

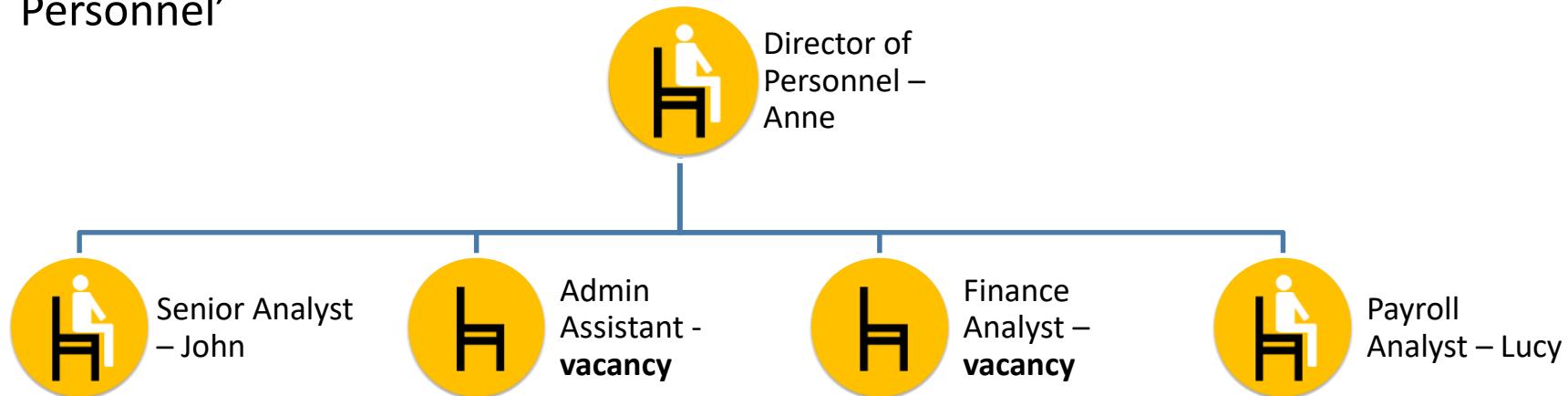


Manager Self Service Dashboard (MSS)



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

Navigation and Menu options are based upon assigned KSAMS role security.

ALL employees will have access to their own information.

Manager Actions

- [View Employee Information](#)
- [View Employee Absence Balance](#)
- [View Compensation History](#)
- [View Historical Profiles](#)
- [Current Team Profiles](#)

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

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

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

Direct Reports

- [Charleen Garcia Jimenez](#)
- [Harley Goggins](#)
- [Honglin Fraysse](#)
- [Kirk Han](#)
- [Mike Mccahon](#)
- [Steven Clark](#)
- [Todd Mbatha](#)
- [Veronica Smith](#)

darlene dolan

Primary Title: ACQUISITIONS MGR 1

Employee ID: 10000452

Service Date: 08/01/2013

Log out

Ask UCPath Center

Dashboard

Employee Actions

Manager Actions

Forms Library

Quicklinks

Help / FAQ

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View Employee Information

The screenshot shows the UCPATH interface for viewing employee personal information. On the left, a sidebar for Darlene Dolan displays her primary title (ACQUISITIONS MGR 1), employee ID (1000452), and service date (08/01/2013). The main content area is titled 'VIEW EMPLOYEE PERSONAL INFORMATION' and shows a list of employees under 'Darlene Dolan's employees'. A yellow callout box points to the 'Manager Actions' menu, highlighting the 'View Employee Information' option. Another yellow callout box points to the date field (10/04/2017) and the 'REFRESH EMPLOYEES' button. A third yellow callout box points to the 'FIND EMPLOYEE' button. A blue callout box points to the 'Edit profile' and 'Log out' buttons in the bottom left. A blue arrow points from the 'View Employee Information' menu option to the date field. A blue arrow points from the date field to the 'REFRESH EMPLOYEES' button. A blue arrow points from the 'REFRESH EMPLOYEES' button to the 'FIND EMPLOYEE' button.

Darlene Dolan

Primary Title: ACQUISITIONS MGR 1

Employee ID: 1000452

Service Date: 08/01/2013

Manager Actions

View Employee Information

View Employee Absence...

View Compensation Hist...

View Historical Profiles

UCPath

The View Employee Personal Information menu page displays all employees and open positions in your direct report line as of today's date.

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

Manager 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

Edit profile

Log out

Ask UCPATH Center

Managers may also search for a specific employee by clicking the **Find Employee** button and entering the appropriate search criteria.

FIND EMPLOYEE

Kirk Han

Empl ID: 10002415

Job: 0

Empl Status: Active

HR Status: Active

Position: 40000664

Mike Mccahon

Empl ID: 10000301

Job: 0

SELECT

SELECT



Position and Job Data Identifiers

The screenshot shows the UCPath interface for viewing employee personal information. On the left, a sidebar for Darlene Dolan displays her primary title (ACQUISITIONS MGR 1), employee ID (10000452), and service date (08/01/2013). The main content area is titled "VIEW EMPLOYEE PERSONAL INFORMATION" and shows a list of employees under "Darlene Dolan's employees". The list includes:

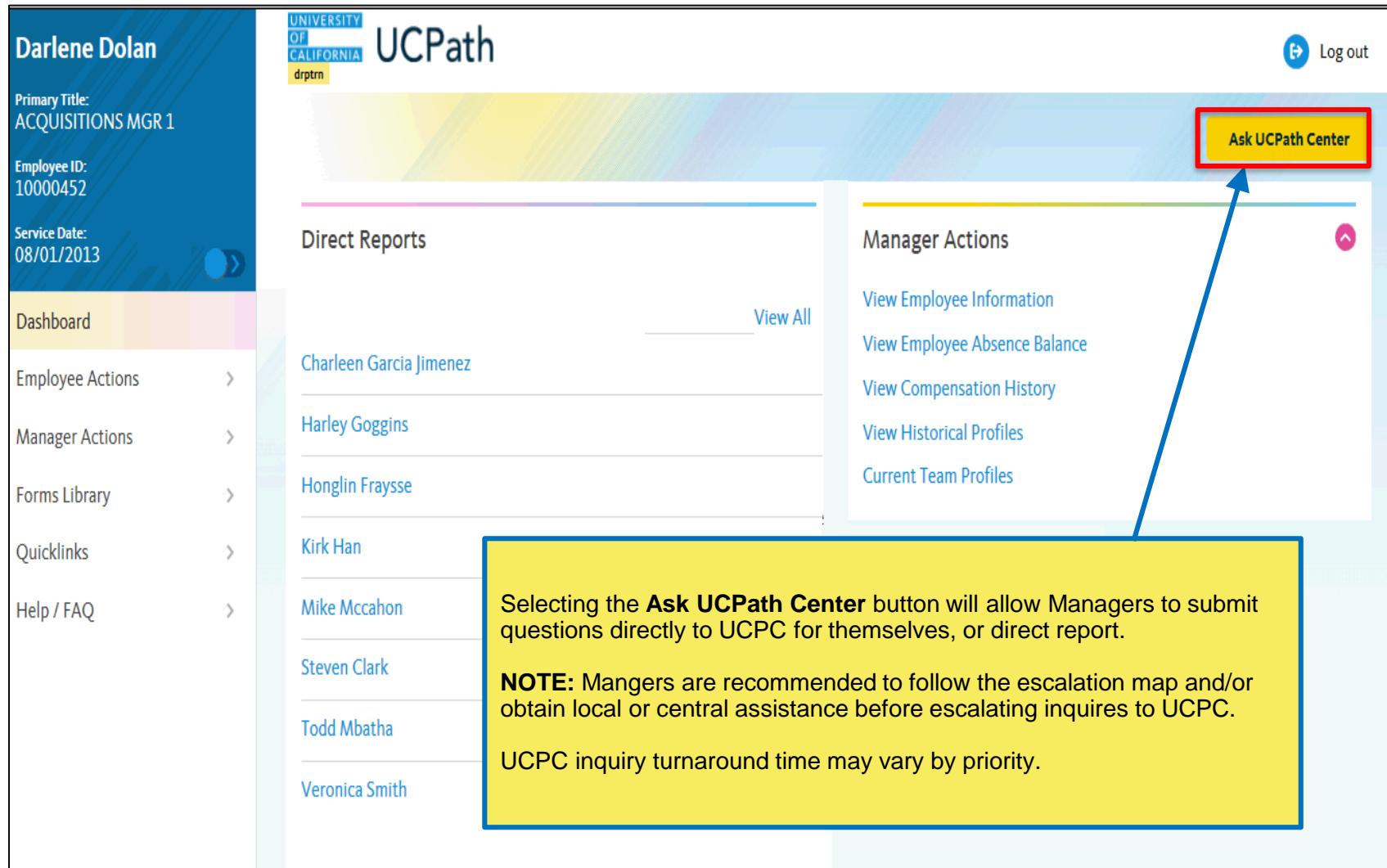
- Empty Position (40001724)**
Job: 0
Position: 40001724
- Empty Position (40000824)**
Job: 0
Position: 40000824
- Kirk Han**
Empl ID: 10002415
Job: 0
Empl Status: Active
HR Status: Active
Position: 40000664
- Mike Mccahon**
Empl ID: 10000301
Job: 0

Annotations provide additional context:

- A callout box in the top right corner states: "UCPath creates when employees are joined with a position. Job Data attributes include i.e.. Empl ID, Job, Empl Status etc..."
- A callout box over the Kirk Han entry states: "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."
- A callout box over the Mike Mccahon entry states: "Click the select button to view current employee profile." A red box highlights the "SELECT" button for Mike Mccahon.
- A callout box over the Empty Position entries states: "Note: If you are the employees' primary Reports To manager, the Job will always show 0 on the view employee personal information page." An arrow points from this note to the "Job: 0" field in the first Empty Position entry.



(UCPC) UCPath Center Inquiry



Ask UCPath Center

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

Mangers 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

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

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 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.



View Employee Absence Balances

Employee ID: 10001581
Employee Name: Charleen Garcia Jimene

Current Balance

Example of Leave balances

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	ACQUISITION EDITORIAL R5	ACQUISITION EDITORIAL R5	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

The screenshot shows the 'VIEW COMPENSATION HISTORY' page for Darlene Dolan. The left sidebar displays her details: Primary Title (ACQUISITIONS MGR 1), Employee ID (10000452), and Service Date (08/01/2013). The main content area is titled 'VIEW COMPENSATION HISTORY' and includes a search bar, a date selector (10/16/2017), and a 'REFRESH EMPLOYEES' button. A large yellow callout box highlights the text: '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.' A blue arrow points from this callout to the 'View Compensation Hist...' link in the sidebar. Another yellow callout box on the right side of the page states: 'You can also search for a particular employee by clicking the Find Employee button and entering the appropriate search criteria.' A red box highlights the 'FIND EMPLOYEE' button, with a blue arrow pointing to it from the text. Below this, another yellow callout box contains the instruction: 'To display the compensation history for a particular employee, click the Select button to the right of the person's name.' A blue arrow points from this callout to the 'SELECT' button next to Charleen Garcia Jimenez's name. The page also shows 'Darlene Dolan's employees' with two listed: Charleen Garcia Jimenez and Mike Mccahon, each with their own 'SELECT' button.

Darlene Dolan

Primary Title: ACQUISITIONS MGR 1

Employee ID: 10000452

Service Date: 08/01/2013

Das Manager Actions

View Employee Information

View Employee Absence...

View Compensation Hist...

View Historical Profiles

Current Team Profiles

Edit profile

Log out

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UCPATH

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

Darlene Dolan's employees

Charleen Garcia Jimenez

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

Mike Mccahon

Empl ID: 10000301
Job: 0
Empl Status: Active

Department: UC PRESS BOOKS

Direct Reports ▾

Direct Reports ▾

Search

Ask UCPATH Center

FIND EMPLOYEE

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



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

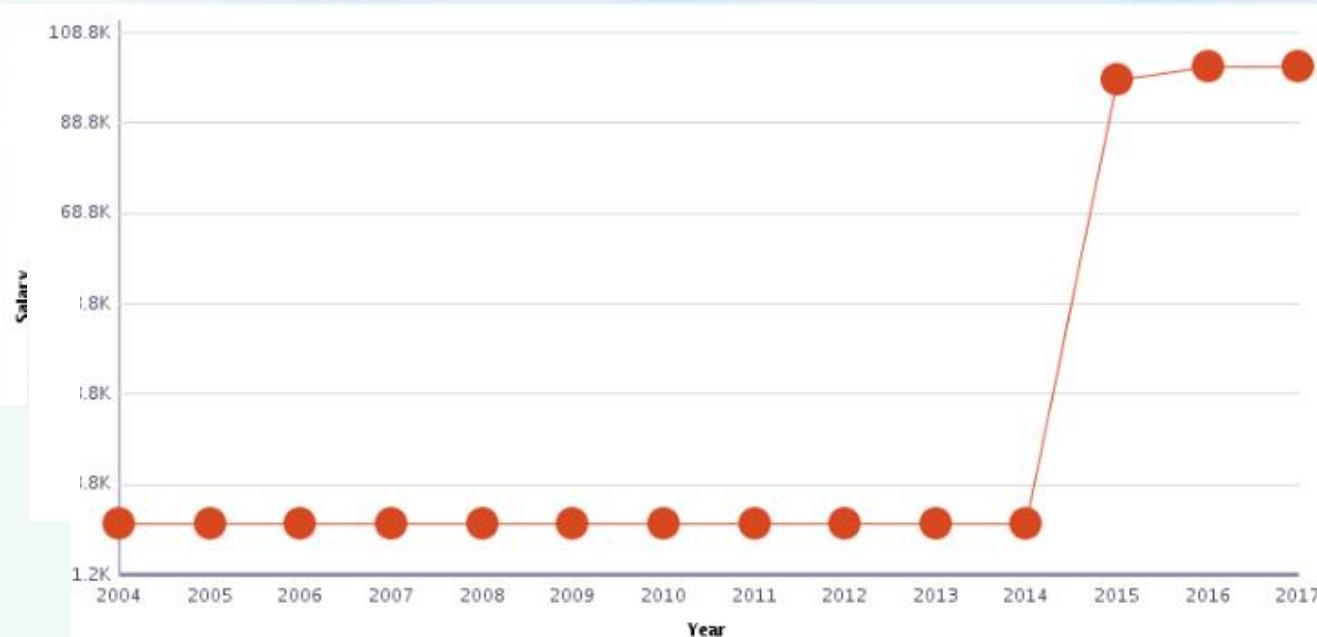
The **compensation history** displays compensation actions for the selected employee in a line graph. Managers may review the graph by specific compensation sources and time periods using the two filters at the top of the page.

Compensation History Chart

[New Window](#) | [Help](#) |

Compensation Source

Time Period



View Team Profiles

Darlene Dolan

Primary Title: ACQUISITIONS MGR 1

Employee ID: 10000452

Service Date: 08/01/2013

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Boc View Employee Informat...

Emp View Employee Absence...

Mar View Compensation Hist...

For View Historical Profiles

Qui Current Team Profiles

Hel

Edit profile

Log out

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drptm UCPath

The Current Team Profiles page displays all the employees in your direct report line as of today's date.

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

Darlene Dolan's employees

Charleen Garcia Jimenez Empl ID: 10001581 Job: 0 Empl Status: Active HR Status: Active Position: 40000381 Job Title: ACQUISITIONS EDITOR 5 Department: UC PRESS BOOKS	<input type="button" value="SELECT"/>
Mike Mccahon Empl ID: 10000301 Job: 0 Empl Status: Active HR Status: Active Position: 40000241 Job Title: ACQUISITIONS EDITOR 4 Department: UC PRESS BOOKS	<input type="button" value="SELECT"/>
Harley Goggins	<input type="button" value="SELECT"/>
Steven Clark	<input type="button" value="SELECT"/>

Search

Click the **Select** button to the right of the person's name to access the direct report's profile.



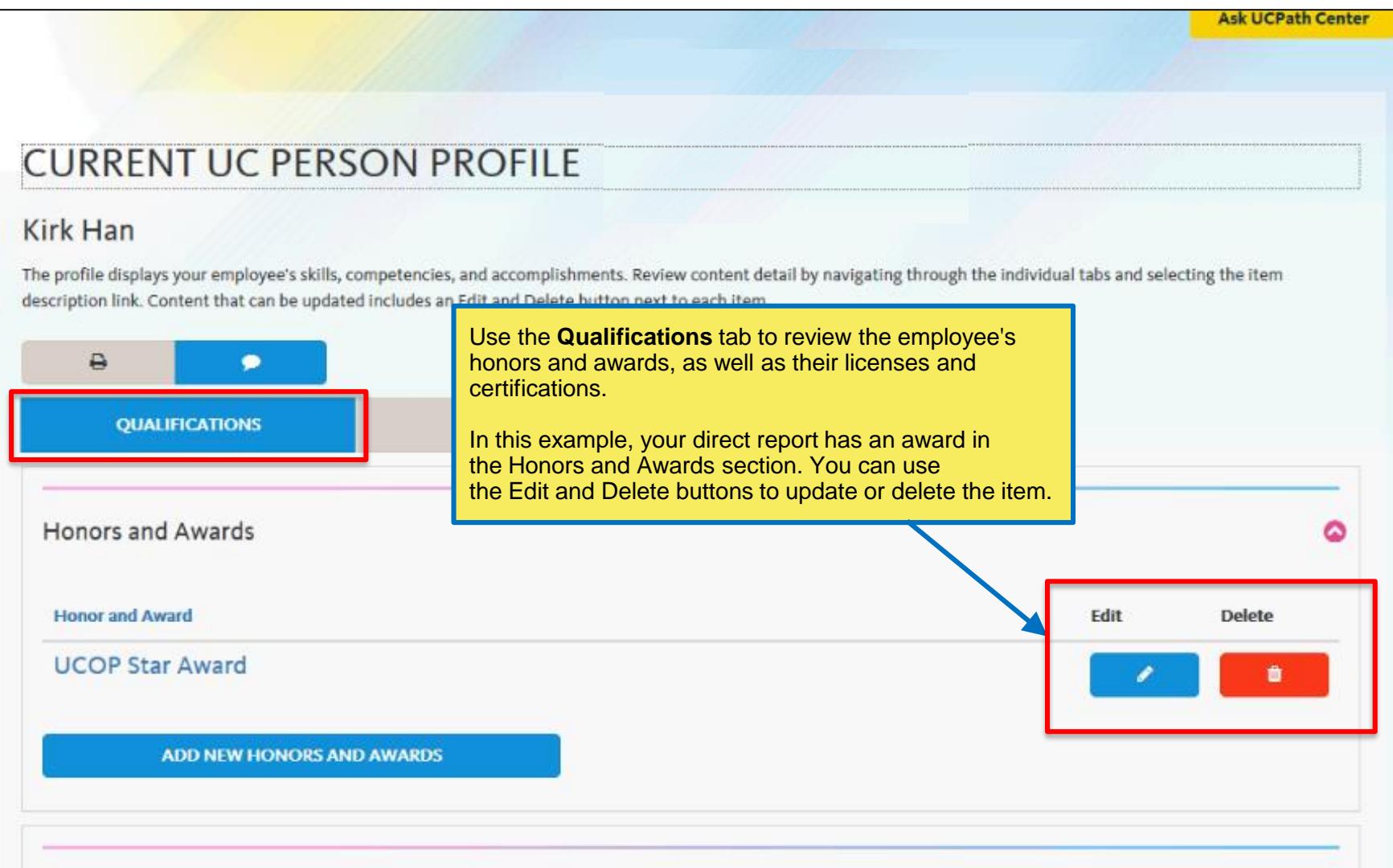
View Team Profiles

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.



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



View Team Profiles

CURRENT UC PERSON PROFILE

Kirk Han

The profile displays your employee's name, photo, and direct report's name. Managers may print or save the direct report's profile by selecting the print icon.

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



QUALIFICATIONS

EDUCATION

Degrees

Degree	Education Field	School Code	Description	Edit	Delete
Bachelor of Arts					

ADD NEW DEGREES

UC Specialty Code

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.



View Team Profiles

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

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 account description link. Content that can be updated includes an Edit and

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

The screenshot shows the 'CURRENT UC PERSON PROFILE' page for Kirk Han. The 'EDUCATION' tab is selected. A red box highlights the comment icon in the toolbar. A yellow callout box explains: 'Managers may leave detailed comments within the direct reports' profile by selecting the comment icon.' The table lists a degree:

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.uclc.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](#)

