

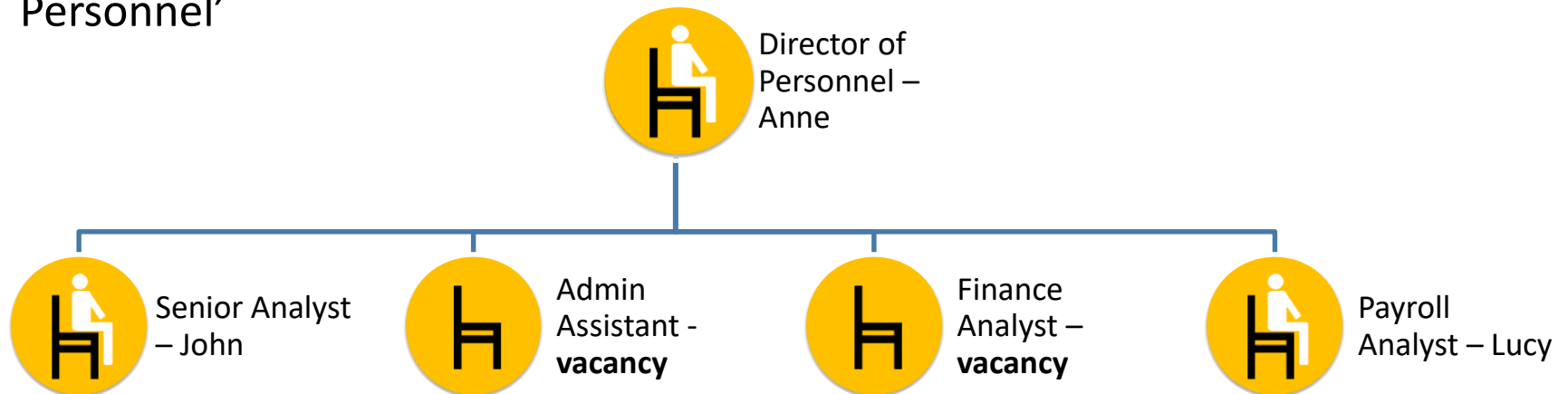


# Manager Self Service Dashboard (MSS)



# What is Manager Self Service (*Reports-To*)

- Managers or Supervisors who are assigned as '**Reports To**' will have *view only* access in Manager Self Service to their employees job information summary pages (e.g., salary, appointment details).
- 'Reports To' functionality can also be used to identify organization charts for your organizations.
- In the example below 4 positions report directly to the position of 'Director of Personnel'



# What is the Role of “Reports To” in UCPath

- **Determines who you will see in Manager Self Service**
  - View Employee Absence balances
  - View Employee Information:
    - *Email Address*
    - *Emergency Contacts*
    - *Home and mailing addresses, Phone #'s*
  - View Current Team Profile:
    - *Education*
    - *Honors and Awards*
    - *Licenses and certifications*
  - View Compensation History



# Manager Self Service Dashboard

The screenshot displays the Manager Self Service Dashboard interface. The top left corner features a blue box containing the user's name, title, employee ID, and service date. The top right corner includes a 'Log out' button and a 'Ask UPath Center' button. The main content area is divided into three sections: 'Direct Reports', 'Manager Actions', and a sidebar. The 'Direct Reports' section lists several employees, with a callout explaining that managers can access employee information by selecting a hyperlink. The 'Manager Actions' section lists various actions, with a callout explaining that managers can view employee information by selecting an activity. The sidebar contains a 'Dashboard' button and links to 'Employee Actions', 'Manager Actions', 'Forms Library', 'Quicklinks', and 'Help / FAQ'.

**Darlene Dolan**  
Primary Title: ACQUISITIONS MGR 1  
Employee ID: 10000452  
Service Date: 08/01/2013

**Employee Information** displays in the upper left corner including your Name, Title, Employee ID, and Service Date..

Navigation and Menu options are based upon assigned KSAMS role security.  
ALL employees will have access to their own information.

**Direct Reports**

Managers may access employee information for a specific direct report by selecting the employees' hyperlink within the **Direct Reports** pane.

**Manager Actions**

Managers may view employee information by selecting the activity in the **Manager Actions** pane.

Dashboard  
Employee Actions >  
Manager Actions >  
Forms Library >  
Quicklinks >  
Help / FAQ >

Charleen Garcia Jimenez  
Harley Goggins  
Honglin Fraysse  
Kirk Han  
Mike Mccahon  
Steven Clark  
Todd Mbatha  
Veronica Smith

View Employee Information  
View Employee Absence Balance  
View Compensation History  
View Historical Profiles  
Current Team Profiles

Log out  
Ask UPath Center



# View Employee Information

**Darlene Dolan**  
Primary Title: ACQUISITIONS MGR 1  
Employee ID: 10000452  
Service Date: 08/01/2013

**UCPath**

Log out | Ask UCPATH Center

**VIEW EMPLOYEE PERSONAL INFORMATION**

Select the employee whose job and personal information you want to review. You will be able to process on this page.

10/04/2017 **REFRESH EMPLOYEES**

**Darlene Dolan's employees**

**Position (40001724)**  
40001724

**Position (40000824)**  
Position: 40000824

**Kirk Han** **SELECT**  
Empl ID: 10002415  
Job: 0  
Empl Status: Active  
HR Status: Active  
Position: 40000664

**Mike Mccahon** **SELECT**  
Empl ID: 10000301  
Job: 0

**Annotations:**

- The **View Employee Personal Information** menu page displays all employees and open positions in your direct report line as of today's date.
- Managers may also search for a specific employee by clicking the **Find Employee** button and entering the appropriate search criteria.
- Managers may view direct reports as of another date by selecting the calendar icon within dated field.
- Click the **Refresh Employees** button to display the updated and refresh the page.

Manager Actions:  
View Employee Informat...  
View Employee Absence...  
View Compensation Hist...  
View Historical Profiles

Edit profile | Log out



# Position and Job Data Identifiers

**Darlene Dolan**  
Primary Title: ACQUISITIONS MGR 1  
Employee ID: 10000452  
Service Date: 08/01/2013

**UCPath**  
Log out  
UCPath Center

**VIEW EMPLOYEE PERSONAL INFORMATION**  
Select the employee whose job and personal information you want to review. You will be able to process on this page.

10/04/2017 REFRESH EMPLOYEES

**Darlene Dolan's employees**

**Empty Position (40001724)**  
Job: 0  
Position: 40001724

**Empty Position (40000824)**  
Job: 0  
Position: 40000824

**Kirk Han**  
Empl ID: 10002415  
Job: 0  
Empl Status: Active  
HR Status: Active  
Position: 40000664

**Mike Mccahon**  
Empl ID: 10000301  
Job: 0

**Callout Boxes:**

- UCPath creates when employees are joined with a position. Job Data attributes include i.e.. Empl ID, Job, Empl Status etc...
- Within the **View Employee Personal Information** section, managers will see position and job data identifiers. As previously discussed, positions can be active without an attached employee.
- Click the select button to view current employee profile.
- Note: If you are the employees' primary Reports To manager, the **Job will always show 0** on the view employee personal information page.

**Buttons:** Edit profile, Log out, FIND EMPLOYEE, SELECT



# (UCPC) UCPath Center Inquiry

The screenshot displays the UCPath system interface for a manager named Darlene Dolan. The left sidebar contains a navigation menu with options: Dashboard, Employee Actions, Manager Actions, Forms Library, Quicklinks, and Help / FAQ. The main content area is divided into two sections: 'Direct Reports' and 'Manager Actions'. The 'Direct Reports' section lists several employees: Charleen Garcia Jimenez, Harley Goggins, Honglin Fraysse, Kirk Han, Mike Mccahon, Steven Clark, Todd Mbatha, and Veronica Smith. The 'Manager Actions' section lists options: View Employee Information, View Employee Absence Balance, View Compensation History, View Historical Profiles, and Current Team Profiles. A red box highlights the 'Ask UCPath Center' button in the top right corner, with a blue arrow pointing to it. A yellow callout box contains text explaining the function of this button and providing a note about escalation procedures and turnaround times.

**Darlene Dolan**  
Primary Title: ACQUISITIONS MGR 1  
Employee ID: 10000452  
Service Date: 08/01/2013

UNIVERSITY OF CALIFORNIA drptrn UCPath Log out

**Ask UCPath Center**

**Direct Reports** View All

- Charleen Garcia Jimenez
- Harley Goggins
- Honglin Fraysse
- Kirk Han
- Mike Mccahon
- Steven Clark
- Todd Mbatha
- Veronica Smith

**Manager Actions**

- View Employee Information
- View Employee Absence Balance
- View Compensation History
- View Historical Profiles
- Current Team Profiles

Selecting the **Ask UCPath Center** button will allow Managers to submit questions directly to UCPC for themselves, or direct report.

**NOTE:** Managers are recommended to follow the escalation map and/or obtain local or central assistance before escalating inquiries to UCPC.


UCPC inquiry turnaround time may vary by priority.




# Manager Self Service Dashboard

Ask UCPATH Center


How can we help you today?




For Me



For an Employee



View Inquiries



Search Solution

Managers may submit inquiries to UCPC for themselves or direct reports. They may also view previously submitted inquiries, or search for solutions related to their request, that may have been previously posted.



# Manager Review of Absence Balances

## EMPLOYEE INFORMATION

Charleen Garcia Jimenez

Personal Information

Leave balances for monthly employees are updated at the end of the pay period following the month employee took or earned the leave. For Example: Leave taken in November is updated is updated in November totals at the end of December.

Leave balances for bi-weekly employees are updated in the pay period for which they took the earned leave. For Example: leave taken in the first half of November is updated during the processing for the first half of November.

**Empl ID**

10001581

**Position**

ACQUISITIONS EDITOR 5 (40000381)

**Job Code**

ACQUISITIONS EDITOR 5 (005905)

**Company**

University of California (UCS)

**Business Unit**

UC Office of President (UCOP1)

**First Start Date**

09/07/2004

**Department**

UC PRESS BOOKS (807500)

**Location**

UC Press - 155 Grand Avenue (155GR

**Regular/Temporary**

Not Applicable

**Full/Part Time**

Fixed



# View Employee Absence Balances

Employee ID: 10001581

Employee Name: Charleen Garcia Jimenez

## Example of Leave balances

### Current Balance

First < 1-3 of 3 > Last

Leave	Beginning Balance	Taken	Earned	Adjustments	Ending Balance	Accrual Max
Service Months	137.00	0.00	1.00	0.00	138.00	0.00
Vacation	151.50	0.00	15.51	0.00	167.01	384.00
Sick	929.73	4.00	7.75	0.00	933.48	0.00

Disclaimer : Ending Balances only reflect absences that have been processed as of the date displayed

### Accrual For Pay Period By Appointment

Empl Record	Eligibility Group	Department	Position	Job Code	Pay Period Hours	Service	Vacation Factor	Vacation Accrued	Sick Factor	Sick Accrued
0	STAFF99	UC PRESS BOOKS	ACQUISITIONS EDITOR 5	ACQUISITIONS EDITOR 5	168.00	Y	0.092308	15.507744	0.046154	7.753872

Disclaimer : A month of qualifying service is earned when you are on pay status for at least half the number of working hours in the month or the quadriweekly cycle



# Employee Compensation History

**Darlene Dolan**  
Primary Title: ACQUISITIONS MGR 1  
Employee ID: 10000452  
Service Date: 08/01/2013

Search [ ] Log out [ ] Bookmark [ ]  
Ask UCPath Center

The **View Compensation History** page displays all employees in your direct report line as of today's date. Use the select button to access the compensation history page.

**VIEW COMPENSATION HISTORY**  
Select the employee you'll be working with. You can initiate transactions only for employees who reported to you as of the date you entered on this page.

10/16/2017 [ ] REFRESH EMPLOYEES [ ]

**Darlene Dolan's employees**

**Charleen Garcia Jimenez** [SELECT]  
Empl ID: 10001581  
Job: 0  
Empl Status: Active  
HR Status: Active  
Position: 40000381  
Job Code: 005905  
Job Title: ACQUISITIONS EDITOR 5  
Dept ID: 807500  
Department: UC PRESS BOOKS  
Direct Reports ▾

**Mike Mccahon** [SELECT]  
Empl ID: 10000301  
Job: 0  
Empl Status: Active  
Department: UC PRESS BOOKS  
Direct Reports ▾

You can also search for a particular employee by clicking the **Find Employee** button and entering the appropriate search criteria.

**FIND EMPLOYEE** [ ]

To display the compensation history for a particular employee, click the **Select** button to the right of the person's name

Manager Actions  
View Employee Informat...  
View Employee Absence...  
**View Compensation Hist...**  
View Historical Profiles  
Current Team Profiles

Edit profile [ ]  
Log out [ ]



# Employee Compensation History

## COMPENSATION HISTORY

Charleen Garcia Jimenez



Compensation History

The **Compensation History** page will display the compensation history data for the selected employee. Within this page, several data rows will be available for view i.e.. Date of compensation change, source, compensation amount etc.. To review job data specific to a direct report, the manager will navigate to the PayPath options page.

You also can view these details in a chart format by selecting the compensation history button.

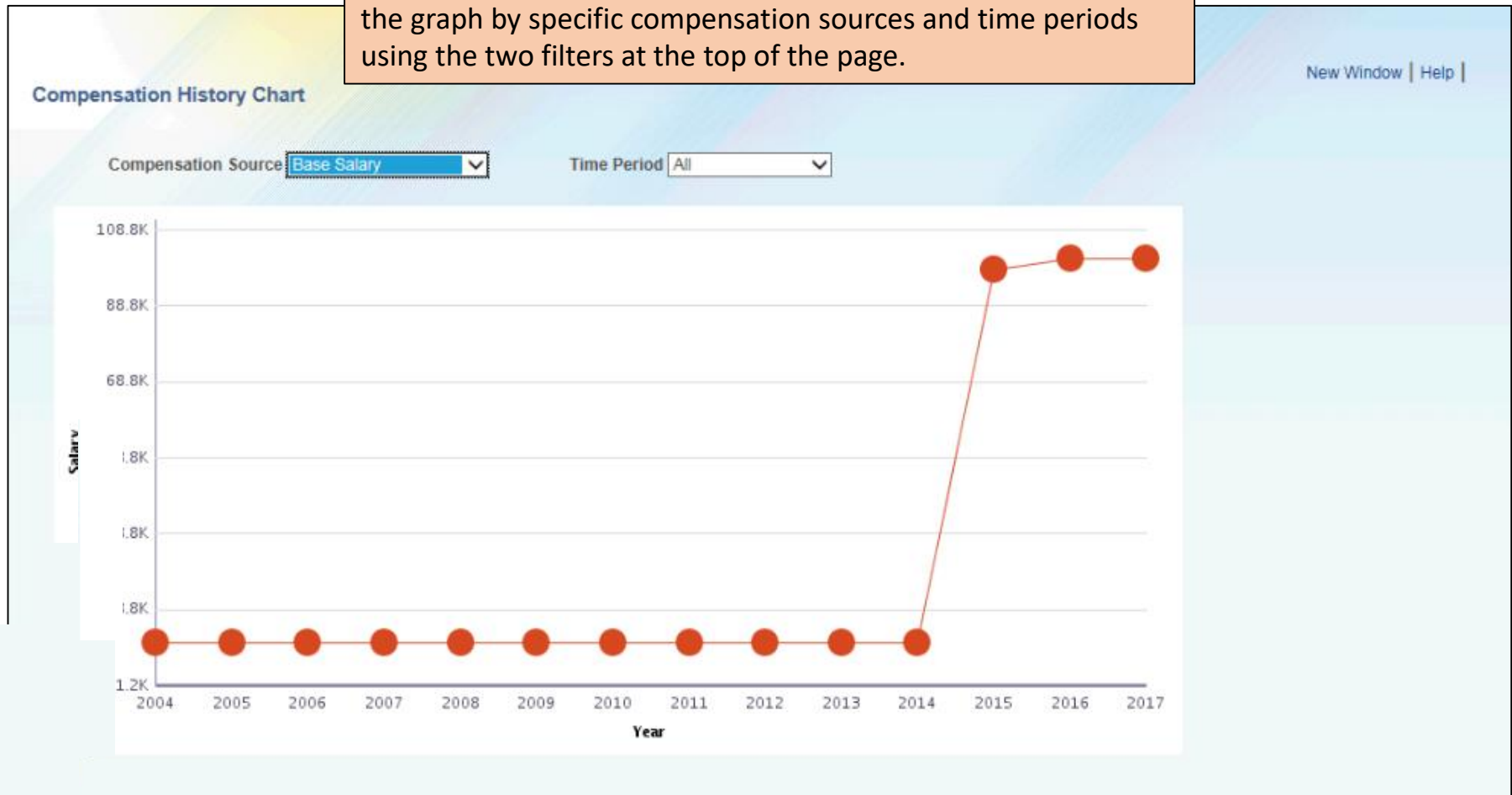
Date of Change	Amount	Change	Action	Reason	Source	Currency	Job Title
07/01/2016	101,295.76	2,950.36	Pay Rate Change	Staff - Merit	Base Salary	USD	ACQUISITIONS EDITOR 5
07/01/2015	98,345.40	98,345.40	Pay Rate Change	Across-The-Board	Base Salary	USD	ACQUISITIONS EDITOR 5
09/07/2004			Hire	Conversion Use Only	Base Salary	USD	CONVERSION JOB CODE

ISSUED CURRENCY



# Employee Compensation History

The **compensation history** displays compensation actions for the selected employee in a line graph. Managers may review the graph by specific compensation sources and time periods using the two filters at the top of the page.



# View Team Profiles

**Darlene Dolan**  
Primary Title: ACQUISITIONS MGR 1  
Employee ID: 10000452  
Service Date: 08/01/2013

**UCPath**  
UNIVERSITY OF CALIFORNIA  
drptm

Search [ ] Log out [ ] Bookmark [ ]  
Ask UCPATH Center

## CURRENT TEAM PROFILES

Select the employee to be viewed. You will be able to process only those employees that report to you as of the date entered on this page

10/16/2017 [ ] REFRESH EMPLOYEES

**Darlene Dolan's employees**

Manager Actions:  
View Employee Information...  
View Employee Absence...  
View Compensation History...  
View Historical Profiles  
**Current Team Profiles**

**Charleen Garcia Jimenez** [SELECT]  
Empl ID: 10001581  
Job: 0  
Empl Status: Active  
HR Status: Active  
Position: 40000381  
Job Title: ACQUISITIONS EDITOR 5  
Department: UC PRESS BOOKS

**Mike Mccahon** [SELECT]  
Empl ID: 10000301  
Job: 0  
Empl Status: Active  
HR Status: Active  
Position: 40000241  
Job Title: ACQUISITIONS EDITOR 4  
Department: UC PRESS BOOKS

**Harley Goggins** [SELECT]

**Steven Clark** [SELECT]

Callouts:  
- The **Current Team Profiles** page displays all the employees in your direct report line as of today's date.  
- Click the **Select** button to the right of the person's name to access the direct report's profile.



# View Team Profiles

Ask UCPATH Center

CURRENT UC PERSON PROFILE

Kirk Han

The profile displays your employee's skills, competencies, and accomplishments. Review content detail by navigating through the individual tabs and selecting the item description link. Content that can be updated includes an [Edit](#) and [Delete](#) button next to each item.

QUALIFICATIONS

Use the **Qualifications** tab to review the employee's honors and awards, as well as their licenses and certifications.

In this example, your direct report has an award in the Honors and Awards section. You can use the Edit and Delete buttons to update or delete the item.

Honors and Awards

Honor and Award

UCOP Star Award

ADD NEW HONORS AND AWARDS

Edit

Delete



## View Team Profiles

## CURRENT UC PERSON PROFILE

Kirk Han

The profile displays your employment description link. Content that

Managers may print or save the direct report's profile by selecting the print icon.

shments. Review content details and click the edit button next to each item.



Use the **Education tab** to view the employee's educational degrees and UC specialty codes.

In this example, your direct report has a Bachelor of Arts degree. You can use the Edit and Delete buttons to update or delete the degree.

## QUALIFICATIONS

## EDUCATION

## Degrees

Degree	Education Field	School Code	Description	Edit	Delete
Bachelor of Arts					

[ADD NEW DEGREES](#)

## UC Specialty Code



# View Team Profiles

The printed report will reflect the similar data viewed within the Team Profile page. Information including , *Empll ID, Profile Status, Honors and Awards and Degrees* are viewable within the printed document.

**NOTE:** Report contains P2 Employee Data.

## Kirk Han

As of 2017-10-16

### General Information

Employee ID: 10002415  
Profile Type: PERSON

Kirk Han  
UC Person

Profile Status: Active  
Status Date: 2015-11-03

### Honors and Awards

Content Item ID	Description	Issue Date
STAR	UCOP Star Award	2017-10-06

### Degrees

Content Item ID	Date Acquired	Location	School
BA	1980-01-01		

\*\* End of report \*\*



# View Team Profiles

## CURRENT UC PERSON PROFILE

Kirk Han

The profile displays your employee's skills, competencies, and accomplishments. Content that can be updated includes an Edit and

Managers may leave detailed comments within the direct reports' profile by selecting the comment icon.

avigating through the individual tabs and selecting the item



QUALIFICATIONS

EDUCATION

### Degrees

Degree	Education Field	School Code	Description	Edit	Delete
Bachelor of Arts					

ADD NEW DEGREES

### UC Specialty Code



# View Team Profiles



Managers or Supervisors may enter comments related to employee actions, absences, temporary job duty changes, or action items. These comments are **NOT** part of the employee's job record.

Profile comments should not contain PHI, or information sensitive to HIPAA.

g out ☐ Bookmark

Ask UCPATH Center

## PROFILE COMMENTS

Profile ID 212860

Comments

Managers may navigate to the previous page by selecting **CANCEL** on the bottom of screen.

OK

CANCEL



# Reference Material for Review

## Links to helpful reference material:

- <http://www.hr.uci.edu/> - UCI HR Website
- <https://ap.uci.edu/> - UCI Academic Personnel Website
- <http://www.uclcl.uci.edu/> - UC Learning Center Website (videos available)
- <https://ucpath.uci.edu/training/index.php> - UCI UCPath Training Website

## Employee Self Service UPKs:

- [Manager Self Service](#) – All Manager Self-Service related user simulations and Job Aids

## Other Relevant UPKs:

- [Initiate New Position Control Request](#)
- [Initiate Update Vacant Position Request](#)
- [View Position Information](#)

