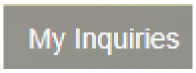
Step	Action
157.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
158.	Click the scroll bar.
159.	Notice the comment now appears in the **Case Comments** section.
160.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
161.	Return to the top of the page. Click the scroll bar.
162.	Click the **My Inquiries** link.  My Inquiries
163.	The new inquiry appears in the **My Open Inquires** list.
164.	You have reopened a closed inquiry. **End of Procedure.**

Monitor UCPath Center Cases

Use this task to review the status of an existing inquiry via the UCPath website.

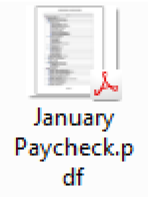
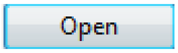
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

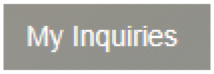
Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
165.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link.  My Inquiries

Step	Action
166.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
167.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
168.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
169.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link.  Date/Time Opened ▲
170.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again..  Date/Time Opened ▼
171.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link.  00180573
172.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field.  Add a new comment
173.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction....**.

Step	Action
174.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
175.	Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center
176.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
177.	Click the scroll bar.
178.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link.  View All
179.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▾
180.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
181.	To return to the case details, click the **00180573** link.  00180573
182.	Click the scroll bar.
183.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link.  Upload Files

Step	Action
184.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
185.	Click the **Open** button. 
186.	A message confirms the file was uploaded. Click the **Done** button. 
187.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
188.	You can view all attachments in a list. Click the **View All** link. 
189.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 
190.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 
191.	Click the **00180573** link. 
192.	Click the scroll bar.

Step	Action
193.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
194.	Click the **Email** link. Sandbox: UCPath Center: Inquir.
195.	Review the email information as you scroll down the page. Click the scroll bar.
196.	Review the email from the UCPath Center. Click the scroll bar.
197.	Click the case number to return to the details of the case. Click the **00180573** link. 00180573
198.	To review closed inquiries, click the **My Inquiries** link. My Inquiries
199.	Click the **My Closed Inquiries** tab. My Closed Inquiries
200.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
201.	Click the **00180567** link. 00180567
202.	Click the scroll bar.
203.	Notice the **Status** is **Closed/Resolved**.
204.	Click the scroll bar.

Step	Action
205.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. ⌂
206.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMWFAL260: Template Transactions - Part II

View Personal Information

Use this task to view an employee's personal information using the **Modify a Person** page.

Navigation: Peoplesoft Menu > Workforce Administration > Personal Information > **Modify a Person**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
207.	After you navigate to the **Personal Information** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
208.	Click in the **Empl ID** field.
209.	Enter the desired information into the **Empl ID** field.
210.	Click the **Search** button. Search
211.	The **Biographical Details** page displays the employee's name and other biographical information.

Step	Action
212.	The following fields use **Effective Dates** to keep a history of changes: Name, address, biographical (such as education, marital status, and language) and some regional fields. Current, historical, or future information can be viewed for these fields. When new information takes effect, the system stores the old data so that you can track the changes that occur over time. The employee's National ID (SSN) is partially masked for most users, with the exception of few UCPath Center users.
213.	Click the **Contact Information** tab. 
214.	The **Contact Information** page displays the employee's address, phone and email information.
215.	Click the **Regional** tab. 
216.	The **Regional** page displays country-specific personal information such as ethnic group and military status.
217.	The values in the **Ethnic Group** section are based on U.S. Federal Equal Employment Opportunities ethnic categories.
218.	Click the **UC Personal Data** tab. 
219.	The **UC Personal Data** page displays the employee's disclosure preferences for campus offerings and university mailings.
220.	You have viewed employee personal information in UCPath. **End of Procedure.**

Initiate Personal Data Change Template Transaction (Staff/Acad)

This task provides an overview of how to initiate a personal data change template transaction. This template can be used for academic and staff employees.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to initiate a personal data change template.

Step	Action
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC. 🔍
3.	There is only one personal data template. This template is used for academic and staff employees. Click the **UC_PERSON_DATA** list item. 
4.	Click in the **Effective Date** field. 
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field. For this example, enter **11/1/18**.
6.	Click the **Create Transaction** button. 
7.	In the **Employee ID** field, enter the employee's ID number or use the lookup to search for and select it. You have access only to employee records within your business unit. Click in the **Employee ID** field. 
8.	Enter the desired information into the **Employee ID** field. For this example, enter **10020270**.
9.	The **Effective Date** is populated based on your entry on the previous page. Ensure this is the date on which the personal data change begins. In this example, accept the default.
10.	Click the **Continue** button. 
11.	The personal data template appears. The top of the page displays header data, which you can show/hide as needed.
12.	The employee's personal data automatically populates from the employee's existing personal data information. Update the information as needed.

Step	Action
13.	Click in the **Date of Birth** field.  01/01/1994
14.	You can type over the existing data to update it. Enter the desired information into the **Date of Birth** field. For this example, enter **1/11/1994**.
15.	Click the scroll bar.
16.	Click in the **Address Line 1** field.  23499 Lake Vista Drive
17.	You can type over the existing data to update it. Enter the desired information into the **Address Line 1** field. For this example, enter **87778 Juniper Rd**.
18.	The **Personal Phone Number** and **Person Email Address** sections do not display the employee's existing data. However, if you enter new information here it will update the existing information.
19.	Use the **Comments** field to enter specific details or an explanation regarding the transaction. This field is referenced by UCPC WFA Production to assist with the processing of the transaction. Click in the **Comments** field.
20.	Enter the desired information into the **Comments** field. For this example, enter **Updated DOB and Address.**.
21.	Use the **Supporting documents** link to attach supporting documents for the transaction.
22.	Click the scroll bar.
23.	Enter comments for the Approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not display on the employee’s record after the transaction is processed to completion.
24.	Click the **Save and Submit** button. 
25.	Click the **OK** button. 
26.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
27.	You have initiated a personal data change template transaction. **End of Procedure.**

Update Personal Information - Emergency Contacts

Use this task to update an employee's emergency contact information.

Navigation: PeopleSoft Menu > Workforce Administration > Personal Relationships > **Emergency Contact**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **Emergency Contact** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10077106**.
4.	Click the **Search** button. 
5.	The system displays the **Emergency Contact** component, which includes two tabs: **Contact Address/Phone** and **Other Phone Numbers**. Use this component to enter a new emergency contact or update existing emergency contact information.
6.	If an emergency contact is already listed, you can update the existing contact's information as necessary and save the data. You can also insert a new row to enter information for an additional contact, or delete a row if a person is no longer a valid emergency contact for the selected employee. In this example, the employee does not currently have an emergency contact, so you can begin entering data.
7.	Enter the desired information into the **Contact Name** field. For this example, enter **Rocko Allen**.
8.	If the employee has multiple emergency contacts, only one can be designated as the primary contact. Click the **Primary Contact** option. ☐

Step	Action
9.	Click the button to the right of the **Relationship to Employee** field.
10.	Select the appropriate **Relationship to employee**. For this example, click the **Friend** list item. Friend
11.	If the emergency contact's address is the same as the employee's, select the **Same Address as Employee** check box. If not, click the **Edit Address** button in the **Contact Address** section to enter the address information.
12.	If the emergency contact's phone number is the same as the employee's, select the **Same Phone as Employee** check box. If not, enter the phone number in the Phone field in the **Contact Phone** section.
13.	To enter the contact's address if different from the employee's click the **Edit Address** button. Edit Address
14.	The system displays the **Edit Address** page. The **Country** field defaults to **United States**, but you can select another country to change the edits fields by clicking the **Change Country** button.
15.	Click in the **Address 1** field.
16.	Enter the desired information into the **Address 1** field. For this example, enter **1234 Bidwell Parkway**.
17.	Click in the **City** field.
18.	Enter the desired information into the **City** field. For this example, enter **Riverside**.
19.	Click in the **State** field.
20.	Enter the desired information into the **State** field. For this example, enter **CA**.
21.	Click in the **Postal** field.
22.	Enter the desired information into the **Postal** field. For this example, enter **92501**.

Step	Action
23.	Click the **OK** button. 
24.	Click in the **Phone** field. 
25.	Enter the desired information into the **Phone** field. For this example, enter **9155551212**.
26.	Click the **Other Phone Numbers** tab. 
27.	Use the **Other Phone Numbers** page to enter the emergency contact's additional phone numbers, such as a work or cell phone number. Select the appropriate type from the **Phone Type** list, then enter the corresponding phone number. To enter an additional phone type and number, under **Other Phone Numbers for Emergency Contact**, click the **Insert a new row** button. In this example, the emergency contact does not have an additional phone type and phone number from that entered on the **Contact Address/Phone** page.
28.	Click the **Save** button. 
29.	You have updated an employee's emergency contact information. **End of Procedure.**

Update Personal Information - Additional Names

Use this task to update an employee's additional name information: former, preferred or professional.

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > Biographical > **Additional Names**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **Additional Names** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field.
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10077106**.
4.	Click the **Search** button. 
5.	The **Additional Names** page appears. In this example, the employee only has a primary name listed. You can insert an additional row to specify another name type: **Former**, **Preferred** or **Professional**.
6.	Click the **Add a new row** button. ⊞
7.	Click the button to the right of the **Type of Name** field. ⌄
8.	Select the appropriate **Type of Name**. For this example, click the **Professional** list item. 
9.	Click the **Add Name Data** link. 
10.	The system displays the **Name History** page for the selected name type. You can maintain a separate history for each name type using effective dates. In this example, there is no existing information for the selected name type so you must enter the data.
11.	The effective date defaults to the system date (today's date), but you can update it as necessary.
12.	The **Status** field defaults to **Active**. If you are entering new data, accept the default value. If you are updating existing name type data to indicate it is no longer active, select the **Inactive** option.
13.	Accept the default **Name Format** of **English**, unless you must enter a format for a different language.

Step	Action
14.	Click the **Edit Name** link. 
15.	The system displays the **Name** page and corresponding fields for the selected language (English in this example). Enter the appropriate name information, including prefix, first name, middle name, last name and sufffix.
16.	If applicable, select the appropriate prefix from the drop-down list. For example, **Mr**, **Ms**, **Dr** and so forth.
17.	Click in the **First Name** field. 
18.	Enter the desired information into the **First Name** field. For this example, enter **Elizabeth**.
19.	You can enter a middle name, if known. In this example, the employee did not specify a middle name.
20.	Click in the **Last Name** field. 
21.	Enter the desired information into the **Last Name** field. For this example, enter **Queen**.
22.	If applicable, select the appropriate suffix from the drop-down list. For example, **Jr**, **Sr**, **III** and so forth.
23.	Click the **Refresh Name** button. 
24.	The system updates the name details. Verify the name data you entered above is correct. If necessary, make corrections and click the **Refresh Name** button again.
25.	Click the **OK** button to return to the **Name History** page. 
26.	Click the **OK** button to return to the **Additional Names** page. 
27.	The system displays the additional name data on a separate row in the **Current Names** section.
28.	Click the **Save** button. 
29.	You have updated personal information - additional names. **End of Procedure.**

Update Personal Information - Security Clearance

Use this task to update an employee's security clearance information (excluding I-9 information).

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > **Security Clearance**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **Security Clearance** page, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10015070**.
4.	Click the **Search** button.  Search
5.	The system displays the **Security Clearance** page. In this example, the employee has **I9 Completion** security clearance information listed. **Note:** I-9 completion and E-Verify information should not be adjusted. This information is maintained by UCPath Center and the Tracker interface.
6.	To review all security clearance information, click the **Include History** button.  Include History
7.	To insert a new effective-dated security clearance row, click the **Add a new row** button. ⊞
8.	Click the **Look up Security Clearance Type** button. 🔍
9.	Select the appropriate **Security Clearance Type**. For this example, click the **U08** link for **DMV Driving Record Check**.  U08

Step	Action
10.	Enter the appropriate **Effective Date** for the security clearance. Click the **Calendar Effective Date** button. 31
11.	For this example, click the **1** link for October 1, 2018. 1
12.	Click in the **Clearance Number** field.
13.	Enter the desired information into the **Clearance Number** field. For this example, enter **A5090717**.
14.	Enter the **Expiration Date** and **Sponsor**, if applicable.
15.	Click the **Save** button. Save
16.	To change a security clearance type to **Inactive:** **1.** Navigate to the appropriate **Security Clearance Type** row. **2.** Insert a new row in the **Clearance Information** section. **3.** Enter the **Effective Date** of the Inactive status. **4.** Select the **Inactive** option in the **Status** field. **5. Save**.
17.	You have updated an employee's security clearance information. **End of Procedure.**

Job Aid: Template Transactions – Action Reason Codes and Descriptions

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMWFAL250JA_TemplateTransactions_ActionReasonCodesDescriptions_D1Rev00.pdf) to open the **Template Transactions - Action Reason Codes and Descriptions** job aid in a new web browser window/tab.

Initiate Voluntary Termination Template Transaction

Use this task to initiate a voluntary termination template transaction. This template can be used for academic and staff employees. A separate termination template must be initiated for all applicable jobs.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to select the appropriate template to begin the termination process.
2.	Click the **Look up Select Template** button. 🔍
3.	Select the appropriate termination template. There are two termination templates, one for voluntary terminations and one for involuntary terminations. Click the **UC_VOL_TERM** list item. UC_VOL_TERM
4.	Click in the **Effective Date** field.
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field. For this example, enter **11/1/18**.
6.	Click the **Create Transaction** button. Create Transaction
7.	In the **Employee ID** field, enter the employee's ID number or use the lookup to search for and select it. You have access only to employee records within your business unit. For this example, click the **Look up Employee ID** button. 🔍
8.	Select the appropriate **Employee ID**. For this example, click the **10000036** list item. 10000036
9.	The **Employment Record Number** defaults to the first record number for which you have departmental access (in this example, **0**). Select the correct **Employment Record Number** for the job to terminate.
10.	The **Effective Date** is populated based on your entry on the previous page. Ensure that you entered the correct date on which the termination is effective. This date should be one day after the employee's last day of work.
11.	Click the button to the right of the **Reason Code** field. ⌄

Step	Action
12.	Select the appropriate **Reason Code**. For this example, click the **Resign - Moved out of Area** list item. 
13.	Click the **Continue** button. 
14.	The voluntary termination template appears. The top of the page displays header data, which you can show/hide as needed.
15.	The employee's position number and work location data automatically populate for the selected employment record.
16.	The **Last Date Worked** field defaults to the work day prior to the **Effective Date**, but you can update it as necessary. If the **Effective Date** is a Monday, the **Last Date Worked** defaults to the previous Friday. This date should always be a date earlier than the **Effective Date** you entered on the previous page. For this example, accept the default.
17.	Use the **Comments** field to enter specific details or explanation regarding the transaction. This field is referenced by UCPC WFA Production to assist with the processing of the transaction.
18.	Click the scroll bar.
19.	Use the **Supporting documents** link to attach supporting documents.
20.	Enter comments for the approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not display on the employee's record after the transaction is processed to completion.
21.	Click the **Save and Submit** button. 
22.	Some Location's business process allows users to have the Template Initiator role as well as the Payroll Initiator role. In these cases, the **Add Payroll Request** link is available. This link allows direct access to the **Payroll Requests** page. For specific steps on entering a payroll request or final pay, refer to the **Payroll** folder > **PHCMPAYL200: Additional Compensation and Pay Adjustment Requests** course and applicable simulations.
23.	Click the **OK** button. 

Step	Action
24.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
25.	You have initiated a voluntary termination template transaction. **End of Procedure.**

Initiate Involuntary Termination Template Transaction

Use this task to initiate an involuntary termination template transaction. The steps in this procedure can be used for academic and staff employees. For termination reason of Death, UCPC WFA Production will terminate all employee jobs. For all other reasons, a separate termination template must be initiated for all applicable jobs.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to select the appropriate template to begin the termination process.
2.	**Note:** The **Transaction Type** field is not used by UC. Click the **Look up Select Template** button. 🔍
3.	Select the appropriate termination template. There are two termination templates, one for voluntary terminations and one for involuntary terminations. Click the **UC_INVOL_TERM** link. UC_INVOL_TERM
4.	Click in the **Effective Date** field. 
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field. For this example, enter **11/1/18**.
6.	Click the **Create Transaction** button. 

Step	Action
7.	In the **Employee ID** field, enter the employee’s ID number or use the lookup to search for and select it. You have access only to employee records within your business unit. Click the **Look up Employee ID** button. 🔍
8.	Select the appropriate **Employee ID**. For this example, click the **10000063** list item. 10000063
9.	The **Employment Record Number** defaults to the first record number for which you have departmental access (in this example, **0**). Select the correct **Employment Record Number** for the job to terminate. For termination reason of **Death**, UCPC WFA Production will terminate all employee jobs. For all other reasons, a separate termination template must be initiated for all applicable jobs. For this example, accept the default.
10.	The **Effective Date** is populated based on your entry on the previous page. Ensure that you entered the correct date on which the termination is effective. This date should be one day after the employee's last day of work.
11.	Click the button to the right of the **Reason Code** field. ⌄
12.	Select the appropriate **Reason Code**. For this example, click the **Dismissal - Attendance** list item. Dismissal - Attendance
13.	Click the **Continue** button. Continue
14.	The involuntary termination template appears. The top of the page displays header data, which you can show/hide as needed.
15.	The employee's position number and work location data automatically populate for the selected employment record.

Step	Action
16.	The **Last Date Worked** field defaults to the work day prior to the **Effective Date**, but you can update it as necessary. If the **Effective Date** is a Monday, the **Last Date Worked** defaults to the previous Friday. This date should always be a date earlier than the **Effective Date** you entered on the previous page. For this example, accept the default.
17.	Use the **Comments** field to enter specific details or an explanation regarding the transaction. This field is referenced by UCPC WFA Production to assist with processing the transaction.
18.	Click the scroll bar.
19.	Use the **Supporting documents** link to attach supporting documents.
20.	Enter comments for the approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not display on the employee’s record after the transaction is processed to completion.
21.	Click the **Save and Submit** button. Save and Submit
22.	Some Location's business process allows users to have the Template Initiator role as well as the Payroll Initiator role. In these cases, the **Add Payroll Request** link is available. This link allows direct access to the **Payroll Requests** page. For specific steps on entering a payroll request or final pay, refer to the *PHCMPAYL200: Additional Compensation and Pay Adjustment Requests* course and applicable simulations.
23.	Click the **OK** button. OK
24.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
25.	You have initiated an involuntary termination template transaction. **End of Procedure.**

Initiate Retirement Template Transaction

Use this task to initiate a retirement template transaction. This template can be used for academic or staff employees. UCPC WFA Production will retire the employee from all jobs after receiving the first retirement template.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to select the appropriate template to begin the retirement process.
2.	**Note:** The **Transaction Type** field is not used by UC. Click the **Look up Select Template** button. 🔍
3.	Click the **UC_RETIREMENT** list item. UC_RETIREMENT
4.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Click in the **Effective Date** field.
5.	Enter the desired information into the **Effective Date** field. For this example, enter **11/1/18**.
6.	Click the **Create Transaction** button. Create Transaction
7.	In the **Employee ID** field, enter the employee's ID number or use the lookup to search for and select it. You have access only to employee records within your business unit. For this example, click the **Look up Employee ID** button. 🔍
8.	Select the appropriate **Employee ID**. For this example, click the **10000056** list item. 10000056
9.	The **Employment Record Number** defaults to the first record number for which you have departmental access (in this example, **0**). Select the correct **Employment Record Number** for the job to terminate. If an employee has multiple jobs, you do not need to initiate a retirement template transaction for all jobs; UCPC WFA Production will retire the employee from all jobs after receiving the first retirement template.

Step	Action
10.	The **Effective Date** is populated based on your entry on the previous page. Ensure that you entered the correct date on which the employee's retirement is effective. This date should be one day after the employee's last day of work.
11.	Click the **Continue** button. Continue
12.	The retirement template appears. The top of the page displays header data, which you can show/hide as needed.
13.	The employee's position number and work location data automatically populate for the selected employment record.
14.	The **Last Date Worked** field defaults to the work day prior to the **Job Effective Date**, but you can update it as necessary. If the **Effective Date** is a Monday, the **Last Date Worked** defaults to the previous Friday. This date should always be a date earlier than the **Effective Date** you entered on the previous page.
15.	Click the scroll bar.
16.	Use the **Comments** field to enter specific details or explanation regarding the transaction. This field is referenced by UCPC WFA Production to assist with the processing of the transaction.
17.	Use the **Supporting documents** link to attach supporting documents.
18.	Enter comments for the approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not appear on the employee’s record after the transaction is processed to completion.
19.	Click the **Save and Submit** button. Save and Submit
20.	Some Location's business process allows users to have the Template Initiator role as well as the Payroll Initiator role. In these cases, the **Add Payroll Request** link is available. This link allows direct access to the **Payroll Requests** page. For specific steps on entering a payroll request or final pay, refer to the *PHCMPAYL200: Additional Compensation and Pay Adjustment Requests* course and applicable simulations.
21.	Click the **OK** button. OK
22.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
23.	You have initiated a retirement template transaction. **End of Procedure.**

Initiate Intralocation Transfer Template Transaction (Staff)

Use this task to initiate an intralocation transfer template transaction for a staff employee.

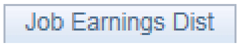
Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to initiate an intralocation transfer template.
2.	Click the **Look up Select Template** button. 🔍
3.	Select the appropriate transfer template. Notice there are two transfer templates, one for staff employees and one for academic employees. Click the **UC_TRANSFER** list item. 
4.	Click in the **Effective Date** field. 
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field. For this example, enter **11/1/18**.
6.	Click the **Create Transaction** button. 
7.	In the **Employee ID** field, enter the employee’s ID number or use the lookup to search for and select it. You have access only to employee records within your business unit. Click in the **Employee ID** field. 
8.	Enter the desired information into the **Employee ID** field. For this example, enter **10007140**.

Step	Action
9.	The **Employment Record Number** defaults to the first record number for which you have departmental access (in this example, **0**). Select the correct **Employment Record Number** for the transfer. For this example, accept the default.
10.	The **Effective Date** is populated based on your entry on the previous page. Ensure this is the date on which the employment in the new position begins. In this example, accept the default.
11.	Click the button to the right of the **Reason Code** field. 
12.	Select the appropriate **Reason Code**. For this example, click the **Promotion** list item. 
13.	Click the **Continue** button. 
14.	The transfer template appears. The top of the page displays header data, which you can show/hide as needed.
15.	This template includes two tabs: **Job Data** and **Job Earnings Dist**.
16.	Enter the appropriate position number or search for it using the look up. You have access only to position numbers within your business unit or related business unit. Click in the **Position Number** field. 
17.	Enter the desired information into the **Position Number** field. For this example, enter **40004618**.
18.	Press **[Tab]** to automatically populate the position-related fields.
19.	Click the scroll bar.
20.	For staff employees, the **Employee Classification** field is blank and must be entered. Click the **Look up Employee Classification** button. 🔍
21.	Select the appropriate **Employee Classification**. For this example, click the **2** list item. 2

Step	Action
22.	If the employment is a short term assignment or temporary hire, enter the date the position ends in the **Expected Job End Date** field. Non-Academic employees are automatically terminated in UCPath on this date. An **Expected Job End Date** is required for following employee classes: **1** - Contract **4** - Limited **5** - Casual/Restricted **6** - Per Diem (If applicable) **8** - Floater **15** - Staff – Rehired Retiree
23.	Some job codes have steps associated with them. When a **Step** is entered, UCPath automatically updates the **Job Compensation - Pay Components** fields and the compensation information cannot be changed. Some job codes do not have steps associated with them, in which case the **Job Compensation - Pay Components** fields must be manually entered. If the job has above scale component of pay, then step does not need to be selected. Enter applicable above scale comp rate codes in the **Job Compensation- Pay Components** section.
24.	For this example the job is not associated with steps. It is important to enter accurate compensation information as information entered here overrides the existing compensation data. Click the **Look up Comp Rate Code** button. 🔍
25.	Select the appropriate **Comp Rate Code**. For this example, click the **UCANNL** list item.  UCANNL
26.	Click in the **Compensation Rate** field. 
27.	Enter the desired information into the **Compensation Rate** field. For this example, enter **72000**.
28.	In the **UC Job Data** section, enter or select the appropriate values as applicable.

Step	Action
29.	The **Probation Code** field is required if: ● the **Classified/Unclassified Ind** field is **Professional and Support Staff**, and ● the **Employee Class** is **Career** or **Partial Year Career**. The **Probation End Date** field is required if the **Probation Code** is any value other than **Completed** or **Probation Completed, Other Job**.
30.	Click the scroll bar.
31.	The payroll-related **Compensation Frequency** field automatically populates based on the job code. This field defines how the total compensation is paid out to the employee per paycheck.
32.	Use the **Comments** field to enter specific details or an explanation regarding the transaction. This field is referenced by UCPC WFA Production to assist with the processing of the transaction. Click in the **Comments** field.
33.	Enter the desired information into the **Comments** field. For this example, enter **Transfer to new position within RVCMP.**.
34.	Click the scroll bar.
35.	Click the **Job Earnings Dist** tab. 
36.	In most cases, the **Job Earnings Distribution** section is automated. If the **Comp Rate** code entered on the **Job Data** tab has a mapped **Earnings Code**, the **Job Earnings Distribution** section is updated automatically.
37.	The **Job Earnings Distribution** section also can be used to manually enter distribution information. Use the **Earnings Distribution Type** field to enter distribution **By Amount** or **By Percent**. After the **Earnings Distribution Type** is selected, the **Aggregate Comp Rate** field is populated with the monthly amount. ● If **By Amount** is selected, the total of all compensation rates entered must add up to the monthly comp rate. ● If **By Percent** is selected, the total of all percentages entered must add up to 100%.
38.	Use the **Supporting documents** link to attach supporting documents for the transfer.
39.	Enter comments for the Approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not appear on the employee's record after the transaction is processed to completion. You can enter **Initiator Comments** on either tab within this template.

Step	Action
40.	Click the **Save and Submit** button. 
41.	Click the **OK** button. 
42.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
43.	You have initiated an intralocation transfer template transaction for a staff employee. **End of Procedure.**

Initiate Intralocation Transfer Template Transaction (Acad)

Use this task to initiate an intralocation transfer template transaction for an academic employee.

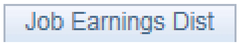
Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to initiate an intralocation transfer template.
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC. 🔍
3.	Select the appropriate transfer template. Notice there are two transfer templates, one for staff and one for academic. Click the **UC_TRANSFER_AC** list item. 
4.	Click in the **Effective Date** field. ☐

Step	Action
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field. For this example, enter **11/1/18**.
6.	Click the **Create Transaction** button. 
7.	In the **Employee ID** field, enter the employee's ID number or use the lookup to search for and select it. You have access only to employee records within your business unit. Click in the **Employee ID** field. 
8.	Enter the desired information into the **Employee ID** field. For this example, enter **10070270**.
9.	The **Employment Record Number** defaults to the first record number for which you have departmental access (in this example, **0**). Select the correct **Employment Record Number** for the transfer.
10.	The **Effective Date** is populated based on your entry on the previous page. Ensure this is the date on which the employment in the new position begins. For this example, accept the default.
11.	Click the button to the right of the **Reason Code** field. 
12.	Select the appropriate **Reason Code**. For this example, click the **Lateral Transfer** list item. 
13.	Click the **Continue** button. 
14.	The transfer template appears. The top of the page displays header data, which you can show/hide as needed.
15.	The transfer template includes two tabs: **Job Data** and **Job Earnings Dist**.

Step	Action
16.	Enter the appropriate position number or search for it using the look up. You have access only to position numbers within your business unit or related business unit. Click in the **Position Number** field.
17.	Enter the desired information into the **Position Number** field. For this example, enter **40008479**.
18.	Press **[Tab]** to automatically populate the position-related fields.
19.	Click the scroll bar.
20.	For academic employees, the **Employee Classification** field automatically populates based on the job code and cannot be changed.
21.	Some job codes have steps associated with them. When a **Step** is entered, UCPath automatically updates the **Job Compensation - Pay Components** fields and the compensation information cannot be changed. Some job codes do not have steps associated with them, in which case the **Job Compensation - Pay Components** fields must be entered manually. If the job has above scale component of pay, then step does not need to be selected. Enter applicable above scale comp rate codes in the **Job Compensation - Pay Components** section. For contract-based pay hires, refer to the *Initiate Full Hire Contract Pay Template Transaction* simulation for specific steps on contract pay entries.
22.	For this example, the job has associated steps. Click the **Look up Step** button. 🔍
23.	Select the appropriate **Step**. For this example, click the **1** list item. 1
24.	If the employment is a short term assignment or temporary hire, enter the date the position ends in the **Expected Job End Date** field. An expected end date is required for following employee classes: • Staff: Contract • Staff: Floater • Staff: Rehired Retiree • Academic: Post Docs • Academic: Recall • Academic: Academic Student • Student: Casual/Restricted

Step	Action
25.	Click in the **Expected Job End Date** field. 
26.	Enter the desired information into the **Expected Job End Date** field. For this example, enter **6/30/19**.
27.	For academic templates, the **End Job Automatically** check box displays. If the **End Job Automatically** check box is selected the UCPath Center will run a process to terminate the employee as of the **Expected Job End Date**.
28.	In the **UC Job Data** section, enter or select the appropriate values as applicable.
29.	Click the scroll bar.
30.	The payroll-related **Compensation Frequency** field automatically populates based on the job code. This field defines how the total compensation is paid out to the employee per paycheck. This field is changed only for specific exceptions, such as contract based pay. Any time this field is changed from the default enter a **Comment** to explain why the field was changed.
31.	Use the **Comments** field to enter specific details or an explanation regarding the transaction. For example, this field can be used to enter details about a contract pay transaction, such as contract begin date and contract end date. This field is referenced by UCPC WFA Production to assist with the processing of the transaction. Click in the **Comments** field.
32.	Enter the desired information into the **Comments** field. For this example, enter **Intralocation transfer to a new position within RVCMP.**.
33.	Click the scroll bar.
34.	Click the **Job Earnings Dist** tab. 
35.	In most cases, the **Job Earnings Distribution** section is automated. If the **Comp Rate** code entered on the **Job Data** tab has a mapped **Earnings Code**, the **Job Earnings Distribution** section is updated automatically.

Step	Action
36.	The **Job Earnings Distribution** section also can be used to manually enter distribution information. Use the **Earnings Distribution Type** field to enter distribution **By Amount** or **By Percent**. After the **Earnings Distribution Type** is selected, the **Aggregate Comp Rate** field is populated with the monthly amount. • If **By Amount** is selected, the total of all compensation rates entered must add up to the monthly comp rate. • If **By Percent** is selected, the total of all percentages entered must add up to 100%.
37.	For certain academic comp rate codes, such as Health Science Comp Plan, earnings codes are defaulted based on the **Comp Rate Code** entered in **Job Compensation - Pay Components** section. Also in those cases, earnings distribution type is **By Amount** and amounts are automatically calculated.
38.	Use the **Supporting documents** link to attach supporting documents for the transfer.
39.	Enter comments for the Approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not appear on the employee's record after the transaction is processed to completion. You can enter **Initiator Comments** on any of the tabs within this template.
40.	Click the **Save and Submit** button. 
41.	Click the **OK** button. 
42.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
43.	You have initiated an intralocation transfer template transaction for an academic employee. **End of Procedure.**

Initiate Interlocation Transfer (Concurrent Hire) Template Transaction

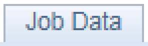
Use this task to initiate an interlocation transfer (concurrent hire) template transaction. Interlocation transfers are initiated when an employee transfers from one UCPath business unit to another UCPath business unit without a break in service.

Interlocation transfers are completed using the **Concurrent Hire** template (transfer to location) and the **Voluntary Termination** template (transfer from location). This task includes steps on completing the **Concurrent Hire** template for the interlocation transfer.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

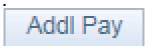
Step	Action
1.	Use the **Smart HR Transactions** page to initiate an interlocation (concurrent hire) template.
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC. 🔍
3.	Select the appropriate concurrent hire/interlocation transfer template. Notice there are two templates, one for staff and one for academic. For this example, click the **UC_CONC_HIRE** list item.  UC_CONC_HIRE
4.	Click in the **Effective Date** field. 
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field. For this example, enter **11/1/18**.
6.	Click the **Create Transaction** button.  Create Transaction
7.	In the **Employee ID** field, enter the employee's ID number or use the lookup to search for and select it. Click in the **Employee ID** field. 
8.	Enter the desired information into the **Employee ID** field. For this example, enter **10002610**.
9.	The **Effective Date** is populated based on your entry on the previous page. Ensure this is the date on which the employment in the new position begins. For this example, accept the default.
10.	Click the button to the right of the **Reason Code** field. ⌄

Step	Action
11.	Select the appropriate **Reason Code**. For this example, click the **Transfer-Inter BU, Lateral** list item. 
12.	In the **Address Format** field, accept the default of **United States** or select the **Global** option, if applicable.
13.	Click the **Continue** button. 
14.	UCPath displays a message indicating the individual already exists in the system. Verify that the displayed employee ID and name correspond with the individual you are hiring into a concurrent job. Click the **OK** button. 
15.	The concurrent hire template appears. The top of the page displays header data, which you can show/hide as needed.
16.	Four tabs are available on this template: **Personal Data**, **Job Data**, **Earns Dist** and **Addl Pay**. The employee's personal data automatically populates from the employee's existing personal data information. If a change is required for personal data, it should be submitted using Employee Self Service or the **Personal Data Change Template**.
17.	Click the scroll bar.
18.	Use the **Comments** field to enter specific details or an explanation regarding the transaction. This field is referenced by UCPC WFA Production to assist with the processing of the transaction. Click in the **Comments** field.
19.	Enter the desired information into the **Comments** field. For this example, enter **Interlocation transfer from LACMP to RVCMP.**.
20.	Click the scroll bar.
21.	Click the **Job Data** tab. 

Step	Action
22.	Enter the position number or search for it using the look up. You have access only to position numbers within your business unit or related business unit. Click in the **Position Number** field.
23.	Enter the desired information into the **Position Number** field. For this example, enter **40015919**.
24.	Press **[Tab]** to automatically populate the position-related fields.
25.	Click the scroll bar.
26.	For academic employees, the **Employee Classification** field automatically populates based on the job code and cannot be changed. For staff employees, the **Employee Classification** field is blank and must be entered.
27.	In this example, you'll enter the classification for the staff employee. Click the **Look up Employee Classification** button. 🔍
28.	Select the appropriate **Employee Classification**. For this example, click the **2** list item. 2
29.	In the **UC Job Data** section, enter or select the appropriate values as applicable.
30.	The **Probation Code** field is required if: ● the **Classified/Unclassified Ind** field is **Professional and Support Staff**, and ● the **Employee Class** is **Career** or **Partial Year Career**. The **Probation End Date** field is required if the **Probation Code** is any value other than **Completed** or **Probation Completed, Other Job**.
31.	Click the button to the right of the **Probation Code** field. ⌄
32.	Select the appropriate **Probation Code**. For this example, click the **Probation Completed** list item. Probation Completed
33.	Click in the **Probation End Date** field.
34.	Enter the desired information into the **Probation End Date** field. For this example, enter **2/10/2001**.

Step	Action
35.	Click the scroll bar.
36.	Some job codes have steps associated with them. When a **Step** is entered, UCPath automatically updates the **Job Compensation - Pay Components** fields and the compensation information cannot be changed. Some job codes do not have steps associated with them, in which case the **Job Compensation - Pay Components** fields must be manually entered. If the job has above scale component of pay, then step does not need to be selected. Enter applicable above scale comp rate codes in the **Job Compensation - Pay Components** section. In this example, the job code is not associated with steps.
37.	It is important to enter accurate compensation information as information entered here overrides the existing compensation data. Click the **Look up Comp Rate Code** button. 🔍
38.	Click the scroll bar.
39.	Select the appropriate **Comp Rate Code**. For this example, click the **UCHRLY** list item. UCHRLY
40.	Click in the **Compensation Rate** field. 
41.	Enter the desired information into the **Compensation Rate** field. For this example, enter **25.50**.

Step	Action
42.	An **Expected Job End Date** is required for the following staff employee classes. (These employees will be automatically terminated on the date entered.) **1** - Contract **4** - Limited **5** - Casual/Restricted **6** - Per Diem (If applicable) **8** - Floater **15** - Staff – Rehired Retiree An **Expected Job End Date** is required for all academic employee classes, except: **3** - Academic Recall **9** - Faculty **10** - Non-Faculty **11** - Academic Student **14** - Academic Contingent Worker **21** - Emeriti **22** - Deans/Faculty Administrators **23** - Post Docs
43.	A process will run to terminate staff employees as of the **Expected Job End Date**. For academic employees, the process runs and terminates the employee as of the **Expected Job End Date** if the **End Job Automatically** check box is selected (the check box only displays on the academic templates).
44.	The payroll-related **Compensation Frequency** field automatically populates based on the job code. This field defines how the total compensation is paid out to the employee per paycheck. This field can be changed for specific exceptions, such as contract based pay or to change to an academic frequency. Any time this field is changed from the default, enter a comment (on the first tab) to explain why the field was changed.
45.	Click the scroll bar.
46.	Click the **Earns Dist** tab. 
47.	In most cases, the **Job Earnings Distribution** section is automatically populated based on the **Comp Rate** code entered on the **Job Data** tab, if the **Comp Rate** code has a mapped **Earnings Code**.
48.	The **Job Earnings Distribution** section also can be used to manually enter distribution information. Use the **Earnings Distribution Type** field to enter distribution **By Amount** or **By Percent**. After the **Earnings Distribution Type** is selected, the **Aggregate Comp Rate** field is populated with the monthly amount. ● If **By Amount** is selected, the total of all compensation rates entered must add up to the monthly comp rate. ● If **By Percent** is selected, the total of all percentages entered must add up to 100%.

Step	Action
49.	For certain academic comp rate codes, such as Health Science Comp Plan, earnings codes are defaulted based on the **Comp Rate Code** entered in **Job Compensation - Pay Components** section. Also in those cases, earnings distribution type is **By Amount** and amounts are automatically calculated.
50.	Click the **Addl Pay** tab. 
51.	There may be cases where an employee is only paid by using a recurring flat amount. In this case, the compensation section is not populated on the **Job Data** tab. Instead, the **Additional Pay** section is used. There also may be cases where neither compensation rate nor additional pay is entered. In those cases, it is recommended that you enter a comment that explains how the employee should be paid. For one time additional pay, use payroll's one time payments page.
52.	Use the **Supporting documents** link to attach supporting documents for the transfer.
53.	Enter comments for the Approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not appear on the employee’s record after the transaction is processed to completion. You can enter **Initiator Comments** on any of the tabs within this template.
54.	The **Save and Submit** button is not available until all required fields on each tab are completed. Click the **Save and Submit** button. 
55.	Click the **OK** button. 
56.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
57.	You have initiated an interlocation transfer (concurrent hire) template transaction. **End of Procedure.**

Initiate Interlocation Transfer (Terminate) Template Transaction

Use this task to initiate an interlocation transfer (terminate) template transaction. Interlocation transfers are initiated when an employee transfers from one UCPath business unit to another UCPath business unit without a break in service.

Interlocation transfers are completed using a combination of the **Concurrent Hire** template (transfer to location) and the **Voluntary Termination** template (transfer from location). This task includes steps on completing the termination template for the interlocation transfer.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to initiate an interlocation transfer (terminate) template transaction.
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC.
3.	For an interlocation transfer, use the **UC Voluntary Termination** template. Click the **UC_VOL_TERM** link. UC_VOL_TERM
4.	Click in the **Effective Date** field.
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field. For this example, enter **11/1/18**.
6.	Click the **Create Transaction** button. Create Transaction
7.	In the **Employee ID** field, enter the employee's ID number or use the lookup to search for and select it. You have access only to employee records within your business unit. Click in the **Employee ID** field.
8.	Enter the desired information into the **Employee ID** field. For this example, enter **10002610**.

Step	Action
9.	The **Employment Record Number** defaults to the first record number for which you have departmental access (in this example, **2**). Select the correct **Employment Record Number** for the job to terminate. For this example, accept the default.
10.	The **Effective Date** is populated based on your entry on the previous page. To ensure there is not a break in service during the interlocation transfer, the **Effective Date** of the termination must be the same date as the **Effective Date** of the concurrent hire. In this example, accept the default.
11.	Click the button to the right of the **Reason Code** field. ⌄
12.	Click the **Interlocation (BU) Transfer** list item. 
13.	Click the **Continue** button. 
14.	The voluntary termination template appears. The top of the page displays header data, which you can show/hide as needed.
15.	The employee's position number and work location data automatically populate for the selected employment record.
16.	The **Last Date Worked** field defaults to the work day prior to the **Effective Date**, but you can update it as necessary. If the **Effective Date** is a Monday, the **Last Date Worked** defaults to the previous Friday. This date should always be a date earlier than the **Effective Date** you entered on the previous page. For this example, accept the default.
17.	Use the **Comments** field to enter specific details or explanation regarding the transaction. This field is referenced by UCPC WFA Production to assist with processing the transaction. Click in the **Comments** field.
18.	Enter the desired information into the **Comments** field. For this example, enter **Interlocation transfer from LACMP to RVCMP.**.
19.	Click the scroll bar.
20.	Use the **Supporting documents** link to attach supporting documents.

Step	Action
21.	Enter comments for the Approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not display on the employee's record after the transaction is processed to completion.
22.	Click the **Save and Submit** button. 
23.	Click the **OK** button. 
24.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
25.	You have initiated an interlocation transfer (termination) template transaction. **End of Procedure.**

Update Person Checklist

Use this task to update an existing person checklist and add a new checklist.

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > Organizational Relationships > **Person Checklist**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **Person Checklist** page, the system displays the **Find an Existing Value** tab, which you use to search for the employee.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10075592**.
4.	Click the **Search** button. 
5.	The **Person Checklist** page displays the current checklist that is assigned to the employee. In most cases this will be the **UC New Hire Checklist**.
6.	The **New Hire Checklist** contains a list of tasks that should be completed when a new person is hired. The tasks are listed in the **Person Checklist Items** section.
7.	You must navigate to the appropriate page to update the tasks listed. Links are available for some tasks that take you directly to the UCPath page to enter the requirement.

Step	Action
8.	After tasks are entered in UCPath they must be marked as **Completed** on the checklist along with the date the task was completed.
9.	For this example, update the **Emergency Contact** information. Click the **Emergency Contact** link. Emergency Contact
10.	The **Emergency Contact** component appears for you to enter the emergency contact address and phone.
11.	Click in the **Contact Name** field.
12.	Enter the desired information into the **Contact Name** field. For this example, enter **Bruce Walker**.
13.	There must be one emergency contact designated as the primary contact. Click the **Primary Contact** option. ☐
14.	Click the button to the right of the **Relationship to Employee** field. ⌄
15.	Select the appropriate **Relationship to Employee**. For this example, click the **Spouse** list item. Spouse
16.	Click in the **Phone** field.
17.	Enter the desired information into the **Phone** field. For this example, enter **514-343-9009**.
18.	Use the **Edit Address** button to add an address for the emergency contact.
19.	Click the **Save** button. Save
20.	Update the **Status** field to indicate the employee's emergency contact has been added. Click the button to the right of the **Status** field. ⌄
21.	Click the **Completed** list item. Completed

Step	Action
22.	Enter a Status Date to indicate when the task was completed. Click in the **Status Date** field.
23.	Enter the desired information into the **Status Date** field. For this example, enter **12/11/2017**.
24.	You can also add other checklists to the employee. For example, if the employee transfers, you can add the **Transfer Checklist** to ensure all the transfer tasks are completed.
25.	To add a new checklist, you must first add a new row. Click the **Add a new row** button. ⊞
26.	Click the **Look up Checklist** button. 🔍
27.	Select the appropriate **Checklist**. For this example, click the **UCXFR** (UC Transfer (Inter/Intra) link. UCXFR
28.	The checklist is added to the employee.
29.	You have updated an existing person checklist and added a new checklist. **End of Procedure.**

Initiate Add Contingent Worker (No Position) Template Transaction

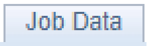
Use this task to initiate adding a contingent worker (no position) template transaction.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to initiate a template transaction.
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC 🔍

Step	Action
3.	Select the appropriate add contingent worker template. Notice there are two add contingent worker templates, one for adding a contingent worker with a position and one for adding a contingent worker without position data. Click the **UC_ADD_CWR** list item. 
4.	Click in the **Effective Date** field. 
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field.
6.	Click the **Create Transaction** button. 
7.	In the **Employee ID** field, accept the default value of **NEW**. After the WFA Production team at UCPath Center processes the new hire template, the system automatically generates the next sequential UC Employee ID number for the individual.
8.	The **Effective Date** is populated based on your entry on the previous page. Ensure that you entered the correct hire date or the date the contingent worker begins the job.
9.	Click the **Continue** button. 
10.	The add contingent worker template appears. Header details appear above the tabs. You can show/hide the header information as needed.
11.	The add contingent worker template includes two tabs: **Personal Data** and **Job Data**. Fields that are required by the system are indicted with an asterisk *.
12.	Click in the **First Name** field. 
13.	Enter the desired information into the **First Name** field.
14.	Click in the **Last Name** field. 
15.	Enter the desired information into the **Last Name** field.

Step	Action
16.	Click in the **Date of Birth** field. 
17.	Enter the desired information into the **Date of Birth** field.
18.	National ID is an optional field for a contingent worker. Click in the **National ID** field. 
19.	Enter the individual's social security number in the **National ID** field.
20.	Scroll down to display additional fields and page functions.
21.	Click in the **Address Line 1** field. 
22.	Enter the desired information into the **Address Line 1** field.
23.	Click in the **City** field. 
24.	Enter the desired information into the **City** field.
25.	Click in the **State** field. 
26.	Enter the desired information into the **State** field.
27.	Click in the **Postal Code** field. 
28.	Enter the desired information into the **Postal Code** field.
29.	Click in the **Patent Acknowledgment Sign Dt** field. 
30.	In the **Patent Acknowledgment Sign Dt** field, enter the date on which the individual signed the UC patent acknowledgement.
31.	If applicable, to indicate the person did not originally sign the standard Patent Acknowledgment form, select the **Modified Patent Ackmnt Sign Dt** check box.
32.	Use the **Comments** field to enter specific details or an explanation regarding the transaction. This field is referenced by the WFA Production team at UCPath Center to gain additional information for the transaction.
33.	If necessary, scroll up to display the **Job Data** tab.
34.	Click the **Job Data** tab. 
35.	The fields in the **Work Location - Job Fields** section are required.

Step	Action
36.	Click in the **Business Unit** field. 
37.	Enter the desired information into the **Business Unit** field.
38.	Click in the **Department** field. 
39.	Enter the desired information into the **Department** field.
40.	Click in the **Location Code** field. 
41.	Enter the desired information into the **Location Code** field.
42.	You must enter a valid contingent worker **Job Code**. Contingent worker job codes begin with CWR. For example, CWR001. Click in the **Job Code** field. 
43.	Enter the desired information into the **Job Code** field.
44.	Click in the **Reports To Position Number** field. 
45.	Enter the desired information into the **Reports To Position Number** field.
46.	Click in the **Employee Classification** field. 
47.	In the **Employee Class** field, enter **13** for staff CWRs or **14** for academic CWRs. Enter the desired information into the **Employee Classification** field.
48.	Click in the **FTE** field. 
49.	Enter the desired information into the **FTE** field.
50.	Scroll down to display additional fields and page functions.
51.	In the **Expected Job End Date** field, enter the date on which the person's job assignment ends. Click in the **Expected Job End Date** field. 
52.	Enter the desired information into the **Expected Job End Date** field.
53.	Use the **Supporting documents** link to attach supporting documents for the concurrent hire.

Step	Action
54.	Enter comments for the Approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not display on the employee's record after the transaction is processed to completion. You can enter **Initiator Comments** on any of the tabs within this template.
55.	Click the **Save and Submit** button. 
56.	Click the **OK** button. 
57.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
58.	You have initiated adding a contingent worker (no position) template transaction. **End of Procedure.**

Initiate Add Contingent Worker (With Position) Template Transaction

Use this task to initiate adding a contingent worker (with position) template transaction.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to initiate a template transaction.
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC.
3.	Select the appropriate add contingent worker template. Notice there are two add contingent worker templates, one for adding a contingent worker with a position and one for adding a contingent worker without position data. Click the **UC_ADD_CWR_POSN** list item. 
4.	Click in the **Effective Date** field. 

Step	Action
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field.
6.	Click the **Create Transaction** button.  Create Transaction
7.	In the **Employee ID** field, accept the default value of **NEW**. After the WFA Production team at UCPath Center processes the new hire template, the system automatically generates the next sequential UC Employee ID number for the individual.
8.	In the **Job Effective Date** field, enter the appropriate start date for the new contingent worker.
9.	Click the **Continue** button.  Continue
10.	The add contingent worker template appears. Header details appear above the tabs. You can show/hide the header information as needed.
11.	The add contingent worker template includes two tabs: **Personal Data** and **Job Data**. Fields that are required by the system are indicted with an asterisk *.
12.	Click in the **First Name** field. 
13.	Enter the desired information into the **First Name** field.
14.	Click in the **Last Name** field. 
15.	Enter the desired information into the **Last Name** field.
16.	Click in the **Date of Birth** field. 
17.	Enter the desired information into the **Date of Birth** field.
18.	National ID is an optional for a contingent worker. Click in the **National ID** field. 
19.	Enter the individual's social security number in the **National ID** field.

Step	Action
20.	Scroll down to display additional fields and page functions. Click the scroll bar.
21.	Click in the **Address Line 1** field. 
22.	Enter the desired information into the **Address Line 1** field.
23.	Click in the **City** field. 
24.	Enter the desired information into the **City** field.
25.	Click in the **State** field. 
26.	Enter the desired information into the **State** field.
27.	Click in the **Postal Code** field. 
28.	Enter the desired information into the **Postal Code** field.
29.	Click in the **Patent Acknowledgment Sign Dt** field. 
30.	In the **Patent Acknowledgment Sign Dt** field, enter the date on which the individual signed the UC patent acknowledgement.
31.	If applicable, to indicate the person did not originally sign the standard Patent Acknowledgment form, select the **Modified Patent Ackmnt Sign Dt** check box.
32.	If necessary, scroll up to display the **Job Data** tab. Click the scroll bar.
33.	Click the **Job Data** tab. 
34.	Click in the **Position Number** field. 
35.	Enter a position number, which is associated with a job code that starts with CWR. For example, job code CWR003. When you press **Tab** to move out of the field or click in another field, the system populates all other fields, such as **Business Unit**, **Department**, **Location** and **Establishment ID**, based on the position number. Enter the desired information into the **Position Number** field.

Step	Action
36.	Press **[Tab]** to populate the position-related fields.
37.	Several fields automatically populate based on the selected position number. Ensure the **Job Code** begins with **CWR**.
38.	Scroll down to display additional fields and page functions. Click the scroll bar.
39.	In the **Employee Class** field, enter **13** for staff CWRs or **14** for academic CWRs. Click in the **Employee Classification** field.
40.	Enter the desired information into the **Employee Classification** field.
41.	In the **Expected Job End Date** field, enter the date on which the person's job assignment ends. Click in the **Expected Job End Date** field.
42.	Enter the desired information into the **Expected Job End Date** field.
43.	Use the **Supporting documents** link to attach supporting documents for the concurrent hire.
44.	Enter comments for the Approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not display on the employee's record after the transaction is processed to completion. You can enter **Initiator Comments** on any of the tabs within this template.
45.	Click the **Save and Submit** button. Save and Submit
46.	Click the **OK** button. OK
47.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
48.	You have initiated adding a contingent worker (with position) template transaction. **End of Procedure.**

Initiate Complete Contingent Worker Instance Template Transaction

Use this task to initiate a complete contingent worker instance template transaction.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to initiate a template transaction.
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC. 🔍
3.	Select the appropriate contingent worker template. There are multiple templates for contingent worker transactions. Click the **UC_COM_CWR** list item. UC_COM_CWR
4.	Click in the **Effective Date** field.
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field.
6.	Click the **Create Transaction** button. 
7.	In the **Employee ID** field, enter the person's ID number or use the lookup to search for and select it. You can enter or select only the CWR records to which you have UCPath department access.
8.	The **Employment Record Number** defaults to the first record number for which you have departmental access (in this example, **0**). Select the correct **Employment Record Number** for the completed job.
9.	The **Effective Date** is populated based on your entry on the previous page. Ensure this is the date on which the completion takes effect. Typically, this is one business day after last date worked. For this example, accept the default date.
10.	Click the **Continue** button. 

Step	Action
11.	The complete contingent worker template appears. The top of the page displays header data, which you can show/hide as needed.
12.	The **Last Date Worked** field value defaults to one business day prior to the effective date you entered on the previous page. If the effective date is a Monday, then the **Last Date Worked** field defaults to the prior Friday's date. You can update this value if necessary.
13.	Use the **Comments** field to enter specific details or explanation regarding the transaction. This field is referenced by UCPC WFA Production to assist with processing the transaction.
14.	Use the **Supporting documents** link to attach supporting documents.
15.	Enter comments for the Approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not display on the employee's record after the transaction is processed to completion.
16.	Click the **Save and Submit** button. 
17.	Click the **OK** button. 
18.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
19.	You have initiated a complete contingent worker instance template transaction. **End of Procedure.**

Initiate Extend Contingent Worker (No Position) Template Transaction

Use this task to initiate an extend a contingent worker (no position) template transaction.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to a template transaction.

Step	Action
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC.
3.	Select the appropriate extend contingent worker appointment template. Notice there are two extend CWR templates, one for extending a CWR with a position and one for extending a CWR without a position. Click the **UC_EXT_CWR** list item. 
4.	Click in the **Effective Date** field.
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field.
6.	Click the **Create Transaction** button. 
7.	In the **Employee ID** field, enter the person's ID number or use the lookup to search for and select it. You can enter or select only the CWR records to which you have UCPath department access.
8.	The **Employment Record Number** defaults to the first record number based on your department security access. Select the correct **Employment Record Number** for the job you are extending.
9.	The **Effective Date** is populated based on your entry on the previous page. Ensure this is the date on which the contingent worker's employment extension begins.
10.	Click the **Continue** button. 
11.	Click in the **Expected Job End Date** field.
12.	In the **Expected Job End Date** field, enter the date on which employment for the selected employment record is scheduled to end. This date must be greater than the transaction effective date.

Step	Action
13.	Use the **Comments** field to enter specific details or an explanation regarding the transaction. This field is referenced by UCPC WFA Production to assist with processing the transaction. Click in the **Comments** field.
14.	Enter the desired information into the **Comments** field.
15.	Use the **Supporting documents** link to attach supporting documents.
16.	Enter comments for the Approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not display on the employee's record after the transaction is processed to completion.
17.	Click the **Save and Submit** button. 
18.	Click the **OK** button. 
19.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
20.	You have initiated an extend a contingent worker (no position) template transaction. **End of Procedure.**

Initiate Extend Contingent Worker (With Position) Template Transaction

Use this task to initiate an extend contingent worker (with position) template transaction.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to initiate a template transaction.
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC.

Step	Action
3.	Select the appropriate extend contingent worker template. Notice there are two extend contingent worker templates, one for contingent workers with a position and one for those without position data. Click the **UC_EXT_CWR_POSN** list item. 
4.	Click in the **Effective Date** field. 
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field.
6.	Click the **Create Transaction** button. 
7.	Click in the **Employee ID** field. 
8.	In the **Employee ID** field, enter the person's ID number or use the lookup to search for and select it. You can enter or select only the CWR records to which you have UCPath department access. Enter the desired information into the **Employee ID** field.
9.	The **Employment Record Number** defaults to the CWR's first record number based on your department security access. Select the correct **Employment Record Number** for the job you are extending.
10.	The **Effective Date** is populated based on your entry on the previous page. Ensure this is the date on which the contingent worker's employment extension begins.
11.	Click the **Continue** button. 
12.	The extend contingent worker template appears. The top of the page displays header data, which you can show/hide as needed.
13.	Click in the **Position Number** field. 

Step	Action
14.	**Position Number** is a required field. Always enter the existing position number from the person's job data, unless the extension is accompanied by a change in position number. The position number must be associated with a job code that starts with CWR. For example, job code CWR001. Enter the desired information into the **Position Number** field.
15.	Click in the **Expected Job End Date** field. 
16.	In the **Expected Job End Date** field, enter the date on which employment for the selected position is scheduled to end. This date must be greater than the transaction effective date.
17.	The **Work Location - Job Fields** default from the position number.
18.	Use the **Comments** field to enter specific details or explanation regarding the transaction. This field is referenced by UCPC WFA Production to assist with processing the transaction.
19.	If necessary, scroll down to display additional fields and page functions. Click the scroll bar.
20.	Use the **Supporting documents** link to attach supporting documents.
21.	Enter comments for the Approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not display on the employee’s record after the transaction is processed to completion.
22.	Click the **Save and Submit** button. 
23.	Click the **OK** button. 
24.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
25.	You have initiated an extend contingent worker (with position) template transaction. **End of Procedure.**

Initiate Renew Contingent Worker (No Position) Template Transaction

Use this task to initiate a renew contingent worker (no position) template transaction.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to initiate a template transaction.
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC.
3.	Select the appropriate renew contingent worker template. Notice there are two renew contingent worker templates, one for contingent workers with a position and one for those without position data. Click the **UC_RENW_CWR** list item. 
4.	Click in the **Effective Date** field. 
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field.
6.	Click the **Create Transaction** button. 
7.	In the **Employee ID** field, enter the person's ID number or use the lookup to search for and select it. You can enter or select only the CWR records to which you have UCPath department access.
8.	The **Effective Date** is populated based on your entry on the previous page. Ensure this is the date on which the employment renewal begins. For this example, accept the default date.
9.	Click the **Continue** button. 
10.	UCPath displays a message indicating the individual already exists in the system. Verify that the displayed employee ID and name corresponds with the individual for which you are renewing employment. Click the **OK** button. 

Step	Action
11.	The renew contingent worker template appears. The top of the page displays header data, which you can show/hide as needed.
12.	The renew contingent worker template includes two tabs: **Personal Data** and **Job Data**. The employee's personal data automatically populates. Update the personal information, if needed.
13.	Scroll down to display additional fields and page functions.
14.	Click in the **Patent Acknowledgment Sign Dt** field. 
15.	Enter the desired information into the **Patent Acknowledgment Sign Dt** field.
16.	If the person did not previously receive the standard Patent Acknowledgement Form, select the **Modified Patent Ackmnt Sign Dt** check box.
17.	Use the **Comments** field to enter specific details or an explanation regarding the transaction. This field is referenced by the WFA Production team at UCPath Center to gain additional information for the transaction.
18.	If necessary, scroll up to display the **Job Data** tab.
19.	Click the **Job Data** tab. 
20.	For CWRs, you must enter the appropriate **Business Unit**, **Department**, **Location** and **Job Code** field values. Click in the **Business Unit** field. 
21.	Enter the desired information into the **Business Unit** field.
22.	Click in the **Department** field. 
23.	Enter the desired information into the **Department** field.
24.	Click in the **Location Code** field. 
25.	Enter the desired information into the **Location Code** field.
26.	Click in the **Job Code** field. 
27.	Valid CWR job codes begin with CWR. For example, **CWR001**. Enter the desired information into the **Job Code** field.

Step	Action
28.	Click in the **Reports To Position Number** field.
29.	Enter the desired information into the **Reports To Position Number** field.
30.	Click in the **Employee Classification** field.
31.	Enter the desired information into the **Employee Classification** field. Enter **13** for staff CWRs and **14** for academic CWRs.
32.	Click in the **FTE** field.
33.	Enter the desired information into the **FTE** field.
34.	Scroll down to display additional fields and page functions.
35.	Click in the **Expected Job End Date** field.
36.	In the **Expected Job End Date** field, enter the date on which employment is scheduled to end. This date must be greater than the transaction effective date.
37.	Use the **Supporting documents** link to attach supporting documents as necessary.
38.	Enter comments for the Approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not display on the employee's record after the transaction is processed to completion. You can enter **Initiator Comments** on either tab within this template.
39.	Click the **Save and Submit** button. 
40.	The system displays the **Select an Action** page. If the person has only one inactive employee record (instance) within your business unit, then that number is defaulted. If the person has more than one inactive employee record within your business unit, then the lowest number is defaulted. Select the instance that you are renewing.
41.	Click the **Save and Submit** button. 
42.	Click the **OK** button. 
43.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.

Step	Action
44.	You have initiated a renew contingent worker (no position) template transaction. **End of Procedure.**

Initiate Renew Contingent Worker (With Position) Template Transaction

Use this task to initiate a renew contingent worker (with position) template transaction.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	Use the **Smart HR Transactions** page to initiate a template transaction.
2.	Click the **Look up Select Template** button. **Note:** The **Transaction Type** field is not used by UC. 🔍
3.	Select the appropriate renew contingent worker template. Notice there are two renew contingent worker templates, one for contingent workers with a position and one for those without position data. Click the **UC_RENW_CWR_POS** list item. UC_RENW_CWR_POS
4.	Click in the **Effective Date** field. 
5.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed. Enter the desired information into the **Effective Date** field. For this example, enter **11/26/2018**.
6.	Click the **Create Transaction** button. 
7.	Click in the **Employee ID** field. 

Step	Action
8.	In the **Employee ID** field, enter the person's ID number or use the lookup to search for and select it. You can enter or select only the CWR records to which you have UCPath department access.
9.	In the **Job Effective Date** field, enter the date on which the employment renewal begins.
10.	Click the **Continue** button. 
11.	UCPath displays a message indicating the individual already exists in the system. Verify that the displayed employee ID and name corresponds with the individual for which you are renewing employment. Click the **OK** button. 
12.	The renew contingent worker template appears. The top of the page displays header data, which you can show/hide as needed.
13.	The renew contingent worker template includes two tabs: **Personal Data and Job Data**. The employee's personal data automatically populates. Update the personal information, if needed.
14.	Scroll down to display additional fields and page functions.
15.	Click in the **Patent Acknowledgment Sign Dt** field. 
16.	Enter the desired information into the **Patent Acknowledgment Sign Dt** field.
17.	If the person did not previously receive the standard Patent Acknowledgement Form, select the **Modified Patent Ackmnt Sign Dt** check box.
18.	Use the **Comments** field to enter specific details or an explanation regarding the transaction. This field is referenced by the WFA Production team at UCPath Center to gain additional information for the transaction.
19.	If necessary, scroll up to display the **Job Data** tab.
20.	Click the **Job Data** tab. 
21.	Click in the **Position Number** field. 

Step	Action
22.	Enter a position number, which is associated with a job code that starts with CWR. For example, job code CWR003. When you press **Tab** to move out of the field or click in another field, the system populates all other fields, such as **Business Unit**, **Department**, **Location** and **Establishment ID**, based on the position number.
23.	If necessary, scroll down to display additional fields and page functions.
24.	Click in the **Employee Classification** field. 
25.	Enter the desired information into the **Employee Classification** field. Enter **13** for staff CWRs and **14** for academic CWRs.
26.	Click in the **Expected Job End Date** field. 
27.	In the **Expected Job End Date** field, enter the date on which employment for the selected position is scheduled to end. This date must be greater than the transaction effective date.
28.	Use the **Supporting documents** link to attach supporting documents as necessary.
29.	Enter comments for the Approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not display on the employee's record after the transaction is processed to completion. You can enter **Initiator Comments** on either tab within this template.
30.	Click the **Save and Submit** button. 
31.	The system displays the **Select an Action** page. If the person has only one inactive employee record (instance) within your business unit, then that number is defaulted. If the person has more than one inactive employee record within your business unit, then the lowest number is defaulted. Select the instance that you are renewing.
32.	Click the **Save and Submit** button. 
33.	Click the **OK** button. 
34.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.

Step	Action
35.	You have initiated a renew contingent worker (with position) template transaction. **End of Procedure.**

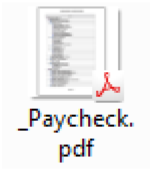
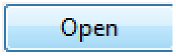
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
36.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
37.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
38.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
39.	Click the button to the right of the **Category** field. 
40.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
41.	Click in the **Subject** field.

Step	Action
42.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
43.	Click in the **Description** field.
44.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
45.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
46.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
47.	Click in the **Best Contact Phone Number** field.
48.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
49.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
50.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
51.	Click the **Add Attachment** link. 
52.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
53.	For this example, click the **_Paycheck.pdf** list item. 
54.	Click the **Open** button. 
55.	The file name appears in the **Attachments** box.
56.	Click the **Submit** button.
57.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
58.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.

Step	Action
59.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
60.	Click the scroll bar.
61.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
62.	Click the scroll bar.
63.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
64.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

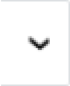
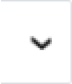
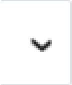
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
65.	Click the **Ask UCPath Center** button. 
66.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.

Step	Action
67.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
68.	UCPath returned one result. Click the scroll bar.
69.	Click the **Create an Inquiry** link. 
70.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
71.	Click the button to the right of the **Requested By** field. 
72.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
73.	Click the button to the right of the **Topic** field. 
74.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
75.	Click the button to the right of the **Category** field. 
76.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
77.	Click in the **Subject** field.

Step	Action
78.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
79.	Click the scroll bar.
80.	Click in the **Description** field.
81.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
82.	In this example, the full **Description** was completed on your behalf.
83.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
84.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
85.	Click the **Submit Inquiry** button. 
86.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
87.	The submitter's name appears.
88.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

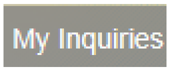
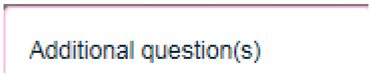
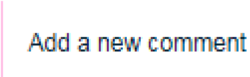
Reopen Closed UCPath Center Case

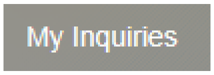
Use this task to reopen a closed inquiry via the UCPath website.

A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
89.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
90.	Click the **My Closed Inquiries** link. 
91.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
92.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 
93.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
94.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
95.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
96.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.

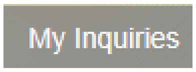
Step	Action
97.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
98.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
99.	Click the scroll bar.
100.	Notice the comment now appears in the **Case Comments** section.
101.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
102.	Return to the top of the page. Click the scroll bar.
103.	Click the **My Inquiries** link. 
104.	The new inquiry appears in the **My Open Inquires** list.
105.	You have reopened a closed inquiry. **End of Procedure.**

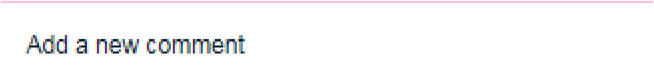
Monitor UCPath Center Cases

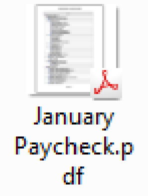
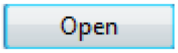
Use this task to review the status of an existing inquiry via the UCPath website.

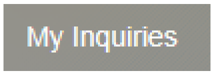
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
106.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
107.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
108.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
109.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
110.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 
111.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 
112.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 

Step	Action
113.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field.  Add a new comment
114.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
115.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
116.	Click the **Submit comment to the UCPath Center** button.  Submit comment to the UCPath Center
117.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
118.	Click the scroll bar.
119.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link.  View All
120.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. ▾
121.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
122.	To return to the case details, click the **00180573** link.  00180573
123.	Click the scroll bar.

Step	Action
124.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
125.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
126.	Click the **Open** button. 
127.	A message confirms the file was uploaded. Click the **Done** button. 
128.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
129.	You can view all attachments in a list. Click the **View All** link. 
130.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 
131.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 

Step	Action
132.	Click the **00180573** link. 
133.	Click the scroll bar.
134.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
135.	Click the **Email** link. 
136.	Review the email information as you scroll down the page. Click the scroll bar.
137.	Review the email from the UCPath Center. Click the scroll bar.
138.	Click the case number to return to the details of the case. Click the **00180573** link. 
139.	To review closed inquiries, click the **My Inquiries** link. 
140.	Click the **My Closed Inquiries** tab. 
141.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
142.	Click the **00180567** link. 
143.	Click the scroll bar.
144.	Notice the **Status** is **Closed/Resolved**.
145.	Click the scroll bar.

Step	Action
146.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
147.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMWFAL270: PayPath Transactions

Job Aid: PayPath Transactions – Action Codes, Reason Codes and Descriptions (Academic)

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMWFAL270JA_PayPathTransactions_ActionReasonCodesDescriptionsACAD_D1Rev01.pdf) to open the **PayPath Transactions - Action Codes, Reason Codes and Descriptions (Academic)** job aid in a new web browser window/tab.

Job Aid: PayPath Transactions – Action Codes, Reason Codes and Descriptions (Staff)

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMWFAL270JA_PayPathTransactions_ActionReasonCodesDescriptionsSTFF_D1Rev01.pdf) to open the **PayPath Transactions - Action Codes, Reason Codes and Descriptions (Staff)** job aid in a new web browser window/tab.

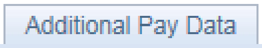
Initiate Position Data Change PayPath Transaction (Staff/Acad)

Use this task to initiate a position data change PayPath transaction. This example demonstrates a change in who the position reports to. The steps in this procedure can be used for academic or staff employees.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 

Step	Action
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10001038**.
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a change to the **Reports To Position** field, stay on the **Position Data** tab.
6.	Before you enter the update, you must identify the **Effective Date** and **Position Change Reason**.
7.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect. Click in the **Effective Date** field. 06/26/2018
8.	Enter the desired information into the **Effective Date** field. For this example, enter **07/01/2018**.
9.	Click the **Look up Position Change Reason** button. 🔍
10.	For this example, click the **Reports To Change** code. Click the **RTC** link. 
11.	Enter the new reports to position number. Click in the **Reports To Position** field. 40000320
12.	Enter the desired information into the **Reports To Position** field. For this example, enter **40000341**.
13.	Click the **Additional Pay Data** tab. 
14.	Click the scroll bar.
15.	Use the **Upload \ View Supporting Documents** link to attach supporting documentation, if applicable.
16.	Use the **Initiator's Comments** field to further explain the transaction for the Approver, if applicable.
17.	Click the **Save And Submit** button. 

Step	Action
18.	The transaction is submitted for approval.
19.	You have initiated a position data change PayPath transaction. **End of Procedure.**

Initiate Position Data Change PayPath Transaction (Acad Promotion)

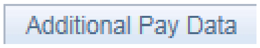
Use this task to initiate a position data change PayPath transaction. This example demonstrates a promotion for an academic employee.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10041269**.
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a position data change, stay on the **Position Data** tab.
6.	Before you enter the update, you must identify the **Effective Date** and **Position Change Reason**.
7.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect. Click in the **Effective Date** field.  06/08/2017
8.	Enter the desired information into the **Effective Date** field. For this example, enter **07/01/2017**.
9.	Click the **Look up Position Change Reason** button. 🔍

Step	Action
10.	For this example, select the **Promotion** code. Click the **PRO** list item. PRO
11.	Enter the **Job Code** for the promotion. Click in the **Job Code** field. 001200
12.	Enter the desired information into the **Job Code** field. For this example, enter **001100**.
13.	UCPath displays a message indicating that the salary plan and grade will be updated. You may need to change step, pay components or earnings distribution information. Click the **OK** button. OK
14.	If the **Salary Admin Plan**/**Salary Grade** has a salary step component configured and you or UCPath changes the **Sal Admin Plan/Salary Grade** fields, the **Step** and compensation data is removed from the **Job Data** tab. UCPath automatically updates the **Salary Admin Plan** and **Salary Grade** fields based on the selected new job code. When there are multiple valid salary plans for the job code, you must enter the correct **Salary Plan**.
15.	The **Salary Admin Plan** and **Salary Grade** fields must be updated based on the selected job code. Because there is only one salary admin plan for this job code, UCPath automatically updates the field.
16.	The **Salary Grade** also must be updated based on the selected job code; however, if there is more than one option, the field is blank and you must select the appropriate value. If there is only one salary grade, UCPath automatically updates the field.
17.	Click the **Look up Salary Grade** button. 🔍
18.	Select the appropriate **Salary Grade** code. For this example, click the **1** link. 1
19.	Click the **OK** button. OK
20.	Click the **Job Data** tab. Job Data

Step	Action
21.	Notice a new **Job Data** row has been added that includes the update from the **Position Data** tab. The new row includes the **Effective Date**, **Action** and **Action Reason** from the position data update.
22.	The updated **Job Code**, **Salary Administration Plan** and **Salary Grade** also appear.
23.	Click the scroll bar.
24.	To complete the promotion, the **Step** must be entered for the new job. After the step is entered, UCPath automatically updates the compensation information. Click in the **Step** field. 
25.	Enter the desired information into the **Step** field. For this example, enter **2**.
26.	UCPath automatically updates the **Pay Components** section based on the selected step.
27.	Click the scroll bar.
28.	Click the **Additional Pay Data** tab. 
29.	Click the scroll bar.
30.	Use the **Supporting Documents** link to attach supporting documentation, if applicable.
31.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
32.	Click the **Save And Submit** button. 
33.	The transaction is submitted for approval.
34.	You have initiated a position data change PayPath transaction for an academic employee. **End of Procedure.**

Initiate Position Data Change PayPath Transaction (Staff Promotion)

Use this task to initiate a position data change PayPath transaction. This example demonstrates a promotion for a staff employee.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10003382**.
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a position data change, stay on the **Position Data** tab.
6.	Before you enter the update, you must identify the **Effective Date** and **Position Change Reason**.
7.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect. Click in the **Effective Date** field. 06/07/2017
8.	Enter the desired information into the **Effective Date** field. For this example, enter **06/01/2017**.
9.	Click the **Look up Position Change Reason** button. 🔍
10.	For this example, select the **Promotion** code. Click the **PRO** link. 
11.	Enter the job code for the promotion. Click in the **Job Code** field. 004723
12.	Enter the desired information into the **Job Code** field. For this example, enter **004722**.

Step	Action
13.	UCPath displays a message indicating that the salary plan and grade will be updated. You may need to change step, pay components or earnings distribution information. Click the **OK** button. OK
14.	The **Salary Admin Plan** and **Salary Grade** fields are updated based on the selected job code.
15.	If the **Salary Admin Plan**/**Salary Grade** have a salary step component configured and you or UCPath changes the **Sal Admin Plan**/**Salary Grade** fields, the **Step** and compensation information is removed from the **Job Data** tab.
16.	Click the **Job Data** tab. Job Data
17.	Notice a new **Job Data** row has been added that includes the update from the **Position Data** tab. The new row includes the **Effective Date**, **Action** and **Action Reason** from the position data update.
18.	The updated **Job Code**, **Salary Administration Plan** and **Salary Grade** also appear.
19.	Click the scroll bar.
20.	To complete the promotion, the new **Step** must be entered for the new job. After the step is entered, UCPath automatically updates the compensation information.
21.	Click the **Look up Step** button. 🔍
22.	Select the appropriate step code. For this example, click the **6** list item. 6
23.	UCPath automatically updates the **Pay Components** section.
24.	Click in the **Job Data Comments** field.
25.	Enter the desired information into the **Job Data Comments** field. For this example, enter **Promotion and step updated.**.
26.	Click the scroll bar.
27.	Click the **Additional Pay Data** tab. Additional Pay Data
28.	Click the scroll bar.

Step	Action
29.	Use the **Supporting Documents** link to attach supporting documentation, if applicable.
30.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
31.	Click the **Save And Submit** button. Save And Submit
32.	The transaction is submitted for approval.
33.	You have initiated a position data change PayPath transaction for a staff promotion. **End of Procedure.**

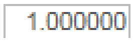
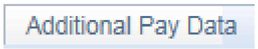
Initiate Position Data Change PayPath Transaction (Acad FTE Change)

Use this task to initiate a FTE position data change PayPath transaction. This example demonstrates a reduction in time FTE change for an academic employee.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field.
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10071591**.
4.	Click the **Search** button. Search
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a position data change, stay on the **Position Data** tab.
6.	Before you enter the update, you must identify the **Effective Date** and **Position Change Reason**.

Step	Action
7.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect. For this example, accept the default.
8.	Click the **Look up Position Change Reason** button. 🔍
9.	For this example, select the **Temporary Reduction in Time** code. Click the **TRT** list item.  TRT
10.	Enter the reduced FTE in the **FTE** field. Click in the **FTE** field.  1.000000
11.	Enter the desired information into the **FTE** field. For this example, enter **.75**.
12.	Click the **Job Data** tab. 
13.	Notice, a new **Job Data** row has been added that includes the update from the **Position Data** tab. The new row includes the **Effective Date**, **Action** and **Action Reason** from the position update.
14.	The new row also includes the updated **FTE** from the **Position FTE**.
15.	Click the scroll bar.
16.	The **Pay Components** and **Earnings Distribution** sections display updated **Comp Rate** amounts based on the new **FTE** of **.75**.
17.	Click in the **Job Data Comments** field. 
18.	Enter the desired information into the **Job Data Comments** field. For this example, enter **Reduced FTE to .75**.
19.	Click the scroll bar.
20.	Click the **Additional Pay Data** tab. 
21.	Click the scroll bar.
22.	Use the **Supporting Documents** link to attach supporting documentation, if applicable.

Step	Action
23.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
24.	Click the **Save And Submit** button. 
25.	The transaction is submitted for approval.
26.	You have initiated an FTE position data change PayPath transaction for an academic employee. **End of Procedure.**

Initiate Position Data Change PayPath Transaction (Staff FTE Change)

Use this task to initiate an FTE position data change PayPath transaction. This example demonstrates a reduction in time FTE change for a staff employee.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10048264**.
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a position data change, stay on the **Position Data** tab.
6.	Before you enter the update, you must identify the **Effective Date** and **Position Change Reason**.

Step	Action
7.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect. Click in the **Effective Date** field. 06/07/2017
8.	Enter the desired information into the **Effective Date** field. For this example, enter **06/05/2017**.
9.	Click the **Look up Position Change Reason** button. 🔍
10.	For this example, select the **Temporary Reduction in Time** code. Click the **TRT** list item. TRT
11.	Enter the reduced FTE in the **FTE** field. Click in the **FTE** field. 1.000000
12.	Enter the desired information into the **FTE** field. For this example, enter **.75**.
13.	Click the **Job Data** tab. Job Data
14.	Notice a new **Job Data** row has been added that includes the update from the **Position Data** tab. The new row includes the **Effective Date**, **Action** and **Action Reason** from the position data update.
15.	The new row also includes the updated **FTE** from the **Position FTE**.
16.	Click the scroll bar.
17.	The **Pay Components** section displays the updated **Comp Rate** amount based on the new **FTE** of **.75**.
18.	Click in the **Job Data Comments** field.
19.	Enter the desired information into the **Job Data Comments** field. For this example, enter **Position FTE reduction in time.**.
20.	Click the scroll bar.
21.	Click the **Additional Pay Data** tab. Additional Pay Data
22.	Click the scroll bar.

Step	Action
23.	Use the **Supporting Documents** link to attach supporting documentation, if applicable.
24.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
25.	Click the **Save And Submit** button. 
26.	The transaction is submitted for approval.
27.	You have initiated a position data change PayPath transaction for a staff employee. **End of Procedure.**

Initiate Multi-Row Job Data Change PayPath Transaction (Staff/Acad)

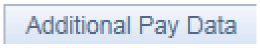
Use this task to initiate a multi-row job data change PayPath transaction. The steps in this procedure can be used for academic and staff employees.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10005009**.
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a job data change, navigate to the **Job Data** tab.
6.	Click the **Job Data** tab. 

Step	Action
7.	This example demonstrates entering two job data changes for the same effective date. The first data change extends the appointment end date and the second data change gives the employee a merit increase. Before entering the update, you must identify the **Effective Date**, **Action** and **Action Reason**.
8.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect.
9.	Click in the **Effective Date** field. 08/08/2017
10.	Enter the desired information into the **Effective Date** field. For this example, enter **8/1/2017**.
11.	Click in the **Action** field. 
12.	Enter the desired information into the **Action** field. For this example, enter **DTA** (data change).
13.	Click in the **Action Reason** field. 
14.	Enter the desired information into the **Action Reason** field. For this example, enter **EXT** (extend appointment).
15.	Click in the **Appointment End Date** field. 07/31/2017
16.	Enter the desired information into the **Appointment End Date** field. For this example, enter **12/31/2017**.
17.	Click the **Add a new row** button. +
18.	The new data row displays the information from the previous row.
19.	Next, enter the information for the second job data change, a merit increase, on the new row.
20.	The **Effective Date** is copied from the previous row and cannot be changed. The **Effective Sequence** displays **1**, indicating it is the second action for the same effective date (the first sequence is **0**).
21.	Click in the **Action** field. 
22.	Enter the desired information into the **Action** field. For this example, enter **PAY** (pay rate change).

Step	Action
23.	Click in the **Action Reason** field. 
24.	Enter the desired information into the **Action Reason** field. For this example, enter **MER** (merit).
25.	Click the scroll bar.
26.	Click in the **Step** field. 
27.	Enter the desired information into the **Step** field. For this example, enter **3**.
28.	UCPath updates the **Pay Components** section based on the selected **Step**.
29.	For **Job Data** updates, enter a comment explaining the update. Click in the **Job Data Comments** field. 
30.	Enter the desired information into the **Job Data Comments** field. For this example, enter **1. Extended Appointment. 2. Merit Increase.**.
31.	Click the scroll bar.
32.	Click the **Additional Pay Data** tab. 
33.	Click the scroll bar.
34.	Use the **Upload \ View Supporting Documents** link to attach supporting documentation, if applicable.
35.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
36.	Click the **Save And Submit** button. 
37.	The transaction is submitted for approval.
38.	You have initiated a multi-row job data change PayPath transaction. **End of Procedure.**

Initiate Pay Rate Change PayPath Transaction (Acad)

Use this task to initiate a pay rate change PayPath transaction for an academic employee.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10067651**.
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a pay rate change, navigate to the **Job Data** tab.
6.	Click the **Job Data** tab. 
7.	Before entering the update, you must identify the **Effective Date**, **Action** and **Action Reason**.
8.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect.
9.	Click in the **Effective Date** field. 06/08/2017
10.	Enter the desired information into the **Effective Date** field. For this example, enter **07/01/2017**.
11.	Click in the **Action** field.
12.	Enter the desired information into the **Action** field. For this example, enter **PAY** (pay rate change).
13.	Click in the **Action Reason** field.
14.	Enter the desired information into the **Action Reason** field. For this example, enter **NEG** (change in negotiated salary).
15.	Click the scroll bar.
16.	For this example, add a new **Comp Rate Code**.

Step	Action
17.	In the **Pay Components** section, click the **Add a New Row** button. ⊞
18.	Click the **Look up Rate Code** button. 🔍
19.	For this example, select the **HSCP-(Y) Negotiated [NOT FIRM]** code. Click the **UCHSN** list item. UCHSN
20.	Click the **OK** button. OK
21.	When the **UCHSN Rate Code** is added to the **Pay Components** section, a new **Earnings Distribution** row is automatically added for **HSCP-Negotiated (Y)**.
22.	Click in the **Comp Rate** field.
23.	Enter the desired information into the **Comp Rate** field. For this example, enter **60000**.
24.	When you exit the Pay Components **Comp Rate** field UCPath automatically updates the Earning Distribution **Comp Rate** field. Press **[Tab]**.
25.	For **Job Data** updates, enter a comment explaining the update. Click in the **Job Data Comments** field.
26.	Enter the desired information into the **Job Data Comments** field. For this example, enter **Added Y component**.
27.	Click the scroll bar.
28.	Click the **Additional Pay Data** tab. Additional Pay Data
29.	Click the scroll bar.
30.	Use the **Supporting Documents** link to attach supporting documentation, if applicable.
31.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.

Step	Action
32.	Click the **Save And Submit** button. 
33.	The transaction is submitted for approval.
34.	You have initiated a pay rate change PayPath transaction for an academic employee. **End of Procedure.**

Initiate Pay Rate Change PayPath Transaction (Staff)

Use this task to initiate a pay rate change PayPath transaction for a staff employee.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field.
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10039133**.
4.	Click the **Search** button.
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a pay rate change, navigate to the **Job Data** tab.
6.	Click the **Job Data** tab. 
7.	Before entering the update, you must identify the **Effective Date**, **Action** and **Action Reason**.
8.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect. For this example, accept the default.
9.	Click in the **Action** field.

Step	Action
10.	Enter the desired information into the **Action** field. For this example, enter **PAY** (pay rate change).
11.	Click in the **Action Reason** field.
12.	Enter the desired information into the **Action Reason** field. For this example, enter **MER** (merit).
13.	Click the scroll bar.
14.	Enter the appropriate information to update the employee's pay rate. For this example, the **Step** is updated, which automatically updates the employee's compensation information.
15.	Notice, the **Comp Rate** for **Step 6** is currently **32.90**. After the step is updated, the compensation rates are updated as well.
16.	Click the **Look up Step** button. 🔍
17.	For this example, click the **7** list item. 7
18.	The **Comp Rate** for **Step 7** is updated to **33.55**.
19.	Click the scroll bar.
20.	For **Job Data** updates, enter a comment explaining the update. Click in the **Job Data Comments** field.
21.	Enter the desired information into the **Job Data Comments** field. For this example, enter **Merit increase**.
22.	Click the scroll bar.
23.	Click the **Additional Pay Data** tab. 
24.	Click the scroll bar.
25.	Use the **Supporting Documents** link to attach supporting documentation, if applicable.
26.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
27.	Click the **Save And Submit** button. 

Step	Action
28.	The transaction is submitted for approval.
29.	You have initiated a pay rate change PayPath transaction for a staff employee. **End of Procedure.**

Initiate Job Earnings Distribution PayPath Transaction (Acad)

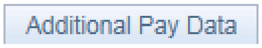
Use this task to initiate a job earnings distribution (JED) PayPath transaction for an academic employee.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10059492**.
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a JED change, navigate to the **Job Data** tab.
6.	Click the **Job Data** tab. 
7.	Before entering the update, you must identify the **Effective Date**, **Action** and **Action Reason**.
8.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect. For this example, accept the default.
9.	Click in the **Action** field. 

Step	Action
10.	Enter the desired information into the **Action** field. For this example, enter **JED** (earnings distribution change).
11.	Click in the **Action Reason** field. 
12.	Enter the desired information into the **Action Reason** field. For this example, enter **JED** (negotiated compensation plans).
13.	Click the scroll bar.
14.	The **Earnings Distribution Type** field is editable based on the selected **Action** code (JED).
15.	You can distribute earnings by percent or amount. Click the button to the right of the **Earnings Distribution Type** field. 
16.	For this example, click the **By Amount** list item. 
17.	Use the **Earnings Distribution** section to enter the **Earnings Code** and the distribution percent or amount. The percent total must equal 100%.
18.	For this example, add the Negotiated Salary Trial Program (NSTP) **Earnings Codes** in the **Earnings Distribution** section.
19.	Click in the **Earnings Code** field. 
20.	Enter the desired information into the **Earnings Code** field. For this example, enter **NCB**.
21.	Enter the monthly compensation rate. Click in the **Comp Rate** field. 
22.	Enter the desired information into the **Comp Rate** field. For this example, enter **10391.666667**.
23.	In the **Pay Components** section, click the **Add a new row** button. 
24.	Click in the **Rate Code** field. 
25.	Enter the desired information into the **Rate Code** field. For this example, enter **UCGCY**.
26.	A new **Earning Distribution** row with earn code **NNC** is automatically added as a result of adding the **UCGCY** Comp **Rate Code**.

Step	Action
27.	Enter the annual compensation rate. Click in the **Comp Rate** field.
28.	Enter the desired information into the **Comp Rate** field. For this example, enter **24000**.
29.	After entering the annual **Comp Rate** for the **UCGCY** code, the monthly **Comp Rate** for the additional earn code, **NNC**, is automatically calculated and added to the **Earnings Distribution** section.
30.	For **Job Data** updates, enter a comment explaining the update. Click in the **Job Data Comments** field.
31.	Enter the desired information into the **Job Data Comments** field. For this example, enter **Moved to NSTP JED.**.
32.	Click the scroll bar.
33.	Click the **Additional Pay Data** tab. 
34.	Click the scroll bar.
35.	Use the **Supporting Documents** link to attach supporting documentation, if applicable.
36.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
37.	Click the **Save And Submit** button. 
38.	The transaction is submitted for approval.
39.	You have initiated a Job Earnings Distribution (JED) PayPath transaction for an academic employee. **End of Procedure.**

Initiate Job Earnings Distribution PayPath Transaction (Staff)

Use this task to initiate a job earnings distribution (JED) PayPath transaction for a staff employee.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10083179**.
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a JED change, navigate to the **Job Data** tab.
6.	Click the **Job Data** tab. 
7.	Before entering the update, you must identify the **Effective Date**, **Action** and **Action Reason**.
8.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect.
9.	Click in the **Effective Date** field.  06/07/2017
10.	Enter the desired information into the **Effective Date** field. For this example, enter **07/01/2017**.
11.	Click in the **Action** field. 
12.	Enter the desired information into the **Action** field. For this example, enter **JED** (earnings distribution change).
13.	Click in the **Action Reason** field. 
14.	Enter the desired information into the **Action Reason** field. For this example, enter **ERT** (ERIT-EE reduction in time).
15.	Click the scroll bar.
16.	The **Earnings Distribution Type** field is editable based on the selected **Action** code (JED).

Step	Action
17.	You can distribute earnings by percent or amount. Click the button to the right of the **Earnings Distribution Type** field. ⌄
18.	For this example, click the **By Percent** list item. By Percent
19.	Use the **Earnings Distribution** section to enter the **Earnings Code** and the distribution percent or amount. The percent total must equal 100%. The **Comp Rate** amounts update automatically based on the **Distribution %** entered.
20.	For this example, the employee's regular pay (REG) is set to 80% and a new row is needed to add the ERIT at 20%.
21.	Click in the **Distribution %** field.
22.	Enter the desired information into the **Distribution %** field. For this example, enter **80**.
23.	Click the **Add a Row** button. ⊞
24.	Click in the **Earnings Code** field.
25.	Enter the desired information into the **Earnings Code** field. For this example, enter **ERT**.
26.	Click in the **Distribution %** field.
27.	Enter the desired information into the **Distribution %** field. For this example, enter **20**.
28.	The **Comp Rate** amounts are automatically calculated according the **Distribution %**.
29.	Enter the appropriate end date for the ERIT. Click in the **ERIT/Phased Retirement End Dt** field.
30.	Enter the desired information into the **ERIT/Phased Retirement End Dt** field. For this example, enter **07/01/2018**.

Step	Action
31.	For **Job Data** updates, enter a comment explaining the update. Click in the **Job Data Comments** field.
32.	Enter the desired information into the **Job Data Comments** field. For this example, enter **ERIT from 7/1/17 to 7/1/18**.
33.	Click the scroll bar.
34.	Click the **Additional Pay Data** tab. 
35.	Click the scroll bar.
36.	Use the **Supporting Documents** link to attach supporting documentation, if applicable.
37.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
38.	Click the **Save And Submit** button. 
39.	The transaction is submitted for approval.
40.	You have initiated a job earnings distribution (JED) PayPath transaction for a staff employee. **End of Procedure.**

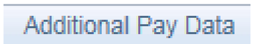
Initiate Return to Normal (JED) Distribution PayPath Transaction (Staff/Acad)

Use this task to initiate a return to regular job earnings distribution PayPath transaction. The steps in this procedure can be used for academic or staff employees.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10073013**.
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a return to normal job earnings distribution, navigate to the **Job Data** tab.
6.	Click the **Job Data** tab. 
7.	Before entering the update, you must identify the **Effective Date**, **Action** and **Action Reason**.
8.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect.
9.	Click in the **Effective Date** field. 06/22/2017
10.	Enter the desired information into the **Effective Date** field. For this example, enter **07/01/2017**.
11.	Click in the **Action** field. 
12.	Enter the desired information into the **Action** field. For this example, enter **JED** (earnings distribution change).
13.	Click in the **Action Reason** field. 
14.	Enter the desired information into the **Action Reason** field. For this example, enter **RET** (return to normal hours/dist).
15.	Click the scroll bar.

Step	Action
16.	If JED is distributed **By Percent**: To return the JED to regular distribution, reset the **Earnings Distribution Type** to **None**. If JED is distributed **By Amount**: You may need to manually re-enter the correct earnings distributions by amount.
17.	For this example, **By Percent**, click the button to the right of the **Earnings Distribution Type** field. 
18.	Click the **None** list item. 
19.	UCPath automatically clears the **Earnings Distribution** section. **Note:** The REG line is not needed.
20.	For staff employees: If the JED is related to ERIT, clear the **ERIT/Phased Retirement End Dt** field. Click in the **ERIT/Phased Retirement End Dt** field. 
21.	Press **[Delete]**.
22.	For **Job Data** updates, enter a comment explaining the update. Click in the **Job Data Comments** field. 
23.	Enter the desired information into the **Job Data Comments** field. For this example, enter **Returned from ERIT.**.
24.	Click the scroll bar.
25.	Click the **Additional Pay Data** tab. 
26.	Click the scroll bar.
27.	Use the **Supporting Documents** link to attach supporting documentation, if applicable.
28.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
29.	Click the **Save and Submit** button. 

Step	Action
30.	The transaction is submitted for approval.
31.	You have initiated a return to regular job earnings distribution PayPath transaction. **End of Procedure.**

Job Aid: Short Work Break Matrix

Click here (https://sp.ucop.edu/sites/ucpathhelp/D1_Location/LOCjobaids/UCPC_PHCMWFAL270JA_ShortWorkBreakMatrix_D1_Rev00.pdf) to open the **Short Work Break Matrix** job aid in a new web browser window/tab.

Initiate Short Work Break PayPath Transaction (Staff/Acad)

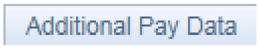
Use this task to initiate a short work break PayPath transaction. The steps in this procedure can be used for academic or staff employees.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10003896**.
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, short work break, navigate to the **Job Data** tab.
6.	Click the **Job Data** tab. 
7.	Before entering the update, you must identify the **Effective Date**, **Action** and **Action Reason**.

Step	Action
8.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect.
9.	Click in the **Effective Date** field.  06/07/2017
10.	Enter the desired information into the **Effective Date** field. For this example, enter **06/12/2017**.
11.	Click the **Look up Action** button. 🔍
12.	Click the **SWB** (short work break) link.  SWB
13.	After the **SWB Action** is selected the **Expected Return Date** field appears. This field is required.
14.	Click the **Look up Action Reason** button. 🔍
15.	Select the appropriate **Action Reason** code. For this example, click the **UST** (staff students) list item.  UST
16.	Click the scroll bar.
17.	Review the **Appointment End Date** field. If present, this date should not be prior to the **Expected Return Date** for the short work break. If the **Appointment End Date** is before the **Expected Return Date**, then you must first extend the **Appointment End Date** (**Effective Seq 0**) then add a row to enter the short work break (**Effective Seq 1**).
18.	Click in the **Expected Return Date** field. 
19.	Enter the desired information into the **Expected Return Date** field. For this example, enter **8/15/2017**.
20.	For **Job Data** updates, enter a comment explaining the update. Click in the **Job Data Comments** field. 
21.	Enter the desired information into the **Job Data Comments** field. For this example, enter **SWB until 8/15/17**.
22.	Click the scroll bar.

Step	Action
23.	Click the **Additional Pay Data** tab. 
24.	Click the scroll bar.
25.	Use the **Supporting Documents** link to attach supporting documentation, if applicable.
26.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
27.	Click the **Save And Submit** button. 
28.	The transaction is submitted for approval.
29.	You have initiated a short work break PayPath transaction. **End of Procedure.**

Initiate Return from Short Work Break PayPath Transaction (Staff/Acad)

Use this task to initiate a return from short work break PayPath transaction. The steps in this procedure can be used for academic or staff employees.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10003896**.
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a return from short work break, navigate to the **Job Data** tab.

Step	Action
6.	Click the **Job Data** tab.  Job Data
7.	Before entering the update, you must identify the **Effective Date**, **Action** and **Action Reason**.
8.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect.
9.	Click in the **Effective Date** field.  06/07/2017
10.	Enter the desired information into the **Effective Date** field. For this example, enter **08/01/2017**.
11.	Click the **Look up Action** button. 🔍
12.	Click the **RWB** (return from work break) list item.  RWB
13.	Click the **Look up Action Reason** button. 🔍
14.	Click the **RWB** (return from short work break) list item.  RWB
15.	Click the scroll bar.
16.	For **Job Data** updates, enter a comment explaining the update. Click in the **Job Data Comments** field. 
17.	Enter the desired information into the **Job Data Comments** field. For this example, enter **Returned from SWB early on 8/1/17.**.
18.	Click the scroll bar.
19.	Click the **Additional Pay Data** tab.  Additional Pay Data
20.	Click the scroll bar.
21.	Use the **Supporting Documents** link to attach supporting documentation, if applicable.
22.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.

Step	Action
23.	Click the **Save And Submit** button. Save And Submit
24.	The transaction is submitted for approval.
25.	You have initiated a return from a short work break PayPath transaction. **End of Procedure.**

Initiate Additional Pay PayPath Transaction (Staff/Acad)

Use this task to initiate an additional pay PayPath transaction for academic or staff employees.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field.
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10073757**.
4.	Click the **Search** button. Search
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, initiating additional pay, navigate to the **Additional Pay** tab.
6.	Click the **Additional Pay Data** tab. Additional Pay Data
7.	Use the **Additional Pay Data** page to enter specific information about the payment. **New Additional Pay** is entered on the left. If the employee has existing additional pay, it appears in the **Current Additional Pay** section on the right.

Step	Action
8.	Enter the **Earnings Code**, **Effective Date** and **Pay Period Amount** for the additional pay. For one-time or recurring payments enter a **Goal Amount** or **End Date**. The additional payment stops when the goal amount or end date is reached.
9.	Click the **Look up Earnings Code** button. 🔍
10.	The **Earnings Codes** that appear are based on the earnings program tied to the employee's paygroup. Select the appropriate **Earnings Code**. For this example, click the **ADC** (Additional Comp-General) list item. ADC
11.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the first day of the pay period that the additional pay should begin. Click in the **Effective Date** field. 06/22/2017
12.	Enter the desired information into the **Effective Date** field. For this example, enter **7/1/2017**.
13.	Enter the per pay period amount of the additional pay. Click in the **Pay Period Amt** field. 
14.	Enter the desired information into the **Pay Period Amt** field. For this example, enter **100.00**.
15.	Click the button to the right of the **Reason** field. ⌄
16.	Select the appropriate **Reason**. For this example, click the **New Additional Pay** list item. New Additional Pay
17.	The system continues to pay the amount indicated in the **Pay Period Amt** field until the **Goal Amount** is reached. Click in the **Goal Amount** field. 
18.	Enter the desired information into the **Goal Amount** field. For this example, enter **500.00**.

Step	Action
19.	The **Prorate Additional Pay** check box is based on the employee's JOB record. If the employee has a mid-period, effective-dated change on their JOB record, the system prorates the additional pay. The system does not prorate the additional pay based on the **Effective Date** of the Additional Pay record. It is encouraged to keep this box on.
20.	Accept the default for the **Applies to Pay Periods** check boxes. The **First** check box is selected for monthly employees. The **First** and **Second** check boxes are selected for biweekly employees. For biweekly employees, you may select which pay period(s) the additional pay should be paid.
21.	In the **Earnings Code** section, you can add a row to enter another type of additional pay with a different **Earnings Code**.
22.	In the **Effective Date** section, you can add a row to enter another additional pay for the same **Earnings Code** but a different **Effective Date**.
23.	In the **Payment Details** section, you can add a row to enter another additional pay for the same **Earnings Code** on the same **Effective Date** but different payment information.
24.	Click the scroll bar.
25.	Use the **Upload \ View Supporting Documents** link to attach supporting documentation, if applicable.
26.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
27.	Click the **Save And Submit** button. Save And Submit
28.	The transaction is submitted for approval.
29.	You have initiated an additional pay PayPath transaction. **End of Procedure.**

Initiate Update to Additional Pay PayPath Transaction (Staff/Acad)

Use this task to update an existing recurring additional pay PayPath transaction for staff and academic employees.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field.
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10001679**.
4.	Click the **Search** button. Search
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, an update to additional pay, navigate to the **Additional Pay Data** tab.
6.	Click the **Additional Pay Data** tab. Additional Pay Data
7.	Use the **Additional Pay Data** page to enter specific information about the payment. **New Additional Pay** is entered on the left. If the employee has existing additional pay, it appears in the **Current Additional Pay** section on the right.
8.	Enter the **Earnings Code**, **Effective Date** and **Pay Period Amount** for the additional pay. For one-time and recurring payments, enter a **Goal Amount** or **End Date**. The additional payment stops when the goal amount or end date is reached.
9.	Enter the same **Earnings Code** as the current additional pay. In this example, the current code is **SAS**. Click in the **Earnings Code** field.
10.	Enter the desired information into the **Earnings Code** field. For this example, enter **SAS**.

Step	Action
11.	The update must have an **Effective Date** that is after the current additional pay **Effective Date** and before current additional pay **End Date** (if one exists). When an **Effective Date** is entered and is within this range, the **Override Data** button will appear. In this example, the current **Effective Date** is 01/01/2017 and the **End Date** is 02/28/2017. Click in the **Effective Date** field.  08/08/2017
12.	Enter the desired information into the **Effective Date** field. For this example, enter **02/01/2017**.
13.	After you enter the **Earnings Code** and the **Effective Date**, the current additional pay information populates the new additional pay section and the **Override Data** button appears.
14.	Click the **Override Data** button to open the fields for edit. 
15.	The **Payment Details** fields open for editing. Update the fields, as needed. In this example, the **End Date** and **Pay Period Amt** fields must be updated.
16.	Click in the **End Date** field. 
17.	Enter the desired information into the **End Date** field. For this example, enter **08/31/2017**.
18.	Click in the **Pay Period Amt** field.  $1,991.18
19.	Enter the desired information into the **Pay Period Amt** field. For this example, enter **2,000.00**.
20.	Accept the default for the **Applies to Pay Periods** check boxes. The **First** check box is selected for monthly employees. The **First** and **Second** check boxes are selected for biweekly employees. For biweekly employees, you may select which pay period(s) the additional pay should be paid.
21.	Click the scroll bar.
22.	Use the **Upload \ View Supporting Documents** link to attach supporting documentation, if applicable.
23.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.

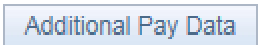
Step	Action
24.	Click the **Save And Submit** button. 
25.	The transaction is submitted for approval.
26.	You have updated a recurring additional pay PayPath transaction. **End of Procedure.**

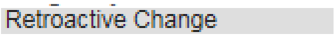
Initiate Retroactive Additional Pay PayPath Transaction (Staff/Acad)

Use this task to initiate a retroactive additional pay PayPath transaction for academic or staff employees.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10026789**.
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, initiating retroactive additional pay, navigate to the **Additional Pay** tab.
6.	Click the **Additional Pay Data** tab. 
7.	Use the **Additional Pay Data** page to enter specific information about the retroactive payment. **New Additional Pay** is entered on the left. If the employee has existing additional pay, it appears in the **Current Additional Pay** section on the right. This employee has **No Data present for current Additional Pay**.

Step	Action
8.	Enter the **Earnings Code**, **Effective Date** and **Pay Period Amount** for the additional pay. For one-time and recurring payments, enter a **Goal Amount** or **End Date**. The additional payment stops when the goal amount or end date is reached.
9.	Click the **Look up Earnings Code** button. 🔍
10.	The **Earnings Codes** that appear are based on the earnings program tied to the employee's paygroup. Select the appropriate **Earnings Code**. For this example, click the **CCA** (child care assistance) list item. CCA
11.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the first day of the pay period that the additional pay should begin. To enter a retroactive date, select a pay period date that has already been paid. Click in the **Effective Date** field. 08/09/2017
12.	Enter the desired information into the **Effective Date** field. For this example, enter **05/01/2017**.
13.	Click the button to the right of the **Reason** field. ⌄
14.	Click the **Retroactive Change** list item. Retroactive Change
15.	Enter the monthly amount of the additional pay. The system automatically calculates the amount as needed for each prior paycheck, provided the employee was paid in the prior pay period(s) and the **Earnings Code** selected is configured as a retro eligible earnings code Click in the **Pay Period Amt** field. 
16.	Enter the desired information into the **Pay Period Amt** field. For this example, enter **50.00**.
17.	Click in the **Goal Amount** field. 
18.	Enter the desired information into the **Goal Amount** field. For this example, enter **2,500**.

Step	Action
19.	Accept the default for the **Applies to Pay Periods** check boxes. The **First** check box is selected for monthly employees. The **First** and **Second** check boxes are selected for biweekly employees. For biweekly employees, you may select which pay period(s) the additional pay should be paid.
20.	Click the scroll bar.
21.	Use the **Upload \ View Supporting Documents** link to attach supporting documentation, if applicable.
22.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
23.	Click the **Save And Submit** button. 
24.	The transaction is submitted for approval.
25.	You have initiated a retroactive additional pay PayPath transaction. **End of Procedure.**

Initiate Position Data + Job Data Change PayPath Transaction (Acad)

Use this task to initiate a position data change and job data change PayPath transaction. This example demonstrates a promotion and pay rate change for an academic employee.

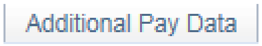
Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10048408**.
4.	Click the **Search** button. 

Step	Action
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a position data change and job data change, stay on the **Position Data** tab.
6.	Before you enter the update, you must identify the **Effective Date** and **Position Change Reason**.
7.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect. For this example, accept the default date.
8.	Click in the **Position Change Reason** field. 
9.	Enter the desired information into the **Position Change Reason** field. For this example, enter **PRO** (promotion).
10.	Enter the **Job Code** for the promotion. Click in the **Job Code** field.  001300
11.	Enter the desired information into the **Job Code** field. For this example, enter **001200**.
12.	UCPath displays a message indicating that the salary plan and grade will be updated. You may need to change step, pay components or earnings distribution information. Click the **OK** button. 
13.	UCPath automatically updates the **Salary Admin Plan** and **Salary Grade** fields based on the selected job code. If the **Salary Admin Plan**/**Salary Grade** have a salary step component configured and you or UCPath changes the **Sal Admin Plan**/**Salary Grade** fields, the **Step** and compensation information is removed from the **Job Data** tab.
14.	Because there is only one **Salary Admin Plan** for this job code, UCPath automatically populates the field. For other examples you may have to enter the plan.
15.	When there is only one **Salary Grade** UCPath automatically populates the field. For other examples you may have to enter the grade.
16.	Click the **Job Data** tab. 
17.	Notice a new **Job Data** row has been added that includes the update from the **Position Data** tab. The new row includes the **Effective Date**, **Action** and **Action Reason** from the position update.

Step	Action
18.	The updated **Job Code**, **Salary Administration Plan** and **Salary Grade** also appear.
19.	Click the scroll bar.
20.	To complete the promotion, the **Step** must be entered for the new job. After you enter the step, UCPath automatically enters the compensation information. Click in the **Step** field.
21.	Enter the desired information into the **Step** field. For this example, enter **1**.
22.	UCPath automatically updates the **Pay Components** section.
23.	Click the scroll bar.
24.	Next, add a new **Job Data** row to add an offscale increase. Click the **Add a new row** button. ➕
25.	A new row appears with the same **Effective Date**, but a new **Effective Sequence** of **1**. (The **Effective Sequence** of the previous row is **0**).
26.	Click in the **Action** field.
27.	Enter the desired information into the **Action** field. For this example, enter **PAY**.
28.	Click the **Look up Action Reason** button. 🔍
29.	For this example, select the **Off Scale Increase** code. Click the **OFF** list item. OFF
30.	Click the scroll bar.
31.	In the **Pay Components** section, add a new row for the offscale increase. Click the **Add a new row** button. ➕
32.	Click in the **Rate Code** field.
33.	Enter the desired information into the **Rate Code** field. For this example, enter **UCOFF1**.
34.	Click in the **Comp Rate** field.

Step	Action
35.	Enter the desired information into the **Comp Rate** field. For this example, enter **24000**.
36.	Click in the **Job Data Comments** field. 
37.	Enter the desired information into the **Job Data Comments** field. For this example, enter **Position promotion with off-scale increase.**.
38.	Click the scroll bar.
39.	Click the **Additional Pay Data** tab. 
40.	Click the scroll bar.
41.	Use the **Upload \ View Supporting Documents** link to attach supporting documentation, if applicable.
42.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
43.	Click the **Save And Submit** button. 
44.	The transaction is submitted for approval.
45.	Use this task to initiate a position data change and job data change PayPath transaction. **End of Procedure.**

Initiate Position Data + Job Data Change PayPath Transaction (Acad HSCP)

Use this task to initiate a position data change and job data change PayPath transaction. This example demonstrates a promotion and pay rate change for an academic HSCP employee.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.

Step	Action
2.	Click in the **Empl ID** field.
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10132507**.
4.	Click the **Search** button. Search
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a position data and job data change, stay on the **Position Data** tab.
6.	Before you enter the update, you must identify the **Effective Date** and **Position Change Reason**.
7.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect. Click in the **Effective Date** field. 06/08/2017
8.	Enter the desired information into the **Effective Date** field. For this example, enter **07/01/2017**.
9.	Click the **Look up Position Change Reason** button. 🔍
10.	For this example, select the **Promotion** code. Click the **PRO** list item. PRO
11.	Enter the **Job Code** for the promotion. Click in the **Job Code** field. 001732
12.	Enter the desired information into the **Job Code** field. For this example, enter **001733**.
13.	UCPath displays a message indicating that the salary plan and grade will be updated. You may need to change step, pay components or earnings distribution information. Click the **OK** button. OK

Step	Action
14.	UCPath automatically updates the **Salary Admin Plan** and **Salary Grade** fields based on the selected job code. If the **Salary Admin Plan**/**Salary Grade** have a salary step component configured and you or UCPath changes the **Sal Admin Plan**/**Salary Grade** fields, the **Step** and compensation information is removed from the **Job Data** tab.
15.	Because there is only one **Salary Grade** for this job code, UCPath automatically populates the field. For other examples you may have to enter the grade.
16.	UCPath did not populate the **Sal Admin Plan** field because there is more than one option available. Select the appropriate value from the list of options. If there is only one salary admin plan UCPath automatically populates the field.
17.	Click the **Look up Sal Admin Plan** button. 🔍
18.	Select the appropriate **Salary Admin Plan**. For this example, click the **APU8** link. APU8
19.	UCPath displays a message that you may need to update the step, pay components or earnings distribution. Click the **OK** button. OK
20.	Click the **Job Data** tab. Job Data
21.	Notice a new **Job Data** row has been added that includes the update from the **Position Data** tab. The new row includes the **Effective Date**, **Action** and **Action Reason** from the position update.
22.	The updated **Job Code**, **Salary Administration Plan** and **Salary Grade** also appear.
23.	Click the scroll bar.
24.	To complete the promotion, the **Step** must be entered for the new job. After you enter the step, UCPath automatically enters the compensation information. Click in the **Step** field. ☐
25.	Enter the desired information into the **Step** field. For this example, enter **1**.
26.	UCPath automatically updates the **Pay Components** and **Earnings Distribution** sections.

Step	Action
27.	For **Job Data** updates, enter a comment explaining the update. Click in the **Job Data Comments** field. 
28.	Enter the desired information into the **Job Data Comments** field. For this example, enter **Promotion with step update.**.
29.	Click the scroll bar.
30.	Next, add a new **Job Data** row to enter a new Y component of pay. Click the **Add a New Row** button. ⊞
31.	A new row appears with the same **Effective Date**, but a new **Effective Sequence** of **1**. (The **Effective Sequence** of the previous row is **0**).
32.	Click the **Look up Action** button. 🔍
33.	For this example, select the **Pay Rate Change** code. Click the **PAY** list item. PAY
34.	Click the **Look up Action Reason** button. 🔍
35.	For this example, select the **Change in Negotiated Salary** code. Click the **NEG** list item. NEG
36.	Click the scroll bar.
37.	In the **Pay Components** section, add a new row for the Y component of pay. Click the **Add a New Row** button. ⊞
38.	Enter the desired information into the **Rate Code** field. For this example, enter **UCHSY**.
39.	Press **[Tab]** to update the earnings distribution based on the new **UCHSY** rate code.
40.	UCPath automatically adds a new earnings distribution for **HSCP-Negotiated (Y)**.
41.	Enter the desired information into the Pay Components **Comp Rate** field. For this example, enter **48000**.

Step	Action
42.	Press **[Tab]** to update the earnings distribution **Comp Rate**.
43.	UCPath automatically adds the Earnings Distribution **Comp Rate** for earn code **HSCP-Negotiated (Y)**.
44.	Click in the **Job Data Comments** field.  Promotion with step update.
45.	Add the additional change information into the **Job Data Comments** field. For this example, enter **Added Y component of pay.**.
46.	Click the scroll bar.
47.	Click the **Additional Pay Data** tab. 
48.	Click the scroll bar.
49.	Use the **Supporting Documents** link to attach supporting documentation, if applicable.
50.	Use the **Initiator's Comments** field, to further explain the transaction to the Approver, if applicable.
51.	Click the **Save and Submit** button. 
52.	The transaction is submitted for approval.
53.	You have initiated a position data change and job data change PayPath transaction. **End of Procedure.**

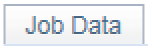
Initiate Position Data + Job Data Change PayPath Transaction (Staff)

Use this task to initiate a position data change and job data change PayPath transaction. This example demonstrates a promotion and pay rate change for a staff employee.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.

Step	Action
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10000070**.
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a position data and job data change, stay on the **Position Data** tab.
6.	Before you enter the update, you must identify the **Effective Date** and **Position Change Reason**.
7.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect. For this example, accept the default date.
8.	Click in the **Position Change Reason** field. 
9.	Enter the desired information into the **Position Change Reason** field. For this example, enter **PRO** (promotion).
10.	Enter the **Job Code** for the promotion. Click in the **Job Code** field. 004529
11.	Enter the desired information into the **Job Code** field. For this example, enter **000534**.
12.	UCPath displays a message indicating that the salary plan and grade will be updated. You may need to change step, pay components or earnings distribution information. Click the **OK** button. 
13.	Because there is only one **Salary Admin Plan** and one **Salary Grade** for this job code, UCPath automatically populates the fields. For other examples you may have to enter the plan and/or grade.
14.	Click the **Job Data** tab. 
15.	Notice a new **Job Data** row has been added that includes the update from the **Position Data** tab. The new row includes the **Effective Date**, **Action** and **Action Reason** from the position update.

Step	Action
16.	The updated **Job Code**, **Salary Administration Plan** and **Salary Grade** also appear.
17.	Add a new row to enter the pay change for the promotion. Click the **Add a new row** button. +
18.	A new row appears with the same **Effective Date**, but a new **Effective Sequence** of **1**. (The **Effective Sequence** of the previous row is **0**).
19.	Click in the **Action** field.
20.	Enter the desired information into the **Action** field. For this example, enter **PAY** (pay rate change).
21.	Click in the **Action Reason** field.
22.	Enter the desired information into the **Action Reason** field. For this example, enter **PRO** (promotion).
23.	Click the scroll bar.
24.	Click in the **Comp Rate** field. 67,536.030000
25.	Enter the desired information into the **Comp Rate** field. For this example, enter **80000**.
26.	Click in the **Job Data Comments** field.
27.	Enter the desired information into the **Job Data Comments** field. For this example, enter **Position promotion to new job code plus pay increase due to promotion.**.
28.	Click the scroll bar.
29.	Click the **Additional Pay Data** tab. 
30.	Click the scroll bar.
31.	Use the **Upload \ View Supporting Documents** link to attach supporting documentation, if applicable.
32.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.

Step	Action
33.	Click the **Save And Submit** button. 
34.	The transaction is submitted for approval.
35.	You have initiated a position data change and job data change PayPath transaction. **End of Procedure.**

Initiate Job Data Change + Additional Pay PayPath Transaction (Acad)

Use this task to initiate a job data change and an additional pay PayPath transaction for academic employees.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10020313**.
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a job data change with additional pay, navigate to the **Job Data** tab.
6.	Click the **Job Data** tab. 
7.	Before entering the update, you must identify the **Effective Date**, **Action** and **Action Reason**.
8.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect. For this example, accept the default.

Step	Action
9.	Click in the **Action** field.
10.	Enter the desired information into the **Action** field. For this example, enter **PAY**.
11.	Click in the **Action Reason** field.
12.	Enter the desired information into the **Action Reason** field. For this example, enter **STI** (step increase).
13.	Click the scroll bar.
14.	Click in the **Step** field.  38
15.	Enter the desired information into the **Step** field. For this example, enter **39**.
16.	After the step is entered, UCPath automatically updates the compensation information.
17.	For **Job Data** updates, enter a comment explaining the update. Click in the **Job Data Comments** field.
18.	Enter the desired information into the **Job Data Comments** field. For this example, enter **Step increase with additional pay.**.
19.	Click the scroll bar.
20.	Click the **Additional Pay Data** tab. 
21.	Use the **Additional Pay Data** page to enter specific information about the payment. **New Additional Pay** is entered on the left. If the employee has existing additional pay, it appears on the right. This employee has **No Data present for current Additional Pay**.
22.	Enter the **Earnings Code**, **Effective Date** and **Pay Period Amount** for the additional pay. For one-time and recurring payments, enter a **Goal Amount** or **End Date**. The additional payment stops when the goal amount or end date is reached.
23.	Click the **Look up Earnings Code** button. 🔍

Step	Action
24.	The **Earnings Codes** that appear are based on the earnings program tied to the employee's paygroup. Select the appropriate **Earnings Code**. For this example, click the **ADC** (Additional Comp-General) list item. ADC
25.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the first day of the pay period that the additional pay should begin. Click in the **Effective Date** field. 07/10/2017
26.	Enter the desired information into the **Effective Date** field. For this example, enter **7/1/2017**.
27.	Enter the per pay period amount of the additional pay. Click in the **Pay Period Amt** field. 
28.	Enter the desired information into the **Pay Period Amt** field. For this example, enter **500**.
29.	The system continues to pay the amount indicated in the **Pay Period Amt** field until the **Goal Amount** is reached. Click in the **Goal Amount** field. 
30.	Enter the desired information into the **Goal Amount** field. For this example, enter **500**.
31.	Click the button to the right of the **Reason** field. 
32.	Select the appropriate **Reason**. For this example, click the **Academic Advancement** list item. Academic Advancement
33.	Accept the default for the **Applies to Pay Periods** check boxes. The **First** check box is selected for monthly employees. The **First** and **Second** check boxes are selected for biweekly employees. For biweekly employees, you may select which pay period(s) the additional pay should be paid.
34.	Click the scroll bar.
35.	Use the **Upload \ View Supporting Documents** link to attach supporting documentation, if applicable.

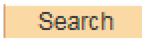
Step	Action
36.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
37.	Click the **Save And Submit** button. 
38.	The transaction is submitted for approval.
39.	You have initiated a job data change and an additional pay PayPath transaction. **End of Procedure.**

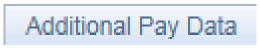
Initiate Job Data Change + Additional Pay PayPath Transaction (Staff)

Use this task to initiate a job data change and an additional pay PayPath transaction for staff employees.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10003401**.
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a job data change, navigate to the **Job Data** tab.
6.	Click the **Job Data** tab. 
7.	Before entering the update, you must identify the **Effective Date**, **Action** and **Action Reason**.
8.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect.

Step	Action
9.	Click in the **Effective Date** field.  07/10/2017
10.	Enter the desired information into the **Effective Date** field. For this example, enter **08/01/2017**.
11.	Click in the **Action** field. 
12.	Enter the desired information into the **Action** field. For this example, enter **PAY**.
13.	Click in the **Action Reason** field. 
14.	Enter the desired information into the **Action Reason** field. For this example, enter **MER**.
15.	Click the scroll bar.
16.	Click in the **Step** field.  10
17.	Enter the desired information into the **Step** field. For this example, enter **11**.
18.	After the step is entered, UCPath automatically updates the compensation information.
19.	For **Job Data** updates, enter a comment explaining the update. Click in the **Job Data Comments** field. 
20.	Enter the desired information into the **Job Data Comments** field. For this example, enter **Merit increase with additional pay.**.
21.	Click the scroll bar.
22.	Click the **Additional Pay Data** tab. 
23.	Use the **Additional Pay Data** page to enter specific information about the payment. **New Additional Pay** is entered on the left. If the employee has existing additional pay, it appears on the right. This employee has **No Data present for current Additional Pay**.
24.	Enter the **Earnings Code**, **Effective Date** and **Pay Period Amount** for the additional pay. For one-time or recurring payments, enter a **Goal Amount** or **End Date**. The additional payment stops when the goal amount or end date is reached.

Step	Action
25.	Click the **Look up Earnings Code** button. 🔍
26.	The **Earnings Codes** that appear are based on the earnings program tied to the employee's paygroup. Select the appropriate **Earnings Code**. For this example, click the **ANN** (incentive award) list item. ANN
27.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the first day of the pay period that the additional pay should begin. Click in the **Effective Date** field. 07/10/2017
28.	Enter the desired information into the **Effective Date** field. For this example, enter **8/1/2017**.
29.	Enter the per pay period amount of the additional pay. Click in the **Pay Period Amt** field. 10 ×
30.	Enter the desired information into the **Pay Period Amt** field. For this example, enter **100**.
31.	The system continues to pay the amount indicated in the **Pay Period Amt** field until the **Goal Amount** is reached. Click in the **Goal Amount** field. ×
32.	Enter the desired information into the **Goal Amount** field. For this example, enter **300**.
33.	Accept the default for the **Applies to Pay Periods** check boxes. The **First** check box is selected for monthly employees. The **First** and **Second** check boxes are selected for biweekly employees.
34.	Click the scroll bar.
35.	Use the **Upload \ View Supporting Documents** link to attach supporting documentation, if applicable.
36.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
37.	Click the **Save And Submit** button. Save And Submit
38.	The transaction is submitted for approval.

Step	Action
39.	You have initiated a job data change and an additional pay PayPath transaction. **End of Procedure.**

Initiate Position Data + Job Data + Additional Pay Change PayPath Transaction (Acad)

Use this task to initiate a position data change, job data change and an additional pay change PayPath transaction for academic employees.

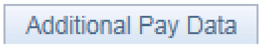
Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10048408**.
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a position data and job data change with additional pay, stay on the **Position Data** tab.
6.	Before you enter the update, you must identify the **Effective Date** and **Position Change Reason**.
7.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect. Click in the **Effective Date** field. 07/10/2017
8.	Enter the desired information into the **Effective Date** field. For this example, enter **07/01/2017**.
9.	Click the **Look up Position Change Reason** button. 🔍

Step	Action
10.	For this example, select the **Promotion** code. Click the **PRO** list item. PRO
11.	Enter the **Job Code** for the promotion. Click in the **Job Code** field. 001300
12.	Enter the desired information into the **Job Code** field. For this example, enter **001200**.
13.	UCPath displays a message indicating that the salary plan and grade will be updated. You may need to change step, pay components or earnings distribution information. Click the **OK** button. OK
14.	UCPath automatically updates the **Salary Admin Plan** and **Salary Grade** fields based on the selected job code. If the **Salary Admin Plan**/**Salary Grade** have a salary step component configured and you or UCPath changes the **Sal Admin Plan**/**Salary Grade** fields, the **Step** and compensation information is removed from the **Job Data** tab.
15.	Because there is only one **Salary Admin Plan** for this job code, UCPath automatically populates the field. For other examples you may have to enter the plan.
16.	UCPath did not populate the **Salary Grade** field because there is more than one option available. Select the appropriate value from the list of options. If there is only one salary grade, UCPath automatically populates the field.
17.	Click the **Look up Salary Grade** button. 🔍
18.	Select the appropriate **Salary Grade** code. For this example, click the **1** link. 1
19.	UCPath displays a message that you may need to update the step, pay components or earnings distribution. Click the **OK** button. OK

Step	Action
20.	Click the **Job Data** tab. Job Data
21.	Notice a new **Job Data** row has been added that includes the update from the **Position Data** tab. The new row includes the **Effective Date**, **Action** and **Action Reason** from the position update.
22.	The updated **Job Code**, **Salary Administration Plan** and **Salary Grade** also appear.
23.	To complete the promotion, the new **Step** must be entered for the new job. After you enter the step, UCPath automatically updates the compensation information. Click the **Look up Step** button. 🔍
24.	Select the appropriate step. For this example, click the **1** list item. 1
25.	UCPath automatically updates the compensation information.
26.	Next, add a row to update the Post Doc Anniversary Date. Click the **Add a new row** button. +
27.	A new row appears with the same **Effective Date**, but a new **Effective Sequence** of **1**. (The **Effective Sequence** of the previous row is **0**).
28.	Click the **Look up Action** button. 🔍
29.	For this example, select the **Data Change** code. Click the **DTA** list item. DTA
30.	Click the **Look up Action Reason** button. 🔍
31.	For this example, select the **Update Post Doc Anniversary Dt** code. Click the **PST** link. PST
32.	Click the scroll bar.
33.	Click in the **Post Docs Anniversary Date** field.

Step	Action
34.	Enter the desired information into the **Post Docs Anniversary Date** field. For this example, enter **07/01/2018**.
35.	Click in the **Job Comments** field.
36.	Enter the desired information into the **Job Comments** field. For this example, enter **Promotion, entered post doc anniversary date and additional pay.**.
37.	Click the scroll bar.
38.	Click the **Additional Pay Data** tab.  Additional Pay Data
39.	Use the **Additional Pay Data** page to enter specific information about the payment. **New Additional Pay** is entered on the left. If the employee has existing additional pay, it appears on the right. This employee has **No Data present for current Additional Pay**.
40.	Enter the **Earnings Code**, **Effective Date** and **Pay Period Amount** for the additional pay. For one-time and recurring payments, enter a **Goal Amount** or **End Date**. The additional payment stops when the goal amount or end date is reached.
41.	Click the **Look up Earnings Code** button. 🔍
42.	For this example, click the **ADC** (Additional Comp-General) list item.  ADC
43.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the first day of the pay period that the additional pay should begin. Click in the **Effective Date** field.  07/10/2017
44.	Enter the desired information into the **Effective Date** field. For this example, enter **07/01/2017**.
45.	Enter the per pay period amount of the additional pay. Click in the **Pay Period Amt** field.
46.	Enter the desired information into the **Pay Period Amt** field. For this example, enter **5000**.

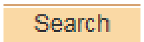
Step	Action
47.	The system continues to pay the amount indicated in the **Pay Period Amt** field until the **Goal Amount** is reached. Click in the **Goal Amount** field. 
48.	Enter the desired information into the **Goal Amount** field. For this example, enter **35000**.
49.	Click the button to the right of the **Reason** field. 
50.	Select the appropriate **Reason**. For this example, click the **Negotiated Change** list item. 
51.	Accept the default for the **Applies to Pay Periods** check boxes. The **First** check box is selected for monthly employees. The **First** and **Second** check boxes are selected for biweekly employees. For biweekly employees, you may select which pay period(s) the additional pay should be paid.
52.	Click the scroll bar.
53.	Use the **Upload \ View Supporting Documents** link to attach supporting documentation, if applicable.
54.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
55.	Click the **Save And Submit** button. 
56.	The transaction is submitted for approval.
57.	You have initiated a position data change, job data change and an additional pay change PayPath transaction. **End of Procedure.**

Initiate Position Data + Job Data + Additional Pay Change PayPath Transaction (Staff)

Use this task to initiate a position data change, job data change and an additional pay change PayPath transaction for staff employees.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10000176**.
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a position data and job data change with additional pay, stay on the **Position Data** tab.
6.	Before you enter the update, you must identify the **Effective Date** and **Position Change Reason**.
7.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect. Click in the **Effective Date** field.  07/10/2017
8.	Enter the desired information into the **Effective Date** field. For this example, enter **07/01/2017**.
9.	Click in the **Position Change Reason** field. 
10.	Enter the desired information into the **Position Change Reason** field. For this example, enter **PRO** (promotion).
11.	Enter the **Job Code** for the promotion. Click in the **Job Code** field.  007732
12.	Enter the desired information into the **Job Code** field. For this example, enter **000282**.
13.	UCPath displays a message indicating that the salary plan and grade will be updated. You may need to change step, pay components or earnings distribution information. Click the **OK** button. 

Step	Action
14.	The **Salary Admin Plan** and **Salary Grade** fields are updated based on the selected job code. Because there is only one **Salary Admin Plan** and one **Salary Grade** for this job code, UCPath automatically populates the fields. For other examples, you may need to select the correct values.
15.	Click the **Job Data** tab. 
16.	Notice a new **Job Data** row has been added that includes the update from the **Position Data** tab. The new row includes the **Effective Date**, **Action** and **Action Reason** from the position update.
17.	The updated **Job Code**, **Salary Administration Plan** and **Salary Grade** also appear.
18.	Add a row to enter a pay increase. Click the **Add a new row** button. ⊞
19.	A new row displays with the same **Effective Date**, but a new **Effective Sequence** of **1**. (The **Effective Sequence** of the previous row is **0**).
20.	Click in the **Action** field. 
21.	Enter the desired information into the **Action** field. For this example, enter **PAY** (pay rate change).
22.	Click in the **Action Reason** field. 
23.	Enter the desired information into the **Action Reason** field. For this example, enter **PRO** (promotion/academic promotion).
24.	Click the scroll bar.
25.	Click in the **Comp Rate** field.  81,449.000000
26.	Enter the desired information into the **Comp Rate** field. For this example, enter **91000**.
27.	Click in the **Job Data Comments** field. 
28.	Enter the desired information into the **Job Data Comments** field. For this example, enter **Position promotion with pay increase and additional pay.**.
29.	Click the scroll bar.

Step	Action
30.	Click the **Additional Pay Data** tab.  Additional Pay Data
31.	Use the **Additional Pay Data** page to enter specific information about the payment. **New Additional Pay** is entered on the left. If the employee has existing additional pay, it appears on the right. This employee has **No Data present for current Additional Pay**.
32.	Enter the **Earnings Code**, **Effective Date** and **Pay Period Amount** for the additional pay. For one-time and recurring payments, enter a **Goal Amount** or **End Date**. The additional payment stops when the goal amount or end date is reached.
33.	Click the **Look up Earnings Code** button. 🔍
34.	The **Earnings Codes** that appear are based on the earnings program tied to the employee's paygroup. Select the appropriate **Earnings Code**. For this example, click the **CCA** (Child Care Assistance) list item.  CCA
35.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the first day of the pay period that the additional pay should begin. Click in the **Effective Date** field.  07/10/2017
36.	Enter the desired information into the **Effective Date** field. For this example, enter **8/1/2017**.
37.	Enter the per pay period amount of the additional pay. Click in the **Pay Period Amt** field.
38.	Enter the desired information into the **Pay Period Amt** field. For this example, enter **250**.
39.	The system continues to pay the amount indicated in the **Pay Period Amt** field until the **End Date** or **Goal Amount** is reached. Click in the **End Date** field.
40.	Enter the desired information into the **End Date** field. For this example, enter **02/01/2018**.

Step	Action
41.	Accept the default for the **Applies to Pay Periods** check boxes. The **First** check box is selected for monthly employees. The **First** and **Second** check boxes are selected for biweekly employees. For biweekly employees, you may select which pay period(s) the additional pay should be paid.
42.	Click the scroll bar.
43.	Use the **Upload \ View Supporting Documents** link to attach supporting documentation, if applicable.
44.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
45.	Click the **Save And Submit** button. 
46.	The transaction is submitted for approval.
47.	You have initiated a position data change, job data change and an additional pay change PayPath transaction. **End of Procedure.**

Initiate Job Data FTE Override PayPath Transaction (Staff/Acad)

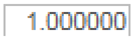
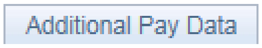
Use this task to initiate a Job Data FTE override PayPath transaction. This action makes the Position FTE and Job Data FTE independent so that the Position FTE does not update Job Data FTE. This example demonstrates a temporary change in Job Data FTE and applies to either staff or academic employees.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10071591**.

Step	Action
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a position change, stay on the **Position Data** tab.
6.	Notice, the current **FTE** value for the Position is **1.0**. By default, UCPath automatically copies the FTE value entered on the **Position** to the **Job Data** FTE. In this example, the employee is reducing their FTE temporarily so you can disconnect the automatic update from **Position** to **Job Data** so that the **Job Data** FTE can be temporarily changed without changing the **Position** FTE.
7.	When the **Include FTE** check box is selected the FTE value is automatically copied from **Position** to **Job Data**. This check box is selected by default and is view-only. When you enter the proper **Position Change Reason** code on this page, the check box becomes editable. When you clear the check box, the FTE values on **Position** and **Job Data** are independent of each other.
8.	Before you enter the update, you must identify the **Effective Date** and **Position Change Reason**.
9.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect. For this example, accept the default.
10.	Click in the **Position Change Reason** field. 
11.	Enter the desired information into the **Position Change Reason** field. For this example, enter **JFT** (Job Data FTE Override).
12.	After you enter the **Job Data FTE Override** value in the **Position Change Reason** field, the **Include FTE** check box becomes editable.
13.	Click the **Include FTE** option to clear the check box. ☑
14.	Click the **Job Data** tab. 
15.	UCPath automatically inserts the position **Action** and **Action Reason** on the **Job Data** page.
16.	Click the scroll bar.
17.	Notice the **Comp Rate**, **Standard Hours**, and **Earnings Distribution** fields currently display information based on a **1.0 FTE**.

Step	Action
18.	Notice the **Job Data FTE** field is now editable because it is no longer controlled by the **Position FTE**. Click in the **FTE** field. 
19.	Enter the desired information into the **FTE** field. For this example, enter **.5**.
20.	Now that the **Job Data FTE** has been changed, the **Comp Rate**, **Standard Hours** and **Earnings Distribution** fields display information based on the updated FTE.
21.	For **Job Data** updates, enter a comment explaining the update. Click in the **Job Data Comments** field. 
22.	Enter the desired information into the **Job Data Comments** field. For this example, enter **Job Data FTE Override.**.
23.	Click the scroll bar.
24.	Click the **Additional Pay Data** tab. 
25.	Click the scroll bar.
26.	Use the **Supporting Documents** link to attach supporting documentation, if applicable.
27.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
28.	Click the **Save And Submit** button. 
29.	The transaction is submitted for approval.
30.	You have initiated a Job Data FTE override PayPath transaction. **End of Procedure.**

Initiate Position Data Change PayPath Transaction (Staff/Acad Dept Transfer)

Use this task to initiate a position data change PayPath transaction. This example demonstrates a department transfer within the same position. The steps in this procedure can be used for academic or staff employees.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10003260**.
4.	Click the **Search** button.  Search
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, a department transfer, stay on the **Position Data** tab.
6.	Before you enter the update, you must identify the **Effective Date** and **Position Change Reason**.
7.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the update should take effect. Click in the **Effective Date** field.  06/07/2017
8.	Enter the desired information into the **Effective Date** field. For this example, enter **06/05/2017**.
9.	Click the **Look up Position Change Reason** button. 🔍
10.	For this example, select the **Transfer** code. Click the **XFR** list item.  XFR
11.	Enter the new **Department ID** for the transfer. Click in the **Department ID** field.  168500
12.	Enter the desired information into the **Department ID** field. For this example, enter **167000**.
13.	The **Location** field automatically updates based on the selected **Department ID**.

Step	Action
14.	Click the **Job Data** tab. 
15.	Notice a new **Job Data** row has been added that includes the update from the **Position Data** tab. The new row includes the **Effective Date**, **Action** and **Action Reason** from the position data update, as well as the new **Department** and **Location Code**.
16.	Click the **Additional Pay Data** tab. 
17.	Click the scroll bar.
18.	Use the **Supporting Documents** link to attach supporting documentation, if applicable.
19.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
20.	Click the **Save And Submit** button. 
21.	The transaction is submitted for approval.
22.	You have initiated a position data change PayPath transaction. **End of Procedure.**

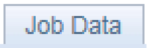
Initiate Short Work Break Extension PayPath Transaction (Staff/Acad)

Use this task to initiate an extension for a short work break. The steps in this procedure can be used for academic or staff employees.

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Note: This page also may be available in **Workcenter** depending on your security access.

Step	Action
1.	After you navigate to the **PayPath Actions** component, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate employee record. Enter search criteria in one or more of the search fields on this page.
2.	Click in the **Empl ID** field. 
3.	Enter the desired information into the **Empl ID** field. For this example, enter **10006443**.

Step	Action
4.	Click the **Search** button. 
5.	The **PayPath Actions** page displays the **Position Data** tab. Navigate to the appropriate tab for the update you must enter. For this example, an extension for a short work break, navigate to the **Job Data** tab.
6.	Click the **Job Data** tab. 
7.	Before entering the update, you must identify the **Effective Date**, **Action** and **Action Reason**.
8.	The **Effective Date** field defaults to the system date (today's date). If needed, change the date to reflect the date the extension should take effect. For this example, accept the default.
9.	Click the **Look up Action** button. 🔍
10.	Select the appropriate action. Click the **DTA** (Data Change) link. 
11.	Click the **Look up Action Reason** button. 🔍
12.	Select the appropriate action reason. Click the **EXP** (Extend Expected Return Date) link. 
13.	Review the **Appointment End Date** field. If present, this date should not be prior to the **Expected Return Date** for the short work break. If the **Appointment End Date** is <u>before</u> the **Expected Return Date**, then you must first extend the **Appointment End Date** (**Effective Seq 0**) then add a row to extend the short work break (**Effective Seq 1**).
14.	In this example, the **Appointment End Date** is after the new **Expected Return Date**. No change is needed for the **Appointment End Date** field. Click in the **Expected Return Date** field.  11/30/2018
15.	Enter the desired information into the **Expected Return Date** field. For this example, enter **12/31/2018**.

Step	Action
16.	Click the **Additional Pay Data** tab. 
17.	Click the scroll bar.
18.	Use the **Supporting Documents** link to attach supporting documentation, if applicable.
19.	Use the **Initiator's Comments** field, to further explain the transaction for the Approver, if applicable.
20.	Click the **Save And Submit** button. 
21.	A warning message appears. Click the **OK** button. 
22.	The transaction is submitted for approval.
23.	You have initiated an extension for a short work break. **End of Procedure.**

Submit Case to UCPath Center

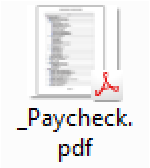
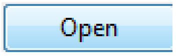
Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
24.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 

Step	Action
25.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. ▼
26.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.  Payroll
27.	Click the button to the right of the **Category** field. ▼
28.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
29.	Click in the **Subject** field.
30.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
31.	Click in the **Description** field.
32.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
33.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
34.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
35.	Click in the **Best Contact Phone Number** field.
36.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
37.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
38.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
39.	Click the **Add Attachment** link.  Add Attachment

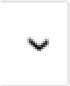
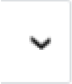
Step	Action
40.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
41.	For this example, click the **_Paycheck.pdf** list item. 
42.	Click the **Open** button. 
43.	The file name appears in the **Attachments** box.
44.	Click the **Submit** button.
45.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
46.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
47.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
48.	Click the scroll bar.
49.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
50.	Click the scroll bar.
51.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
52.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

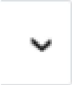
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
53.	Click the **Ask UCPath Center** button.  Ask UCPath Center
54.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
55.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
56.	UCPath returned one result. Click the scroll bar.
57.	Click the **Create an Inquiry** link.  Create an Inquiry
58.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
59.	Click the button to the right of the **Requested By** field. 
60.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
61.	Click the button to the right of the **Topic** field. 

Step	Action
62.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
63.	Click the button to the right of the **Category** field. 
64.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
65.	Click in the **Subject** field.
66.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
67.	Click the scroll bar.
68.	Click in the **Description** field.
69.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
70.	In this example, the full **Description** was completed on your behalf.
71.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
72.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
73.	Click the **Submit Inquiry** button. 
74.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
75.	The submitter's name appears.
76.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

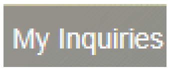
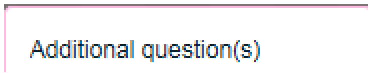
Reopen Closed UCPath Center Case

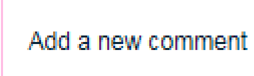
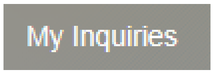
Use this task to reopen a closed inquiry via the UCPath website.

A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
77.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. My Inquiries
78.	Click the **My Closed Inquiries** link. My Closed Inquiries
79.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 00180567
80.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. Select Your Reopen Reason
81.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. Additional question(s)

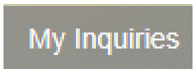
Step	Action
82.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
83.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
84.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
85.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
86.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
87.	Click the scroll bar.
88.	Notice the comment now appears in the **Case Comments** section.
89.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
90.	Return to the top of the page. Click the scroll bar.
91.	Click the **My Inquiries** link. 
92.	The new inquiry appears in the **My Open Inquires** list.
93.	You have reopened a closed inquiry. **End of Procedure.**

Monitor UCPath Center Cases

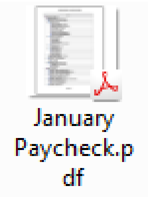
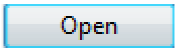
Use this task to review the status of an existing inquiry via the UCPath website.

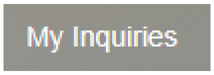
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
94.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
95.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
96.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
97.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
98.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 

Step	Action
99.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. Date/Time Opened ▾
100.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 00180573
101.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field. Add a new comment
102.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
103.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
104.	Click the **Submit comment to the UCPath Center** button. Submit comment to the UCPath Center
105.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
106.	Click the scroll bar.
107.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. View All

Step	Action
108.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. 
109.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
110.	To return to the case details, click the **00180573** link. 
111.	Click the scroll bar.
112.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
113.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
114.	Click the **Open** button. 
115.	A message confirms the file was uploaded. Click the **Done** button. 
116.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
117.	You can view all attachments in a list. Click the **View All** link. 

Step	Action
118.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. ▼
119.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. ▼
120.	Click the **00180573** link.  00180573
121.	Click the scroll bar.
122.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
123.	Click the **Email** link.  Sandbox: UCPath Center: Inquir.
124.	Review the email information as you scroll down the page. Click the scroll bar.
125.	Review the email from the UCPath Center. Click the scroll bar.
126.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
127.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
128.	Click the **My Closed Inquiries** tab.  My Closed Inquiries

Step	Action
129.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
130.	Click the **00180567** link.  00180567
131.	Click the scroll bar.
132.	Notice the **Status** is **Closed/Resolved**.
133.	Click the scroll bar.
134.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. ⌂
135.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMWFAL300: Position Control

View Position Information

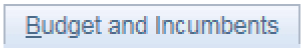
Use this task to view position data for a specific position in UCPath.

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Maintain Positions/Budgets > **Add/Update Position Info**

Step	Action
136.	When you navigate to the **Add/Update Position Info** component, the system displays the **Find an Existing Value** tab, which you use to search for existing positions. If you don't know the position number you can search using other search fields. Enter search criteria in one or more of the search fields.
137.	Click in the **Position Number** field. 
138.	Enter the desired information into the **Position Number** field. For this example, enter **40078651**.

Step	Action
139.	Select the **Include History** check box to view historical, current and future rows of data. You also have the ability to select this action within the **Position Data** component.
140.	Click the **Search** button. 
141.	The **Description** page displays header-level information about the position, as well as **Job Information**, **Work Location** information and **Salary Plan Information**. This component is effective dated and captures the history of all changes to the position.
142.	Positions are typically set up as single headcount, but there are instances of multiple headcount positions. This example displays a **Current Head Count** of **1 out of 1**, which is currently filled by an employee, as indicated by the **Headcount Status** field.
143.	Review the **Job Information** associated with the position. The **Union Code**, **Title** and **Short Title** fields are attributes of the **Job Code**. These fields default from the job code when the position is created. The **Reg/Temp** and **Regular Shift** fields are not used by UC.
144.	Review the **Work Location** information associated with the position. These fields identify the **Department** and physical **Location** of the position, as well as the position to which this position reports (**Reports To** field). The **Supervisor Lvl** field is not used by UC.
145.	Scroll down to display additional fields and page options.
146.	Review the **Salary Plan Information** associated with the position. These fields identify the position's **Salary Admin Plan** and the **Grade**. You can also view the **Standard Hours** within the **Work Period**. The **Step** field is not used at the position level.
147.	The daily hours are inconsequential and are not used to determine an employee’s time/pay.

Step	Action
148.	Review the position's **FLSA Status**. **FLSA Status** options include: **Exempt**, **Nonexempt, Nonexempt Alt Overtime** and **No FLSA Required**. **Note:** The **Nonexempt Alt Overtime** option is used to track whether someone is eligible for an alternate overtime calculation when working in states that do not use the federal overtime guidelines. This status enables the calculation of double overtime using the regular rate of pay.
149.	The **Bargaining Unit** field is not used by UC. Union dues and fees are based on the **Union Code** (above) which defaults from the **Job Code**. However, for record keeping purposes, the union codes are mapped to the respective bargaining unit behind the scenes in UCPath.
150.	If you did not select the **Include History** check box when you searched for and selected the position, you can click the **Include History** button at the bottom of each page in the component.
151.	Click the **Specific Information** link.  Specific Information
152.	The **Specific Information** page displays the **Max Head Count** for the position, a series of check boxes, and a section specific to **Education and Government**.
153.	The **Incumbents** check boxes become available for update (by a Position Administrator only) when the position has at least one incumbent, as seen in this example.
154.	The **Update Incumbents** check box is selected when the position has incumbents. When selected, any updates to the position automatically update the position-related **Job Data** fields for the assigned incumbents.
155.	The **Include Salary Plan/Grade** check box is selected when the grade is not configured to include steps and the **Update Incumbents** check box is selected.
156.	The **Force Update for Title Changes** check box is selected when there is a requirement for the title on the position to be different from the **Business Title** on the job.
157.	The **Include FTE** check box is selected when there is a requirement for the full time equivalency (FTE) on the position to be different from the FTE on the job.
158.	If the position is approved, then the **Budgeted Position** check box is selected. All approved positions are considered budgeted; if this check box is not selected, you cannot report on this position.
159.	UC does not use the following fields: **Signature Authority**, **Confidential Position**, **Job Sharing Permitted** and **Available for Telework**.

Step	Action
160.	The **Education and Government** section identifies the position's **Classified Indicator** and the **FTE**. If applicable, the **Position Pool ID** field indicates the position pool to which the position belongs. Work Study positions must have a position pool. The **FTE** field displays the maximum FTE that a single incumbent in the position can have. The **Adds to FTE Actual Count** field indicates whether the position counts against the department's FTE maximum, if established. UC does not use the following fields: **Pre-Encumbrance Indicator**, **Encumber Salary Option**. **Calc Group (Flex Service)** and **Academic Rank**.
161.	Click the **UC Position Data** tab. 
162.	The **UC Position Data** page displays employee relations information, such as the **HR Worksite ID**, **Employee Relations Code**, **Representation Code** and if there are any special training or security clearances required for the position.
163.	The **HR Worksite ID** field drives the majority of UCPath and Tracker integration functionality. This field determines: • If the Worksite is configured to send automatic emails or not. • If the Worksite has e-Verify turned on or not. • If the Worksite requires new I-9s for rehires within less than three years of previous start date. Refer to your Location's business process on Tracker processing.
164.	Click the **Budget and Incumbents** tab. 
165.	The **Budget and Incumbents** page displays the current incumbent(s) assigned to the position. The **Current Budget** section is not used by UC.
166.	This is an example of a filled position, so the **Current Incumbent** section displays incumbent information. If the position is a multi-headcount position, all incumbents assigned to the position appear. To view additional information about an employee's job, click the **Job Data** link. You must have the appropriate security access to view the **Job Data** component.
167.	Click the **Supporting Documents** tab. 

Step	Action
168.	The **Supporting Documents** page stores any attachments associated with the position record. Attachments can be opened and viewed but cannot be deleted. This example does not have any supporting documents.
169.	You have viewed position data for a specific position in UCPath. **End of Procedure.**

Initiate New Position Control Request

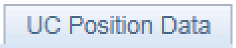
Use this task to request that a position be added in UCPath. After you save and submit a position request, it automatically routes to the appropriate Location approver(s).

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Position Control Request**

Step	Action
1.	Click the **Add New Position** option. ○
2.	Click the **Next >>** button. Next >>
3.	The **Effective Date** defaults to the system date (today's date), but you can update it, if necessary. Enter the date on which the position becomes effective or select the appropriate date from the calendar.
4.	In the **Status** field, accept the default of **Active**.
5.	In the **Reason** field, accept the default of **NEW**.
6.	In the **Position Status** field, accept the default of **Approved** or select the appropriate option. **- Approved** is used for filled or vacant positions that are approved for use. **- Frozen** is used for inactive positions that can be re-instated (**Approved**) when needed. **- Proposed** is used when a position is created but not yet approved for use.
7.	The **Status Date** field defaults to the system date (today’s date), but you can update it, if necessary.
8.	The **Key Position** field is not used by UC.
9.	Click in the **Job Code** field. ☐

Step	Action
10.	Enter the desired information into the **Job Code** field. For this example, enter **004723**.
11.	When you tab out of the **Job Code** field or click in another field, the system populates additional fields in the **Job Information** section based on the job code you entered. Press **[Tab]**.
12.	Click the button to the right of the **Full/Part Time** field.
13.	Select the appropriate value. For this example, click the **Fixed** list item. Fixed
14.	Click in the **Department** field.
15.	Enter the desired information into the **Department** field. For this example, enter **352500**.
16.	In most cases, when you tab out of the **Department** field or click in another field, the **Location** field value automatically populates based on the selected department. You can enter or update the **Location** field if necessary by entering the appropriate value or clicking the lookup to search for and select it. All positions in UCPath are established in the **Company UCS**; you cannot update this value.
17.	Click in the **Reports To** field.
18.	Enter the desired information into the **Reports To** field. For this example, enter **40081000**.
19.	The **Dot-Line** field is not used by UC.
20.	Scroll down to display additional fields and page options.
21.	The values available for the **Salary Admin Plan** and **Salary Grade** fields are dependent on the **Job Code** value you entered. Not all job codes have an associated salary plan. Academic job codes also include a BYA (by agreement) salary plan.
22.	Click in the **Salary Admin Plan** field.
23.	Enter the desired information into the **Salary Admin Plan** field. For this example, enter **UCCX**.
24.	Click in the **Salary Grade** field.

Step	Action
25.	Enter the desired information into the **Salary Grade** field. For this example, enter **112**.
26.	The daily hours indicated are inconsequential and are not used to determine an employee's time/pay.
27.	The **FLSA Status** field defaults based on the job code. **FLSA Status** options include: **Exempt**, **Nonexempt, Nonexempt Alt Overtime** and **No FLSA Required**. **Note:** The **Nonexempt Alt Overtime** option is used to track whether someone is eligible for an alternate overtime calculation when working in states that do not use the federal overtime guidelines. This status enables the calculation of double overtime using the regular rate of pay.
28.	The **Bargaining Unit** field is not used by UC. Union dues and fees are based on the **Union Code** (above) which defaults from the **Job Code**. However, for record keeping purposes, the union codes are mapped to the respective bargaining unit behind the scenes in UCPath.
29.	After you begin data entry on a **Position Control Request** transaction, you have the option to **Save for Later**. This allows you to save the data you entered, access the draft transaction at a later time to continue data entry, including attaching any necessary documentation and submitting the request for review and approval.
30.	Click the **Specific Information** link. Specific Information
31.	Use the **Specific Information** page to identify the **Max Head Count** and **FTE** (full-time equivalency) for the position.
32.	The **Max Head Count** field defaults to **1**, but you can update it if necessary for multi-headcount positions.
33.	The **Update Incumbents**, **Include Salary Plan/Grade** and **Include FTE** check boxes are not available when adding or updating positions using the **Position Control Request** page. These options (updated only by Position Administrators) allow updates to the position to automatically update the position-related fields in **Job Data** for the assigned incumbents.
34.	The **Work Phone** and **Health Certificate** fields are not used by UC.
35.	Click in the **FTE** field. 0.000000
36.	Enter the desired information into the **FTE** field. For this example, enter **1**.
37.	Click the **Adds to FTE Actual Count** option. ☐

Step	Action
38.	After you enter a value in the **FTE** field, you can confirm that the **Standard Hours** field and hours by day fields on the **Description** page are updated appropriately. When **FTE** is **0.00**, the **Standard Hours** field value defaults to **.01**, because it is a required field and cannot be left blank.
39.	Click the **UC Position Data** tab. 
40.	Use the **UC Position Data** page to enter the **HR Worksite ID**, the **Employee Relations Code** and if there are any special training or security clearances required for the position.
41.	The **HR Worksite ID** field drives the majority of UCPath and Tracker integration functionality. This field determines: • If the Worksite is configured to send automatic emails or not. • If the Worksite has e-Verify turned on or not. • If the Worksite requires new I-9s for rehires within less than three years of previous start date. Refer to your Location's business process on I-9 and Tracker processing to determine the appropriate **HR Worksite ID**.
42.	Click in the **HR Worksite ID** field. 
43.	Enter the desired information into the **HR Worksite ID** field. For this example, enter **2201771**.
44.	Click the button to the right of the **Employee Relations Code** field. 
45.	Select the appropriate **Employee Relations Code**. 
46.	Click the **Supporting Documents** tab. 
47.	Use the **Supporting Documents** page to attach one or more supporting documents to your request. To begin the steps for uploading a document, click the **Add Attachment** button.
48.	When you are finished entering position details, click the **Save and Submit** button. 
49.	If there are no errors when you save and submit, the system automatically assigns the request a unique **Transaction ID** number.
50.	Notice that the **Position Number** field still displays the value **NEW**. Upon final approval, the system automatically assigns the next available **Position Number**.

Step	Action
51.	After you enter and submit the request, it is automatically routed to the appropriate Location approver(s).
52.	You have initiated a position control request for a new position. **End of Procedure.**

Initiate New Position Control Request - Copy Existing Position

Use this task to request that a position be added in UCPath by copying an existing position's data. After you save and submit a position request, it automatically routes to the appropriate Location approver(s).

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Position Control Request**

Step	Action
1.	Click the **Add New Position** option. ○
2.	Click the **Next >>** button. Next >>
3.	In the **Effective Date** field, enter the date on which the position becomes effective or select the appropriate date from the calendar.
4.	In the **Status** field, accept the default of **Active**.
5.	In the **Reason** field, accept the default of **NEW**.
6.	In the **Position Status** field, accept the default of **Approved**.
7.	The **Status Date** field defaults to the system date (today's date), but you can update it, if necessary.
8.	To create a position based on the data for an existing position, click the **Initialize** button. Initialize
9.	The system displays the **Default Position Data** dialog box, on which you enter the appropriate effective date and select the position you want to copy.
10.	In the **Effective Date** field, enter the date on which the position you want to copy is effective or select the appropriate date from the calendar.
11.	Click in the **Position Number** field.
12.	In the **Position Number** field, enter the appropriate position number or use the lookup to search for and select it.

Step	Action
13.	UCPath allows you to enter or look up and select positions created on or after the effective date you enter here. If you don't see a position that you know exists, revise the effective date and make sure the position number is correct.
14.	Click the **OK** button.  OK
15.	The **Description** page displays the information from the position you want to copy. You can update the information as necessary.
16.	Scroll down to display additional fields and page options.
17.	When you are finished reviewing the copied data and making necessary updates, click the **Specific Information** link.  Specific Information
18.	Review the details on the **Specific Information** page and make any necessary updates. When you are finished viewing the default data and making any necessary updates, click the **UC Position Data** tab.  UC Position Data
19.	The system does not copy forward values for the **UC Position Data** page from the position you are copying to the new position. You must manually enter the **HR Worksite ID**, the **Relations Code** and any applicable training codes or security clearance types.
20.	The **HR Worksite ID** field drives the majority of UCPath and Tracker integration functionality. This field determines: • If the Worksite is configured to send automatic emails or not. • If the Worksite has e-Verify turned on or not. • If the Worksite requires new I-9s for rehires within less than three years of previous start date. Refer to your Location's business process on I-9 and Tracker processing to determine the appropriate **HR Worksite ID**.
21.	Click in the **HR Worksite ID** field.
22.	Enter the desired information into the **HR Worksite ID** field. For this example, enter **2201771**.
23.	Click the button to the right of the **Employee Relations Code** field. ⌄
24.	The **Employee Relations Code** value does not copy from the position you copied; select the appropriate employee relations code.  All Others, Not Confidential

Step	Action
25.	If applicable, in the **Special Training Code** field, enter the appropriate training code value or use the lookup to search for and select it. Use the add a new row button to add an additional code.
26.	If applicable, in the **Security Clearance Type** field, enter the appropriate clearance type code or use the lookup to search for and select it. Use the add a new row button to add an additional code.
27.	When you are finished reviewing the default data and making any necessary updates on the **UC Position Data** page, click the **Supporting Documents** tab. 
28.	Use the **Supporting Documents** page to attach one or more supporting documents to your request. To begin the steps for uploading a document, click the **Add Attachment** button.
29.	After you begin data entry on a **Position Control Request** transaction, you have the option to **Save for Later**. This allows you to save the data you have entered, access the draft transaction at a later time, continue data entry, attach any necessary documentation and submit the request for review and approval.
30.	When you are finished reviewing and updating the position data, click the **Save and Submit** button. 
31.	If there are no errors when you save and submit, the system automatically assigns the request a unique **Transaction ID** number.
32.	Notice that the **Position Number** field still displays the value **NEW**. Upon final approval, the system automatically assigns the next available **Position Number**.
33.	After you enter and submit the request, it is automatically routed to the appropriate Location approver(s).
34.	You have initiated a Position Control Request for a new position by copying an existing position. **End of Procedure.**

Initiate Update Vacant Position Request

Use this task to request an update to a vacant position in UCPath. After you save and submit a position request, it is automatically routed to the appropriate Location approver(s).

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **Position Control Request**

Step	Action
1.	Click the **Update Vacant Position** option. ○
2.	Click the **Next** >> button. Next >>
3.	When you select the **Update Vacant Position** option, the system displays the **Find an Existing Value** page. Use this page to enter the date on which the position update(s) take effect, and to select the appropriate vacant position. If you don't know the position number, you can search for the position using other search fields.
4.	In the **Effective Date** field, enter the date on which the updated position data becomes effective.
5.	Click in the **Position Number** field.
6.	Enter the desired information into the **Position Number** field.
7.	Click the **Search** button. Search
8.	When you perform a search for a position, if no records match the search criteria, the system displays a message that 0 results were retrieved. If one or more records match the search criteria, the system displays a list of those results.
9.	It's important to remember that the effective date determines which positions are available for update. For example, if a position was created on 07/01/2017 and you enter **07/01/2017** in the **Effective Date** field, then the system will not include the position in the search results. However, if you enter **07/02/2017** in the **Effective Date** field, then the system recognizes the position and the system begins a new transaction with 07/02/2017 as the effective date.
10.	Scroll right to display additional fields and page options.
11.	Click the **Select** button next to the position for which you want to submit a change request. Select

Step	Action
12.	The **Description** page of the **Position Control Request** component appears. To request an update to the position, you must first specify a reason for the update. Click in the **Reason** field. 
13.	Enter the appropriate reason code in the **Reason** field or click the lookup to select it.
14.	Make any necessary updates on the **Description** page.
15.	When you are finished updating data on the **Description** page, make any necessary updates on the **Specific Information** and **UC Position Data** pages.
16.	Click the **Supporting Documents** tab. 
17.	Use the **Supporting Documents** page to attach one or more supporting documents to your request. To begin the steps for uploading a document, click the **Add Attachment** button.
18.	After you begin data entry on a Position Control Request transaction, you have the option to use the **Save for Later** functionality. This allows you to save the data you've entered, access the draft transaction at a later time, continue data entry, attach any necessary documentation, and submit the request for review and approval.
19.	When you are finished reviewing and updating the position data, click the **Save and Submit** button. Notice that you also have options to save this request for later or cancel. 
20.	If there are no errors when you save and submit, the system automatically assigns the request a unique **Transaction ID** number.
21.	After you enter and submit the request, it is automatically routed to the appropriate Location approver(s).
22.	You have requested an update to a vacant position in UCPath. **End of Procedure.**

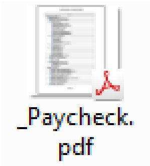
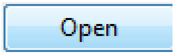
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
23.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
24.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
25.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
26.	Click the button to the right of the **Category** field. 
27.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
28.	Click in the **Subject** field.
29.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
30.	Click in the **Description** field.
31.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
32.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
33.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
34.	Click in the **Best Contact Phone Number** field.
35.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.

Step	Action
36.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.
37.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
38.	Click the **Add Attachment** link. 
39.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
40.	For this example, click the **_Paycheck.pdf** list item. 
41.	Click the **Open** button. 
42.	The file name appears in the **Attachments** box.
43.	Click the **Submit** button.
44.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
45.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
46.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
47.	Click the scroll bar.
48.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
49.	Click the scroll bar.
50.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
51.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

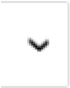
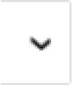
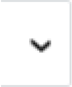
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
52.	Click the **Ask UCPath Center** button. 
53.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
54.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
55.	UCPath returned one result. Click the scroll bar.
56.	Click the **Create an Inquiry** link. 
57.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.

Step	Action
58.	Click the button to the right of the **Requested By** field. 
59.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
60.	Click the button to the right of the **Topic** field. 
61.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
62.	Click the button to the right of the **Category** field. 
63.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
64.	Click in the **Subject** field.
65.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
66.	Click the scroll bar.
67.	Click in the **Description** field.
68.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
69.	In this example, the full **Description** was completed on your behalf.
70.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
71.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.

Step	Action
72.	Click the **Submit Inquiry** button. 
73.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
74.	The submitter's name appears.
75.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

Reopen Closed UCPath Center Case

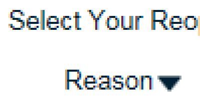
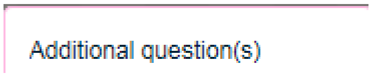
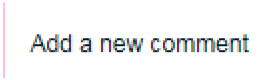
Use this task to reopen a closed inquiry via the UCPath website.

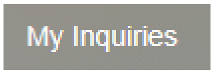
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
76.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
77.	Click the **My Closed Inquiries** link. 
78.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 

Step	Action
79.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. Select Your Reopen Reason ▼
80.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. Additional question(s)
81.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
82.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. Add a new comment
83.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
84.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. Submit comment to the UCPath Center
85.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
86.	Click the scroll bar.
87.	Notice the comment now appears in the **Case Comments** section.

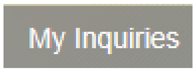
Step	Action
88.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
89.	Return to the top of the page. Click the scroll bar.
90.	Click the **My Inquiries** link. 
91.	The new inquiry appears in the **My Open Inquires** list.
92.	You have reopened a closed inquiry. **End of Procedure.**

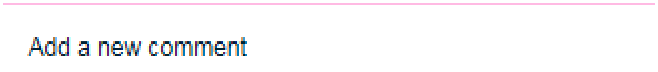
Monitor UCPath Center Cases

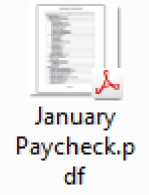
Use this task to review the status of an existing inquiry via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

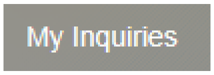
Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
93.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
94.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).

Step	Action
95.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.
96.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
97.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. 
98.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. 
99.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 
100.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field. 
101.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
102.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.

Step	Action
103.	Click the **Submit comment to the UCPath Center** button. 
104.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. 
105.	Click the scroll bar.
106.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. 
107.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. 
108.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
109.	To return to the case details, click the **00180573** link. 
110.	Click the scroll bar.
111.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
112.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 

Step	Action
113.	Click the **Open** button. Open
114.	A message confirms the file was uploaded. Click the **Done** button. Done
115.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.
116.	You can view all attachments in a list. Click the **View All** link. View All
117.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. ▾
118.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. ▾
119.	Click the **00180573** link. 00180573
120.	Click the scroll bar.
121.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
122.	Click the **Email** link. Sandbox: UCPath Center: Inquir.
123.	Review the email information as you scroll down the page. Click the scroll bar.

Step	Action
124.	Review the email from the UCPath Center. Click the scroll bar.
125.	Click the case number to return to the details of the case. Click the **00180573** link.  00180573
126.	To review closed inquiries, click the **My Inquiries** link.  My Inquiries
127.	Click the **My Closed Inquiries** tab.  My Closed Inquiries
128.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
129.	Click the **00180567** link.  00180567
130.	Click the scroll bar.
131.	Notice the **Status** is **Closed/Resolved**.
132.	Click the scroll bar.
133.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
134.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**

PHCMWFAL301: Position Administration

Position Administrator: Add New Position

Use this task to add a new position in UCPath. Adding a position using this component does not initiate AWE.

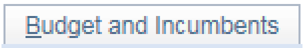
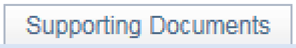
Navigation: PeopleSoft Menu > Organizational Development > Position Management > Maintain Positions/Budgets > **Add/Update Position Info**

Step	Action
1.	When you navigate to the **Add/Update Position Info** component, the system displays the **Find an Existing Value** tab, which you use to search for existing positions.
2.	To begin the steps for adding a new position, click the **Add a New Value** tab. 
3.	Accept the default of all zeros in the **Position Number** field. When you save the record, UCPath automatically assigns the next available position number.
4.	Click the **Add** button. 
5.	Use the **Description** page to enter header-level information about the position, as well as job information, work location details and salary plan information. This component is effective dated to capture the history of changes to the position.
6.	You can manually enter position data for a new position or you can copy an existing position. For more information on how to copy an existing position, refer to the *Position Administrator: Copy Existing Position* topic.
7.	In the **Effective Date** field, enter the date on which the position becomes effective or select the appropriate date from the calendar.
8.	In the **Status** field, accept the default of **Active**.
9.	In the **Reason** field, accept the default of **NEW**.
10.	In the **Position Status** field, accept the default of **Approved** or select the appropriate option. **- Approved** is used for filled or vacant positions that are approved for use and that have the correct funding and/or budget established. **- Frozen** is used for positions that can be re-instated (**Approved**) when needed. Frozen status can be used for vacant positions that the Org/Dept intends to recruit for it in the future. **- Proposed** is used when a position is created but not yet approved for use or that does not have funding and budget established. This status is a trigger for the Funding Manager to add Funding and Budget, if applicable.
11.	The **Status Date** field defaults to the system date (today's date), but you can update it, if necessary.
12.	Next, enter the appropriate data in the **Job Information**, **Work Location** and **Salary Plan Information** sections.
13.	The **Business Unit** field defaults based on your UCPath security profile.

Step	Action
14.	Click in the **Job Code** field. 
15.	In the **Job Code** field, enter the appropriate job code or use the lookup to search for and select it.
16.	In the **Regular Shift** and **Reg/Temp** fields, accept the default **Not Applicable**. UC does not use these fields.
17.	Click the button to the right of the **Full/Part Time** field. 
18.	Select the appropriate value. For this example, select the **Fixed** list item.  Fixed
19.	Accept the **Title** and **Short Title** default field values, or enter the appropriate values. These values default from the job code.
20.	Accept the **Union Code** default field value or enter the appropriate value. This value defaults from the job code.
21.	Accept the **Reg Region** field default value of **USA**.
22.	Click in the **Department** field. 
23.	In the **Department** field, enter the appropriate department ID or use the lookup to search for and select it. The values you can enter or search for and select in the **Department** field are based on your security access.
24.	In most cases, when you tab out of the **Department** field or click in another field, the **Location** field value automatically populates based on the selected department. You can enter or update the **Location** field if necessary by entering the appropriate value or clicking the lookup to search for and select it. All positions in UCPath are established in the **Company UCS**; you cannot update this value.
25.	Click in the **Reports To** field. 
26.	In the **Reports To** field, enter the appropriate position number to which this position reports or use the lookup to search for and select the value.
27.	If applicable, in the **Dot-Line** field, enter the position number to which the new position has a dotted-line reporting relationship.
28.	UC does not use the **Supervisor Lvl** field.

Step	Action
29.	Scroll down to display additional fields and page functions.
30.	Click in the **Salary Admin Plan** field. 
31.	In the **Salary Admin Plan** field, enter the appropriate salary admin plan code or use the lookup to search for and select it. The values available for lookup and selection in the **Salary Admin Plan** and **Salary Grade** fields are dependent on the **Job Code** value you entered. Not all job codes have an associated salary plan. Academic job codes also include a BYA (by agreement) salary plan.
32.	Click in the **Grade** field. 
33.	Enter the desired information into the **Grade** field, if applicable.
34.	The **Step** field is not used at the position level. Leave this field blank.
35.	The **Standard Hours** and days default from the value you enter in the **FTE** field on the **UC Position Data** page.
36.	The **Work Period** defaults to the appropriate period; do not update this value.
37.	The daily hours indicated are inconsequential and are not used to determine an employee's time/pay.
38.	The **FLSA Status** field defaults from the job code. **FLSA Status** options include: **Exempt**, **Nonexempt**, **Nonexempt Alt Overtime** and **No FLSA Required**. **Note:** The **Nonexempt- Alt Overtime** option is used to track whether someone is eligible for an alternate overtime calculation when working in states that do not use the federal overtime guidelines. This status enables the calculation of double overtime using the regular rate of pay.
39.	The **Bargaining Unit** field is not used by UC. Union dues and fees are based on the **Union Code** (above) which defaults from the **Job Code**. However, for record keeping purposes, the union codes are mapped to the respective bargaining unit behind the scenes in UCPath.
40.	When you are finished entering data on the **Description** page, click the **Specific Information** link.  Specific Information
41.	The **Max Head Count** field defaults to **1**, but you can update it if necessary for multi-headcount positions.
42.	If applicable, in the **Health Certificate** field, select the certificate required for this position.

Step	Action
43.	UC is not using the following fields: **Signature Authority**, **Confidential Position**, **Job Sharing Permitted** and **Available for Telework**. When entering a new position, it is not necessary to select the **Update Incumbents** check box.
44.	If this is an approved position, ensure the **Budgeted Position** check box is selected. If this position's status is **Proposed** or **Frozen**, deselect the check box. All approved positions are considered budgeted; if you deselect this check box, you cannot report on this position.
45.	If you are creating a position pool position, in the **Position Pool ID** field, enter the appropriate value or click the lookup to search for and select it. Work study positions must have a position pool.
46.	The **Pre-Encumbrance Indicator**, **Encumber Salary Option** and **Classified Indicator** field values defaults from the selected job code.
47.	UC does not currently use the **Calc Group (Flex Service)** or **Academic Rank** fields.
48.	Click in the **FTE** field.  0.000000
49.	Enter the desired information into the **FTE** field.
50.	Click the **Adds to FTE Actual Count** option. ☐
51.	After you enter a value in the **FTE** field, you can confirm that the **Standard Hours** field and hours by day fields on the **Description** page are updated appropriately. When **FTE** is **0.00**, the **Standard Hours** field value defaults to **.01**, because it is a required field and cannot be left blank.
52.	When you are finished entering data on the **Specific Information** page, click the **UC Position Data** tab. 
53.	The **HR Worksite ID** field drives the majority of UCPath and Tracker integration functionality. This field determines: • If the Worksite is configured to send automatic emails or not. • If the Worksite has e-Verify turned on or not. • If the Worksite requires new I-9s for rehires within less than three years of previous start date. Refer to your Location's business process on I-9 and Tracker processing to determine the appropriate **HR Worksite ID**.
54.	Click in the **HR Worksite ID** field. 

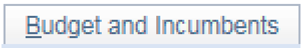
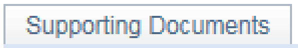
Step	Action
55.	Enter the desired information into the **HR Worksite ID** field. For this example, enter 2201771.
56.	Click the button to the right of the **Employee Relations Code** field. 
57.	Select the appropriate employee relations code.  All Others, Not Confidential
58.	If applicable, in the **Special Training Code** field, enter the appropriate training code value or use the lookup to search for and select it. Use the add a new row button to add an additional code.
59.	If applicable, in the **Security Clearance Type** field, enter the appropriate clearance type code or use the lookup to search for and select it. Use the add a new row button to add an additional code.
60.	When you are finished entering data on the **UC Position Data** page, click the **Budget and Incumbents** tab. 
61.	Review the information on the **Budget and Incumbents** page. For new positions, there is no data entry required for this page.
62.	Click the **Supporting Documents** tab. 
63.	Use the **Supporting Documents** page to attach one or more supporting documents to your request. To begin the steps for uploading a document, click the **Add Attachment** button.
64.	When you are finished entering position details, click the **Save** button. 
65.	After you save the data, if there are no errors, the system automatically assigns the next available **Position Number** to the new position.
66.	You have added a new position in UCPath. **End of Procedure.**

Position Administrator: Copy Existing Position

Use this task to add a new position by copying an existing position in UCPath. Adding a position using this component does not initiate AWE.

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Maintain Positions/Budgets > **Add/Update Position Info**

Step	Action
1.	When you navigate to the **Add/Update Position Info** page, the system displays the **Find an Existing Value** tab, which you use to search for an existing position.
2.	Click the **Add a New Value** tab. 
3.	Accept the default of all zeros in the **Position Number** field. When you save the record, UCPath automatically assigns the next available position number.
4.	Click the **Add** button. 
5.	To create a position based on the data from an existing active or inactive position, click the **Initialize** button. 
6.	The system displays the **Default Position Data** dialog box, on which you enter the appropriate effective date and select the position you want to copy.
7.	In the **Effective Date** field, enter the appropriate date or select it from the calendar. The position you want to copy must be effective as of the date you enter here. For example, if the position you want to copy is effective as of **7/01/2017** and you enter an **Effective Date** value of **6/30/2017**, the position you want to copy will not be available to select.
8.	Enter or search for the **Position Number** you want to copy.
9.	Enter the desired information into the **Position Number** field.
10.	Click the **OK** button. 
11.	The **Description** page displays the **Job Information**, **Work Location** and **Salary Plan Information** values from the position you selected. You can update the information as necessary.
12.	Scroll down to display additional fields and page options.
13.	When you are finished reviewing the copied data and making any necessary updates, click the **Specific Information** link. 
14.	Review the details on the **Specific Information** page and make any necessary updates. When you are finished viewing the default data and making any necessary updates, click the **UC Position Data** tab. 
15.	Review the details on the **UC Position Data** page and make any necessary updates.

Step	Action
16.	The **HR Worksite ID** field drives the majority of UCPath and Tracker integration functionality. This field determines: • If the Worksite is configured to send automatic emails or not. • If the Worksite has e-Verify turned on or not. • If the Worksite requires new I-9s for rehires within less than three years of previous start date. Refer to your Location's business process on I-9 and Tracker processing to determine the appropriate **HR Worksite ID**.
17.	Click in the **HR Worksite ID** field. 
18.	Enter the desired information into the **HR Worksite ID** field. For this example, enter **2201771**.
19.	The **Employee Relations Code** value does not copy from the position you are copying; you must select the appropriate value. Click the button to the right of the **Employee Relations Code** field. 
20.	Select the appropriate **Employee Relations Code**.  All Others, Not Confidential
21.	When you are finished reviewing the default data and making any necessary updates on the **UC Position Data** page, click the **Budget and Incumbents** tab. 
22.	For a new position, the information on the **Budget and Incumbents** page is view-only; you cannot update the information on this page. For a new position, there is no current incumbent information.
23.	When you are finished reviewing the data, click the **Supporting Documents** tab. 
24.	Use the **Supporting Documents** page to attach one or more supporting documents to your request. To begin the steps for uploading a document, click the **Add Attachment** button.
25.	When you are finished reviewing and updating the position data, click the **Save** button. 
26.	After you save the data, the system automatically assigns the next available **Position Number**.

Step	Action
27.	You have copied an existing position in UCPath. **End of Procedure.**

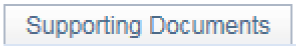
Position Administrator: Update Position Information

Use this task to update position information. This example demonstrates an update to an existing multi-head count position. Updates to a position using this component does not initiate AWE.

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Maintain Positions/Budgets > **Add/Update Position Info**

Step	Action
1.	When you navigate to the **Add/Update Position Info** page, the system displays the **Find an Existing Value** tab, which you use to search for the appropriate position record. If you don't know the position number you can search using other search fields. Enter search criteria in one or more of the search fields.
2.	Click in the **Position Number** field. 
3.	Enter the desired information into the **Position Number** field. For this example, enter **40000082**.
4.	Click the **Search** button. 
5.	In this example, you can see that the **Current Head Count** is 1 out of 15, indicating this is a partially filled multi-head count position.
6.	To update a position, you must first insert a new, effective-dated row. Click the **Add a new row** button. ⊞
7.	In the **Effective Date** field, enter the date on which the updated position data becomes effective or select the appropriate date from the calendar.
8.	For this example, enter a change to the **Reports To** field. Click in the **Reason** field. 
9.	Enter the desired information into the **Reason** field. For this example, enter **RTC** (Reports To Change).
10.	Make any necessary updates on the **Description** page.

Step	Action
11.	Scroll down to display additional fields and page options.
12.	After entering the necessary updates on the **Description** page, click the **Specific Information** link. 
13.	Review the information on the **Specific Information** page and make any necessary updates.
14.	If this is a position-only change or a vacant position, it's not necessary to select the **Update Incumbents** check box. If this is an update to a filled position, ensure the **Update Incumbents** check box is selected to prompt UCPath to cross update the incumbent employee's job data.
15.	Ensure the **Include Salary Plan/Grade** check box is not selected.
16.	Select the **Include FTE** check box to prompt the system to update the **FTE** value on the **Job Information** page when the **Use Position Data** functionality is used in the **Job Data** component. If the **Include FTE** check box is selected in **Position Management**, then the **FTE** field on the **Job Data** page is not editable.
17.	When you are finished making the necessary updates on the **Specific Information** page, click the **UC Position Data** tab. 
18.	Review the information on the **UC Position Data** page and make any necessary updates.
19.	The **HR Worksite ID** field drives the majority of UCPath and Tracker integration functionality. This field determines: • If the Worksite is configured to send automatic emails or not. • If the Worksite has e-Verify turned on or not. • If the Worksite requires new I-9s for rehires within less than three years of previous start date. Refer to your Location's business process on I-9 and Tracker processing for additional **HR Worksite ID** information.
20.	The **JOB Data** section appears for position updates only if the position has one or more incumbents, as in this example. When the **Update Incumbents** check box is selected on the **Specific Information** page, current or future effective-dated updates you enter in the **Expected Job End Date**, **Empl Class** or **Academic Duration of Appt** fields also post to the incumbent employee's or employees' job data in UCPath.
21.	When you are finished making the necessary updates on the **UC Position Data** page, click the **Budget and Incumbents** tab. 

Step	Action
22.	Review the information on the **Budget and Incumbents** page. This information is view-only; you cannot update the information on this page. You can access the incumbent's job data if you have security access to view it. Click the **Job Data** link to display the **Job Data** component for the incumbent. The system returns you to the **Position Data** component when you complete your review or after you make changes.
23.	When you are finished viewing information on the **Budget and Incumbents** page, click the **Supporting Documents** tab. 
24.	Review any existing attachments, and if necessary, upload an attachment. In this example, the position does not have any attachments.
25.	When you are finished updating the position, click the **Save** button. 
26.	You have updated position information. **End of Procedure.**

View Position Information

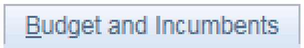
Use this task to view position data for a specific position in UCPath.

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Maintain Positions/Budgets > **Add/Update Position Info**

Step	Action
27.	When you navigate to the **Add/Update Position Info** component, the system displays the **Find an Existing Value** tab, which you use to search for existing positions. If you don't know the position number you can search using other search fields. Enter search criteria in one or more of the search fields.
28.	Click in the **Position Number** field. 
29.	Enter the desired information into the **Position Number** field. For this example, enter **40078651**.
30.	Select the **Include History** check box to view historical, current and future rows of data. You also have the ability to select this action within the **Position Data** component.

Step	Action
31.	Click the **Search** button. 
32.	The **Description** page displays header-level information about the position, as well as **Job Information**, **Work Location** information and **Salary Plan Information**. This component is effective dated and captures the history of all changes to the position.
33.	Positions are typically set up as single headcount, but there are instances of multiple headcount positions. This example displays a **Current Head Count** of **1 out of 1**, which is currently filled by an employee, as indicated by the **Headcount Status** field.
34.	Review the **Job Information** associated with the position. The **Union Code**, **Title** and **Short Title** fields are attributes of the **Job Code**. These fields default from the job code when the position is created. The **Reg/Temp** and **Regular Shift** fields are not used by UC.
35.	Review the **Work Location** information associated with the position. These fields identify the **Department** and physical **Location** of the position, as well as the position to which this position reports (**Reports To** field). The **Supervisor Lvl** field is not used by UC.
36.	Scroll down to display additional fields and page options.
37.	Review the **Salary Plan Information** associated with the position. These fields identify the position's **Salary Admin Plan** and the **Grade**. You can also view the **Standard Hours** within the **Work Period**. The **Step** field is not used at the position level.
38.	The daily hours are inconsequential and are not used to determine an employee’s time/pay.
39.	Review the position's **FLSA Status**. **FLSA Status** options include: **Exempt**, **Nonexempt, Nonexempt Alt Overtime** and **No FLSA Required**. **Note:** The **Nonexempt Alt Overtime** option is used to track whether someone is eligible for an alternate overtime calculation when working in states that do not use the federal overtime guidelines. This status enables the calculation of double overtime using the regular rate of pay.

Step	Action
40.	The **Bargaining Unit** field is not used by UC. Union dues and fees are based on the **Union Code** (above) which defaults from the **Job Code**. However, for record keeping purposes, the union codes are mapped to the respective bargaining unit behind the scenes in UCPath.
41.	If you did not select the **Include History** check box when you searched for and selected the position, you can click the **Include History** button at the bottom of each page in the component.
42.	Click the **Specific Information** link.  Specific Information
43.	The **Specific Information** page displays the **Max Head Count** for the position, a series of check boxes, and a section specific to **Education and Government**.
44.	The **Incumbents** check boxes become available for update (by a Position Administrator only) when the position has at least one incumbent, as seen in this example.
45.	The **Update Incumbents** check box is selected when the position has incumbents. When selected, any updates to the position automatically update the position-related **Job Data** fields for the assigned incumbents.
46.	The **Include Salary Plan/Grade** check box is selected when the grade is not configured to include steps and the **Update Incumbents** check box is selected.
47.	The **Force Update for Title Changes** check box is selected when there is a requirement for the title on the position to be different from the **Business Title** on the job.
48.	The **Include FTE** check box is selected when there is a requirement for the full time equivalency (FTE) on the position to be different from the FTE on the job.
49.	If the position is approved, then the **Budgeted Position** check box is selected. All approved positions are considered budgeted; if this check box is not selected, you cannot report on this position.
50.	UC does not use the following fields: **Signature Authority**, **Confidential Position**, **Job Sharing Permitted** and **Available for Telework**.

Step	Action
51.	The **Education and Government** section identifies the position's **Classified Indicator** and the **FTE**. If applicable, the **Position Pool ID** field indicates the position pool to which the position belongs. Work Study positions must have a position pool. The **FTE** field displays the maximum FTE that a single incumbent in the position can have. The **Adds to FTE Actual Count** field indicates whether the position counts against the department's FTE maximum, if established. UC does not use the following fields: **Pre-Encumbrance Indicator**, **Encumber Salary Option**. **Calc Group (Flex Service)** and **Academic Rank**.
52.	Click the **UC Position Data** tab. 
53.	The **UC Position Data** page displays employee relations information, such as the **HR Worksite ID**, **Employee Relations Code**, **Representation Code** and if there are any special training or security clearances required for the position.
54.	The **HR Worksite ID** field drives the majority of UCPath and Tracker integration functionality. This field determines: • If the Worksite is configured to send automatic emails or not. • If the Worksite has e-Verify turned on or not. • If the Worksite requires new I-9s for rehires within less than three years of previous start date. Refer to your Location's business process on Tracker processing.
55.	Click the **Budget and Incumbents** tab. 
56.	The **Budget and Incumbents** page displays the current incumbent(s) assigned to the position. The **Current Budget** section is not used by UC.
57.	This is an example of a filled position, so the **Current Incumbent** section displays incumbent information. If the position is a multi-headcount position, all incumbents assigned to the position appear. To view additional information about an employee's job, click the **Job Data** link. You must have the appropriate security access to view the **Job Data** component.
58.	Click the **Supporting Documents** tab. 

Step	Action
59.	The **Supporting Documents** page stores any attachments associated with the position record. Attachments can be opened and viewed but cannot be deleted. This example does not have any supporting documents.
60.	You have viewed position data for a specific position in UCPath. **End of Procedure.**

View Position History

Use this task to view position history details for a specific position.

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Review Position/Budget Info > **Position History**

Step	Action
61.	When you navigate to the **Position Summary** page, the system displays the **Find an Existing Value** tab, which you use to search for the applicable position. If you don't know the position number you can search using other search fields. Enter search criteria in one or more of the search fields.
62.	Click in the **Position Number** field. 
63.	Enter the desired information into the **Position Number** field. For this example, enter **40000082**.
64.	Click the **Search** button. 
65.	If the position is currently filled, the **Position History** page displays the current incumbent's details, and if applicable, information for any employees previously assigned to the position.
66.	The **Position Entry Date** field displays the date the employee was assigned to the position. If applicable, the **Position End Date** field displays the date the employee exited the position.
67.	The **Compensation Rate** field displays the compensation amount, currency and frequency associated with the position at the incumbent's position entry and end dates.
68.	To display the **Salary Components** page, on which you can view the salary components information associated with the position at the incumbent's position begin and end dates, click the **Components** link that appears on either the **Position Entry Date** or **Position End Date** row.

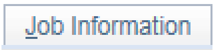
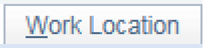
Step	Action
69.	The **Sal Plan** (salary plan), **Grade** and **Step** fields displays the salary plan, salary grade, and salary step at the incumbent's position entry date, and if applicable, at the time the employee exited the position.
70.	To view current position data, including the business unit, job code and more, click the **Current Position Data** link. 
71.	The **Position History - Current Position Data** page displays a summary of current position details.
72.	When you are finished reviewing the data on this page, click the **Return** button to return to the **Position History** page. 
73.	To return to the **Find an Existing Value** tab and search for another position, click the **Return to Search** button. For this example, do not click the button.
74.	You have viewed position history data for a specific position. **End of Procedure.**

View Vacant Budgeted Positions

Use this task to view vacant budgeted positions in UCPath.

Navigation: PeopleSoft Menu > Organizational Development > Position Management > Review Position/Budget Info > **Vacant Budgeted Positions**

Step	Action
75.	When you navigate to the **Vacant Budgeted Positions** page, the system displays the **Find an Existing Value** tab, which you use to search for vacant positions. Enter search criteria in one or more of the search fields.
76.	In the **Department** field, enter the department code or use the lookup to search for and select it.
77.	Click the **Search** button. 
78.	Positions for employees on Short Work Break appear on this page even though the position is still filled. This is because the employee is in an unpaid status; therefore, from a budget perspective the position is vacant.
79.	The **Total Vacant Positions** field displays the total number of vacant, budgeted positions for the selected department.

Step	Action
80.	The **Position Data** tab displays position details for each vacant position that has been flagged as budgeted (in Position Management) in the selected department. This information includes the position number and description.
81.	The **Position Status** column displays the position's status: **Approved** or **Frozen**.
82.	The **Reports To** column displays the position number of the supervisor to which the position reports.
83.	This tab also displays the number of vacant positions associated with each position number based on the maximum head count.
84.	When you are finished viewing information on the **Position Data** tab, click the **Job Information** tab. 
85.	The **Job Information** tab displays the job details for the vacant positions, including job code and description, job function, salary administration plan and salary grade.
86.	When you are finished viewing information on the **Job Information** tab, click the **Work Location** tab. 
87.	The **Work Location** tab displays work location details for each vacant position.
88.	To return to the **Find an Existing Value** tab and search for another department's vacant, budgeted positions, click the **Return to Search** button. 
89.	You have viewed vacant budgeted positions in UCPath. **End of Procedure.**

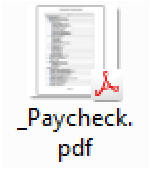
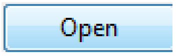
Submit Case to UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
90.	The **Welcome To Ask UCPath Center** page appears. The **Submit An Inquiry** option appears as a link at the top of the page. Click the **Submit An Inquiry** link. 
91.	In this example, enter a payroll inquiry to ask when your direct deposit begins. Click the button to the right of the **Topic** field. 
92.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item. 
93.	Click the button to the right of the **Category** field. 
94.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **General Inquiry Payroll** list item.
95.	Click in the **Subject** field.
96.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**.
97.	Click in the **Description** field.
98.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**.
99.	In this example, the full **Description** was completed on your behalf. Click the scroll bar.
100.	Notice that the **Requested By** field defaults to **Employee**, which means you are submitting a request on your own behalf.
101.	Click in the **Best Contact Phone Number** field.
102.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**.
103.	The email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address. In this example the default email is the best contact email.

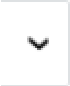
Step	Action
104.	You can attach only one file during initial entry of your inquiry, but you can attach unlimited files after submitting. Accepted formats includes MS Office suite, PDF, JPG, TIFF, PNG or WAV.
105.	Click the **Add Attachment** link. 
106.	Navigate to the document you want to attach. In this example, the document is located on the desktop.
107.	For this example, click the **_Paycheck.pdf** list item. 
108.	Click the **Open** button. 
109.	The file name appears in the **Attachments** box.
110.	Click the **Submit** button.
111.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** section.
112.	**Comments** can be added to the case and then reviewed in the **Case Comments** section. Because this is a new inquiry, no comments appear yet.
113.	Existing attachments can be reviewed and new attachments can be added in the **Attachments** section.
114.	Click the scroll bar.
115.	Related inquiries can be reviewed in the **Related Cases** group box. No related cases exist for this new inquiry Public email messages associated with the case can be reviewed in the **Emails** section.
116.	Click the scroll bar.
117.	The status of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
118.	You have submitted an inquiry to UCPath Center via the UCPath website. **End of Procedure.**

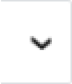
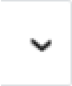
Submit Case (on Behalf of Employee) to UCPath Center

Use this task to submit an inquiry on behalf of another employee to the UCPath Center via the UCPath website.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
119.	Click the **Ask UCPath Center** button. 
120.	If you are authorized to submit an inquiry for an employee, the **Ask UCPath Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.
121.	On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.
122.	UCPath returned one result. Click the scroll bar.
123.	Click the **Create an Inquiry** link. 
124.	Your phone number automatically populates the work phone number from your Salesforce record. You can override with a different number. The phone number field is a text field so it will not format with dashes or slashes. Your email automatically defaults from your Salesforce record. You can override the email by clicking in the **Best Contact Email** field and entering a new email address.
125.	Click the button to the right of the **Requested By** field. 

Step	Action
126.	Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.
127.	Click the button to the right of the **Topic** field. 
128.	Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.
129.	Click the button to the right of the **Category** field. 
130.	A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.
131.	Click in the **Subject** field.
132.	Enter the desired information into the **Subject** field. For this example, enter **How do I change my state tax withholding?**.
133.	Click the scroll bar.
134.	Click in the **Description** field.
135.	Enter the desired information into the **Description** field. For this example, enter **I want to decrease**.
136.	In this example, the full **Description** was completed on your behalf.
137.	You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.
138.	By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.
139.	Click the **Submit Inquiry** button. 
140.	A case number was assigned to the inquiry. You can review the inquiry in the **Details** sections.
141.	The submitter's name appears.

Step	Action
142.	You have submitted an inquiry on behalf of an employee. **End of Procedure.**

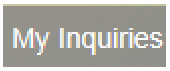
Reopen Closed UCPath Center Case

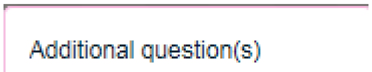
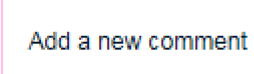
Use this task to reopen a closed inquiry via the UCPath website.

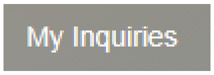
A case can be reopened only once and only within five days of closure.

Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
143.	In this example, you have an additional question about a closed inquiry. Click the **My Inquiries** link. 
144.	Click the **My Closed Inquiries** link. 
145.	Case 00180567 was closed on 10/12/2017 at 11:41 AM. Click the **00180567** link. 
146.	If the inquiry can be reopened, a banner appears at the top of the page. Click the **Select Your Reopen Ready** button. 

Step	Action
147.	Choose the reason associated with your inquiry. In this example, you have an additional question about your original direct deposit inquiry. Click the **Additional question(s)** list item. 
148.	Reopened cases receive a new case number. In this example, the original case number ended in 567, the new case number ends in 575. The reason you reopened the case appears in the **Reopen Reason** field to the right of the **Employee Name** in the header. You can now add comments to the new case. **Note:** If you add comments before picking the reason, you are entering comments on the closed case, not the new case.
149.	Comments should be added to explain why the case needs to be reopened. Click in the **Add a new comment** field. 
150.	Enter the desired information into the **Add a new comment** field. For this example, enter **How do I**.
151.	In this example, the **Add a new comment** field was completed on your behalf. You can add an attachment with the comment by clicking the attachment icon (paperclip). Click the **Submit comment to the UCPath Center** button. 
152.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
153.	Click the scroll bar.
154.	Notice the comment now appears in the **Case Comments** section.
155.	The **Parent Case**, which is the closed case, appears in the details of the new case along with the **Reopen Reason**.
156.	Return to the top of the page. Click the scroll bar.

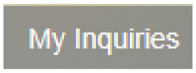
Step	Action
157.	Click the **My Inquiries** link. 
158.	The new inquiry appears in the **My Open Inquires** list.
159.	You have reopened a closed inquiry. **End of Procedure.**

Monitor UCPath Center Cases

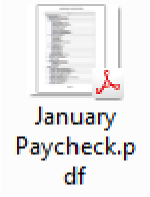
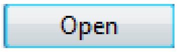
Use this task to review the status of an existing inquiry via the UCPath website.

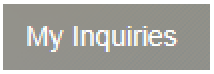
Dashboard Navigation:
Ask UCPath Center
or
Menu Navigation:
Help / FAQ > **Ask UCPath Center**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
160.	The **Welcome to Ask UCPath Center** page appears. The following links appear at the top of the page: **My Inquires**, **Submit An Inquiry**, **Topics** and **UCPath Portal**. Click the **My Inquiries** link. 
161.	Two tabs appear at the top of the page: **My Open Inquires** and **My Closed Inquiries**. If you have the ability to submit inquiries on behalf of others, two additional tabs appear: **On Behalf Of Open Inquiries** and **On Behalf Of Closed Inquiries** (not shown in this example).
162.	Use the **My Open Inquiries** page to review the list of your cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened**, **Case Number**, **Topic, Subject**, **Status**, **Parent Case Number**, **Case Origin** and **Submitter Name**. Click the scroll bar to view more columns.

Step	Action
163.	Notice that the list is currently sorted by the date and time the case was opened. The arrow next to the **Date/Time Opened** header indicates the column is sorted in ascending order with the oldest at the top and the newest at the bottom.
164.	Sort your inquiries by clicking any column heading. You can only sort one column at a time; you cannot combine columns to sort. Click the **Date/Time Opened** link. Date/Time Opened ▲
165.	Now the list is sorted in descending order; the newest case is at the top of the list. Click the **Date/Time Opened** link again.. Date/Time Opened ▼
166.	Click a case number to display details for a specific inquiry. For this example, click the **00180573** link. 00180573
167.	If you add comments to a case, the comments are considered public, which means the employee and anyone who works the case can see the comment. Agents who work the cases can choose to mark comments as internal, which means the employee/initiator will not see the comment. Click in the **Add a new comment** field. Add a new comment
168.	Enter the desired information into the **Add a new comment** field. For this example, enter **The parking deduction...**.
169.	In this example, the comment was completed on your behalf. Notice the paperclip icon below the comment text. You can click this button to add an attachment with your comment.
170.	Click the **Submit comment to the UCPath Center** button. Submit comment to the UCPath Center
171.	Comments do not appear in the **Case Comments** section unless you refresh the page. Click the **Refresh** button. ↻
172.	Click the scroll bar.

Step	Action
173.	The **Case Comments** section displays the number of comments you entered, your name and the creation date. To view all comments, click the **View All** link. 
174.	The list of all comments appears. Remember that some comments may not be public and do not appear in the list. Click the **Show More** button. 
175.	Depending on your web browser, you may not see any items on the **More** menu. You cannot edit or delete case comments.
176.	To return to the case details, click the **00180573** link. 
177.	Click the scroll bar.
178.	You can add unlimited files after the inquiry is saved. Click the **Upload Files** link. 
179.	Navigate to and select the appropriate file. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. For this example, click the **January Paycheck.pdf** list item. 
180.	Click the **Open** button. 
181.	A message confirms the file was uploaded. Click the **Done** button. 
182.	Another message confirms the file was uploaded. If the message does not automatically close, click the **Close** button.

Step	Action
183.	You can view all attachments in a list. Click the **View All** link. View All
184.	The **Attachments** page lists all attachments connected to the inquiry. Click the **Show more** button. 
185.	Depending on your web browser, you may not see any items on the **More** menu. You cannot delete attachments or upload replacement attachments, but you can download a copy of an attached file. Click the **Show more** button again to hide the menu. 
186.	Click the **00180573** link. 00180573
187.	Click the scroll bar.
188.	**Related Cases** are cases linked to this inquiry. The **Emails** section displays any email messages associated with this case. Emails become hidden within 60 seconds. Agents can decide to make email messages public when working the case.
189.	Click the **Email** link. Sandbox: UCPath Center: Inquir.
190.	Review the email information as you scroll down the page. Click the scroll bar.
191.	Review the email from the UCPath Center. Click the scroll bar.
192.	Click the case number to return to the details of the case. Click the **00180573** link. 00180573
193.	To review closed inquiries, click the **My Inquiries** link. My Inquiries

Step	Action
194.	Click the **My Closed Inquiries** tab. 
195.	Use the **My Closed Inquiries** page to review the list of your closed cases. The inquiry you submitted most recently appears at the top of the list. To help you locate the specific case you want to monitor, the list displays the **Date/Time Opened, Date/Time Closed**, **Case Number**, **Topic**, **Subject, Status, Parent Case Number**, **Case Origin** and **Submitter Name.**
196.	Click the **00180567** link. 
197.	Click the scroll bar.
198.	Notice the **Status** is **Closed/Resolved**.
199.	Click the scroll bar.
200.	Return to the **Welcome to Ask UCPath Center** page. Click the **Home** link. 
201.	You have reviewed the status of an existing inquiry via the UCPath website. **End of Procedure.**