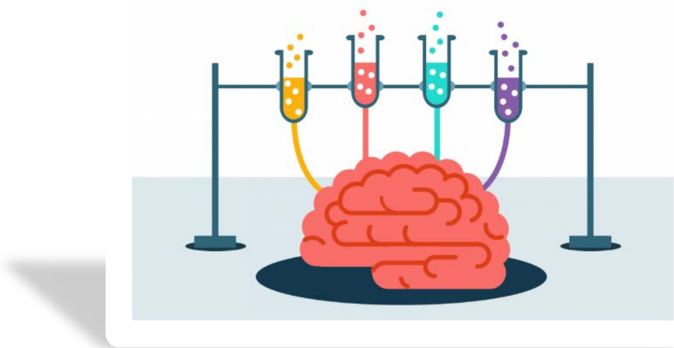
UCI UCPath

Template Transactions – Part 1

Brain Teaser Activity



Answer the following questions:

1. What type of cheese is made backwards?
2. How do oceans say hello to each other?
3. What never asks questions but is often answered?
4. What do the numbers 11, 69 and 88 have in common?

Introductions

Instructor

- Name
- UCI role
- UCPath role
- Years at UC
- Functional experience

Attendees

- Name
- University role
- Years at UCI
- Expectations for this training

General Rules

Safety & Housekeeping

- Emergency evacuation procedures
- Restrooms
- Breaks

Classroom Etiquette

- Please turn off cell phones
- No email or web surfing
- Return from breaks on time
- Please use trash receptacles in the room

Parking Lot

Parking Lot

- Capture any questions or concerns that cannot be addressed during class
- Provide follow up to all attendees of this class

Course Agenda

Lesson

1: Template Transactions Overview

2: Full Hire

3: Approvals and Transaction Status

4: Concurrent Hire

Course Objectives

By the end of this course, you should be able to:

- Identify the actions that are processed using templates.
- Identify the pages used to initiate template transactions.
- View template transaction status.
- Describe the key system steps to complete a full hire and concurrent hire.
- Initiate full hire and concurrent hire template transactions.
- Describe the AWE process.

Key Concepts & Vocabulary

UCPath Term	Definition
Location	A Location is a University of California (UC) campus and its associated medical center, if applicable. For example, UCI is a Location and includes both the campus and the UCI Medical Center
Business Unit	Each UC campus and medical center is identified by a ‘Business Unit’ which will be used to segregate campus information for reporting and system security access. For example: IRCMP = UCI Campus IRMED = UCI Medical Center.
Approval Workflow Engine (AWE)	Approval Workflow Engine (AWE) systematically routes transactions in UCPath to designated roles (e.g., WFA Approver) for approval at the location. Once these approvals are complete, transactions are either routed to the UCPath Center (UCPC) for finalization or are finalized in UCPath.
Contingent Worker (CWR)	Individuals who have a relationship with the University but do not receive pay from the University.

Key Concepts & Vocabulary, (cont'd)

UCPath Term	Definitions
Row Level Security	Row Level Security controls the population a user has access to, and who they can see or submit a transaction for.
Role Level Security	Role Level Security controls what pages a user can see and what actions they can take on each page.
Job Earnings Distribution	Job Earnings Distributions are used to distribute earnings by Earnings Code (which are like PPS DOS codes) on the Job Record either by percentage or amount (e.g., ERIT, HSCP).
UCPC WFA	UCPC WFA is UCPath's team that runs the process to complete transactions in UCPath. UCPC stands for UCPath Center. WFA stands for Work Force Administration.
FTE	Full time equivalent or employment percentage of full time. No longer tied to permanent budget.
Position Number	A unique number that relates to a set of job attributes and represents a slot in UCI's organizational structure. A position can be filled or vacant. All employees at UCI will inhabit a position.

Key Terms – Now vs UCPath

PPS	UCPath
Title Code	Job code
Appointment Type	Employee Classification
DOS Code	Earnings Code
Social Security Number	National ID
Citizenship	National ID Type – Updated Selections
Rate (H or A)	Comp Rate Code
Pay Rate	Compensation Rate
PPS Begin Date	Effective Date
Home Department	Primary Job
Bundles	Templates
Additional Employment	Concurrent Job (Hire)

LESSON 1

Template Transactions Overv

Lesson Objectives

1 Template Transactions Overview

2: Full Hire

3: Approvals and Status

4: Concurrent Hire

In this Lesson you will learn how to:

- Identify the actions that are processed using templates.
- Review the template transaction system process.
- View current employee information using the **Person Org Summary** page.
- Identify the elements of the **Smart HR Transactions** page.
- Review the templates, **Action Reason** codes and descriptions.

Transactions Processed Using Templates

The actions that are processed using templates include:

New Hires	Contingent Workers (CWR)	Concurrent Hires
Rehires	Personal Data Changes	Retirement
Intralocation Transfers	Interlocation Transfers	Terminations

- **Template Transactions** are initiated by the location/department. An Approval Workflow Engine (AWE) will route transactions to be approved by the location and/or the UCPath Center.

Available Templates

Template transactions are initiated through a UCPath template-based page called **Smart HR Templates**.

Available Templates

Template	Description
UC_ADD_CWR	Add Contingent Worker - No Position Data
UC_ADD_CWR_POSN	Add Contingent Worker With Position
UC_COM_CWR	Complete Contingent Worker Instance
UC_CONC_HIRE	Staff Concurrent Hire/Inter Location Transfer
UC_CONC_HIRE_AC	Academic Concurrent Hire/Inter Location Transfer
UC_EXT_CWR	Extend CWR Appointment
UC_EXT_CWR_POSN	Extend CWR (with Position) Appointment
UC_FULL_HIRE	Full Hire - Staff Only
UC_FULL_HIRE_AC	Full Hire - Academic Use Only
UC_INVOL_TERM	Involuntary Termination
UC_PERSON_DATA	UC Personal Data
UC_REHIRE	UC Rehire - All Employees
UC_REHIRE_AC	Rehire - Academic
UC_RENW_CWR	Renew Contingent Worker - Without Position
UC_RENW_CWR_POS	Renew CWR Instance - with Position
UC_RETIREMENT	Retirement
UC_TRANSFER	Intra-Business Unit Transfer - Staff Only
UC_TRANSFER_AC	Intra-Business Unit Transfer - Academic Only
UC_VOL_TERM	Voluntary Termination

- Custom templates provide the fields necessary to complete the transaction all in one place.
- In many cases, there is a template specific to academic and another specific to staff. For example:
  - Full Hire - Staff Only
  - Full Hire - Academic Use Only

System Security by Template

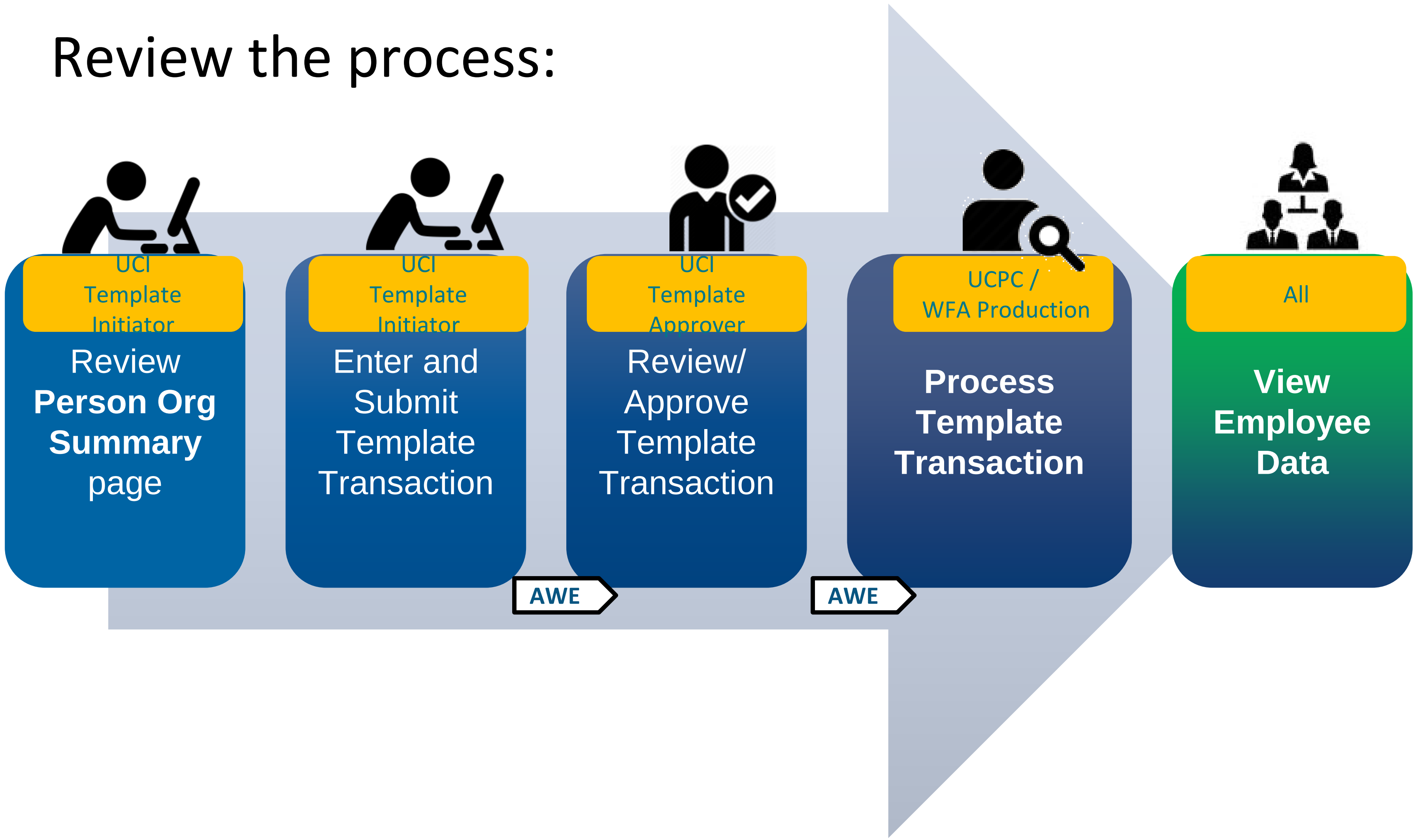
Some templates have system security features enabled that prevent initiators from entering transactions for users in different Business Units and/or departments.

- Below is an example of what type of security is enabled for certain templates.

Business Unit Security	Department Security	No Security
Rehire	Involuntary Termination	Concurrent Hire
Renew Contingent Worker	Voluntary Termination	Full Hire
Intralocation Transfer	Personal Data	Add Contingent Worker with Position
Rehire Reinstatement	Retirement	Add Contingent Worker (No Position)
	End CWR Assignment	
	Extend CWR Assignment	

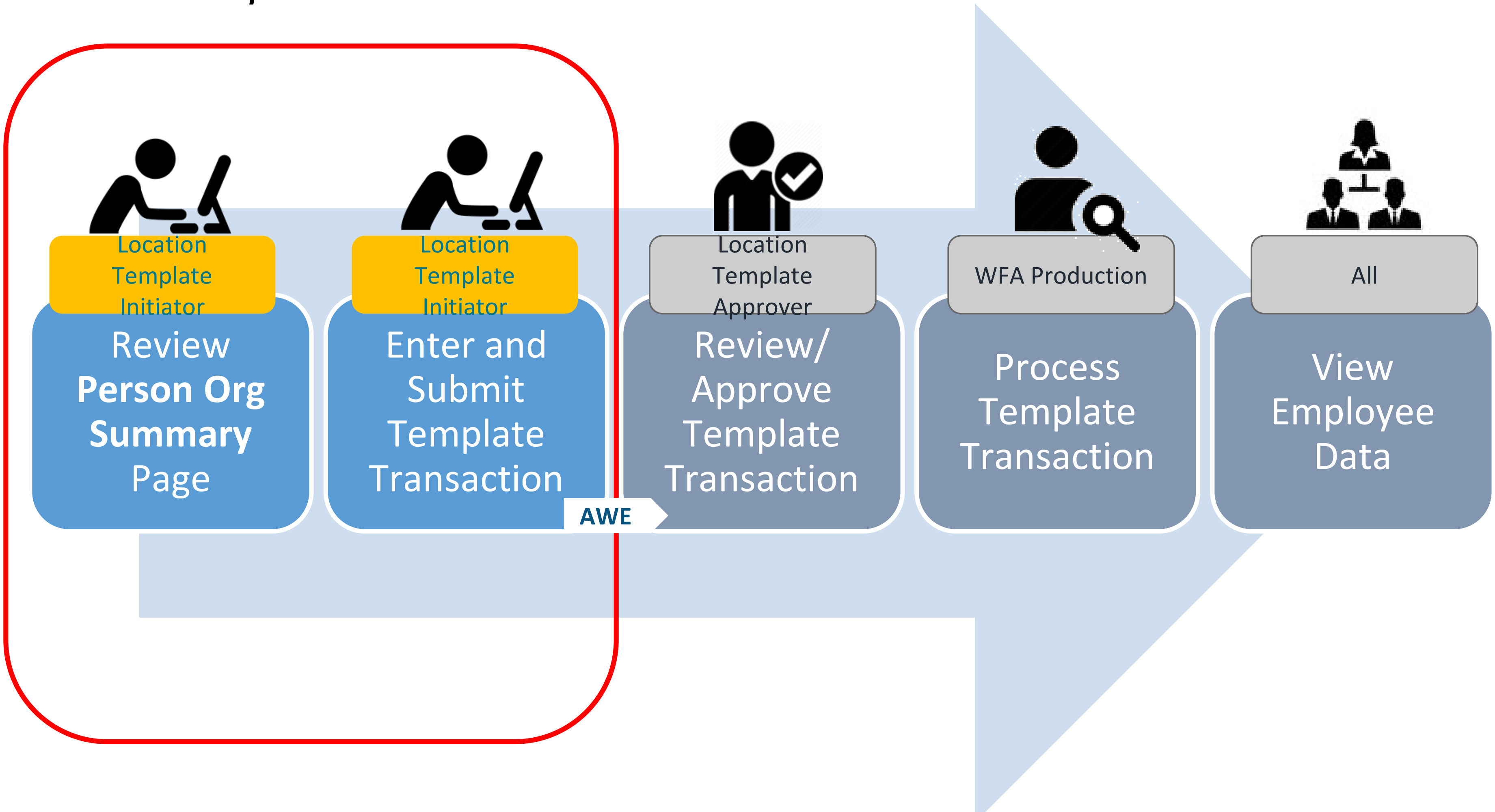
Template Transactions – System Process

Review the process:



Focus of Template Transactions I

The *Template Transactions* courses focus on the Initiator tasks.



Navigating to Person Organizational Summary

Person Organizational Summary Page

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > **Person Organizational Summary**

- If there is more than one row of data, click the **View All** link to see all current information.

The header, above each **Assignments** section, displays the employee's statuses, indicates which job is the **Primary Job** and, if applicable, the **Termination Date** of the assignment.

Person Organizational Summary

Alex Rand Person ID 10002000

Employment Instances — Find | View 1 — First 1-2 of 2 Last

ORG Instance 0 — HR Status Active — Last Hire 01/01/2016
Primary Job: ☑ — Payroll Status Active — Termination Date

Assignments — Personalize | Find | First 1 of 1 Last

Empl Record	Business Unit	Position Number	Dept ID	Department Description	Job Code	Description	Expected Job End Date	FTE	Employee Class	Union Code	FLSA Status	Pay Group	Employee Type	Probation Code	Probation End Date
0	UCOP1	40001351	814000	IMM OFC INFO TECH SRVCS	004920	STDT 3	09/01/2016	0.250000	Student: Casual/Restricted	99	N	MB7	H	None	

ORG Instance 1 — HR Status Active — Last Hire 01/21/2015
Primary Job: ☐ — Payroll Status Active — Termination Date

Assignments — Personalize | Find | First 1 of 1 Last

Empl Record	Business Unit	Position Number	Dept ID	Department Description	Job Code	Description	Expected Job End Date	FTE	Employee Class	Union Code	FLSA Status	Pay Group	Employee Type	Probation Code	Probation End Date
1	UCOP1	40001456	814200	TECHNOLOGY SUPPORT SVS	004920	STDT 3	07/22/2016	0.240000	Student: Casual/Restricted	99	N	MB7	H	None	

Person Organization Summary (cont’d)

Important Things to Know:

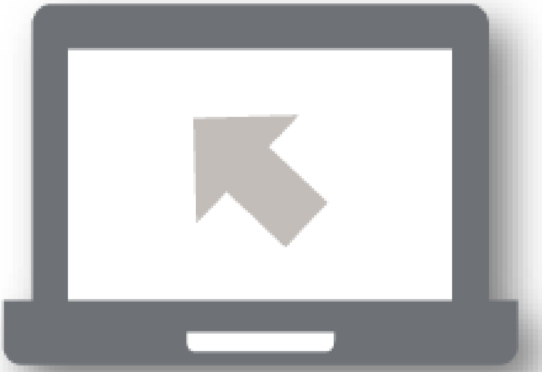
- The Person Organization Summary page displays current employee information for all organizational relationships: Employee and Contingent Worker (CWR)
- An employee may have **more than one** organizational relationship concurrently. For example, the person may be an employee at one UC Location and a CWR at another.
- This page does not have row-level security. If you have access to this page, you can view current job assignment information for all employee records across all locations.
- This page does not display historical or future-dated employment details.

Exercise 1

View Person Organizational Summary

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > **Person Organizational Summary**

- This is your opportunity to practice this task on your own.
- Complete exercise 1 in your workbook.
- Ask your instructor for assistance, if needed.

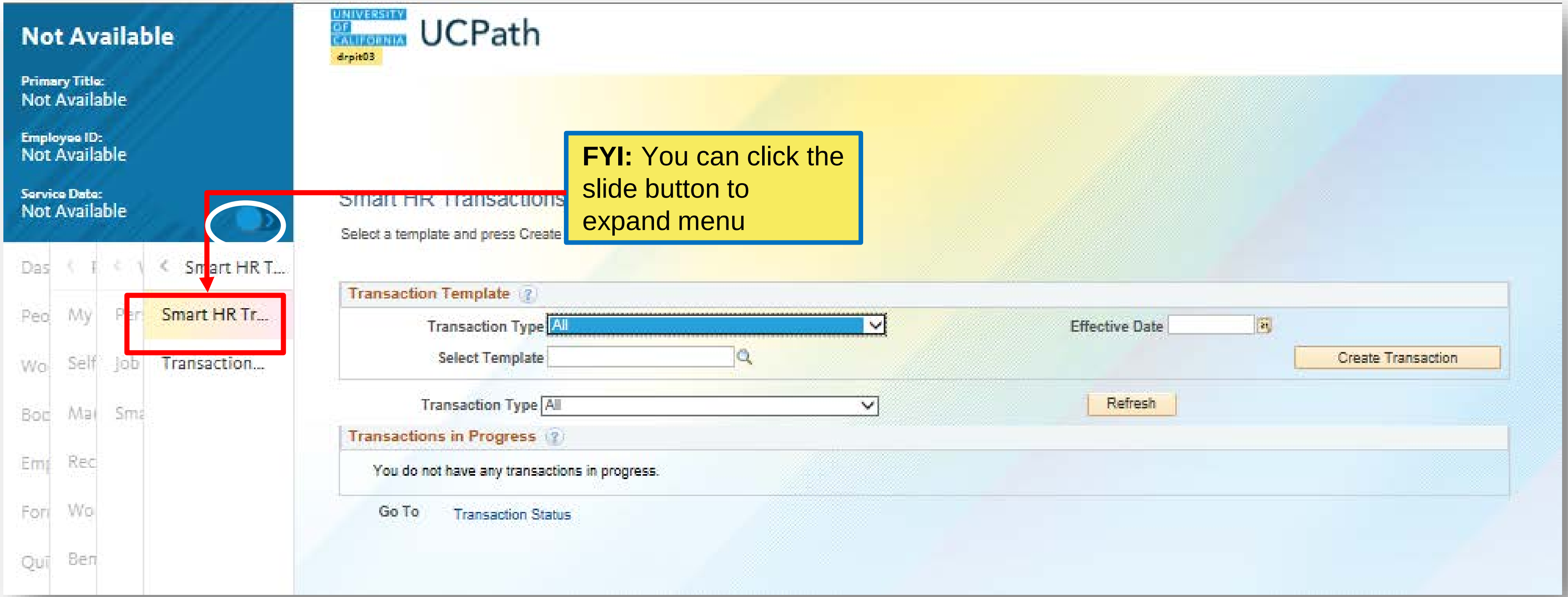


Navigating to SS Smart HR Templates

Smart HR Transactions – Navigation

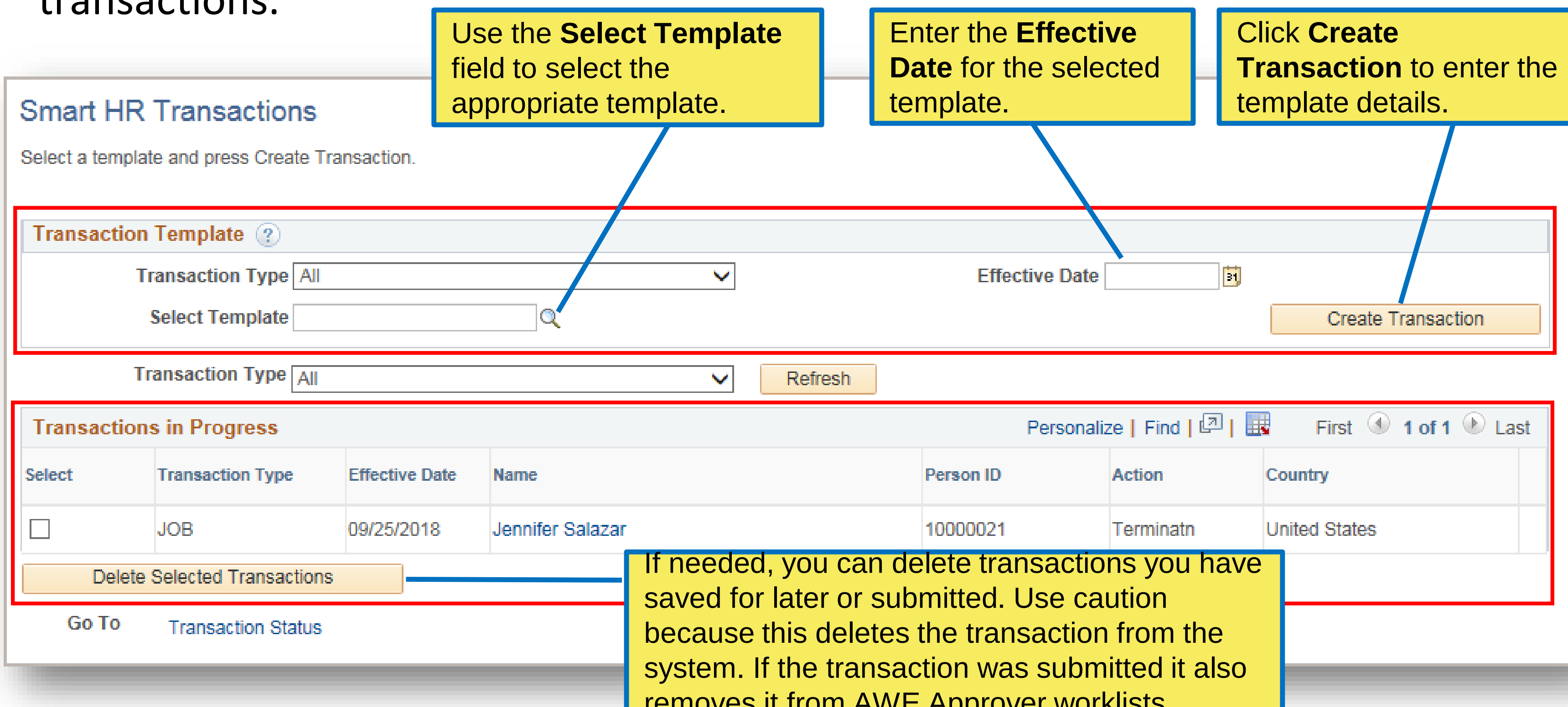
Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

- The **Smart HR Transactions** page is the starting point to initiate a template transaction.



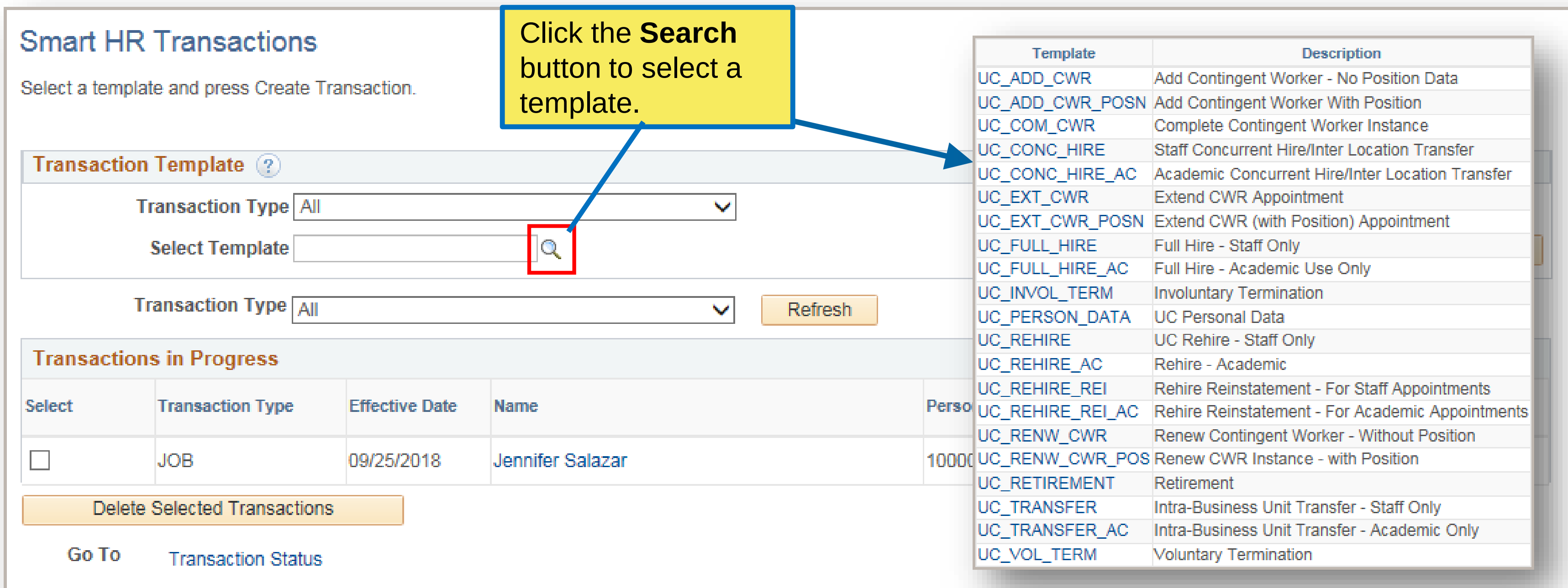
Smart HR Transactions – Page

- Use the **Transaction Template** section to select the type of template appropriate for the request, enter the **Effective Date** and **Create Transaction**.
- Use the **Transactions in Progress** section to review the template transactions <u>you</u> have submitted or saved for later. You also can select and delete your transactions.



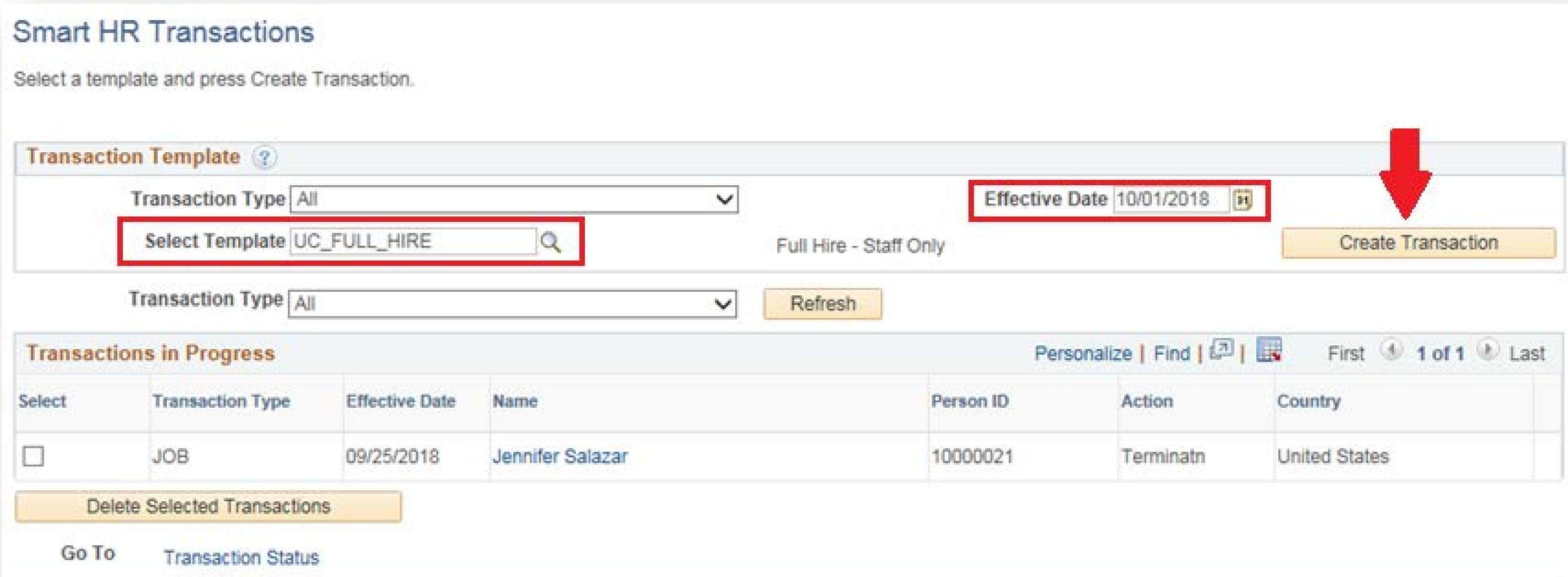
Smart HR Transactions – Templates

- The templates are configured to support the update of the appropriate UCPath component or page, such as **Job Data**, **Personal Data, Person Profile** and **Additional Pay**.
- Use the **Select Template** look up to select the template for the transaction you need to initiate.



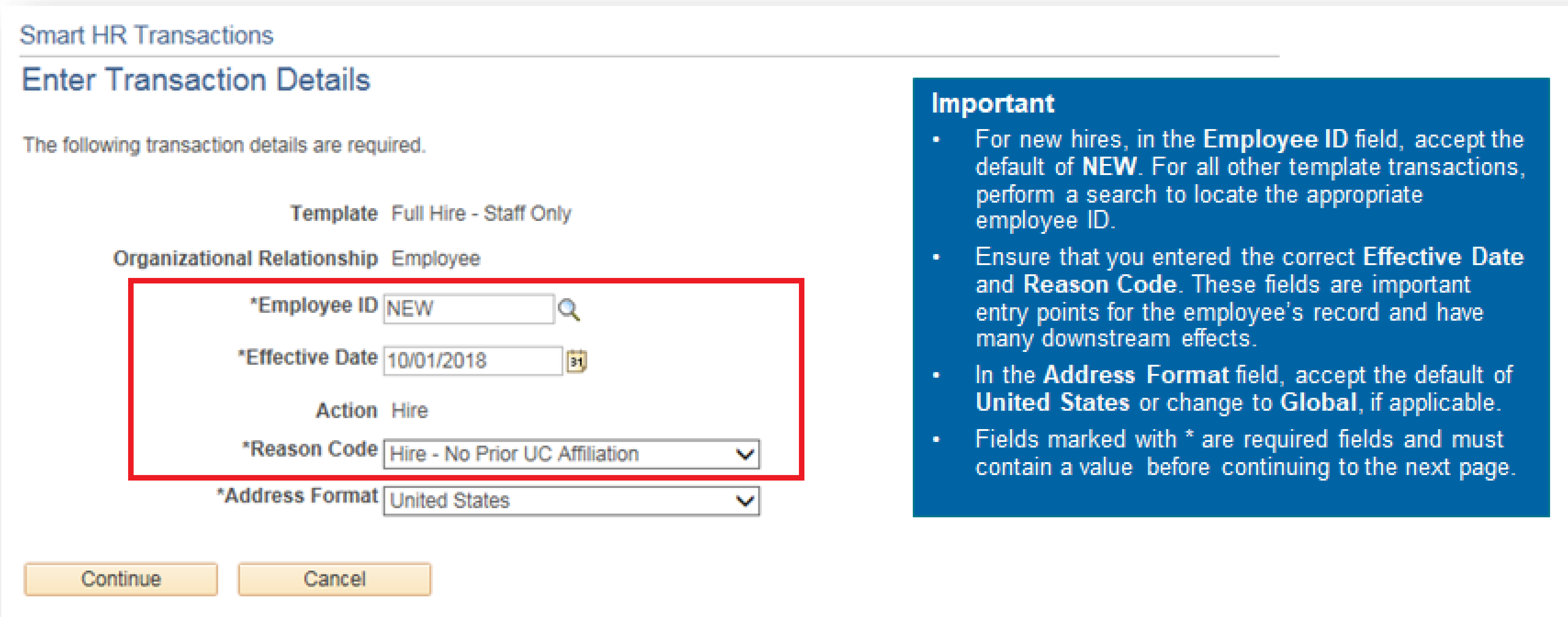
Smart HR Transactions – Create Transaction

- After you select the template, enter the **Effective Date** for the HR action. In this example, it is the hire date.
- Click the **Create Transaction** button to initiate the template.



Smart HR Transactions – Details

- Use the **Enter Transaction Details** page to enter the **Employee ID**, if needed, and **Reason Code**.
- Each template has a unique list of **Reason Codes**.



Job Aid UPK

Template Transactions – Action Reason Codes and Descriptions

- This is your opportunity to review the job aid.
- Open the UCPath Help site and refer to the *Template Transactions – Action Reason Codes and Descriptions* topic.
- Ask your instructor for assistance.

Template Transactions - Key Points

- The **Smart HR Transactions** page is the starting point to initiate any type of template transaction.
- Refer to the *Template Transactions – Action Reason Codes and Descriptions* UPK job aid for a list of all the templates, the associated **Reason Codes** and description.
- **Comments** are needed on the template to further explain the template transaction. This is important!
- Supporting documentation should be attached as needed.
- Approval is required for template transactions.
- Benefits Eligibility is determined by job data attributes.

Lesson Objectives Review

Having completed this Lesson, you should be able to:

- Identify the actions that are processed using templates.
- Review the template transaction system process.
- View current employee information using the **Person Org Summary** page.
- Identify the elements of the **Smart HR Transactions** page.
- Review the templates, **Action Reason** codes and descriptions.
- View template transaction status.

Lesson Review

Knowledge Check:

- You now have the opportunity to assess your knowledge of the information presented in this Lesson.
- The questions and answers presented in this review help you to determine whether you remember and understand the important points.

Multiple Choice

Use the **Person Org Summary** page to view current information for organizational relationships, including:

A. Academic Staff
B. Employees only
C. Employees and Contingent Workers (CWR)
D. None of the above

True or False

UCI and locations use the **Smart HR Transactions** page to initiate Smart HR template transactions.

True.

LESSON 2

Full Hire

Lesson Objectives

- 1: Template Transactions Overview
- 2. Full Hire
- 3: Approval and Status
- 4: Concurrent Hire

In this Lesson you will learn how to:

- Verify that a new hire does not already exist in UCPath using the **Search/Match** page.
- Describe the key system steps to complete a full hire template transaction.
- Initiate a full hire template transaction.
- Add **I-9** related information in the **Person Profile**.

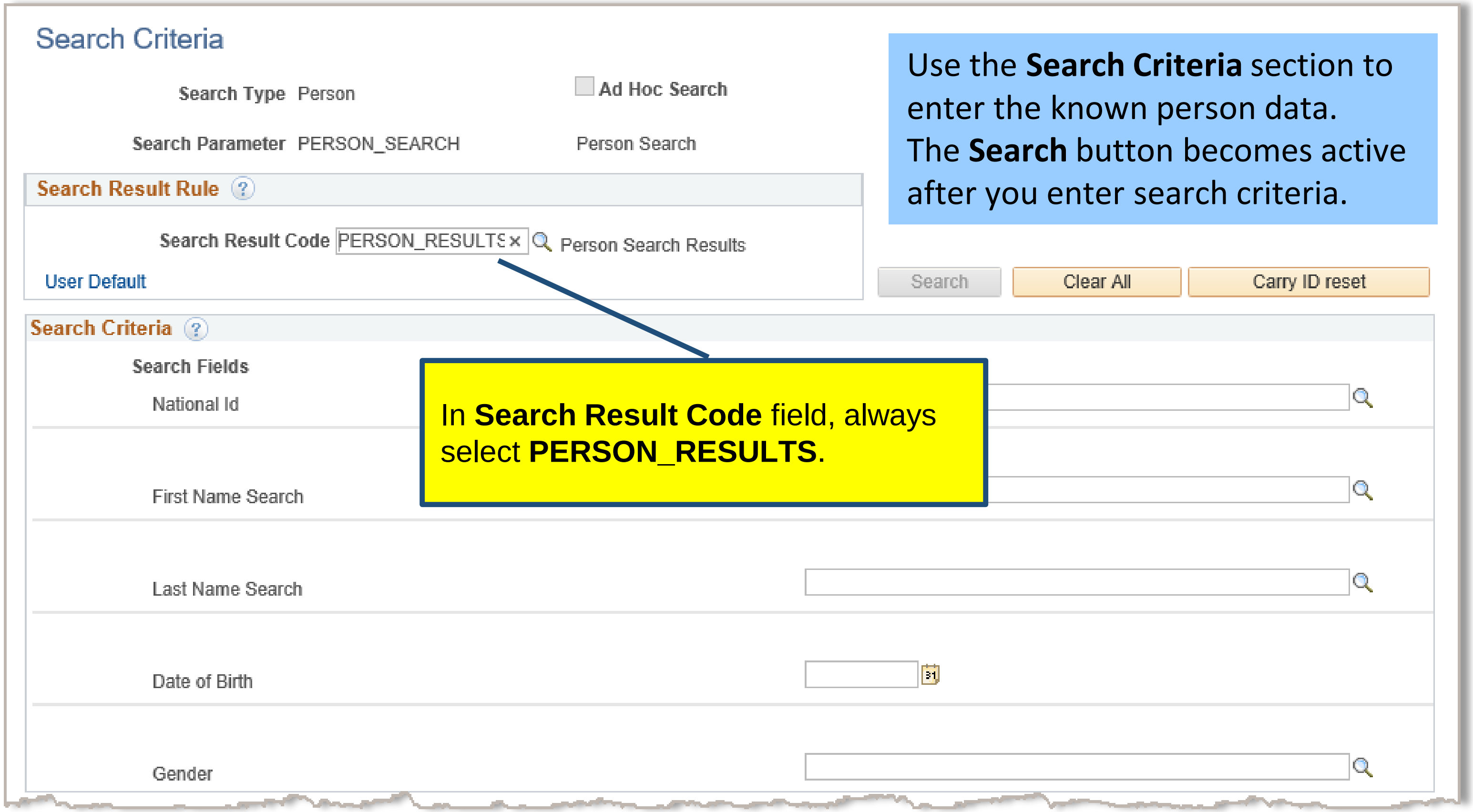
Conducting a Search Match

Search/Match Overview

- Before adding a new hire you must use the **Search/Match** page to verify that the employee does not already exist in UCPath.
- This page allows you to search using various criteria.
- You should perform a search using:
  1. The employee's Social Security number, if you have it.
  2. The employee's first name and the date of birth.
  3. The employees first and last name.
- It is best to use multiple search criteria to limit the search results.

Search/Match Page

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

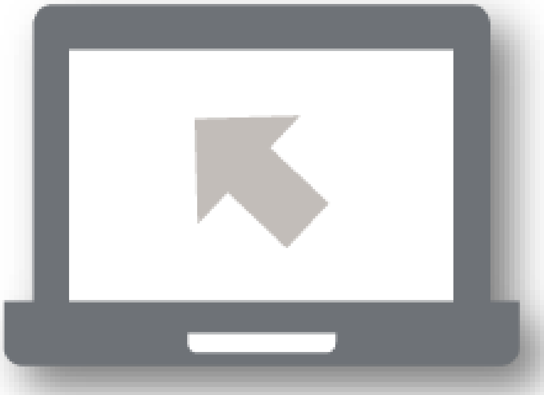


Use the **Search Criteria** section to enter the known person data. The **Search** button becomes active after you enter search criteria.

In **Search Result Code** field, always select **PERSON_RESULTS**.

Searching for People Using Search/Match

- This is your opportunity to view this task on your own.
  - Open the UCPath Help site and refer to the Searching for People Using Search/Match
- Launch the **See It** version of the topic.
- Ask your instructor for assistance.



Position Management Overview – Refresher

Position Management coordinates 3 components Position, Person and Job.

When an employee is hired into a position, a job is created.

Position	**Person**	**Job**
Administrative Assistant	*Employee - John Jones*	*John Jones - Administrative Assistant*

Full Hire – Key System Steps

1. Review **Person Org Summary** page and search using **Search/Match**
2. Navigate to the **Smart HR Transactions** page
3. Select the academic or staff **Full Hire** template
4. **Enter full hire details** and attach supporting documentation as needed
5. **Save and Submit**

Full Hire – Overview

The **full hire template** transactions create a new record for an employee who receives compensation through UCPath Payroll processing.

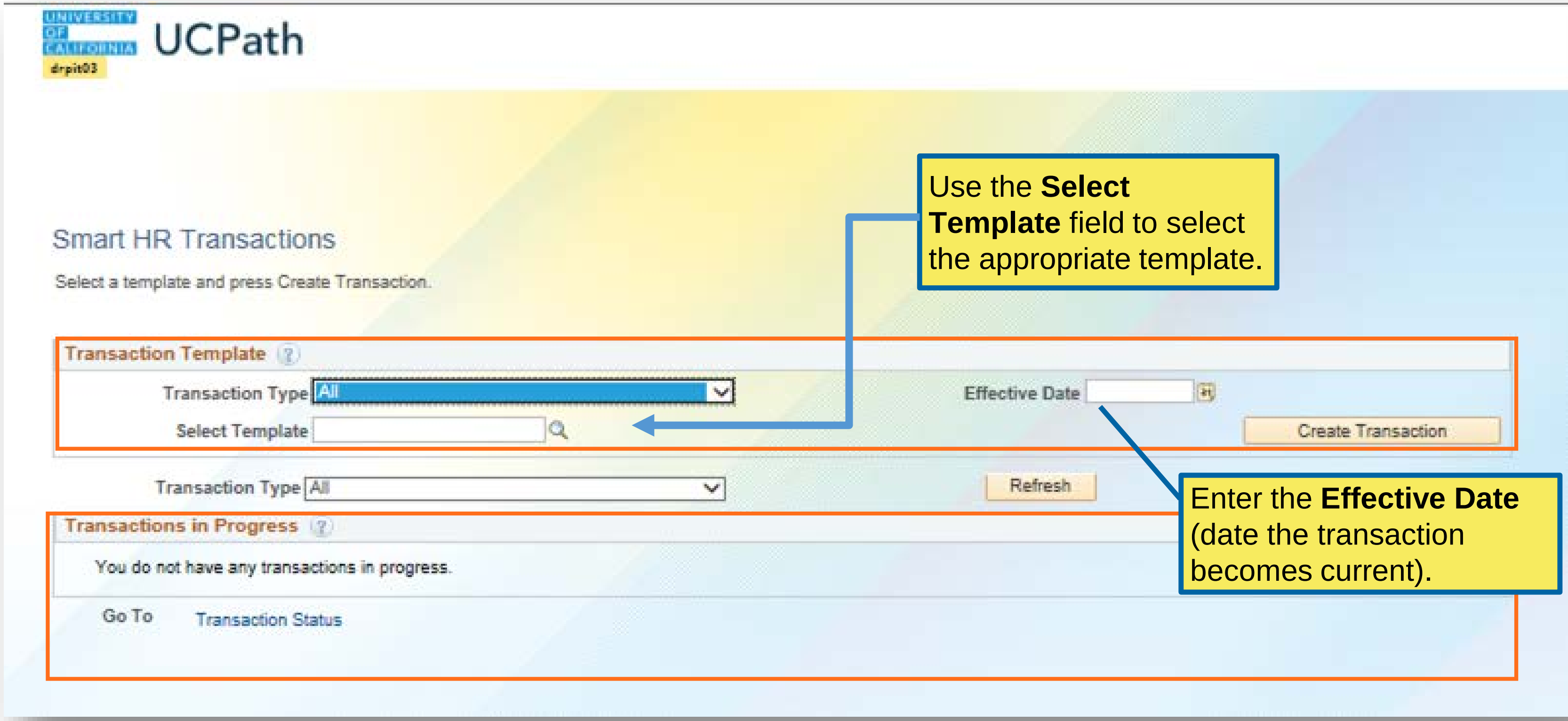
Available Templates

Template	Description
UC_ADD_CWR	Add Contingent Worker - No Position Data
UC_ADD_CWR_POSN	Add Contingent Worker With Position
UC_COM_CWR	Complete Contingent Worker Instance
UC_CONC_HIRE	Staff Concurrent Hire/Inter Location Transfer
UC_CONC_HIRE_AC	Academic Concurrent Hire/Inter Location Transfer
UC_EXT_CWR	Extend CWR Appointment
UC_EXT_CWR_POSN	Extend CWR (with Position) Appointment
UC_FULL_HIRE	Full Hire - Staff Only
UC_FULL_HIRE_AC	Full Hire - Academic Use Only
UC_INVOL_TERM	Involuntary Termination
UC_PERSON_DATA	UC Personal Data
UC_REHIRE	UC Rehire - All Employees
UC_REHIRE_AC	Rehire - Academic
UC_RENW_CWR	Renew Contingent Worker - Without Position
UC_RENW_CWR_POS	Renew CWR Instance - with Position
UC_RETIREMENT	Retirement
UC_TRANSFER	Intra-Business Unit Transfer - Staff Only
UC_TRANSFER_AC	Intra-Business Unit Transfer - Academic Only
UC_VOL_TERM	Voluntary Termination

- Separate hire templates are available for academic and for staff full hires.
- Full Hire Template - to rehire an employee that previously worked in a non-UCPath business unit.
- Rehire Template - to rehire an employee that previously worked in the same business unit (UCI).

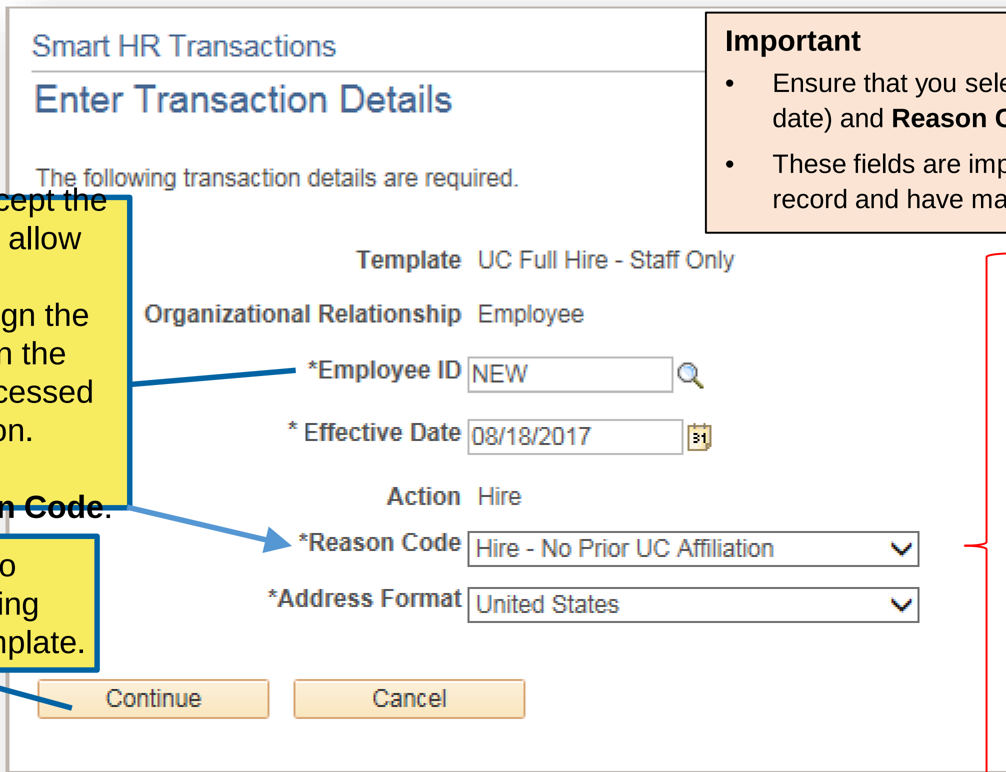
Smart HR Transactions – Page

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**



Enter Transaction Details Page

- Enter the details for the full hire, review **Effective Date** (hire date) and select the **Reason Code**.



Important

- Ensure that you select the correct **Job Effective Date** (hire date) and **Reason Code**.
- These fields are important entry points for the employee's record and have many downstream effects.

For new hires, accept the default of **NEW** to allow the system to automatically assign the employee ID when the transaction is processed by WFA Production.

Select the **Reason Code**.

Click **Continue** to enter the remaining details of the template.

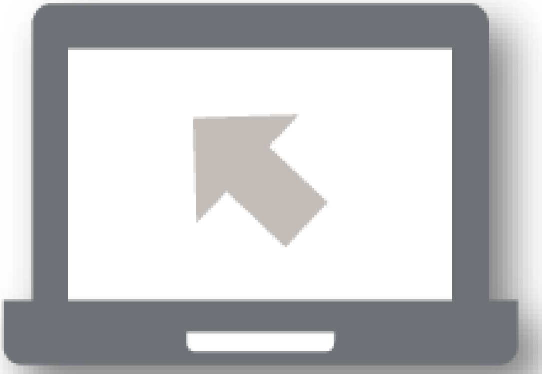
Reason Codes

Academic Concurrent Hire
Concurrent Hire - Dual Empl
Concurrent Hire - Non Dual Emp
Hire - No Prior UC Affiliation
Rehire, < 120 days break
Rehire, >= 120 Days Break
Rehire, fr Layoff-No Pref <120
Rehire, fr Layoff-NoPref >=120
Rehire, from Layoff-Pref < 120
Rehire, from Layoff-Pref >=120
Rehire: Rehired Retiree
Rehire: Reinstatement
Rehire: Retirment Suspended
Rehire: Staff Recall < 120
Rehire: Staff Recall >= 120
Transfer-Inter BU, Demotion
Transfer-Inter BU, Lateral
Transfer-Inter BU, Promotion
Transfer-Inter BU, Undefined
With Prior UC Affiliation

Exercise 2

Navigate to Smart HR Templates. Enter the Effective Date and select the appropriate Smart HR template.

- This is your opportunity to practice this task on your own.
- Complete exercise 2 in your workbook.
- Ask your instructor for assistance, if needed.



Pre-hire Requirements

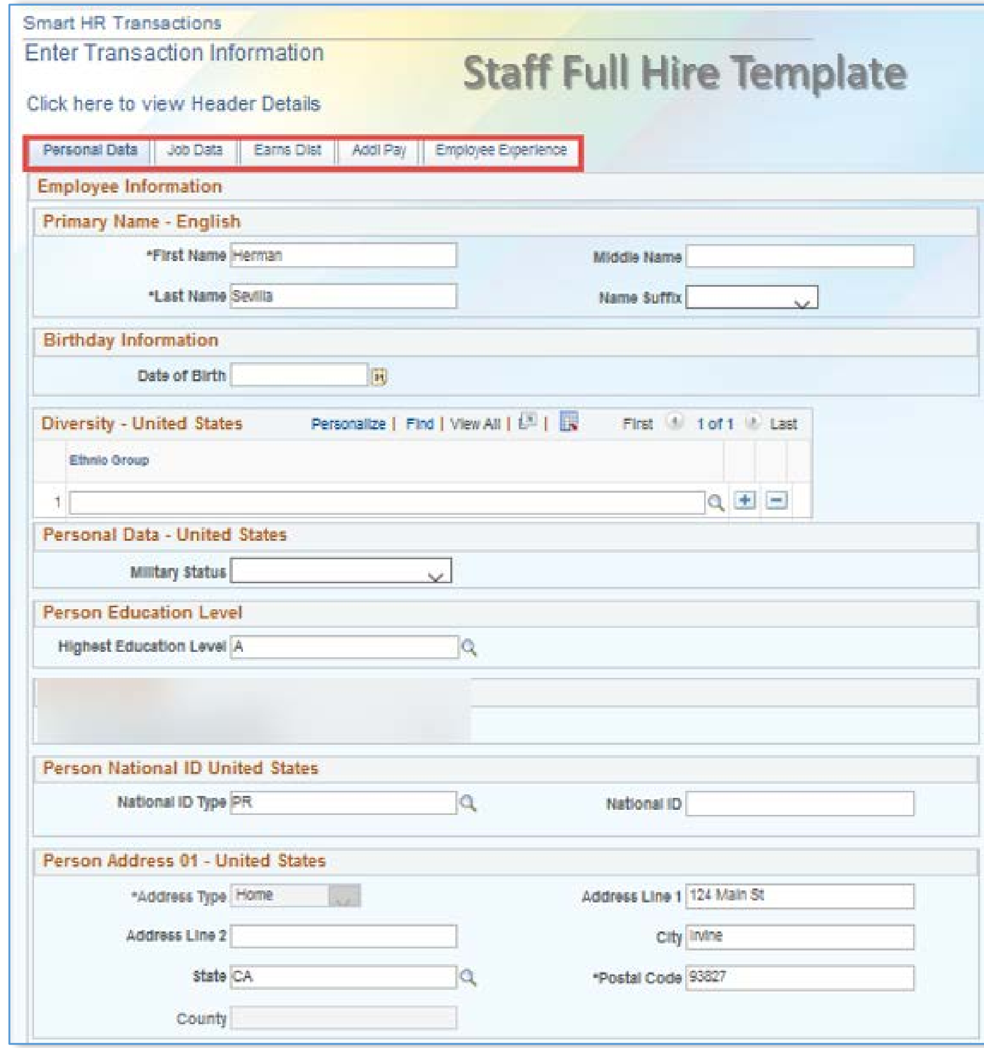
- The Pre-hire process allows the minimum amount of an **employee's personal information** to be entered prior to their start date in order to have an Employee ID generated.
- The following items should be obtained before submitting a Pre-hire:
  - **Full name** (First, Middle or Initial, Last)
  - **Address**
  - **DOB or SSN**
  - **Email**
  - **Position/Job Title**

Once the hire has been approved and processed by the UCPath Center, use the following to make changes:

- **Personal Data Change Smart HR Template** for personal data updates
- **PayPath** for Position and/or Job related updates

Enter Transaction Information Page

- Enter the details for the hire on each tab.
- You must navigate through all the tabs before the **Save and Submit** button is available.
- When complete, click the **Save and Submit** button to submit the template for review and approval.
- **Full Hire – Staff Template** Tabs include Personal Data, Job Data, Earnings Distribution, Additional Pay, and Employee Experience.

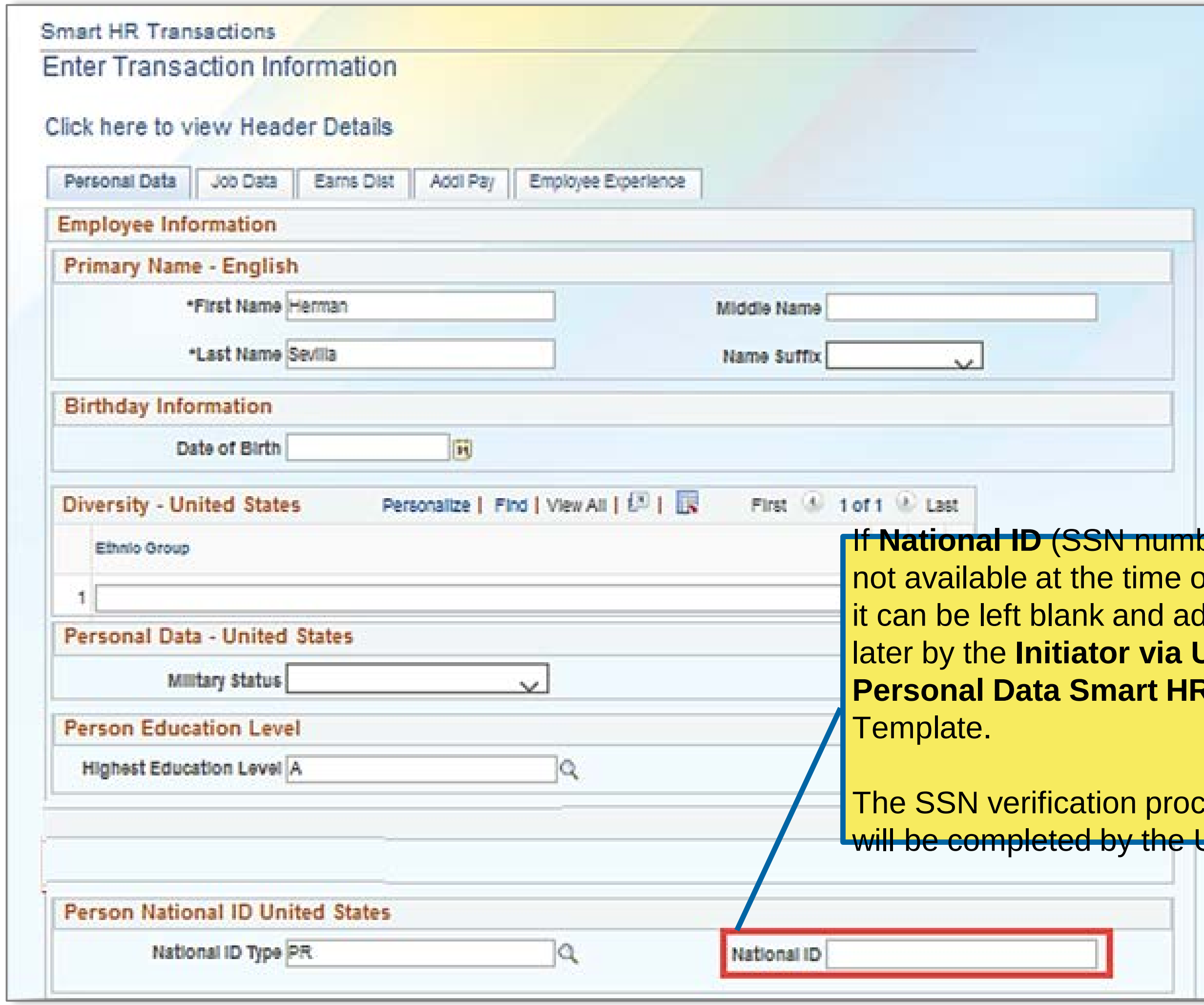


Personal Data Tab

Full Hire Template – Personal Data Page

Personal Data tab is the first tab on the hire template. It must be completed before you can proceed to the four remaining tabs.

The required fields are marked with an asterisk (*).



If **National ID** (SSN number) is not available at the time of hire it can be left blank and added later by the **Initiator via UC Personal Data Smart HR** Template.

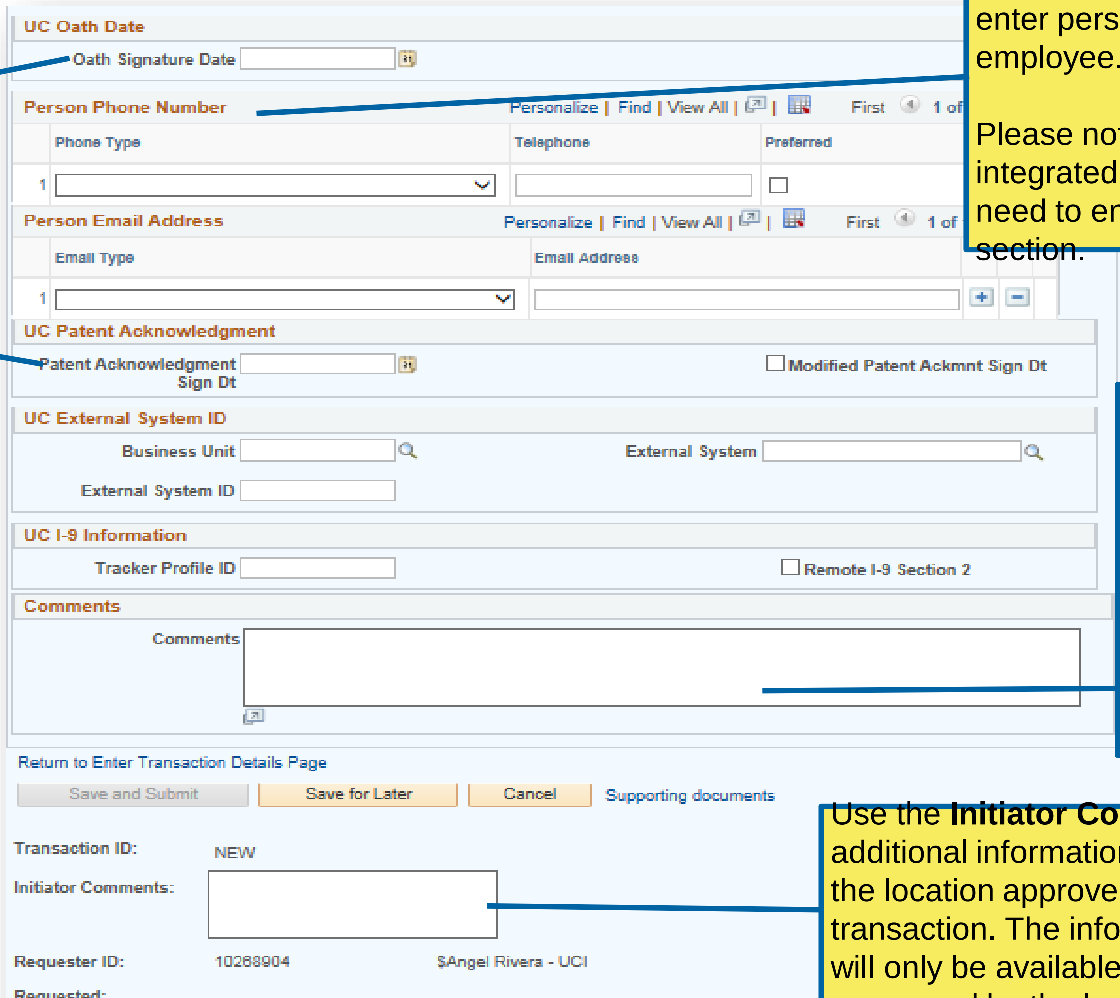
The SSN verification process will be completed by the UCPC.

Full Hire Template – Personal Data Page (cont'd)

This is the remaining part of the **Personal Data** tab.

Enter **UC Oath Signature Date**.

Enter **Patent Acknowledgment Signature Date**.



Use the **Person Phone Number** and **Person Email Address** sections to enter personal contact information for an employee.

Please note that **UCI directory** will be integrated with UCPath so you do not need to enter work contact details in this section.

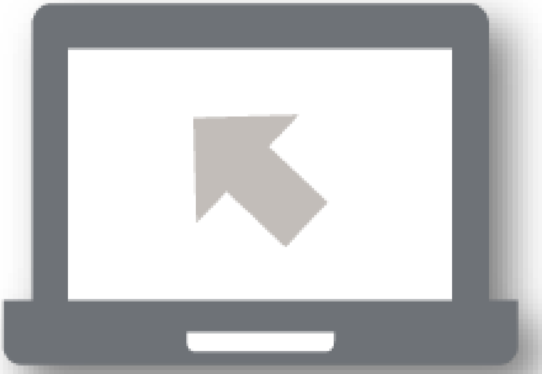
Use the **Comments** field to enter specific details or an explanation regarding the transaction. This field is referenced by **UCPC WFA Production** to assist with the processing of the transaction. The comments entered here will become part of the record for this transaction.

Use the **Initiator Comments** field to enter additional information regarding the transaction for the location approvers and reviewers of the transaction. The information entered in this field will only be available while the transaction is being processed by the location.

Exercise 3

Complete the Personal Data tab of the Smart HR Full Hire template.

- This is your opportunity to practice this task on your own.
- Complete exercise 3 in your workbook.
- Ask your instructor for assistance, if needed.



Job Data Tab

Full Hire Template – Job Data Page

Once the **Personal Data** tab has been completed, the Initiator can proceed to the **Job Data** tab.

The position must already exist in the system before the hire template can be entered.

After the **Position Number** is entered, many of the other fields default and are view-only.

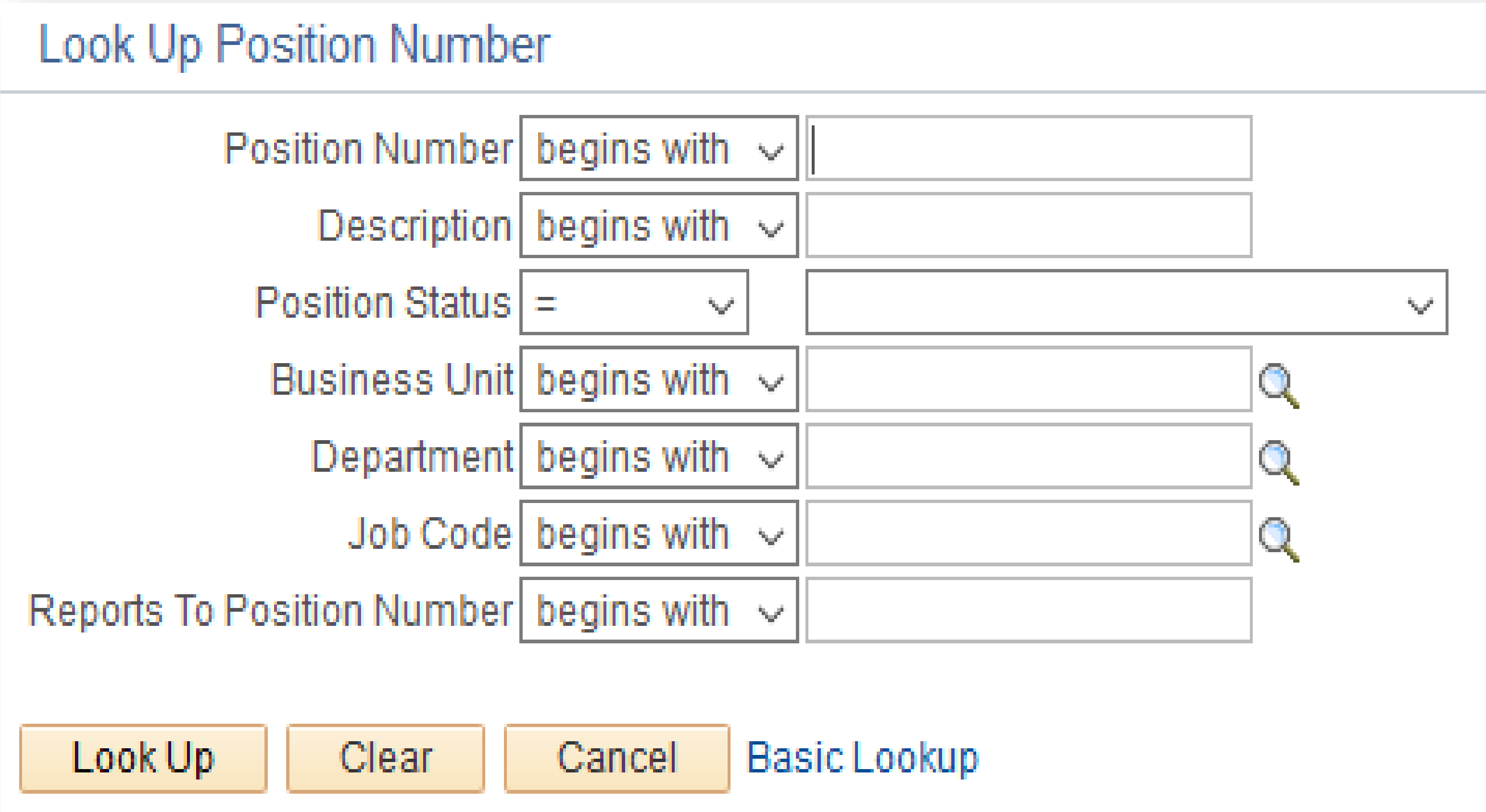
For staff, the **Employee Classification** field does not default and must be manually entered.

Employee Classification refers to Appointment Type in PPS. Please note that the associated numbers and options available have changed. Click on the look up box to see the full list of options available.)

For academic personnel, the **Employee Classification** field defaults and is view-only.

Standard hours and **FTE** also default from the position. Please see the next slide for further information on how to update position and job FTE.

Searching for Position Number



Changes to Position and Job FTE

FTE (Full-Time Equivalent) will no longer indicate a permanently budgeted position like in PPS. In UCPath, it will only reflect the employees percentage of time worked.

UCPath: FTE can be either changed at position or at a job level.

Changing Position FTE	Changing Job FTE
1. **Vacant positon** – changes to FTE for vacant positions can be done via the Position Control Form (PeopleSoft Menu > UC Customizations > UC Extensions > Position Control Request). 2. **Filled position** – changes to FTE for filled positions can be done via PayPath. • See UPK "Initiate Position Data Change PayPath Transaction (Acad FTE Change) *or (Staff FTE Change)* for step by step instructions.	1. You can also keep the position FTE as 1.00 and **only change the job FTE**. This will require you to first decouple the position and job FTE so they are independent. Once decoupled the job FTE can be adjusted as needed. • See UPK "Initiate Job Data FTE Override PayPath Transaction (Staff/Acad)" for step by step instructions.

Full Hire Template – Job Data Page cont'd

This is the continuation of the **Job Data** tab. As mentioned earlier separate hire templates are available for academic and for staff full hires. Some fields on **UC Job Data Section** are different for staff and academics. The example below includes a staff version of the section. Both templates are covered in the UPKs hire simulations.

Enter the **Probation End Date** and select the relevant **Probation Code** from the drop down menu. See below for the list of available options

Enter the relevant **Trial Employment End Date** if applicable.

ERIT/ Phased Retirement End Date should be left blank.

Alternate Work Week displays any alternate schedule the employee is working.

Select the **Review Type** for which the employee is eligible. See below for the list of available review types.

Location Use Type and associated **End Date** are optional fields designed for local reporting use only. They fulfill the requirement for locations to track end dates per job record that may relate to funding, etc. An example of this might be setting a reminder for the expiration of contract/grant funds. See below for the list of options available under Location Use type.

Salary Administration Plan and **Salary Grade** default from position. The Step can be entered manually for staff.

UC Job Data

Probation Code | Probation End Date

Trial Employment End Date | ERIT/Phased Retirement End Dt

Location Use End Date | Location Use Type

Alternate Work Week 7/40 | PY Career Duration

UC Employee Review

Review Type | Next Review Date

Job - Salary Plan

Salary Administration Plan | Salary Grade

Step

Probation Code

- None
- Probation Complete, Other Job
- Probation Completed
- Within Prob,Ext-Chg of Spvsr
- Within Prob,Ext-Dept Head
- Within Prob,Ext-Job Transfer
- Within Prob,Ext-LOA
- Within Prob,Ext-Lack of Train
- Within Prob,Ext-Sig Chg in Dty
- Within Probation

Review Types

- Annual Performance Appraisal
- Eligible - 6 Month Increase
- Eligible Sp. Performance Award
- Eligible for Merit Increase
- Eligible for Trainee Increase
- No Salary Review - At Maximum

Location Use Type

- Funding End Date
- LA: Dual Employment Job
- NSTP Review
- Review Job
- Review Remaining Budget
- Temporary Off-Scale
- Temporary Reduction in Time

Full Hire Template – Job Data Page cont’d

The example below shows the **UC Job Data Section** for an Academic full hire. For more information and detailed steps for the academic hire see the UPK “**Initiate Full Hire Template Transaction (Acad)**”

Academic Duration of Appt.

- Continuing (Unit 18)
- End Date (Academic Term Appts)
- Indefinite
- Potential Security
- Security (LSOE)
- Tenure Track (Ladder Rank)
- Tenured

Select the appropriate **Academic Duration of Appt.** from the list. See left for the list of available duration types.

Location Use Type and associated **End Date** are optional fields designed for local reporting use only. They fulfill the requirement for locations to track end dates per job record that may relate to funding, etc. An example of this might be setting a reminder for the expiration of contract/grant funds. See right for the list of options available under Location Use type.

Location Use Type

- Funding End Date
- LA: Dual Employment Job
- NSTP Review
- Review Job
- Review Remaining Budget
- Temporary Off-Scale
- Temporary Reduction in Time

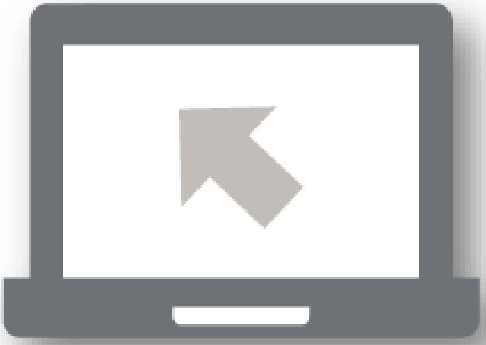
If applicable use this field to enter **Post Docs Anniversary Date**.

Exercise 4

Complete Job Data tab on the Template Transaction

- This is your opportunity to practice this task on your own.
- Complete exercise 4 in your workbook.
- Ask your instructor for assistance, if needed.
- 

at Compensation.



Break

Entering Compensation

Full Hire Template – Compensation Fields

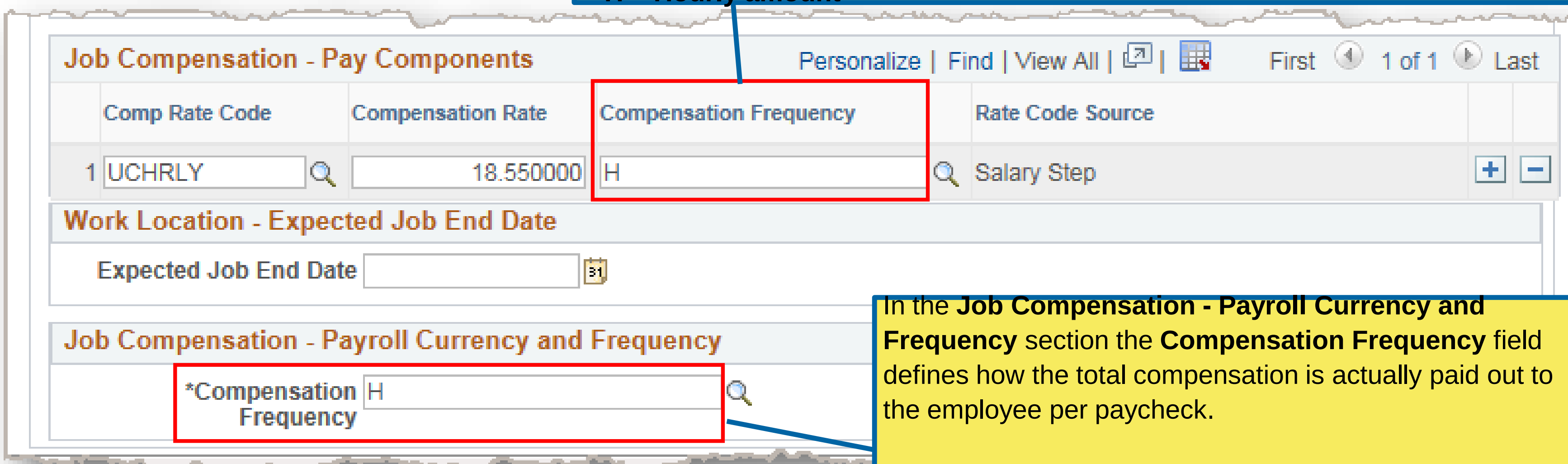
Job Data tab is also used to enter compensation for the employee.

- **Comp Rate Codes** are used to define each component of the employee's base salary.
- **Compensation Rate** is the amount paid at the compensation frequency.

In the **Job Compensation - Pay Components** section the **Compensation Frequency** field defines how the quoted compensation amount is presented:

A = Annual amount

H = Hourly amount



In the **Job Compensation - Payroll Currency and Frequency** section the **Compensation Frequency** field defines how the total compensation is actually paid out to the employee per paycheck.

For example, Monthly, Hourly, 9/12, 1/10.
This field defaults from the job code and can be overridden if there is a need to sync up pay cycles between two or more jobs.

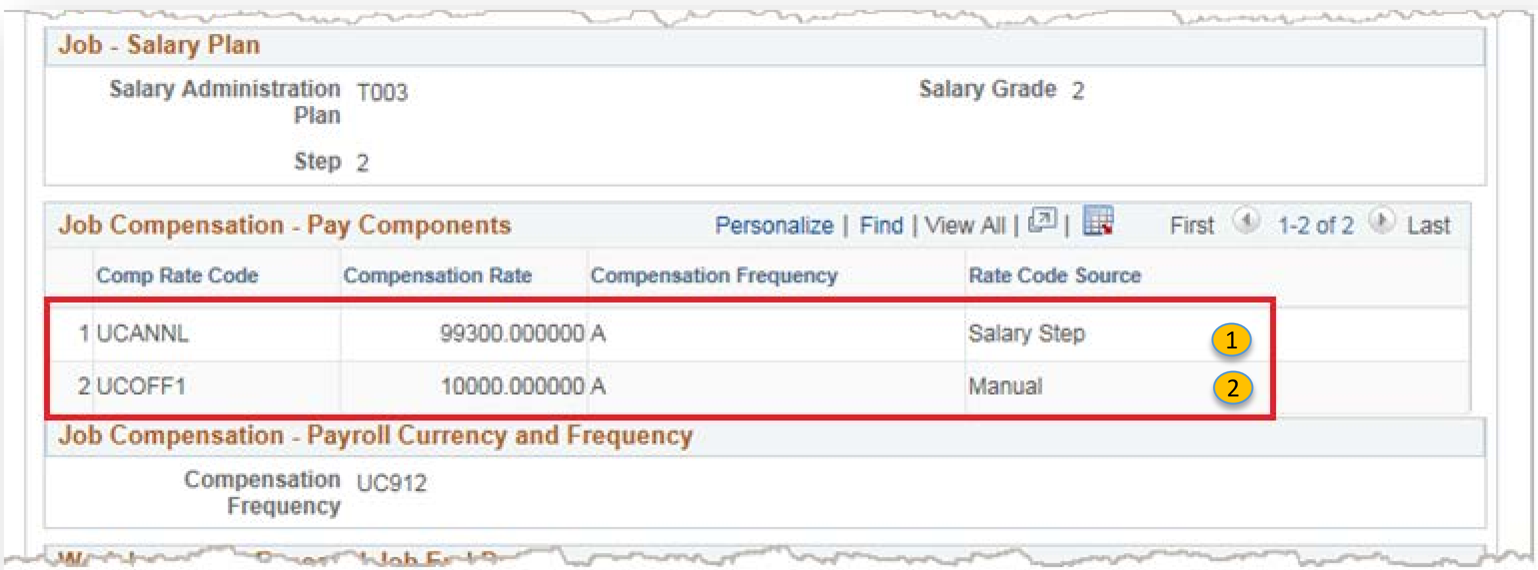
Compensation Details

- Many employees have only one pay component but others may have components like Off Scale or Negotiated/Incentive Components.
- There are certain job codes for which the pay itself is expected to be a flat amount (paid out as additional pay).
  - In these situations, the compensation section in **Job Data** is left blank.
  - This keeps the employee in a pay group that is considered payable so additional pay can process the flat dollar amount.
- There are other employees who do not receive compensation from UC.
  - These employees should have a comp rate of **UCWOS** (without salary).
  - This places them in a pay group that ensures payroll is not processed for them.

For more information on Additional Pay and Without Salary, please refer to the PayPath Part 1 course.

Multiple Components of Pay (MCOP)

- Staff employees: there is very little need for MCOP (outside of Staff Physicians).
- Academic employees: MCOP is more frequent especially if the employee is in the Health Sciences Comp Plan (HSCP) or Negotiated Salary Trial Program (NSTP), which also has a base and incentive component.


Job - Salary Plan

Salary Administration Plan T003 Salary Grade 2

Step 2

Job Compensation - Pay Components Personalize | Find | View All | | First 1-2 of 2 Last

	Comp Rate Code	Compensation Rate	Compensation Frequency	Rate Code Source	
1	UCANNL	99300.000000	A	Salary Step	1
2	UCOFF1	10000.000000	A	Manual	2

Job Compensation - Payroll Currency and Frequency

Compensation Frequency UC912

Multiple Components of Pay (MCOP)

- **HSX** = Base Compensation – also known as “X”
- **HSP** = X Prime Compensation - Based on assigned Academic Program Unit/academic specialty and determines rate from salary tables on the AP website. APU 0-9
- **HSAX** = Above Scale X Compensation
- **HSAP** = Above Scale X Prime Compensation – This is the amount over the APU level selected determines the multiplying factor to the Academic Salary Scale 1-9.
- **HSN** = Negotiated Compensation - Negotiated between faculty and department chair every fiscal year. It is manually entered.
- **OFF1** = Off Scale Compensation - This is the amount that is above the published X and X Prime rates. (not shown below)

Earnings Distribution Type: By Amount   Comp Rate: 39,415.166667   Standard Hours: 40.00   Pay Frequency: UC_FY UC 12/12 - FY

Pay Components   Personalize | Find | First 1-5 of 5 Last

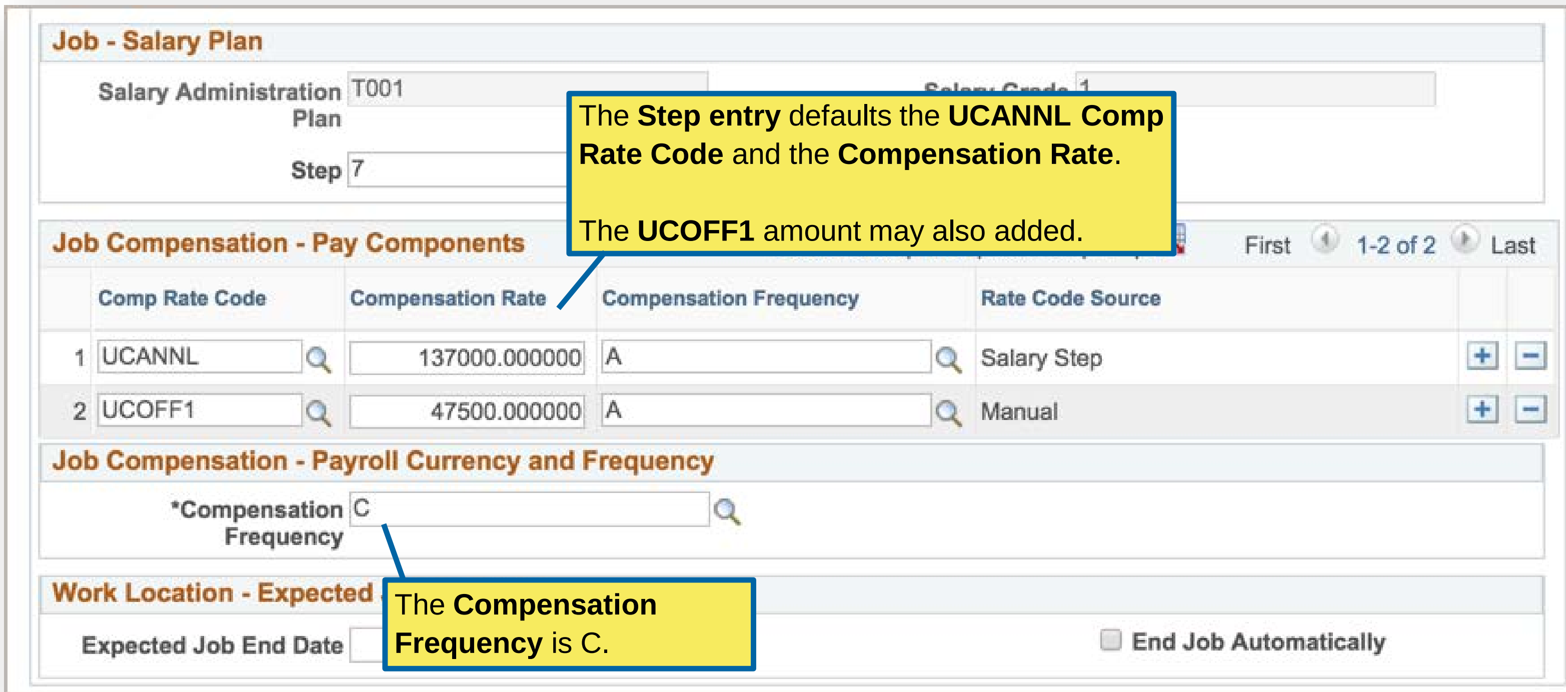
	Rate Code	Comp Rate	Compensation Frequency
1	UCHSAP	5,000.000000	Annual
2	UCHSAX	16,500.000000	Annual
3	UCHSN	199,182.000000	Annual
4	UCHSP	58,200.000000	Annual
5	UCHSX	194,100.000000	Annual

Academic Contract Pay – Overview

1. **Contract Pay** in UCPath pays faculty, or other academic employees, who must be paid a set amount over a period of time. Only employees paid Academic Year (AY) use Contract Pay.
   a. Even though they are normally hired and paid AY, 9/9 or 9/12, when they are placed on Contract Pay, their monthly Compensation Frequency is updated to **C**.
   b. Fiscal Year employees do not need Contract Pay because their pay is automatically prorated and/or retro-payments can be made.
2. **Contract Pay can be requested using a template transaction during hire, rehire or transfer.**
3. **Contract Pay compensation can be quoted in two ways:**
   a. Where the employee is entitled to receive the full annual rate per the Salary Step.
   b. Where the annual rate is manually prorated and entered as an override on the template.
4. You must enter a **Comment** on the template to indicate contract begin and end dates.

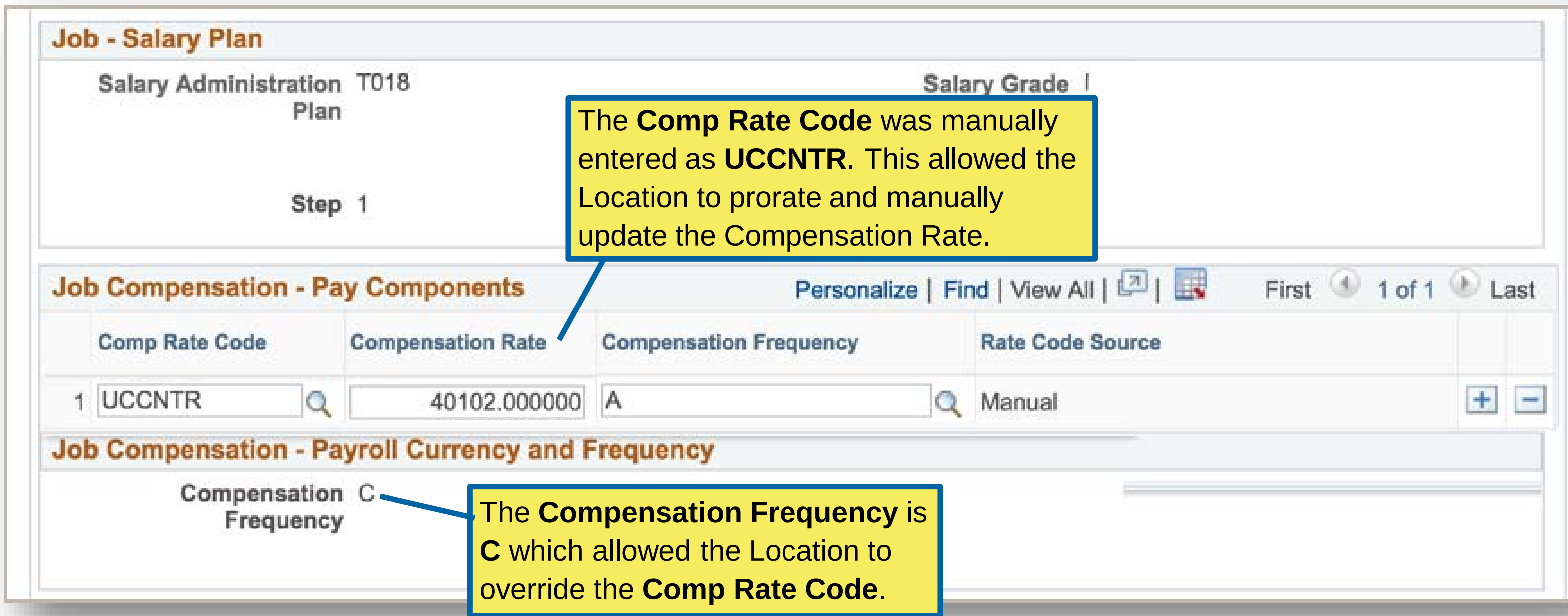
Contract Pay – Full Rate Sample

- When the employee is entitled to receive the full annual rate the template entry might look like this:



Contract Pay – Prorated Sample

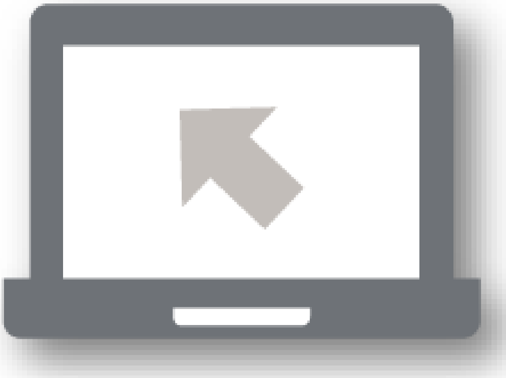
- When the employee is entitled to a prorated annual rate the template entry might look like this:



Exercise 5

Complete the Compensation section of the Template Transaction.

- This is your opportunity to practice this task on your own.
- Complete exercise 5 in your workbook.
- Ask your instructor for assistance, if needed.

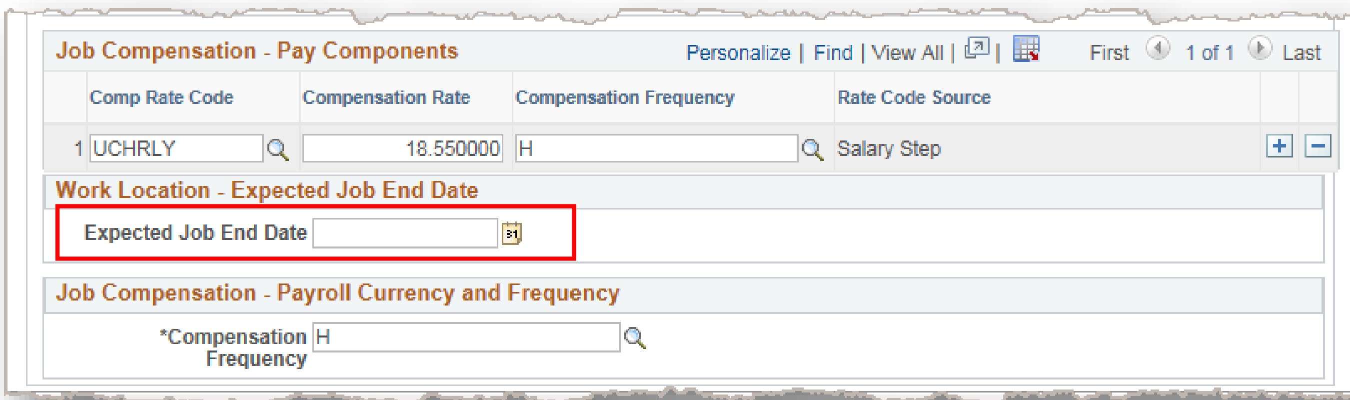


Full Hire Template

Expected Job End Date

Expected Job End Date Field – Staff

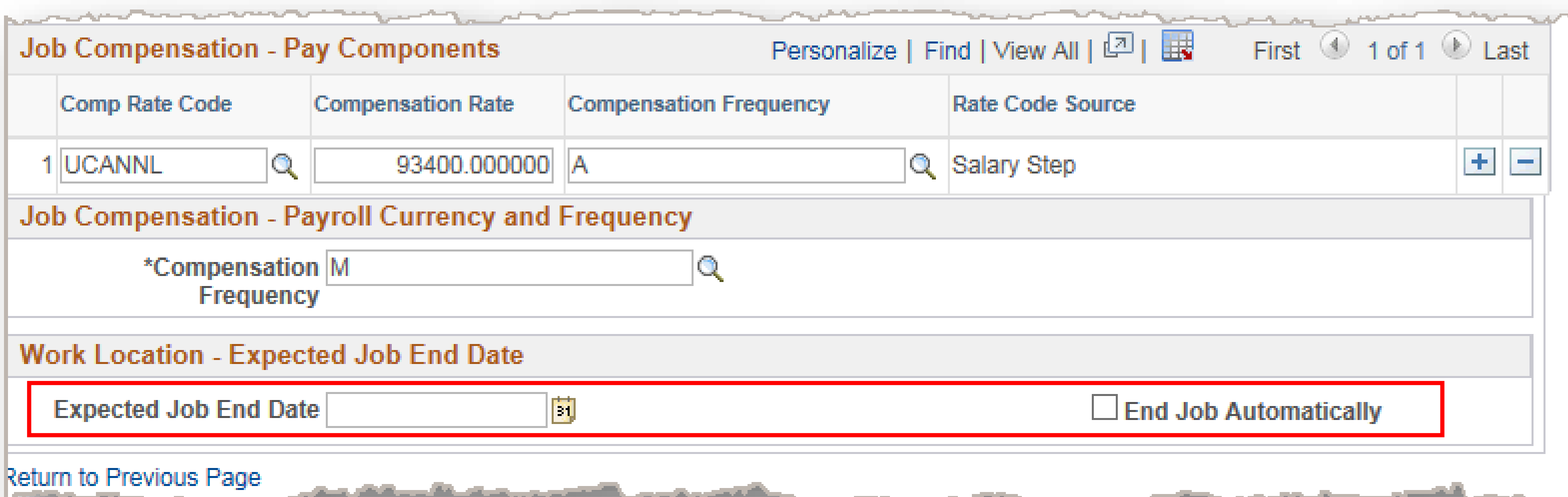
- For short term assignment or temporary hires, enter the date the position ends in the **Expected Job End Date** field.
  - Non-Academic employees are automatically terminated in UCPath on this date.



- Locations must monitor expected job end dates and, if needed, update/extend the expected job end date (in **PayPath Actions**) to ensure the termination does not occur.
- A report will be available to help with Expected Job End Date monitoring.

Expected Job End Date Field – Academic

- For Academic templates, the **End Job Automatically** check box appears next to the **Expected Job End Date** field.
  - Select the check box to automatically terminate the employee on the **Expected Job End Date**.
  - If the check box is not selected, the employee is not automatically terminated.



Expected Job End Date

The **Expected Job End Date** is required for the employee groups listed below. These employees will be automatically terminated upon the expected job end date entered if the **End Job Automatically** checkbox is checked.

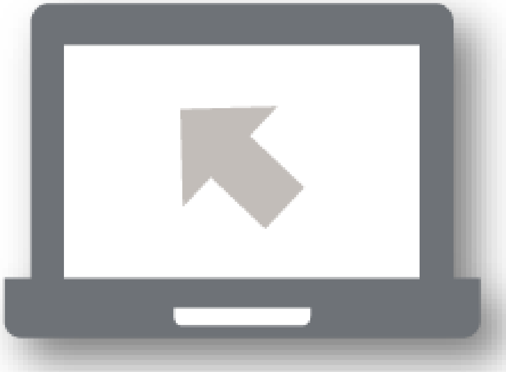
Type	Description
Staff Employees	• Contract • Limited • Student • Floater • Rehired Retiree

Academic Employees	• Contingent Worker – Academic
	• Non-senate academics, the general groupings include:
	    • Specialists
	    • Project Scientists
	    • Professional Researchers
	    • Postdoctoral Scholars
	    • Unit 18 Lecturers (otherwise known as Non-Senate Faculty (NSF))
	    • Academic Coordinators
	    • Academic Administrators
	    • Visiting Titles
	    • UNEX Teachers
	    • Student Academic Titles
	    • Academic Recalled Employees
	    • Non-tenured Professors (Clin X, In Residence, HS Clinical, Adjuncts)
	    • Lecturers with Potential Security of Employment

Exercise 6

Enter Expected Job End Date on Template Transaction

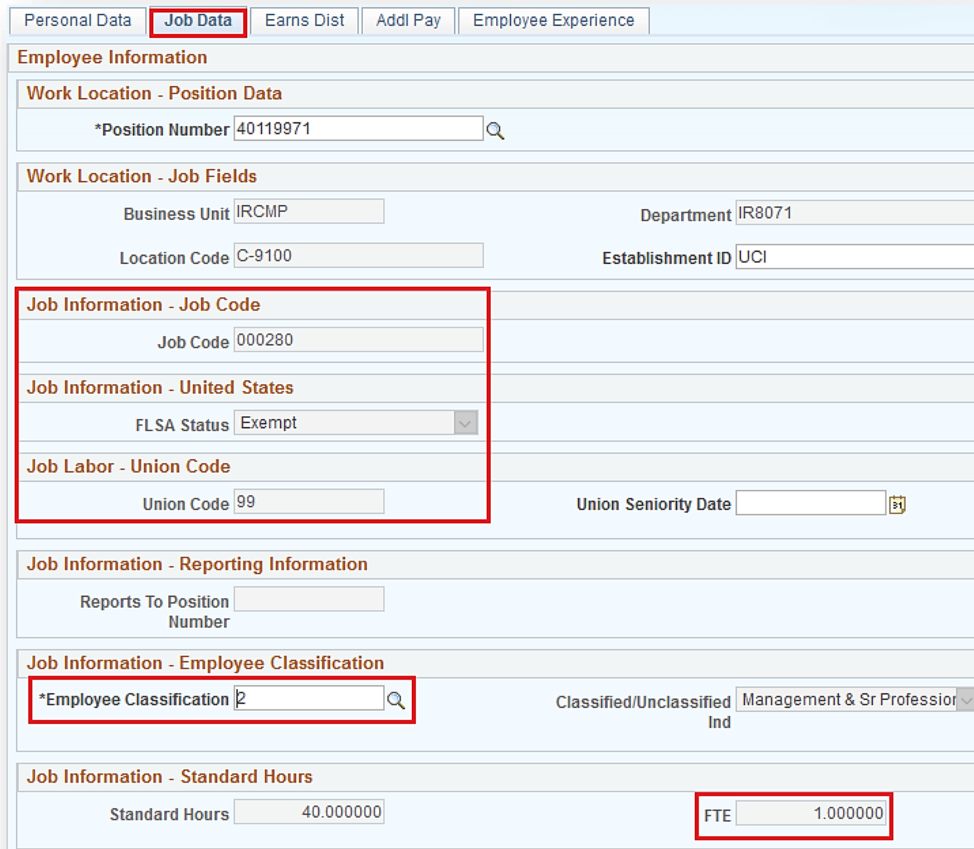
- This is your opportunity to practice this task on your own.
- Complete exercise 6 in your workbook.
- Ask your instructor for assistance, if needed.



Benefits Eligibility Process Overview

Benefits Eligibility is a system-driven, custom process that analyzes and determines eligibility using job data fields. Multiple jobs, if applicable, are combined and analyzed as a whole to determine benefits eligibility. The following information is reviewed for all jobs in an employee's record:

- Job Code attributes
- Employee Classification (Empl Class)
- Appointment Duration, if applicable
- Full Time Equivalent (FTE)



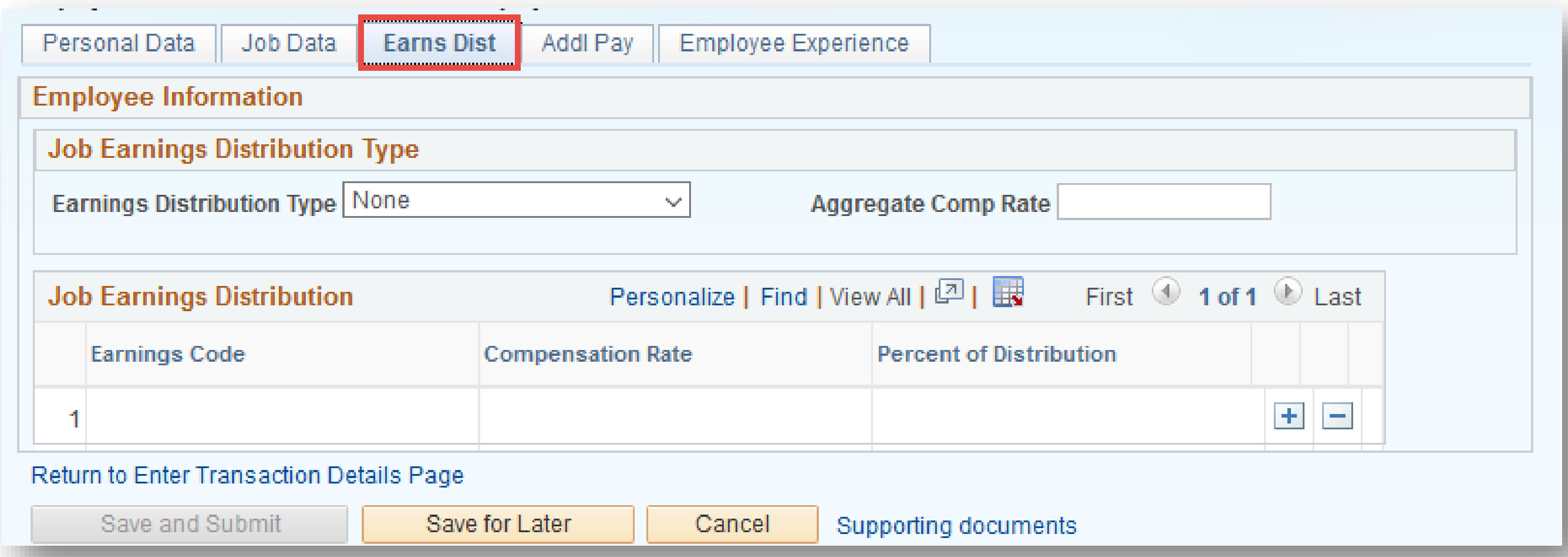
Be aware that system notifications (emails) are automatically sent to employees after benefit eligibility and self service events are finalized for the employee and the overnight batch process completes.

Job Earnings

Job Earning Distribution Page

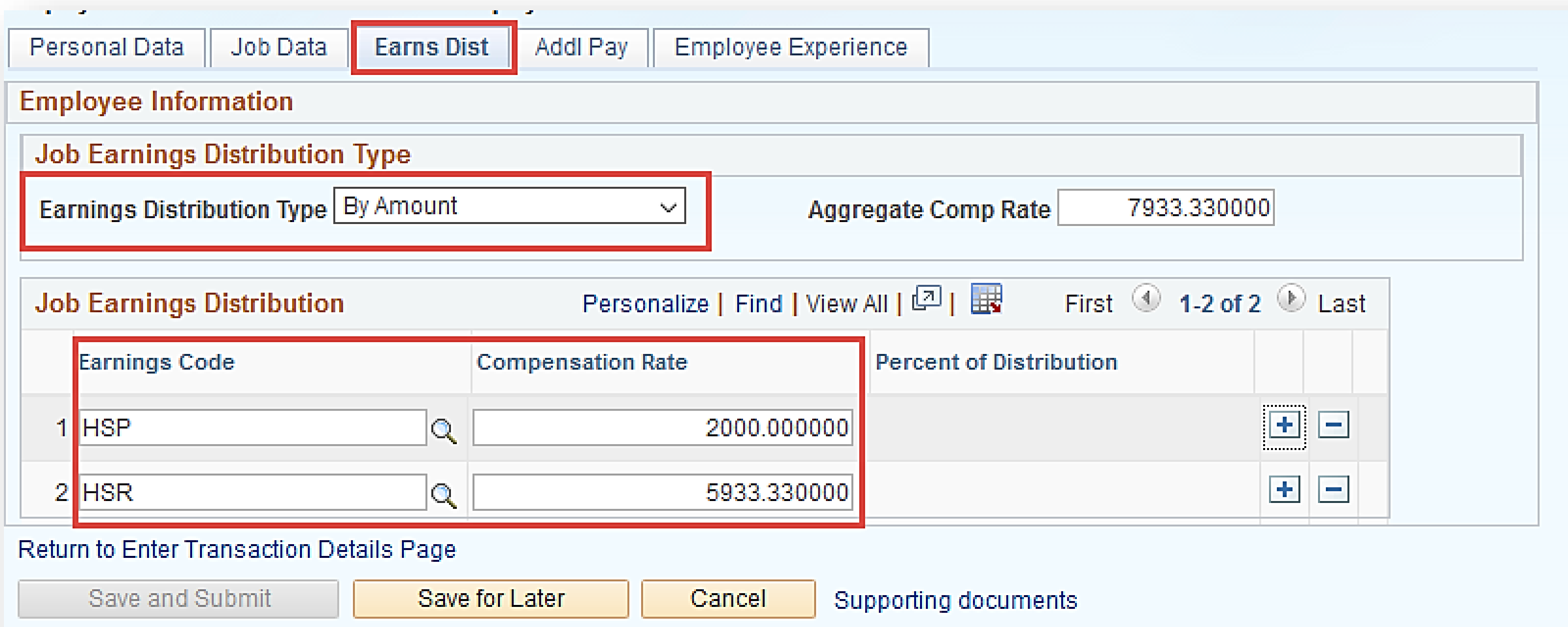
Earns Dist is the third tab on the hire template.

- **Job Earnings Distributions (JED)** can be used to indicate the compensation should be paid using a different Earn Code other than REG. For example, **HSCP** or **NSTP**.



Job Earnings Distribution (cont'd)

- Job Earnings Distribution (JED) is mostly automated and populates distributions **By Amount** or **By Percent** in the **Job Earnings Distribution** section.
- The earnings codes are pulled in based on the Comp Rate Codes in the Pay Components section.



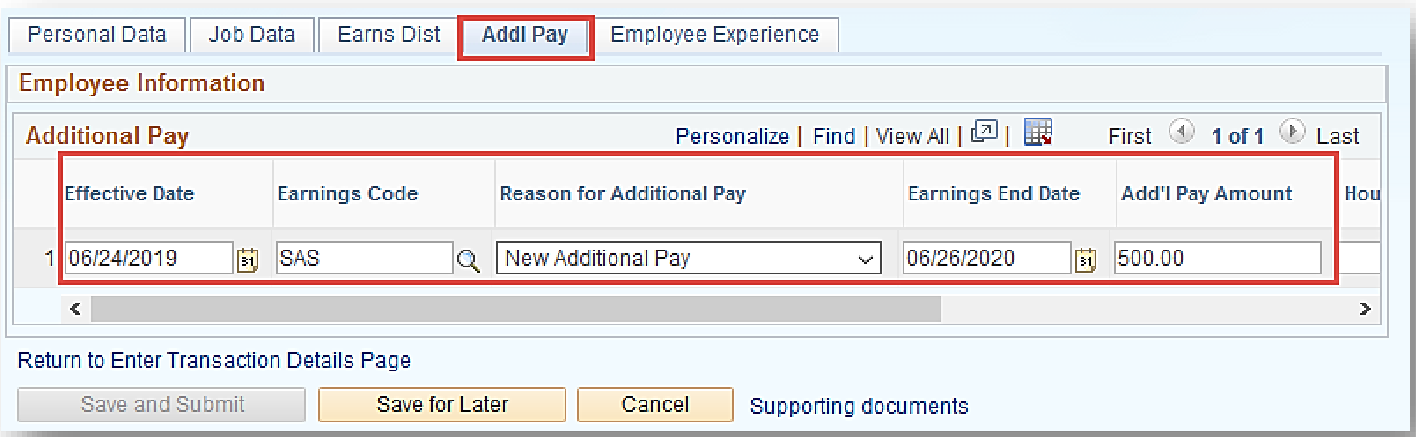
Template Transactions – Job Earnings

- This is your opportunity to review the job aid.
- Open the [UCPath Help](#) site and refer to the *Template Transactions – Job Aid: Earnings Code Configuration* topic.
- Ask your instructor for assistance.

Other (Tabs) Pages

Additional Pay

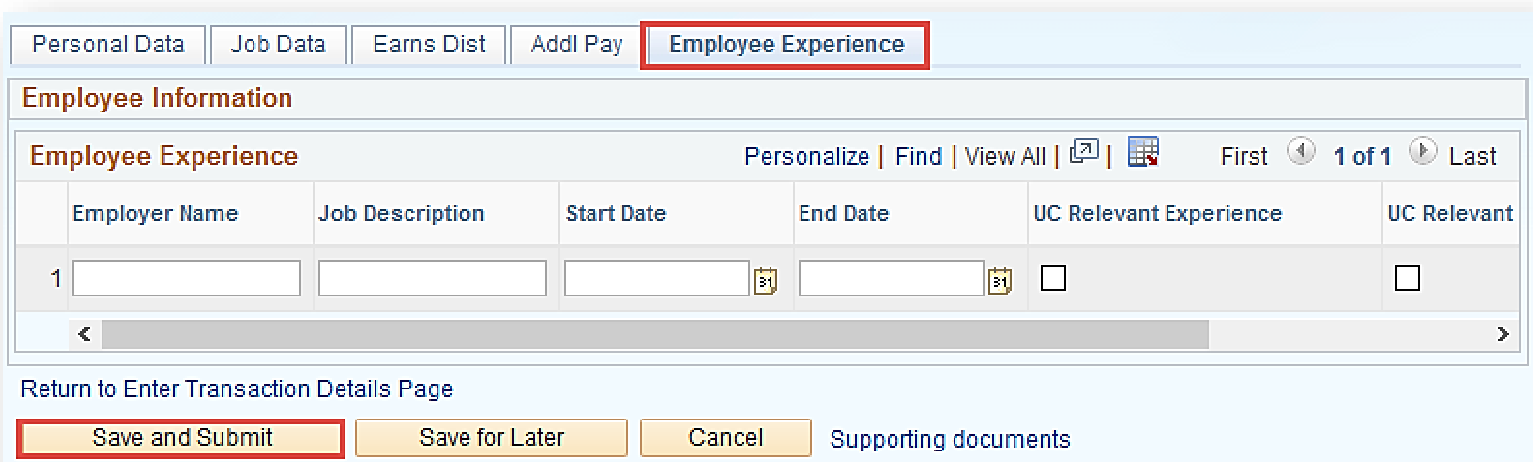
- There are some cases where an employee's base salary is paid through **Additional Pay** using a flat dollar amount.
  - Most commonly for UNEX instructors.
  - No Compensation in Job Data.
- **Additional Pay** is also used for recurring payments.
  - Recurring payments are paid over multiple, consecutive pay periods.
  - Recurring additional pay can be submitted on the hire templates (Full Hire, Rehire, Concurrent Hire).



Example of recurring additional pay setup on hire template

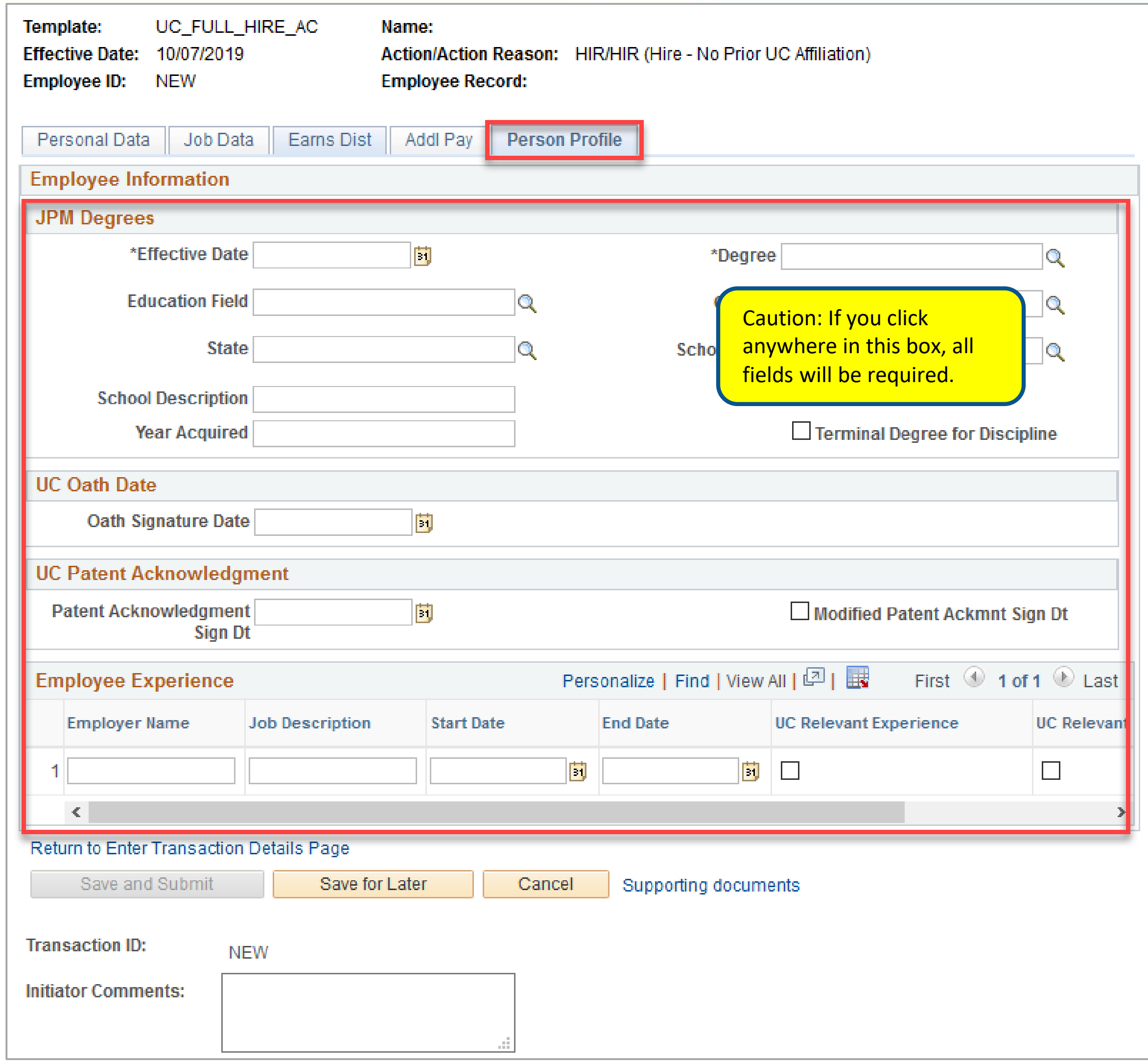
Full Hire (Staff) Template– Employee Experience Page

- The last tab of the Full Hire template for Staff Employees is called **Employee Experience**.
- Use the fields on this page for represented staff to enter data related to the employee's prior work experience. Recording this information in UCPath is helpful in determining new compensation rates for the new hire.
- The information entered in the **Employee Experience** section is copied to the employee's **UC Employee Experience** page after the template is fully processed by UCPC WFA Production.



Full Hire (Academic) Template – Person Profile Page

- The last tab for the Full Hire Academic template is called the **Person Profile**.
- It is used to record Degree information and Oath & Patent signature dates.
- Effective Date is the date of the entry not the degree.



Tracker Overview – I-9

Tracker is used across UC to manage the government form I-9 and administration of the E-Verify process. For Tracker to do this, the system requires data integration between Tracker and UCPath.

I-9 Information

- From UCPath to Tracker:
  - When an employee is hired, rehired, transferred (intralocation or interlocation) or terminated in the system, UCPath sends data real-time to Tracker using a webservice.
- From Tracker to UCPath:
  - When an I-9 has been completed in Tracker or when an employee who has a work authorization (subject to expiration) updates their work authorization, certain pieces of data return to UCPath real-time using webservice.

I-9 Information in UCPath

- Locations have the option to process their I-9s in Tracker prior to initiating the hire template. When I-9 information is processed in **Tracker**, the employee is assigned a **Tracker Profile ID**.
  - Locations must manually enter the **Tracker Profile ID** on the Job Data page on the hire template.

  - After the hire template is saved to UCPath by UCPC WFA Production, UCPath copies the **Tracker Profile ID** to the employee's UCPath **Person Profile** page.
  - The **Tracker Profile ID** links UCPath with Tracker and allows the I-9 information entered in Tracker to be interfaced to the **Security Clearance** component in UCPath.

Happiest of Paths for I-9

There are three scenarios that can occur when providing the Tracker Profile ID to UCPath:

- Scenario 1: If tracker is completed prior to initiating the template transaction, the initiator must obtain and enter the **Tracker Profile ID** manually into the SMART HR Template when completing it.

- Scenario 2: Initiator submits the SMART HR Template with an SSN, once the template is approved Tracker sends the employee a link to go into Tracker to setup a profile and complete information. Tracker then updates UCPath with the Tracker Profile ID.

- Scenario 3: Initiator submits a Pre-Hire using the SMART HR Template but does not provide an SSN. In this scenario Tracker may not have the information needed to send an email link to the employee. So the Initiator will have to go Tracker to obtain the Tracker Profile ID as well as go into UCPath (PeopleSoft Menu > Personal Profile > UC I-9 Information tab) after the employee is hired to add the Tracker Profile ID.

Additional Types of Hires

- Academic employee with an off-scale component
- Without salary appointment
- With salary paid as Additional Pay
  (e.g. recreation program instructors)
- Someone with negotiated salary only
  (e.g. coaches in Athletics)
- An employee with NSTP
- Volunteer
- Retro Hire
- Student on Work Study

Contingent Workers (CWR)

♦ Contingent Workers

- Have a relationship with the University.
- Do not receive pay from the University.
- Only Contingent Workers who **supervise** others are required to have a position. Otherwise they do not have positions.
- Two separate templates for adding CWRs: with and without positions.

♦ UC Net ID will automatically be created for the CWR once the SMART HR template has been processed into UCPath.

♦ UCI **Employee Roster** report will include CWR job end dates to help the supervisors keep their data current.

♦ Some CWRs may be required to sign Patent Acknowledgment as a condition of access to University research facilities or contracts, grants, or other funds through the University.

♦ CWRs will have access to the Self Service Portal.

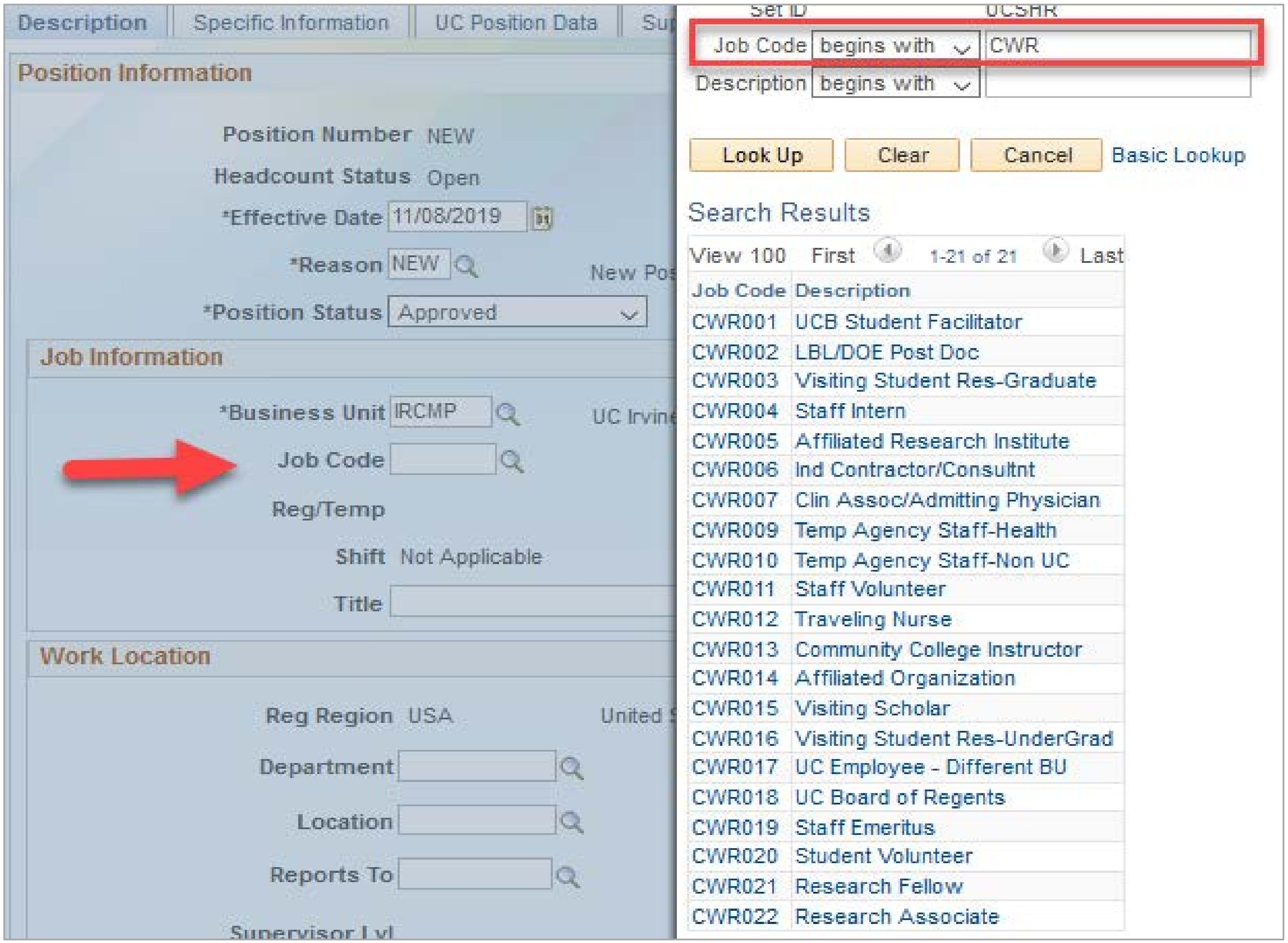
Contingent Workers – Examples

- Staff/Student Volunteer
- Staff Intern
- Individual Contractor / Consultant *(paid through Accounts Payable)*
- Visiting Student (Graduate and Undergraduate)
- Visiting Scholar
- Clinical Associate / Admitting Physician
- Research Fellow / Associate
- Development Supporter

Consult your **Academic Personnel Coordinator or Human Resources** for guidance on entering these types of hires.

Contingent Worker Job Codes

- Job Code number begins with CWR
- Job Codes available for CWRs



Contingent Worker (CWR) Templates

CWR with or without a position

- ♦ Add a CWR
- ♦ Extend a CWR
- ♦ Complete a CWR*

  *Only one template; not a separate template for a position
- ♦ Renew a CWR

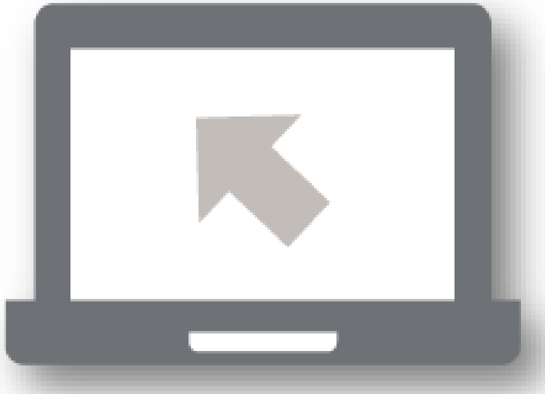
Note:
Remember to review the **Person Org Summary** and **Search/Match** before Adding a New CWR to prevent duplicates in the system.

Template	Description
UC_ADD_CWR	Add Contingent Worker - No Position Data
UC_ADD_CWR_POSN	Add Contingent Worker With Position
UC_COM_CWR	Complete Contingent Worker Instance
UC_CONC_HIRE	Staff Concurrent Hire/Inter Location Transfer
UC_CONC_HIRE_AC	Academic Concurrent Hire/Inter Location Transfer
UC_EXT_CWR	Extend CWR Appointment
UC_EXT_CWR_POSN	Extend CWR (with Position) Appointment
UC_FULL_HIRE	Full Hire - Staff Only
UC_FULL_HIRE_AC	Full Hire - Academic Use Only
UC_INVOL_TERM	Involuntary Termination
UC_PERSON_DATA	UC Personal Data
UC_REHIRE	UC Rehire - Staff Only
UC_REHIRE_AC	Rehire - Academic
UC_REHIRE_REI	Rehire Reinstatement - For Staff Appointments
UC_REHIRE_REI_AC	Rehire Reinstatement - For Academic Appointments
UC_RENW_CWR	Renew Contingent Worker - Without Position
UC_RENW_CWR_POS	Renew CWR Instance - with Position
UC_RETIREMENT	Retirement
UC_TRANSFER	Intra-Business Unit Transfer - Staff Only
UC_TRANSFER_AC	Intra-Business Unit Transfer - Academic Only
UC_VOL_TERM	Voluntary Termination

Instructor Demo UPK

Initiate Add Contingent Worker (With Position) Template Transaction

- This is your opportunity to view this task on your own.
  - Open the UCPath Help site and refer to the Initiate Add Contingent Worker (With Position) Template Transaction
- Launch the **See It** version of the topic.
- Ask your instructor for assistance.



Templates – Additional Notes

- Allow approximately 14 business days for sufficient time for AWE approval and UCPC processing.
- For immediate hires, contact UCPC.
- **Remember:** Verify the Effective Date when you enter any data in UCPath.
- After initial Template process, PayPath is used to make changes to employees' job data.

  - Probation status
  - Salary
  - Compensation
  - Job earnings distribution
  - Recurring additional pay

Full Hire - Key Points

- The **Search/Match** page along with the **Person Organizational Summary** should be reviewed before initiating the Full Hire template to ensure the person does not already exist in UCPath.
- The **Pre-Hire** process can be used to expedite getting someone hired.
- If a date is entered in the **Expected Job End Date** field for a staff employee, their job will auto-terminate on that date.
- If a date is entered in the **Expected Job End Date** field for an academic employee, their job will not auto-terminate unless the **End Job Automatically** box is checked.
- There are specific templates used for Contingent Workers (CWRs).

Lesson Objectives Review

✓ ***Having completed this Lesson, you should be able to:***

- Use the **Search/Match** page to search for someone to ensure they are not already in the system.
- View current employee information using the **Person Org Summary** page.
- Describe the steps to initiate a full-hire template.
- Explain how benefits eligibility is driven by attributes on employee’s Job Data.

Lesson Review

Knowledge Check:

- You now have the opportunity to assess your knowledge of the information presented in this Lesson.
- The questions and answers presented in this review help you to determine whether you remember and understand the important points.

Multiple Choice

How many tabs are on the full-hire template:

A. 3
B. 4
C. 5
D. 6

True or False

If you don’t have information to enter in the **Earnings Distribution** tab while completing the Full-Hire template, skip that tab and proceed to the **Additional Pay** tab in order to submit the transaction.

False.

LESSON 3

Approvals and Transaction Status

Lesson Objectives

- 1: Template Transactions Overview
- 2. Full Hire
- 3: Approval and Status
- 4: Concurrent Hire

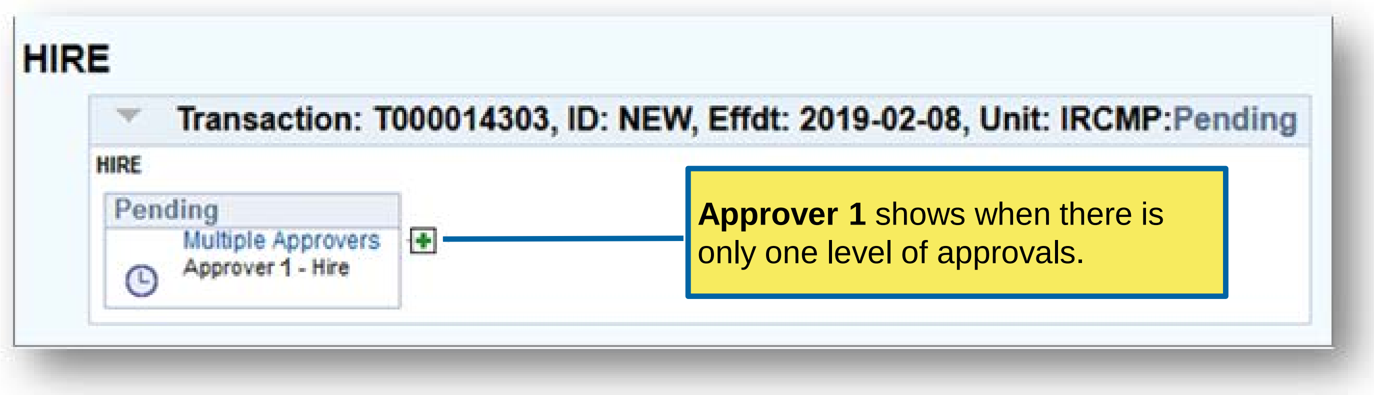
In this Lesson you will learn how to:

- Describe the steps in the approval process.
- Understand the effects of the three approver actions.
- Look up the status of a transaction.

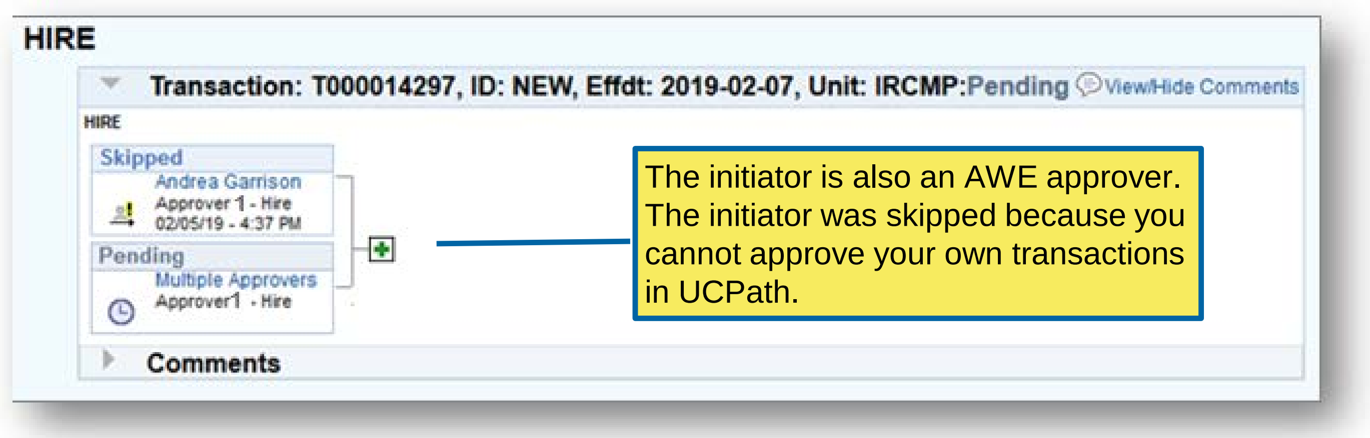
Location Approval Workflow Engine (AWE) Overview

AWE Approvals

When a transaction is submitted by the initiator, AWE **routes the transaction for review and approval**.



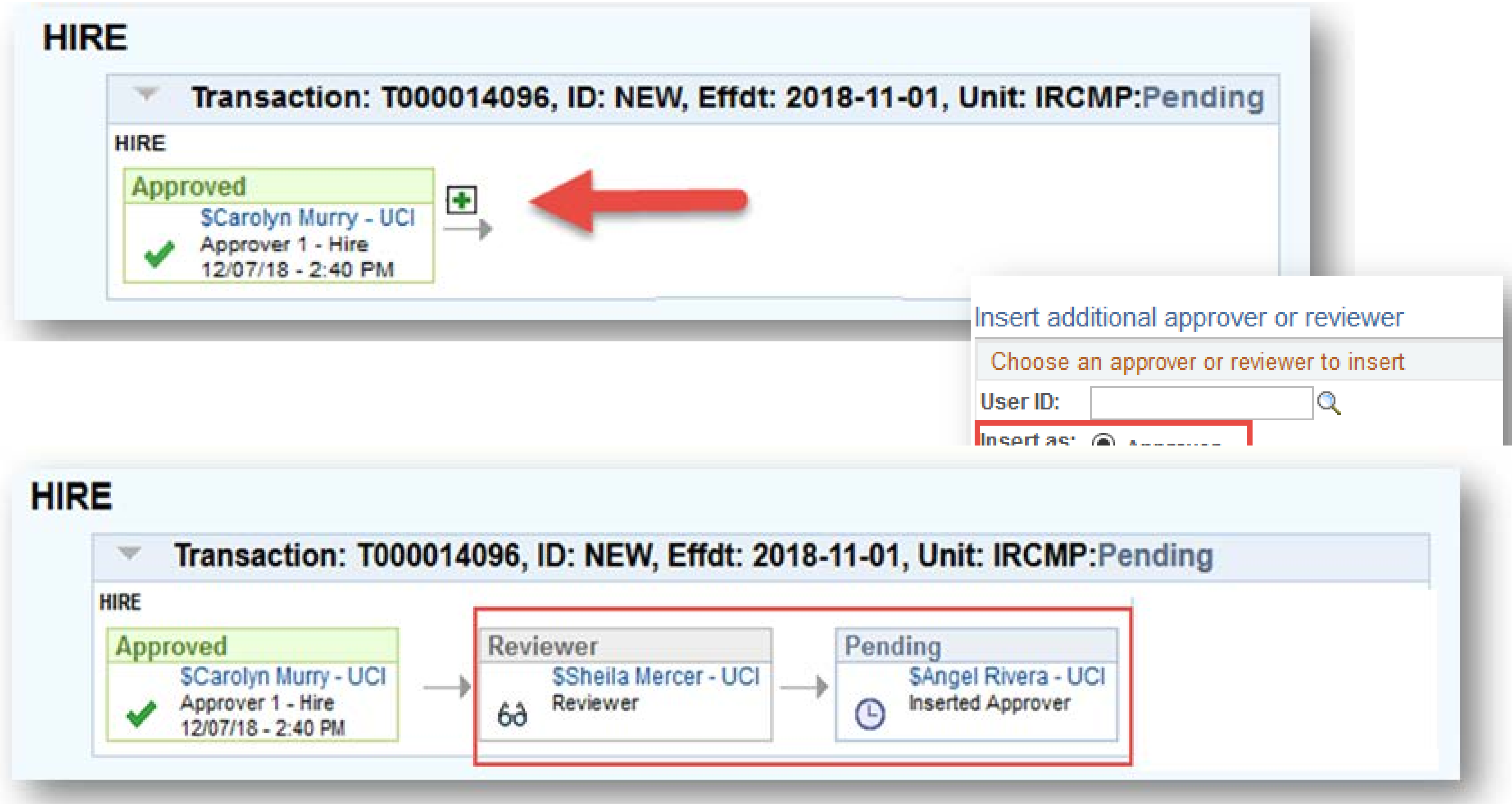
Initiator is not an approver



Initiator is also an approver so they were skipped in the approval flow

Ad-hoc Reviewers and Approvers

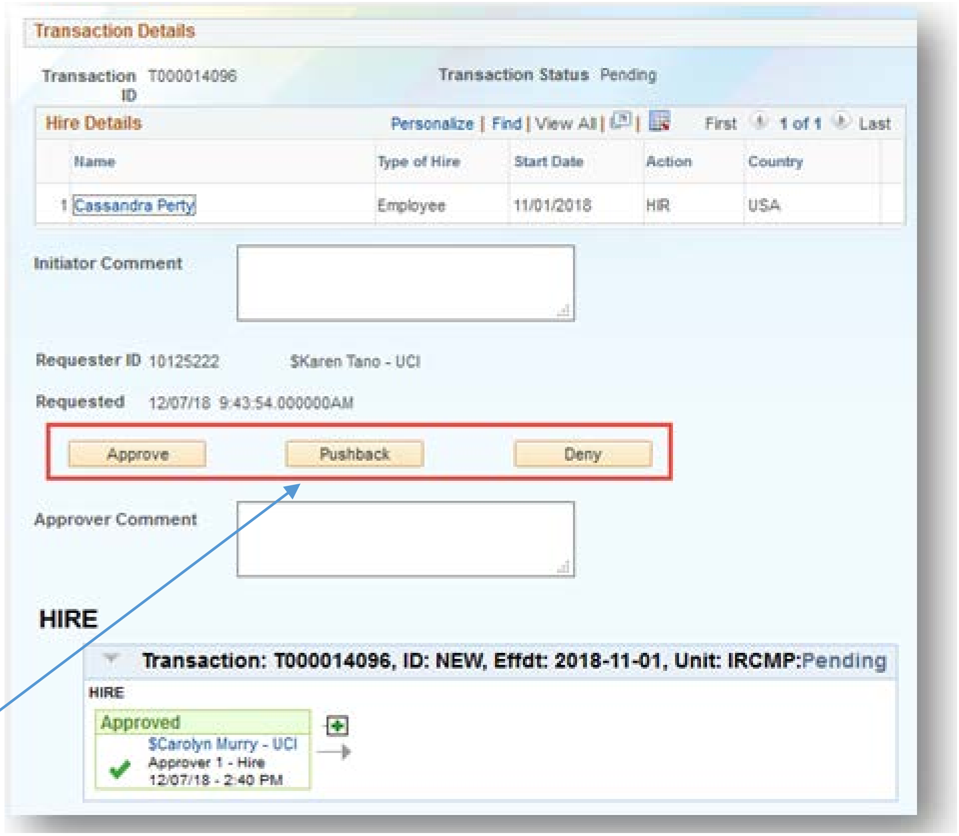
Additional reviewers and approvers can be added by accessing the **Ad-hoc** feature (⊞) in the approval workflow.



Location AWE Approver Options

1st AWE Approver (Approver 2)

Approve	a) Edit transaction, if needed and b) Route to the next level of approval* and/or c) Submit for processing by UCPC.
Deny	Enter comments and deny transaction. It routes back to initiator - no additions or changes reflected in UCPath.



2nd AWE Approver*

Pushback	Enter comments and push the transaction back to lower level approver (Approver 1).

*A second or third AWE approver can appear if an ad-hoc department approver adds another approver using the Ad-hoc functionality.

AWE Notifications

Type of Notification		
Transaction Action	**Initiator**	**Approver(s)**
Submitted	Email	Email & Worklist
Approved at any Level		Email & Worklist to Next Approver
Receives Final Approval	Email	
Denied	Email	Email to Previous Approvers
Pushback		Email & Worklist to Previous Approvers

Transaction Status

Use the following pages to view the status of template transactions.

SS Smart HR Transaction Page – UCI

Use to view template transactions and their status in the approval workflow. This page allows you to search for and view template transactions within the Business Units for which you have access.

PeopleSoft Menu > UC Customizations > UC Extensions > SS Smart HR Transactions

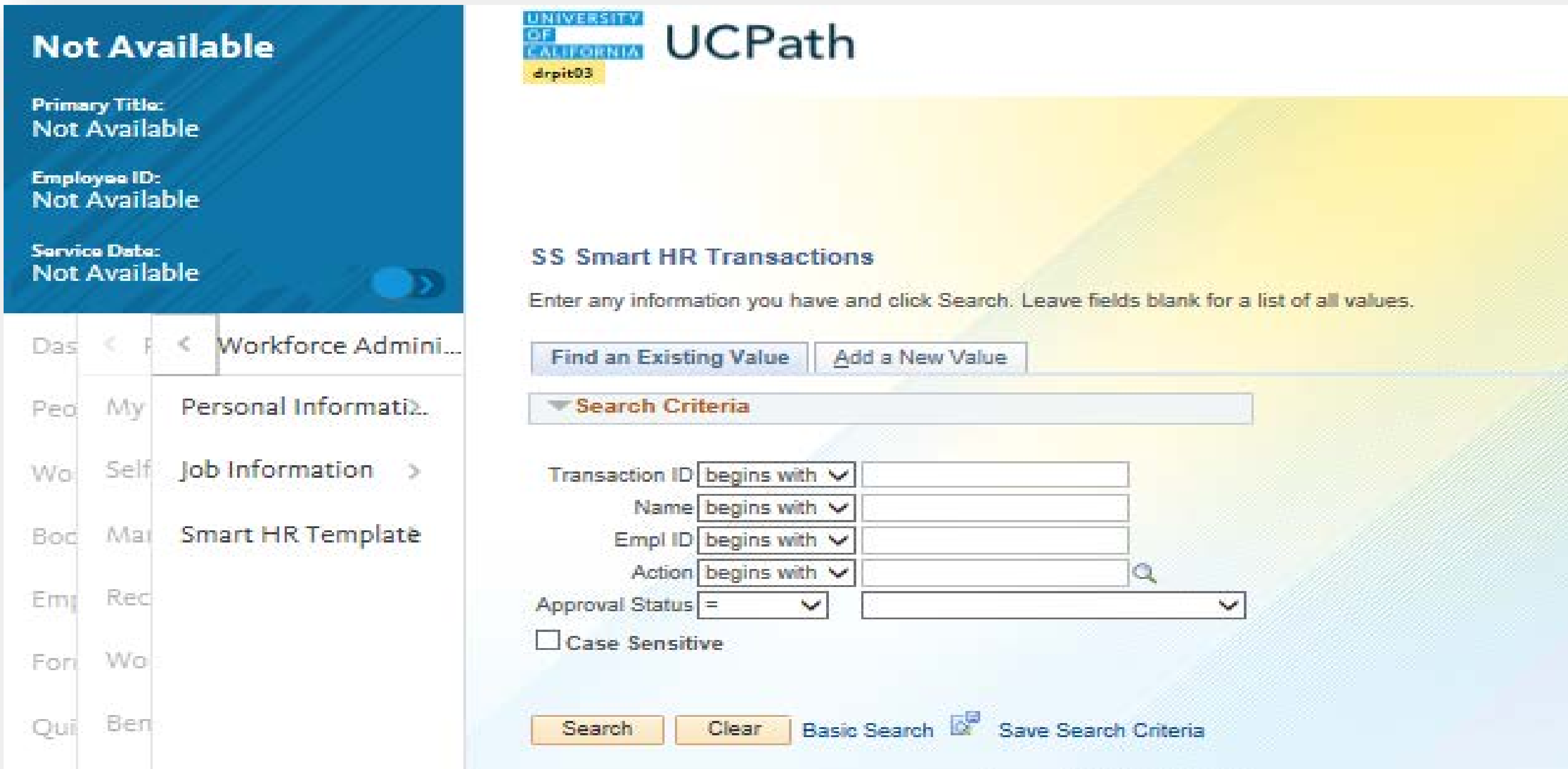
Transaction Status Page – UCPath Center

Use to view the status of template transactions that have completed the approval workflow and are being processed by UCPath Center WFA Production. This page allows you to search for and view template transactions you have submitted, as well as those in departments for which you have row-level security access.

PeopleSoft Menu > Workforce Administration > Smart HR Template > Transaction Status

SS Smart HR Transactions

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



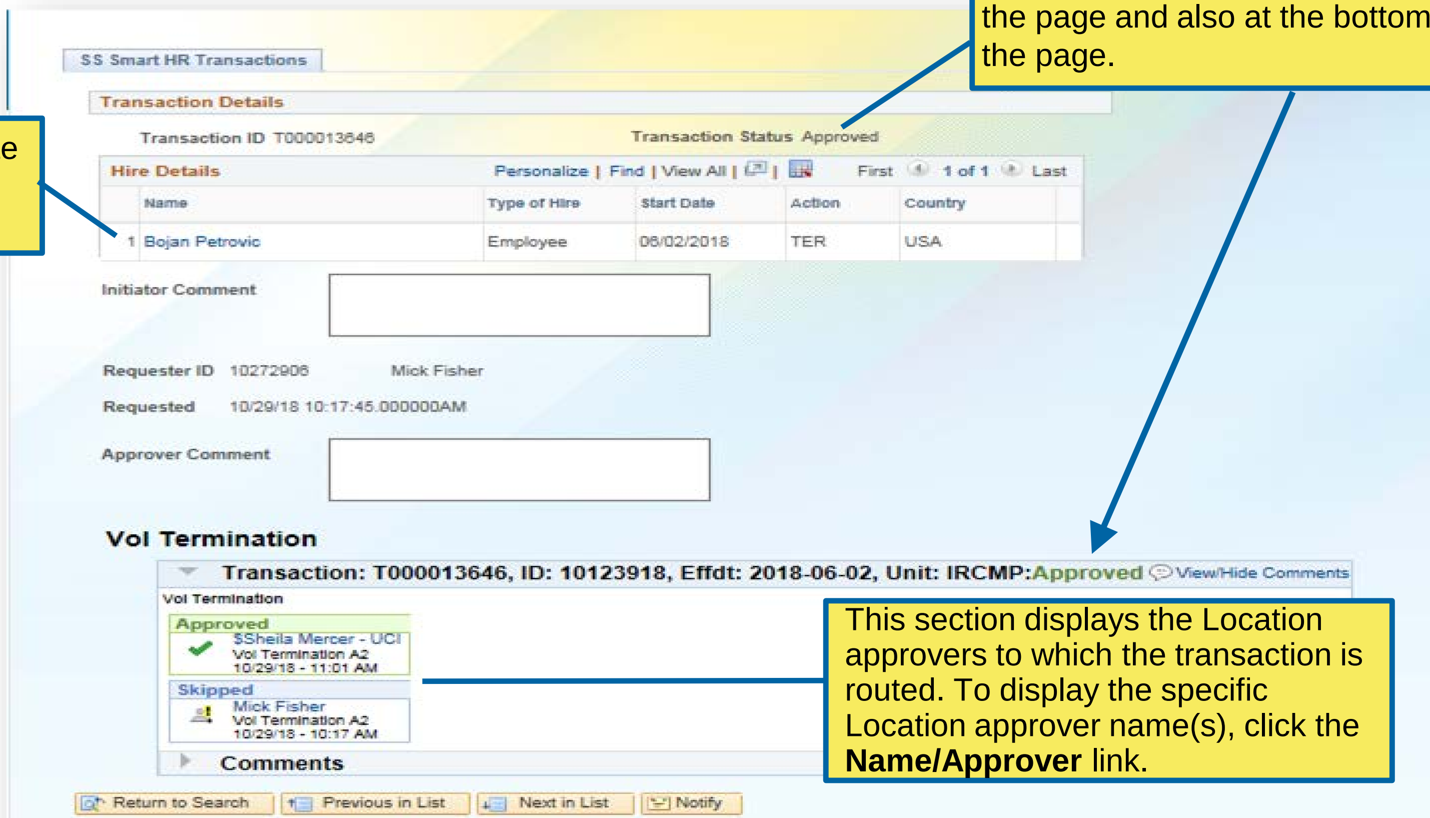
SS Smart HR Transactions Page

Use the **SS Smart HR Transactions** page to:

- View the template transaction details and where it is within the approval workflow.
- View transactions you have submitted along with all transactions submitted within your business unit.
- Review who the approvers are.

The **status** appears at the top of the page and also at the bottom of the page.

To view the template transaction details, click the **Name** link.



This section displays the Location approvers to which the transaction is routed. To display the specific Location approver name(s), click the **Name/Approver** link.

Transaction Status Page

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

Transaction Status

The following transactions are pending, canceled or have been processed by Human Resources.

HR Review Status: All
Transaction Type: All
Transaction Status: All
Start Date From: 09/16/2018 To: 10/06/2018

Business Unit
Empl ID
First Name
Last Name

Refresh | Clear | Download

Adjust the **selection criteria** as needed to filter the displayed transactions. Start Date From and To = effective date of the transaction.

Transaction Status

Personalize | Find | View 100 | First 1-50 of 906 Last

Select	Template	Effective Date	Transaction Status	Person ID	Empl Record	Action		Business Unit	First Name	Last Name	Reason for Cancellation	View Email Text
☐	UC_REHIRE	09/16/2018	Hired/Added	10025725	0	Rehire		RVCMP	Chris	Desarzant		
☐	UC_CONC_HIRE_AC	09/16/2018	Hired/Added	10024915	1	Hire		RVCMP	Jasmine	Perez Cristobal		
☐	UC_CONC_HIRE_AC	09/16/2018	Cancel	10020900	2	Hire	Clone	RVCMP	Jing	Nyitray	View Comments	
☐	UC_CONC_HIRE_AC	09/16/2018	Hired/Added					RVCMP	Amanda	Chao		
☐	UC_CONC_HIRE_AC	09/16/2018	Hired/Added					RVCMP	Amanda	Markovitz		
☐	UC_CONC_HIRE_AC	09/16/2018	Cancel					RVCMP				
☐	UC_CONC_HIRE_AC	09/16/2018	Hired/Added					RVCMP				
☐	UC_CONC_HIRE_AC	09/16/2018	Hired/Added	10031506	1	Hire		RVCMP				
☐	UC_CONC_HIRE_AC	09/16/2018	Cancel	10029577	2	Hire	Clone	RVCMP				
☐	UC_CONC_HIRE_AC	09/16/2018						RVCMP				

Select All   Deselect All

Delete Selected Transactions

Go To   Smart HR Transactions

Transaction Status values include: Requested, Completed, Hired/Added, Denied and Cancel.

If a transaction is cancelled, you can **View Comments** to see why it was cancelled, then **Clone** the existing template information into a new template, correct and submit.
You can also **Clone** transactions that have been denied by an Approver; however, you must review the comments from the Approver in the SS Smart HR Transactions page.

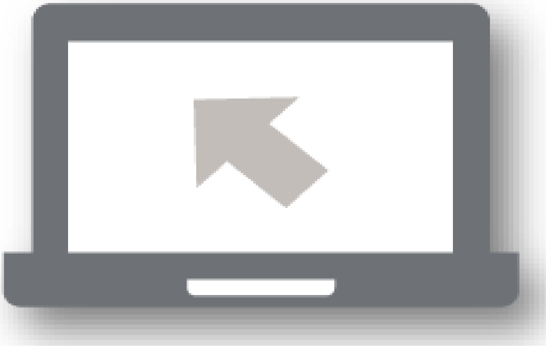
Caution: This button deletes the selected transaction(s) from the system, removing it from UCPC's processing list.

Exercise 7

View Template Transaction Status – SS Smart HR Transactions Page

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

- **This is your opportunity to practice this task on your own.**
- **Search for the transaction status of the hire you just submitted in class.**
- **Go to the SS Smart HR Transactions Page**
- **Ask your instructor for assistance.**



Transaction Status

Use the **Transaction Status** page to:

1. View the status of the template as it goes through the queue at UCPC (WFA Production).
   a. This page tracks the status of templates after approval at the Locations.
2. View the **Person/Empl ID** that is created for new hire transactions.
3. View transactions you submitted along with all transactions for departments for which you have security access.
4. Clone a transaction that was cancelled by UCPath Center.
5. View email notes sent by WFA Production.

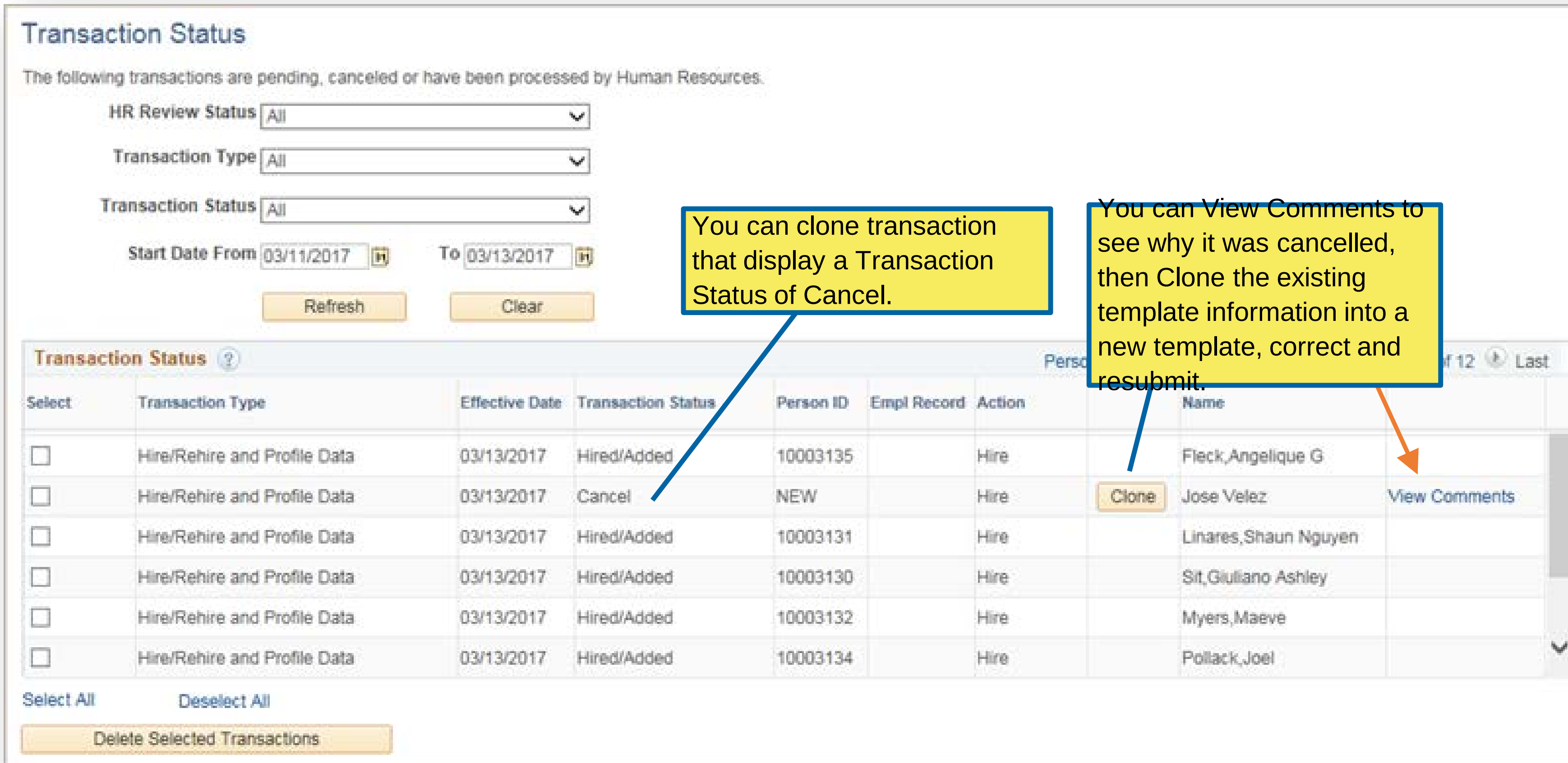
Clone a Template

You can clone a template transaction if that transaction has been DENIED by local approver or CANCELED by the UCPC.

- When a template has been denied or canceled:
  - There should be comments explaining why or what needs to be corrected.
  - An email notification is sent to the Template Initiator when a template has been denied or canceled.
- Access the **Transaction Status** page to view the status of transactions, review comments and clone the template that was denied or cancelled, if applicable.

Clone a Template – Transaction Status Page

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



Transaction Status

The following transactions are pending, canceled or have been processed by Human Resources.

HR Review Status: All

Transaction Type: All

Transaction Status: All

Start Date From: 03/11/2017 To: 03/13/2017

Refresh | Clear

Transaction Status

Perso... of 12 Last

Select	Transaction Type	Effective Date	Transaction Status	Person ID	Empl Record	Action		Name	
☐	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003135		Hire		Fleck,Angelique G	
☐	Hire/Rehire and Profile Data	03/13/2017	Cancel	NEW		Hire	Clone	Jose Velez	View Comments
☐	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003131		Hire		Linares,Shaun Nguyen	
☐	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003130		Hire		Sit,Giuliano Ashley	
☐	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003132		Hire		Myers,Maeve	
☐	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003134		Hire		Pollack,Joel	

Select All | Deselect All

Delete Selected Transactions

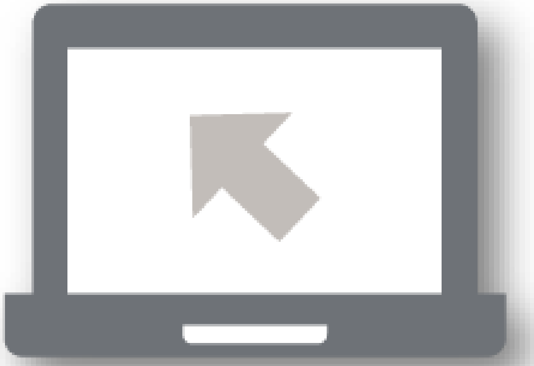
You can clone transaction that display a Transaction Status of Cancel.

You can View Comments to see why it was cancelled, then Clone the existing template information into a new template, correct and resubmit.

Instructor Demo UPK

Clone Template Transaction

- This is your opportunity to view this task on your own.
  - Open the UCPath Help site and refer to the *Clone Template Transaction* topic.
- Launch the **See It** version of the topic.
- Ask your instructor for assistance.



Lesson Objectives Review

✓ **Having completed this Lesson, you should now be able to:**

- Verify that a new hire does not already exist in UCPath using the **Search/Match** page.
- Describe the key system steps to complete a full hire template transaction.
- Initiate a full hire template transaction.
- Add **I-9** related information in the **Person Profile**.

Break

LESSON 4

Concurrent Hire

Lesson Objectives

1: Template Transactions Overview

2: Full Hire

3. Approval and Status

4: Concurrent Hire

In this Lesson you will learn how to:

- Describe the key system steps to complete a concurrent hire template transaction.
- Initiate a concurrent hire template transaction.

Concurrent Hire – Overview

Concurrent Hire:

- A staff or academic employee adds an additional job, which is concurrent to his or her existing job with UC.
- A separate concurrent hire template is available for academic and for staff.

Concurrent hire templates are also used for interlocation transfers.

- Interlocation transfers are covered in the course *Template Transactions - Part II*.

Available Templates

Template	Description
UC_ADD_CWR	Add Contingent Worker - No Position Data
UC_ADD_CWR_POSN	Add Contingent Worker With Position
UC_COM_CWR	Complete Contingent Worker Instance
UC_CONC_HIRE	Staff Concurrent Hire/Inter Location Transfer
UC_CONC_HIRE_AC	Academic Concurrent Hire/Inter Location Transfer
UC_EXT_CWR	Extend CWR Appointment
UC_EXT_CWR_POSN	Extend CWR (with Position) Appointment
UC_FULL_HIRE	Full Hire - Staff Only
UC_FULL_HIRE_AC	Full Hire - Academic Use Only
UC_INVOL_TERM	Involuntary Termination
UC_PERSON_DATA	UC Personal Data
UC_REHIRE	UC Rehire - All Employees
UC_REHIRE_AC	Rehire - Academic
UC_RENW_CWR	Renew Contingent Worker - Without Position
UC_RENW_CWR_POS	Renew CWR Instance - with Position
UC_RETIREMENT	Retirement
UC_TRANSFER	Intra-Business Unit Transfer - Staff Only
UC_TRANSFER_AC	Intra-Business Unit Transfer - Academic Only
UC_VOL_TERM	Voluntary Termination

Types of Concurrent Hires

<u>Inter-location</u>
<u>(Multiple-Location)</u>
across multiple Business Units*

**Business Units refer to individual UC Locations (ex: UCLA to UCI)*

<u>Intra-location</u>
within Business Units**

** For the purpose of the Intra-location Concurrent Jobs process UCI Campus and Medical Center are considered one Business Unit.*

Inter-location/ Multi-location Jobs

- Multi-location jobs are when an employee works for two or more UC Locations simultaneously (e.g., UCI and UC San Diego)
- As an employee can only be paid by one location, when an employee is employed by 2 or more locations at once, one location is designated as the "Home" location. The non-Home location is considered the "Host" location.

HOME

Originating Location
(where the primary job exists)

HOST

Receiving Location
(the location adding employment to existing employment)

Concurrent Jobs – Multi-Location Agreement (MLA)

- If a concurrent job is between multiple Locations, the Location must complete a Multi-Location Agreement (MLA) form and attach it to the concurrent hire template transaction.
- Until all Locations are live on UCPath, use the following guidelines for new concurrent jobs between Locations.

Host	Home	Receiving Location (Host)	Originating Location (Home)
UCPath	UCPath	Submit concurrent hire template with MLA attached.	Coordinate with receiving location and make any applicable data changes.
UCPath	PPS	Submit Contingent Worker template with MLA attached and use Job Code CWR017 (UC Employee-Different Business Unit).	Continue local process for data changes, if applicable.
PPS	UCPath	Complete MLA and send to originating Location.	No UCPath changes needed.

Intra-location Concurrent Jobs

- Refers to an employee having two jobs within the same Location (concurrent employment at UCI Campus or at UCI Campus & UCI Medical Center)

UCI

Originating Department (where the current job exists)

Receiving Department (where the new job is being created)

Concurrent Hires – Additional Notes

- It is the current department's responsibility - where the **existing** job is located - to perform an analysis of **the FTE** (appointment percentage) to ensure the employee will not exceed 100% time for all jobs once the new job is added.
- **Coordination at the location level** will be required for both jobs should adjustments be needed to:
  - FTE
  - FLSA Status (see the next slide)
  - Benefits or leave accrual eligibility
  - Probationary period status
  - The 750 hour rule for Unit 18 lecturers
  - Hours toward career status considerations
  - Ongoing coordination of time and attendance

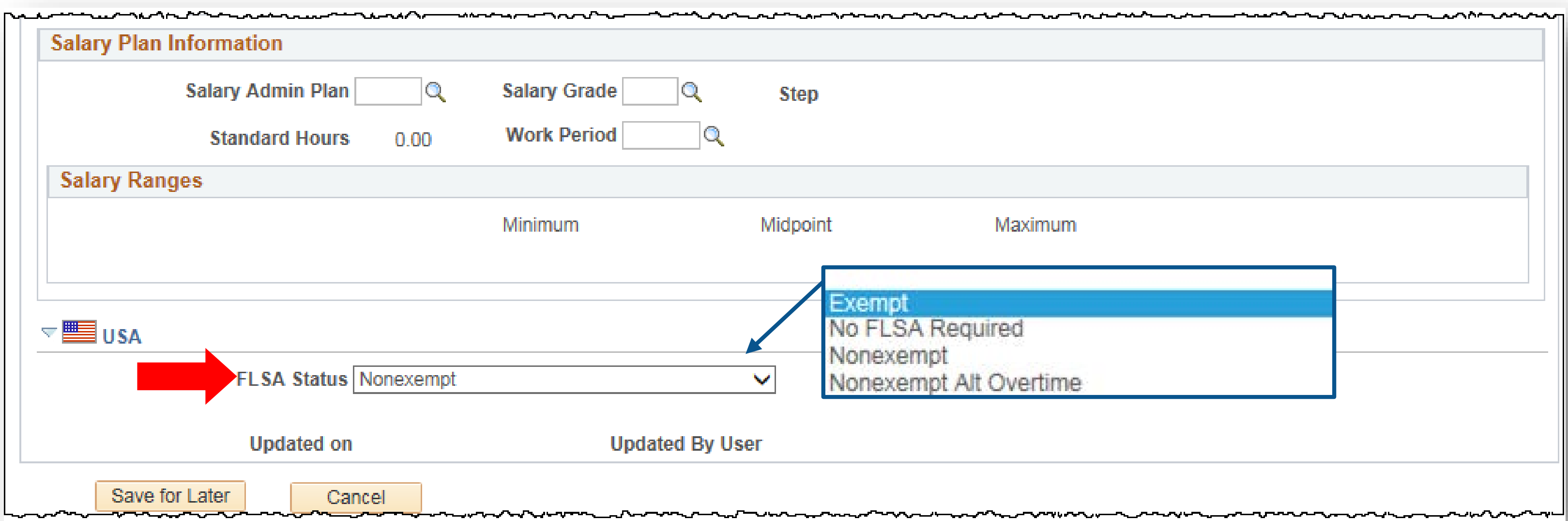
Concurrent Hire - FLSA Status Management

FLSA is an attribute of the position and defaults from the Job Code.

In UCPath an employee can only be assigned one FLSA status. When there is a need to change the FLSA due to the conflict when adding Concurrent Jobs the Units can contact Academic Personnel or Central HR for further guidelines. They will evaluate the jobs and decide what the FLSA status should be assigned. The FLSA Status can then be overridden as required via PayPath.

For more guidelines on updating the FLSA statuses visit:

- http://ap.uci.edu/compensation/flsa/ for academic employee or
- http://hr.uci.edu/partnership/flsa/ for staff



Concurrent Hires - Dual Employment

- Concurrent Hire process also covers **Dual Employment.**
- For Dual Employment, the additional appointment (job) is generally in another department.
  - Applies to **staff appointments only.**
  - Additional appointment is separate from any other job an employee holds.
  - Results in the employee working > 1.00 FTE (100%) in any given month.
  - May occur in an employee's home department **only** if the additional work is **unrelated** to their current job **and** the employee works under a different Job Code.
  - Only **permitted on an exceptional basis**; central HR/AP approval is required.
  - **Multi-location Dual Employment (> 1.00 FTE) is never permitted**.
  - Location must provide **authorization** to UCPC for the dual employment, in the form of a **Dual Employment form** attached to the Smart HR Template.

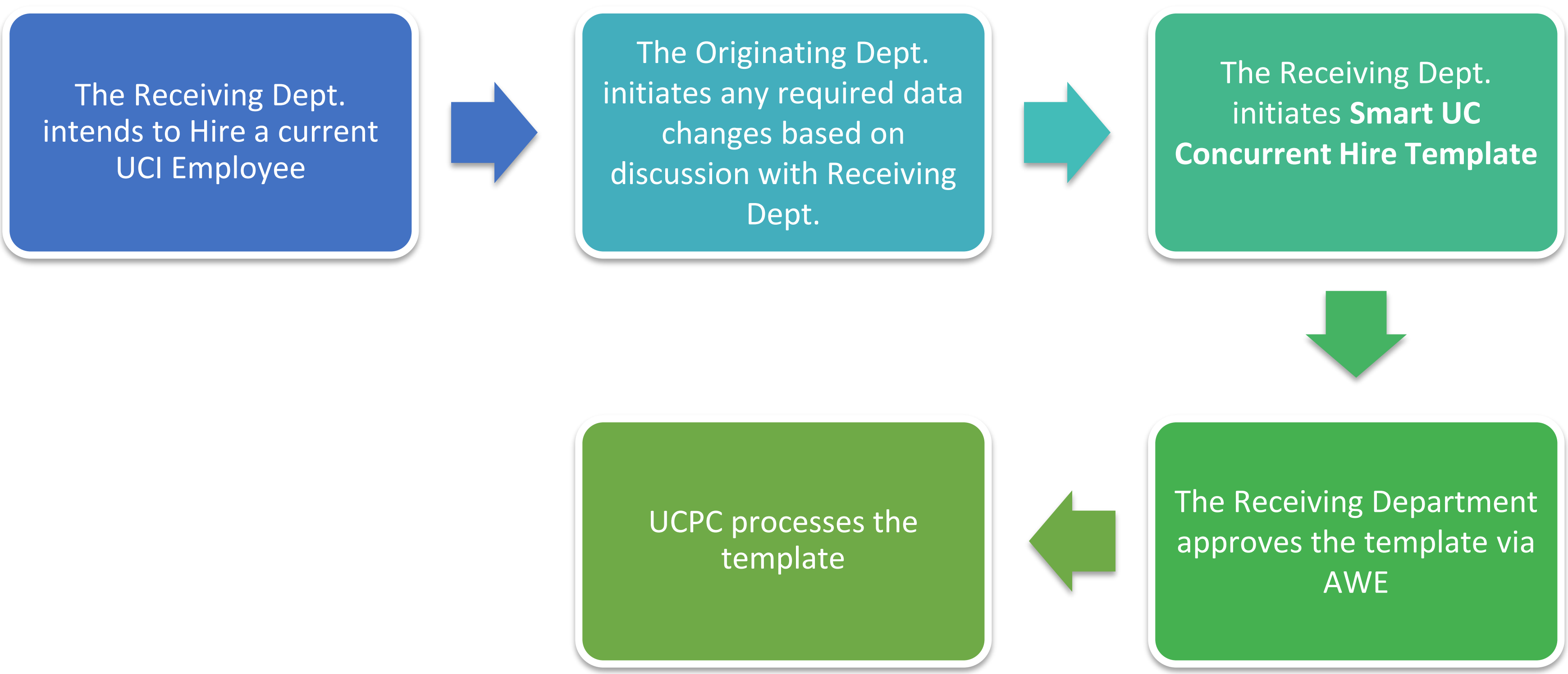
Multi-location Jobs Process Overview

Process Overview for Inter-location Hires when **both locations are on UCPath**.

1. The Host location intends to Hire a current UC Employee
2. The Host location completes MLA using Person Org Summary and Host job information
3. The Host location sends MLA to Home Location
4. The Home Location initiates any required data changes based on discussion with Host Location
5. The Home Location approves and sends MLA to Host location
6. The Host Location initiates a Smart HR template for Concurrent Hire with approved MLA

Intra-location Concurrent Jobs – Process Overview

This is a Business Process for Intra-location Concurrent Hires.

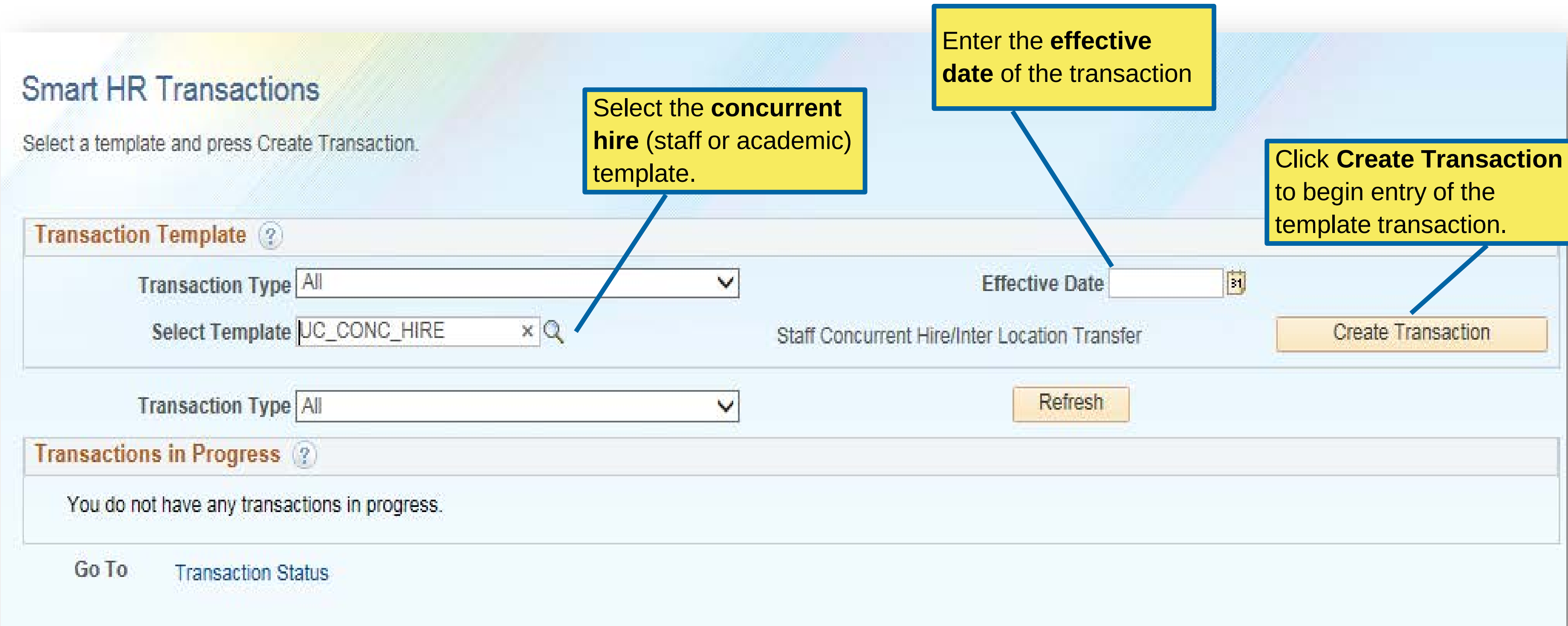


Concurrent Hire – Key System Steps

1. Review Person Org Summary page
2. Navigate to Smart HR Transactions page
3. Select the **Concurrent Hire** template
4. **Enter concurrent hire details** and **attach supporting documentation** as needed
5. Click **Save & Submit for Review and Approval**

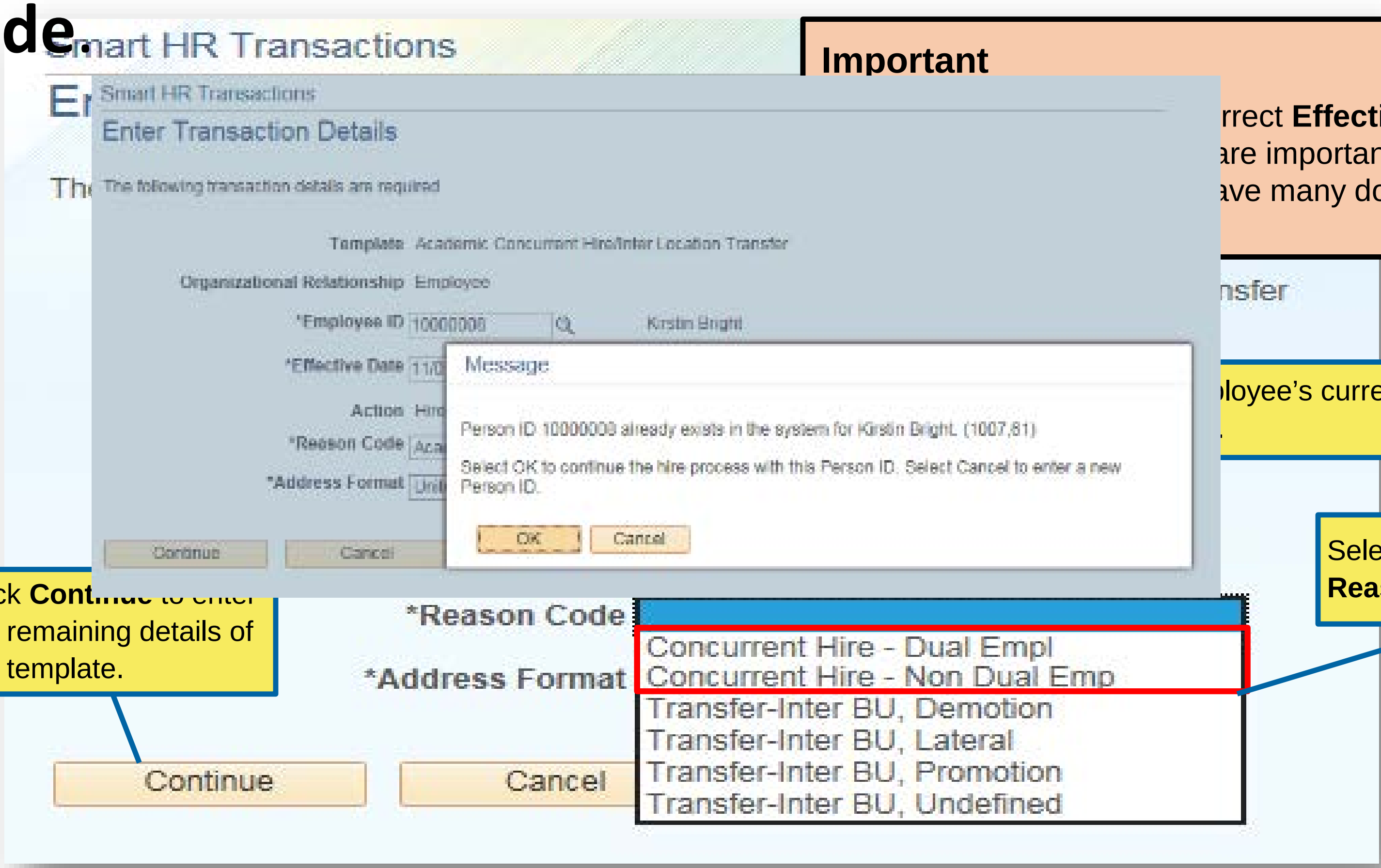
Smart HR Transactions Page

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**



Enter Transaction Details Page

Enter the details for the concurrent hire, beginning with the **Employee ID, Effective Date** and the **Reason Code.**



Important

rrect **Effective Date** and are important entry points for ave many downstream

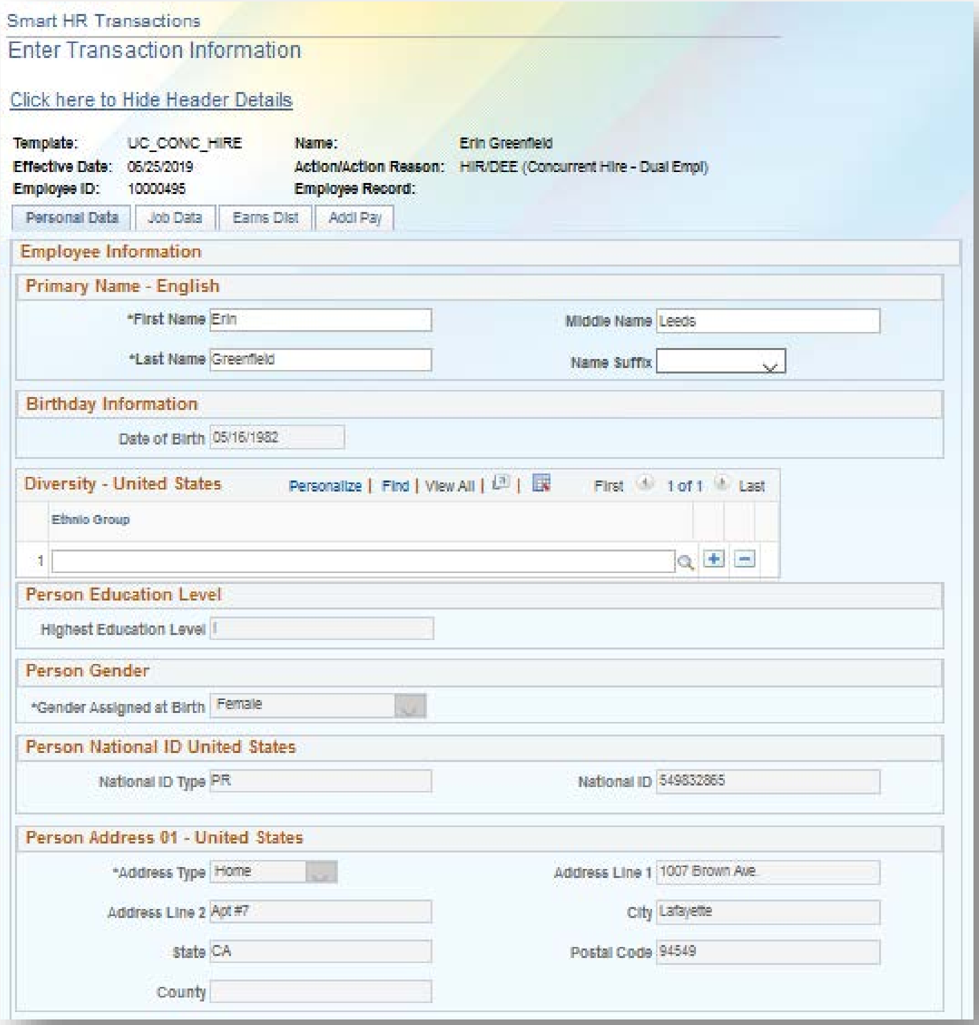
loyee's current

Select the appropriate **Reason Code**.

Click **Conti**... the remaining details of the template.

Enter Transaction Information Page

- Some existing personal information is automatically displayed.
- When complete, click the **Save and Submit** button to submit the template for review and approval.
- Navigate through all the tabs before the **Save and Submit** button is available.



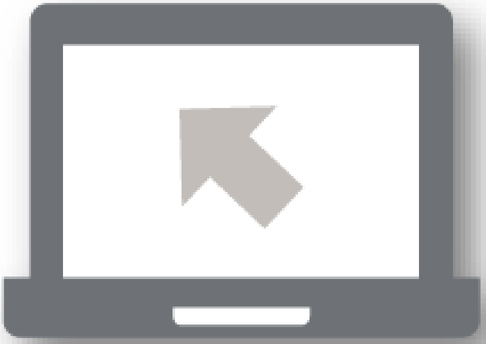
Inter-location One-Time Pay

- If an employee performs work for a different business unit, a concurrent job must be set up so the employee can be paid using the one-time additional pay functionality in UCPath.
- Scenario
  - UC Berkeley Professor Smith receives an honorarium of $500 from UC Davis for a lecture.
  - The employee must be set up with a concurrent job at UC Davis so they can create a payment for the task using one-time additional pay.
- Refer to the *Interlocation One-Time Additional Pay* job aid for the steps to process this type of payment.

Instructor Demo UPK

Initiate Concurrent Hire Template Transaction

- This is your opportunity to view this task on your own.
  - **Staff:** Open the UCPath Help site and refer to the *Initiate Concurrent Hire Template Transaction (Staff)* topic.
  - **Academic:** Open the UCPath Help site and refer to the *Initiate Concurrent Hire Template Transaction (Acad)* topic.
- Launch the **See It** version of the topic.
- Ask your instructor for assistance.



Lesson Review

Assessment

- You now have the opportunity to assess your knowledge of the information presented in this Lesson.
- The questions and answers presented in this review help you to determine whether you remember and understand the important points.

True or False

A concurrent hire is when a staff or academic employee adds an additional job, which is concurrent to his or her existing job with UC.

True.

Fill-In-The-Blank

- Access the ___Person Org Summary___ page before initiating a concurrent hire template transaction to gain an understanding of the employees current assignments.

Lesson Objectives Review

✓ **Having completed this Lesson, you should now be able to:**

- Describe the key system steps to complete a concurrent hire template transaction.
- Initiate a concurrent hire template transaction.

Course Review

Course Summary

- The **Smart HR Transactions** page is the starting point to initiate HR template transactions.
- Refer to the *Template Transactions – Action Reason Codes and Descriptions* job aid for a list of all the templates, the associated **Reason Codes** and a description.
- Remember to enter **Comments** on the template to further describe what is needed with the template transaction.
- Attach supporting documentation whenever needed.

UCI Job Aid - Smart HR Templates

Helps the Initiator decide which template to use depending type of transaction, circumstances and relevant factors.

- See Job Aid: SMART HR Staff/Academic Job Template Selection for help in template selection.

Course Objectives Review

Having completed this course, you should be able to:

- Identify the pages used to initiate template transactions.
- View template transaction status.
- Describe the key system steps to complete a full hire, concurrent hire and add contingent worker template transaction.
- Initiate full hire and concurrent hire template transactions.

Parking Lot

- Review parking lot
  - Have all questions been answered during our class?
  - Are there any new questions to add to the list?

Course Resources

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
- https://ucpath.uci.edu/training/index.php - UCI UCPath Training Website

List of Other Relevant UPKs:

- Initiate New Position Control Request
- Initiate New Position Control Request – Copy Existing Position
- Initiate Update Vacant Position Request
- Job Aid: Template Transactions – Action Reason Codes and Descriptions

Where to Get Help

1. Your training materials are available to use as reminders for navigation, codes, and page processing information.
   - UPKs
   - Job Aids
   - Presentation decks
2. Who do you ask for Help now?
   - Continue to do so. Specially trained users (Points of Contact, POCs) are ready to help you within your departments and divisions.
   - Many of the POCs are those you have already worked with.
3. You or the POC contacts the Employee Experience Center (EEC or Service Now) via phone or website to view knowledge base articles and/or open a ticket.
4. The **UCPath Help** site is your last level of support. Search for conceptual content, job aids or step-by-step instructions for UCPath tasks.
   - From the UCPath portal homepage, expand the **Help / FAQ** section on the left side of the page, click the appropriate link.
   - From any UCPath page or component, click the **Help** link in the upper right corner of the page to find help topics specific to the page/component.

Additional UCPath Pages

Below is a list of UCPath pages that may need to be completed as part of the hire process. It includes the steps listed in the onboarding overview plus some additional pages related to the hire process.

Page	Purpose	Navigation	Course
Position Control Request	Create/ Update a Position	PeopleSoft Menu > UC Customizations > UC Extensions > Position Control Request	Position Control ILT
Funding Entry	Add or update position funding.	PeopleSoft Menu > Set Up HCM > Product Related > Commitment Accounting > UC Customizations > Funding Entry	Funding
Person Profile	Update employee's qualifications, education, oath & patent signature dates and UC Student Status.	PeopleSoft Menu > Workforce Development > Profile Management > Profiles > Person Profile	Template Transactions Part 1 (this course)
Security Clearance Page	Update different types of Security Clearances for an employee. For example, I9 completion.	PeopleSoft Menu > Workforce Administration > Personal Information > Security Clearance	Template Transactions Part 1 (this course)

Training End

Thank You!