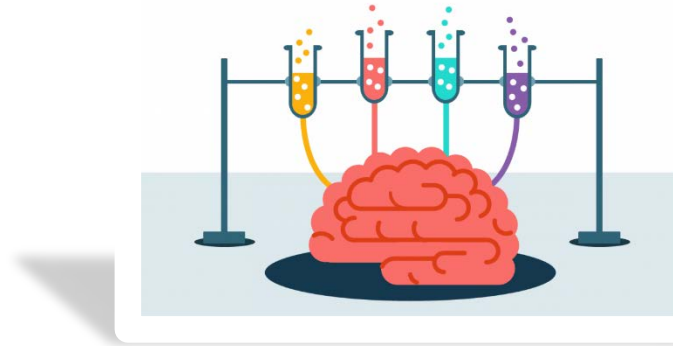


UCI UCPath

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)





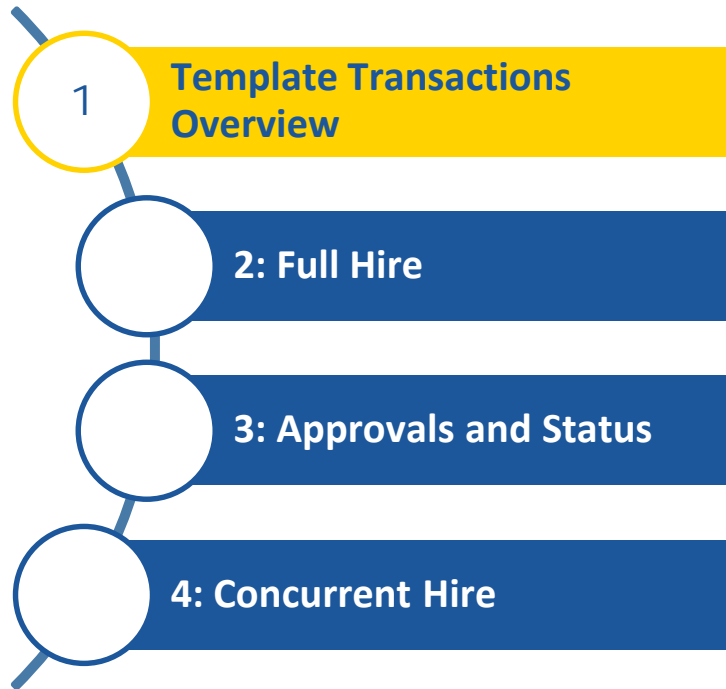
LESSON 1



Template Transactions Overv



Lesson Objectives



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.

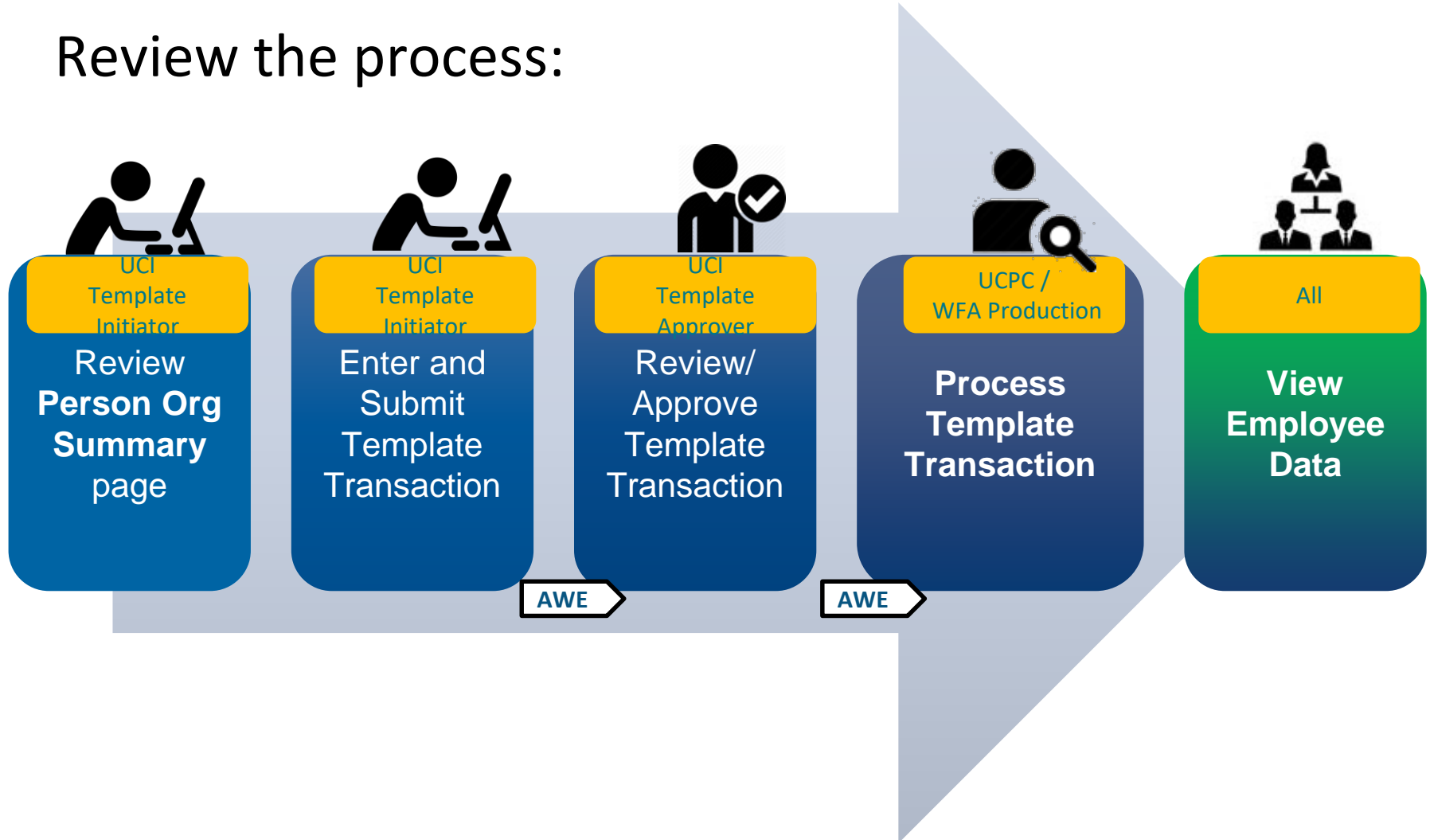
- ◆ Below is an example of what type of security is enabled for certain templates.

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	



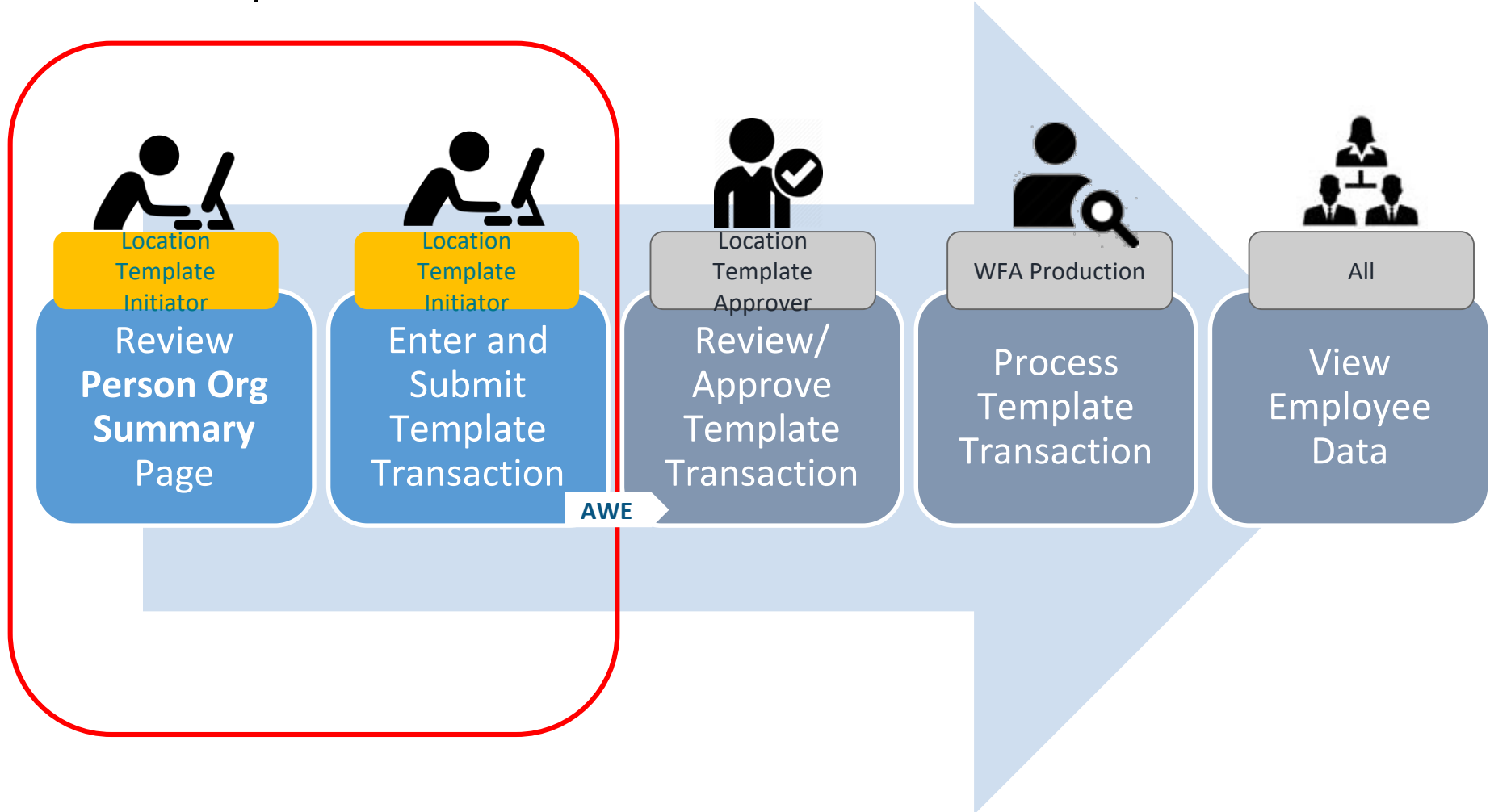
Template Transactions – System Process

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

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

Assignments

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

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.

The screenshot displays the UCPATH interface for Smart HR Transactions. On the left, a blue sidebar contains a 'Not Available' section with fields for Primary Title, Employee ID, and Service Date. Below this is a navigation menu with a red box highlighting 'Smart HR Tr...' and a red arrow pointing to a blue circular icon. The main content area features the UCPATH logo and a yellow banner. A yellow callout box with the text 'FYI: You can click the slide button to expand menu' points to the blue circular icon. The main content area includes a 'Transaction Template' section with dropdowns for 'Transaction Type' (set to 'All') and 'Effective Date', a 'Select Template' search field, and a 'Create Transaction' button. Below this is a 'Transactions in Progress' section with a message 'You do not have any transactions in progress.' and a 'Go To Transaction Status' link.

Not Available

Primary Title:
Not Available

Employee ID:
Not Available

Service Date:
Not Available

Smart HR Tr...

FYI: You can click the slide button to expand menu

Transaction Template ?

Transaction Type All Effective Date 21

Select Template

Create Transaction

Transaction Type All Refresh

Transactions in Progress ?

You do not have any transactions in progress.

Go To Transaction Status



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 you have submitted or saved for later. You also can select and delete your transactions.

The screenshot shows the 'Smart HR Transactions' interface. At the top, a header bar contains the title 'Smart HR Transactions' and a subtitle 'Select a template and press Create Transaction.' Below this, the 'Transaction Template' section is highlighted with a red box. It includes a 'Transaction Type' dropdown menu set to 'All', a 'Select Template' search field, an 'Effective Date' field with a calendar icon, and a 'Create Transaction' button. A yellow callout box points to the 'Select Template' field, stating: 'Use the **Select Template** field to select the appropriate template.' Another yellow callout box points to the 'Effective Date' field, stating: 'Enter the **Effective Date** for the selected template.' A third yellow callout box points to the 'Create Transaction' button, stating: 'Click **Create Transaction** to enter the template details.' Below the 'Transaction Template' section, there is a 'Transactions in Progress' section, also highlighted with a red box. It features a table with columns: 'Select', 'Transaction Type', 'Effective Date', 'Name', 'Person ID', 'Action', and 'Country'. The table contains one row with a checkbox, 'JOB', '09/25/2018', 'Jennifer Salazar', '10000021', 'Terminatn', and 'United States'. Below the table is a 'Delete Selected Transactions' button. A yellow callout box points to this button, stating: 'If needed, you can delete transactions you have saved for later or submitted. Use caution because this deletes the transaction from the system. If the transaction was submitted it also removes it from AWE Approver worklists.' At the bottom of the interface, there is a 'Go To' section with a 'Transaction Status' dropdown.

Smart HR Transactions

Select a template and press Create Transaction.

Transaction Template ?

Transaction Type All

Select Template

Effective Date

Create Transaction

Transaction Type All Refresh

Transactions in Progress Personalize Find First 1 of 1 Last

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	JOB	09/25/2018	Jennifer Salazar	10000021	Terminatn	United States

Delete Selected Transactions

Go To Transaction Status

If needed, you can delete transactions you have saved for later or submitted. Use caution because this deletes the transaction from the system. If the transaction was submitted it also removes it from AWE Approver worklists.




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
Select a template and press Create Transaction.

Transaction Template ?

Transaction Type: All

Select Template: 

Transaction Type: All

Transactions in Progress

Select	Transaction Type	Effective Date	Name	Person
<input type="checkbox"/>	JOB	09/25/2018	Jennifer Salazar	10000

Go To [Transaction Status](#)

Click the **Search** button to select a template.

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_POSN	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



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

Select a template and press Create Transaction.

Transaction Template ?

Transaction Type: All

Effective Date: 10/01/2018

Select Template: UC_FULL_HIRE

Full Hire - Staff Only

Create Transaction

Transaction Type: All

Refresh

Transactions in Progress

Personalize | Find | First 1 of 1 Last

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	JOB	09/25/2018	Jennifer Salazar	10000021	Terminatn	United States

Delete Selected Transactions

Go To Transaction Status



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**.

Smart HR Transactions

Enter Transaction Details

The following transaction details are required.

Template Full Hire - Staff Only

Organizational Relationship Employee

*Employee ID NEW

*Effective Date 10/01/2018

Action Hire

*Reason Code Hire - No Prior UC Affiliation

*Address Format United States

Continue

Cancel

Important

- For new hires, in the **Employee ID** field, accept the default of **NEW**. For all other template transactions, perform a search to locate the appropriate employee ID.
- Ensure that you entered the correct **Effective Date** and **Reason Code**. These fields are important entry points for the employee's record and have many downstream effects.
- In the **Address Format** field, accept the default of **United States** or change to **Global**, if applicable.
- Fields marked with * are required fields and must contain a value before continuing to the next page.





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.



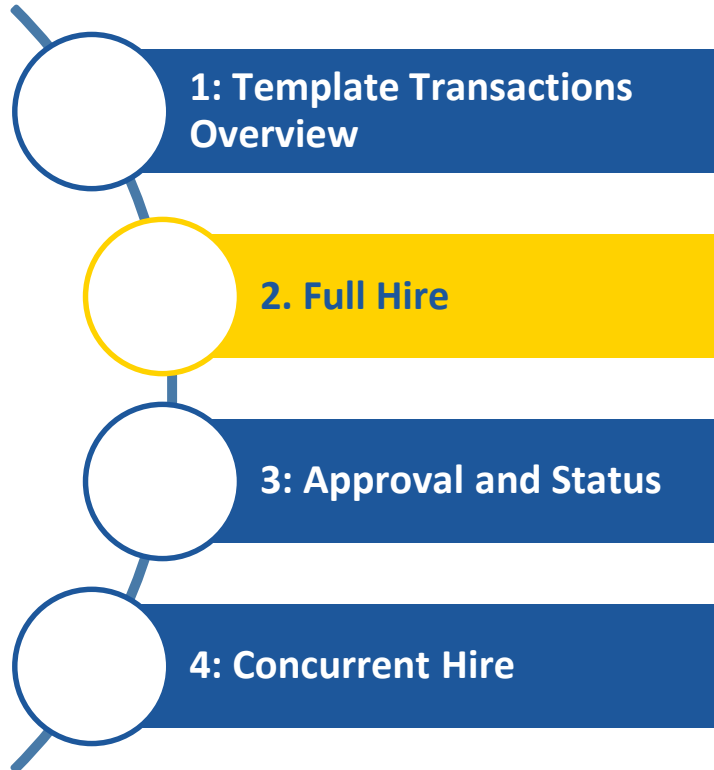
A large, blue, curved arrow pointing from the top left towards the text 'Full Hire'.

LESSON 2

Full Hire



Lesson Objectives



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

The screenshot shows the 'Search Criteria' section of the PeopleSoft interface. It includes fields for 'Search Type' (set to Person), 'Search Parameter' (PERSON_SEARCH), and 'Search Result Rule' (PERSON_RESULTS). A blue callout box explains that the 'Search' button becomes active after entering search criteria. A yellow callout box points to the 'Search Result Code' field, stating that 'PERSON_RESULTS' should always be selected. The 'Search Criteria' section below contains input fields for 'National Id', 'First Name Search', 'Last Name Search', 'Date of Birth', and 'Gender', each with a search icon. At the bottom, there are buttons for 'Search', 'Clear All', and 'Carry ID reset'.

Search Criteria

Search Type Person ☐ Ad Hoc Search

Search Parameter PERSON_SEARCH Person Search

Search Result Rule ?

Search Result Code PERSON_RESULTS x Person Search Results

User Default

Search Criteria ?

Search Fields

National Id

First Name Search

Last Name Search

Date of Birth

Gender

Search Clear All Carry ID reset

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**.



Instructor Demo UPK

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

Administrative Assistant



Person

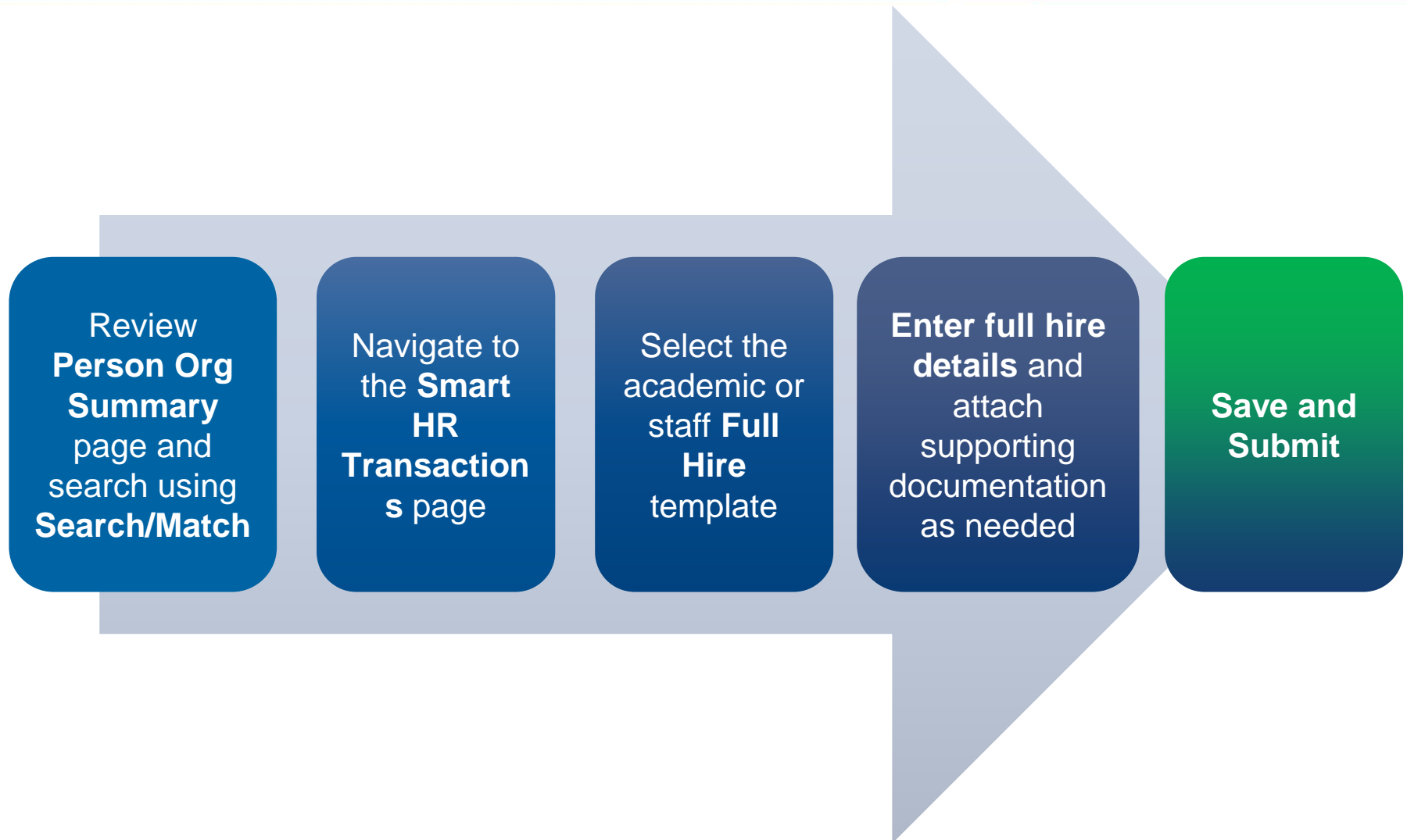
*Employee - John
Jones*



Job

*John Jones -
Administrative
Assistant*

Full Hire – Key System Steps



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**

The screenshot shows the 'Smart HR Transactions' page in the UCPATH system. The page header includes the 'UNIVERSITY OF CALIFORNIA' logo and 'UCPath' text. Below the header, the page title 'Smart HR Transactions' is displayed, followed by the instruction 'Select a template and press Create Transaction.'.

The main form area contains several fields and buttons:

- Transaction Template**: A section with a 'Transaction Type' dropdown menu (currently set to 'All') and a 'Select Template' search field. A blue callout box points to this section with the text: 'Use the **Select Template** field to select the appropriate template.'
- Effective Date**: A date input field with a calendar icon. A blue callout box points to this field with the text: 'Enter the **Effective Date** (date the transaction becomes current).'
- Create Transaction**: A button located to the right of the 'Effective Date' field.
- Refresh**: A button located below the 'Transaction Type' dropdown.
- Transactions in Progress**: A section with a status message 'You do not have any transactions in progress.' and a table with columns 'Go To' and 'Transaction Status'.



Enter Transaction Details Page

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

Smart HR Transactions

Enter Transaction Details

The following transaction details are required.

Template UC Full Hire - Staff Only

Organizational Relationship Employee

*Employee ID

*Effective Date

Action Hire

*Reason Code

*Address Format

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.

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: Retirement 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

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.



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.

The screenshot shows the 'Smart HR Transactions' interface for a 'Staff Full Hire Template'. The page has a header with the title 'Enter Transaction Information' and a link to 'Click here to view Header Details'. Below the header is a tabbed interface with five tabs: 'Personal Data', 'Job Data', 'Earnings Dist', 'Addl Pay', and 'Employee Experience'. The 'Personal Data' tab is currently selected and highlighted with a red border. The form is organized into several sections: 'Employee Information' (Primary Name - English) with fields for First Name (Herman), Middle Name, Last Name (Sevilla), and Name Suffix; 'Birthday Information' with a Date of Birth field; 'Diversity - United States' with a Personalize link, Find button, View All link, and a list of Ethnic Groups (1); 'Personal Data - United States' with a Military Status dropdown; 'Person Education Level' with a Highest Education Level dropdown (A); 'Person National ID United States' with a National ID Type dropdown (PR) and a National ID field; and 'Person Address 01 - United States' with fields for Address Type (Home), Address Line 1 (124 Main St), Address Line 2, City (Irvine), State (CA), Postal Code (93827), and County.

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 (*).

Smart HR Transactions
Enter Transaction Information

Click here to view Header Details

Personal Data | Job Data | Earns Dist | Addl Pay | Employee Experience

Employee Information

Primary Name - English

*First Name Middle Name

*Last Name Name Suffix

Birthday Information

Date of Birth

Diversity - United States Personalize | Find | View All | First 1 of 1 Last

Ethnic Group

Personal Data - United States

Military Status

Person Education Level

Highest Education Level

Person National ID United States

National ID Type National ID

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.

The screenshot displays the 'Personal Data' tab in the UCI UCPATH system. The form is organized into several sections:

- UC Oath Date:** Includes a field for 'Oath Signature Date'.
- Person Phone Number:** Features a 'Personalize' link, 'Find', 'View All', and 'First' buttons. It contains a 'Phone Type' dropdown, a 'Telephone' input field, and a 'Preferred' checkbox.
- Person Email Address:** Similar to the phone section, it includes a 'Personalize' link, 'Find', 'View All', and 'First' buttons, an 'Email Type' dropdown, an 'Email Address' input field, and '+' and '-' buttons.
- UC Patent Acknowledgment:** Contains a 'Patent Acknowledgment Sign Dt' field and a checkbox for 'Modified Patent Ackmnt Sign Dt'.
- UC External System ID:** Includes a 'Business Unit' search field, an 'External System' search field, and an 'External System ID' input field.
- UC I-9 Information:** Features a 'Tracker Profile ID' input field and a checkbox for 'Remote I-9 Section 2'.
- Comments:** A large text area for entering transaction details.

At the bottom of the form, there are buttons for 'Return to Enter Transaction Details Page', 'Save and Submit', 'Save for Later', 'Cancel', and 'Supporting documents'. Below these buttons, the 'Transaction ID' is set to 'NEW'. The 'Initiator Comments' field is empty. The 'Requester ID' is '10268904' and the requester is 'SAngel Rivera - UCI'. The 'Requested' field is empty.



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.

Click here to Hide Header Details

Template: UC_FULL_HIRE Name: Action/Action Reason: HIR
Effective Date: 11/09/2018 Employee Record:
Employee ID: NEW

Personal Data **Job Data** Earnings Dist Addl Pay Employee

Employee Information

Work Location - Position Data

*Position Number #0120014

Work Location - Job Fields

Business Unit IRCMP
Location Code C-9132

Job Information - Job Code

Job Code 000355

Job Information - United States

FLSA Status Exempt

Job Labor - Union Code

Union Code 99 Union Security Date

Job Information - Reporting Information

Reports To Position Number

Job Information - Employee Classification

*Employee Classification Classified/Unclassified Management & Sr Professional Ind

Job Information - Standard Hours

Standard Hours 17.200000 FTE 0.430000

UC Job Data

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

Look Up Position Number

Position Number	begins with ▾	<input type="text"/>
Description	begins with ▾	<input type="text"/>
Position Status	= ▾	<input type="text"/> ▾
Business Unit	begins with ▾	<input type="text"/> 🔍
Department	begins with ▾	<input type="text"/> 🔍
Job Code	begins with ▾	<input type="text"/> 🔍
Reports To Position Number	begins with ▾	<input type="text"/>

Look Up

Clear

Cancel

Basic Lookup



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

1. **Vacant position** – 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.

Changing Job FTE

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

ERIT/ Phased Retirement End Date should be left blank.

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

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

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.

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

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

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.

Location Use Type

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

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 PY Career Duration

UC Employee Review

Review Type Next Review Date

Job - Salary Plan

Salary Administration Plan Salary Grade

Step

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.

UC Job Data

Academic Duration of Appt

Location Use End Date

Location Use Type

Post Docs Anniversary Date

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

Job Compensation - Pay Components

Comp Rate Code	Compensation Rate	Compensation Frequency	Rate Code Source
1 UCHRLY	18.550000	H	Salary Step

Work Location - Expected Job End Date

Expected Job End Date

Job Compensation - Payroll Currency and Frequency

*Compensation Frequency

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.

The screenshot displays the UCPath interface for a job's compensation details. It is divided into two main sections: 'Job - Salary Plan' and 'Job Compensation - Pay Components'.

Job - Salary Plan

Salary Administration Plan	T003	Salary Grade	2
Step	2		

Job Compensation - Pay Components

Personalize | Find | View All | [Grid Icon] | [Print Icon] | 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:

The screenshot displays the 'Job - Salary Plan' template in the UCPath system. It includes fields for 'Salary Administration Plan' (T001), 'Salary Grade' (1), and 'Step' (7). A yellow callout box explains that the 'Step' entry defaults the 'UCANNL Comp Rate Code' and the 'Compensation Rate', and that the 'UCOFF1' amount may also be added.

Job Compensation - Pay Components

Comp Rate Code	Compensation Rate	Compensation Frequency	Rate Code Source
1 UCANNL	137000.000000	A	Salary Step
2 UCOFF1	47500.000000	A	Manual

Job Compensation - Payroll Currency and Frequency

*Compensation Frequency: C

Work Location - Expected

Expected Job End Date: ☐ End Job Automatically

A yellow callout box points to the 'Compensation Frequency' field, stating: 'The Compensation Frequency is C.'

Contract Pay – Prorated Sample

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

The screenshot displays the 'Job - Salary Plan' section of the UCPath system. It shows 'Salary Administration T018 Plan' and 'Salary Grade I'. Below this, 'Step 1' is indicated. A yellow callout box points to the 'Comp Rate Code' field, stating: 'The **Comp Rate Code** was manually entered as **UCCNTR**. This allowed the Location to prorate and manually update the Compensation Rate.'

The 'Job Compensation - Pay Components' section contains a table with the following data:

Comp Rate Code	Compensation Rate	Compensation Frequency	Rate Code Source
1 UCCNTR	40102.000000	A	Manual

Below this, the 'Job Compensation - Payroll Currency and Frequency' section shows 'Compensation Frequency' set to 'C'. A yellow callout box points to this field, stating: 'The **Compensation Frequency** is **C** which allowed the Location to override the **Comp Rate Code**.'

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.



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.

The screenshot shows the 'Job Compensation - Pay Components' form in UCPATH. The form has a header with 'Personalize | Find | View All |' and navigation buttons. Below the header is a table with columns: 'Comp Rate Code', 'Compensation Rate', 'Compensation Frequency', and 'Rate Code Source'. The first row contains the values: '1 UCHRLY', '18.550000', 'H', and 'Salary Step'. Below the table is a section titled 'Work Location - Expected Job End Date' which contains a text field labeled 'Expected Job End Date' with a calendar icon. This field is highlighted with a red box. Below this is another section titled 'Job Compensation - Payroll Currency and Frequency' which contains a text field labeled '*Compensation Frequency' with a value of 'H' and a search icon.

- ◆ 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.

The screenshot displays the UCPath system interface for 'Job Compensation - Pay Components'. The interface includes a table with columns for 'Comp Rate Code', 'Compensation Rate', 'Compensation Frequency', and 'Rate Code Source'. The first row shows 'UCANNL', '93400.000000', 'A', and 'Salary Step'. Below the table, there is a section for 'Job Compensation - Payroll Currency and Frequency' with a field for '*Compensation Frequency' set to 'M'. The 'Work Location - Expected Job End Date' section is highlighted with a red box, showing the 'Expected Job End Date' field and the 'End Job Automatically' checkbox, which is currently unchecked. The interface also includes navigation links like 'Personalize', 'Find', 'View All', and 'Return to Previous Page'.

Comp Rate Code	Compensation Rate	Compensation Frequency	Rate Code Source
1 UCANNL	93400.000000	A	Salary Step

Job Compensation - Payroll Currency and Frequency

*Compensation Frequency M

Work Location - Expected Job End Date

Expected Job End Date ☐ End Job Automatically

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	<ul style="list-style-type: none">• Contract• Limited• Student• Floater• Rehired Retiree
Academic Employees	<ul style="list-style-type: none">• Contingent Worker – Academic• Non-senate academics, the general groupings include:<ul style="list-style-type: none">• 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.

Personal Data	Job Data	Earns Dist	Addl Pay	Employee Experience
Employee Information				
Work Location - Position Data				
*Position Number 40119971				
Work Location - Job Fields				
Business Unit IRCMP		Department IR8071		
Location Code C-9100		Establishment ID UCI		
Job Information - Job Code				
Job Code 000280				
Job Information - United States				
FLSA Status Exempt				
Job Labor - Union Code				
Union Code 99				
Union Seniority Date				
Job Information - Reporting Information				
Reports To Position Number				
Job Information - Employee Classification				
*Employee Classification 2				
Classified/Unclassified Ind Management & Sr Professor				
Job Information - Standard Hours				
Standard Hours 40.000000				
FTE 1.000000				



Full Hire Template

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**.

Personal Data | Job Data | **Earns Dist** | Addl Pay | Employee Experience

Employee Information

Job Earnings Distribution Type

Earnings Distribution Type: Aggregate Comp Rate:

Job Earnings Distribution Personalize | Find | View All | | First 1 of 1 Last

	Earnings Code	Compensation Rate	Percent of Distribution		
1				<input type="button" value="+"/>	<input type="button" value="-"/>

[Return to Enter Transaction Details Page](#)

[Supporting documents](#)

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.

Personal Data | Job Data | **Earns Dist** | Addl Pay | Employee Experience

Employee Information

Job Earnings Distribution Type

Earnings Distribution Type: By Amount (dropdown) | Aggregate Comp Rate: 7933.330000

Job Earnings Distribution | Personalize | Find | View All | 1-2 of 2 | First | Last

Earnings Code	Compensation Rate	Percent of Distribution
1 HSP	2000.000000	+ -
2 HSR	5933.330000	+ -

Return to Enter Transaction Details Page

Save and Submit | Save for Later | Cancel | Supporting documents





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.



Full Hire Template

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).

The screenshot displays the 'Add Pay' tab in a web-based HR system. The 'Employee Information' section is active, showing a table for 'Additional Pay'. A red box highlights the first entry in the table, which is a recurring payment. The entry details are as follows:

Effective Date	Earnings Code	Reason for Additional Pay	Earnings End Date	Add'l Pay Amount	Hou
06/24/2019	SAS	New Additional Pay	06/26/2020	500.00	

Below the table, there are buttons for 'Save and Submit', 'Save for Later', and 'Cancel', along with a link for 'Supporting documents'. The page also includes navigation links like 'Personal Data', 'Job Data', 'Earns Dist', and 'Employee Experience' at the top.

Example of recurring additional pay setup on hire template

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.

Personal Data | Job Data | Earns Dist | Addl Pay | **Employee Experience**

Employee Information

Employee Experience Personalize | Find | View All | First 1 of 1 Last

	Employer Name	Job Description	Start Date	End Date	UC Relevant Experience	UC Relevant
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

< >

Return to Enter Transaction Details Page

Save and Submit | Save for Later | Cancel | Supporting documents

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.

Template: UC_FULL_HIRE_AC Name: Action/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation)
 Effective Date: 10/07/2019 Employee Record:
 Employee ID: NEW


Personal Data Job Data Earns Dist Add Pay **Person Profile**

Employee Information


JPM Degrees





*Effective Date  *Degree 
 Education Field  School 
 State  ☐ Terminal Degree for Discipline
 School Description
 Year Acquired



UC Oath Date

Oath Signature Date 

UC Patent Acknowledgment

Patent Acknowledgment Sign Dt  ☐ Modified Patent Ackmnt Sign Dt

Employee Experience Personalize | Find | View All |   First  1 of 1  Last

	Employer Name	Job Description	Start Date	End Date	UC Relevant Experience	UC Relevant
1	<input type="text"/>	<input type="text"/>	<input type="text"/> 	<input type="text"/> 	<input type="checkbox"/>	<input type="checkbox"/>

[Return to Enter Transaction Details Page](#)

 [Supporting documents](#)

Transaction ID: NEW

Initiator Comments:



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.

A screenshot of a web form titled "UC I-9 Information". The form has a light blue header bar with the title. Below the header, there is a label "Tracker Profile ID" followed by a text input field. To the right of the input field, there is a checkbox labeled "Remote I-9 Section 2". The entire form is framed with a decorative, torn-edge border.

UC I-9 Information

Tracker Profile ID

☐ Remote I-9 Section 2

- 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

The screenshot displays the UCI UCPath system interface. The main window has tabs for 'Description', 'Specific Information', 'UC Position Data', and 'Supervisor'. The 'Position Information' tab is active, showing fields for Position Number (NEW), Headcount Status (Open), Effective Date (11/08/2019), Reason (NEW), Position Status (Approved), Business Unit (IRCMP), Job Code, Reg/Temp, Shift (Not Applicable), and Title. A red arrow points to the 'Job Code' field. The 'Job Information' tab is also visible, showing fields for Reg Region (USA), Department, Location, Reports To, and Supervisor Lvl. A search results window is open on the right, showing a list of job codes starting with 'CWR'.

SEARCH UCSPR

Job Code begins with CWR

Description begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-21 of 21 Last

Job Code	Description
CWR001	UCB Student Facilitator
CWR002	LBL/DOE Post Doc
CWR003	Visiting Student Res-Graduate
CWR004	Staff Intern
CWR005	Affiliated Research Institute
CWR006	Ind Contractor/Consultnt
CWR007	Clin Assoc/Admitting Physician
CWR009	Temp Agency Staff-Health
CWR010	Temp Agency Staff-Non UC
CWR011	Staff Volunteer
CWR012	Traveling Nurse
CWR013	Community College Instructor
CWR014	Affiliated Organization
CWR015	Visiting Scholar
CWR016	Visiting Student Res-UnderGrad
CWR017	UC Employee - Different BU
CWR018	UC Board of Regents
CWR019	Staff Emeritus
CWR020	Student Volunteer
CWR021	Research Fellow
CWR022	Research Associate



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.



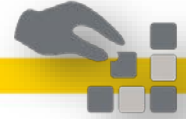
Templates – Additional Notes

- ◆ 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.



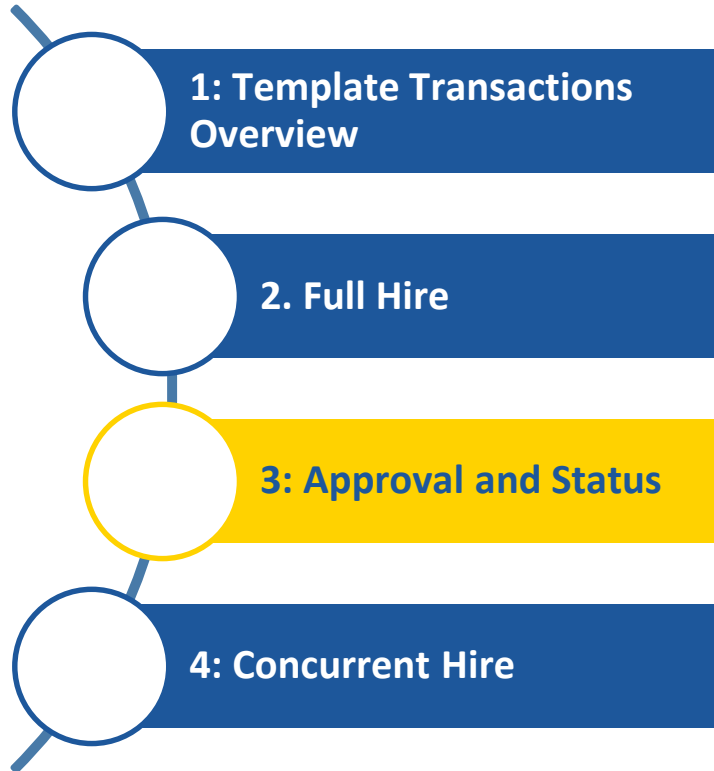


LESSON 3

Approvals and Transaction Status



Lesson Objectives



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.**

HIRE

Transaction: T000014303, ID: NEW, Effdt: 2019-02-08, Unit: IRCMP:Pending

HIRE

Pending

Multiple Approvers

Approver 1 - Hire

Approver 1 shows when there is only one level of approvals.

Initiator is not an approver

HIRE

Transaction: T000014297, ID: NEW, Effdt: 2019-02-07, Unit: IRCMP:Pending [View/Hide Comments](#)

HIRE

Status	Approvers
Skipped	Andrea Garrison Approver 1 - Hire 02/05/19 - 4:37 PM
Pending	Multiple Approvers Approver1 - Hire

Comments

The initiator is also an AWE approver. The initiator was skipped because you cannot approve your own transactions in UCPATH.

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.

The image displays two screenshots of the HIRE approval workflow interface. The top screenshot shows a workflow step labeled 'Approved' with a green checkmark, indicating it has been completed by 'SCarolyn Murry - UCI' on 12/07/18 at 2:40 PM. A red arrow points to a small green square icon with a white plus sign (⊕) next to the step. A dropdown menu is open, showing the option 'Insert additional approver or reviewer' and a search bar for 'User ID:'. The bottom screenshot shows the same workflow, but with an additional step added: 'Reviewer' by 'SSheila Mercer - UCI' on 6/3, followed by 'Pending' by 'SAngel Rivera - UCI' as an 'Inserted Approver'. A red box highlights these two new steps.

HIRE

Transaction: T000014096, ID: NEW, Effdt: 2018-11-01, Unit: IRCMP:Pending

HIRE

Approved

SCarolyn Murry - UCI
Approver 1 - Hire
12/07/18 - 2:40 PM

Insert additional approver or reviewer

Choose an approver or reviewer to insert

User ID:

Insert as:

HIRE

Transaction: T000014096, ID: NEW, Effdt: 2018-11-01, Unit: IRCMP:Pending

HIRE

Approved

SCarolyn Murry - UCI
Approver 1 - Hire
12/07/18 - 2:40 PM

Reviewer

SSheila Mercer - UCI
Reviewer
6/3

Pending

SAngel Rivera - UCI
Inserted Approver



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).

The screenshot shows the UCPath AWE Approver interface for a Hire transaction. At the top, it displays 'Transaction Details' with 'Transaction ID: T000014096' and 'Transaction Status: Pending'. Below this is a 'Hire Details' table with columns: Name, Type of Hire, Start Date, Action, and Country. The table contains one row for 'Cassandra Perty', an Employee, hired on 11/01/2018, with Action 'HIR' and Country 'USA'. Below the table is an 'Initiator Comment' field. Further down, it shows 'Requester ID: 10125222' and 'Requester: \$Karen Tano - UCI'. The 'Requested' date and time are '12/07/18 9:43:54.000000AM'. A red box highlights three buttons: 'Approve', 'Pushback', and 'Deny'. Below these is an 'Approver Comment' field. At the bottom, a 'HIRE' section shows the transaction details: 'Transaction: T000014096, ID: NEW, Effdt: 2018-11-01, Unit: IRCMP:Pending'. Below this, a green box indicates 'Approved' by '\$Carolyn Murry - UCI' as 'Approver 1 - Hire' on '12/07/18 - 2:40 PM'. A blue arrow points from the 'Pushback' button in the red box to the 'Approver Comment' field.

* 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**

Not Available

Primary Title:
Not Available

Employee ID:
Not Available

Service Date:
Not Available

Das < P < Workforce Admini...

Peo My Personal Informati2.

Wo Self Job Information >

Boc Mar Smart HR Template

Emg Rec

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Qui Ben

UNIVERSITY
OF
CALIFORNIA
drpit03

UCPath

SS Smart HR Transactions

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

▼ Search Criteria

Transaction ID begins with ▼

Name begins with ▼

Empl ID begins with ▼


Action begins with ▼

Approval Status = ▼

☐ Case Sensitive

Search

Clear

Basic Search 

Save Search Criteria



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.

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

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

The screenshot displays the 'SS Smart HR Transactions' interface. At the top, the 'Transaction Status' is 'Approved'. Below this, the 'Transaction Details' section shows 'Transaction ID T000013646'. The 'Hire Details' table lists one transaction for 'Bojan Petrovic', an 'Employee' hired on '06/02/2018' with action 'TER' and country 'USA'. Below the table are fields for 'Initiator Comment', 'Requester ID 10272906' (Mick Fisher), 'Requested' date/time, and 'Approver Comment'. The 'Vol Termination' section shows the transaction details: 'Transaction: T000013646, ID: 10123918, Effdt: 2018-06-02, Unit: IRCMP:Approved'. It lists two approvers: 'SSheila Mercer - UCI' (Approved) and 'Mick Fisher' (Skipped). A 'Comments' section is at the bottom. Navigation buttons like 'Return to Search', 'Previous in List', 'Next in List', and 'Notify' are at the very bottom.

Name	Type of Hire	Start Date	Action	Country
1 Bojan Petrovic	Employee	06/02/2018	TER	USA

Transaction Status: Approved

Transaction ID: T000013646

Transaction: T000013646, ID: 10123918, Effdt: 2018-06-02, Unit: IRCMP:Approved

Vol Termination

Approved

SSheila Mercer - UCI
Vol Termination A2
10/29/18 - 11:01 AM

Skipped

Mick Fisher
Vol Termination A2
10/29/18 - 10:17 AM

Comments

Return to Search Previous in List Next in List Notify

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

Business Unit

Transaction Type

Empl ID

Transaction Status

First Name

Start Date From To

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
<input type="checkbox"/>	UC_REHIRE	09/16/2018	Hired/Added	10025725	0	Rehire	RVCMP	Chris	Desarant		
<input type="checkbox"/>	UC_CONC_HIRE_AC	09/16/2018	Hired/Added	10024915	1	Hire	RVCMP	Jasmine	Perez Cristobal		
<input type="checkbox"/>	UC_CONC_HIRE_AC	09/16/2018	Cancel	10020900	2	Hire	RVCMP	Jing	Nyitray	View Comments	
<input type="checkbox"/>	UC_CONC_HIRE_AC	09/16/2018	Hired/Added				RVCMP	Amanda	Chao		
<input type="checkbox"/>	UC_CONC_HIRE_AC	09/16/2018	Hired/Added				RVCMP	Amanda	Markovitz		
<input type="checkbox"/>	UC_CONC_HIRE_AC	09/16/2018	Cancel				RVCMP				
<input type="checkbox"/>	UC_CONC_HIRE_AC	09/16/2018	Hired/Added				RVCMP				
<input type="checkbox"/>	UC_CONC_HIRE_AC	09/16/2018	Hired/Added	10031506	1	Hire	RVCMP				
<input type="checkbox"/>	UC_CONC_HIRE_AC	09/16/2018	Cancel	10029577	2	Hire	RVCMP				
<input type="checkbox"/>	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.

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

If a transaction is cancelled, you can View Comments to see why it was cancelled, the Clone the existing template information into 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.

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

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

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.



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

Transaction Type

Transaction Status

Start Date From To

Transaction Status

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

Select All Deselect All

[View Comments](#)

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



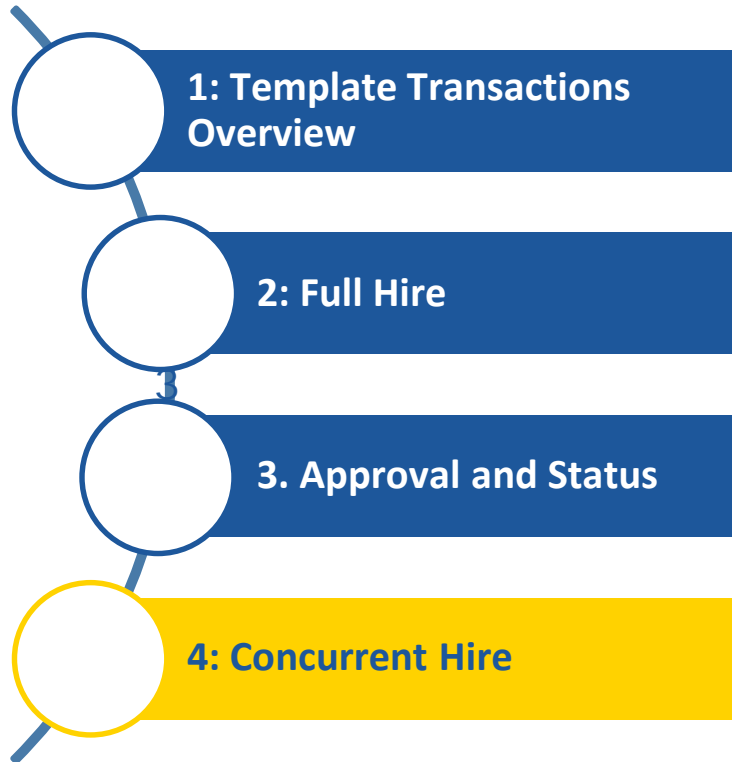
A large, blue, 3D-style curved arrow that starts pointing left and then turns downward to point right, framing the text.

LESSON 4

Concurrent Hire



Lesson Objectives



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*.

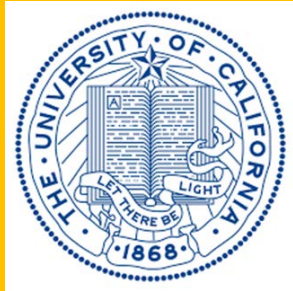
Available Templates

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

**Inter-location
(Multiple-Location)
across multiple Business
Units***



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

**Intra-location
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)

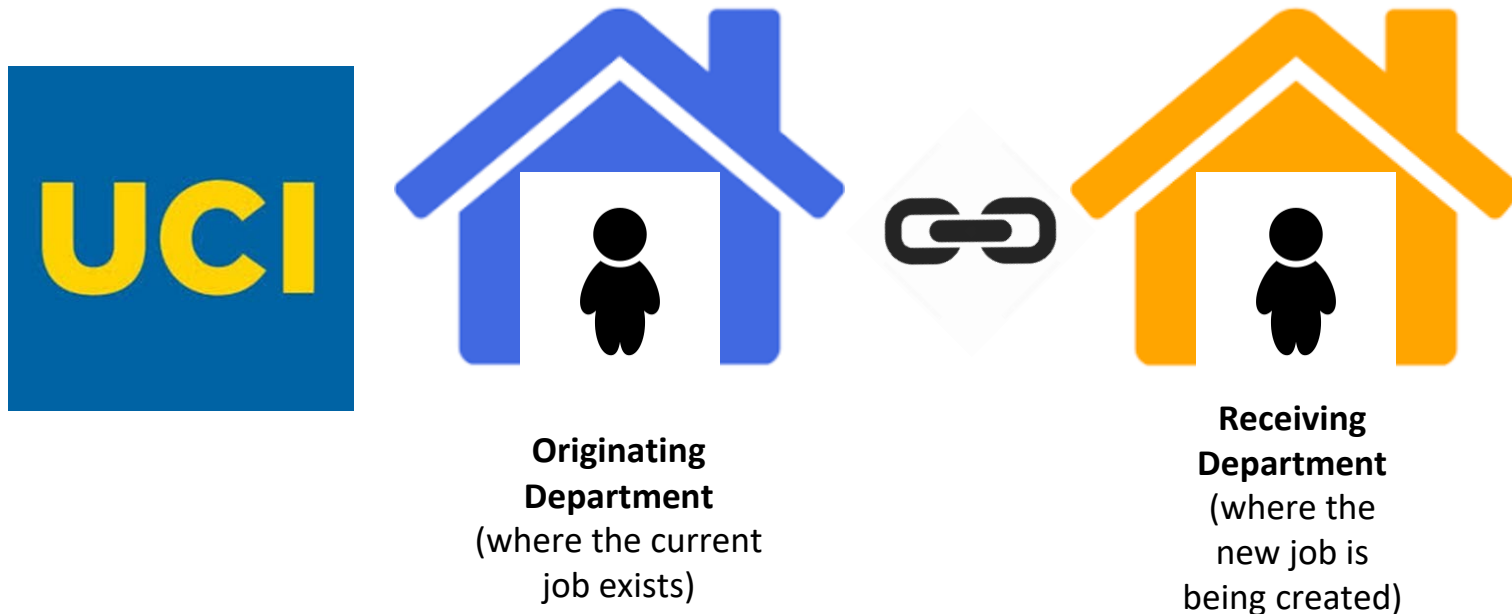
- ◆ If a concurrent job is between multiple Locations, the Location must complete a Multi-Location Agreement (MLA) form and attach it to the concurrent hire template transaction.
- ◆ Until all Locations are live on UCPath, use the following guidelines for new concurrent jobs between Locations.

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)



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

The screenshot displays the 'Salary Plan Information' form in UCPath. The form includes fields for 'Salary Admin Plan', 'Salary Grade', 'Step', 'Standard Hours' (set to 0.00), and 'Work Period'. Below these is a 'Salary Ranges' table with columns for 'Minimum', 'Midpoint', and 'Maximum'. At the bottom, there is a section for 'FLSA Status' with a dropdown menu. A red arrow points to the 'FLSA Status' dropdown, which is currently set to 'Nonexempt'. A blue arrow points to the dropdown menu, which is open and shows the following options: 'Exempt', 'No FLSA Required', 'Nonexempt', and 'Nonexempt Alt Overtime'. The 'Nonexempt' option is currently selected. Below the dropdown, there are fields for 'Updated on' and 'Updated By User'. At the bottom of the form, there are two buttons: 'Save for Later' and 'Cancel'.

Salary Ranges		
Minimum	Midpoint	Maximum

USA

FLSA Status: Nonexempt

Updated on: Updated By User:

Save for Later Cancel



Concurrent Hires - Dual Employment

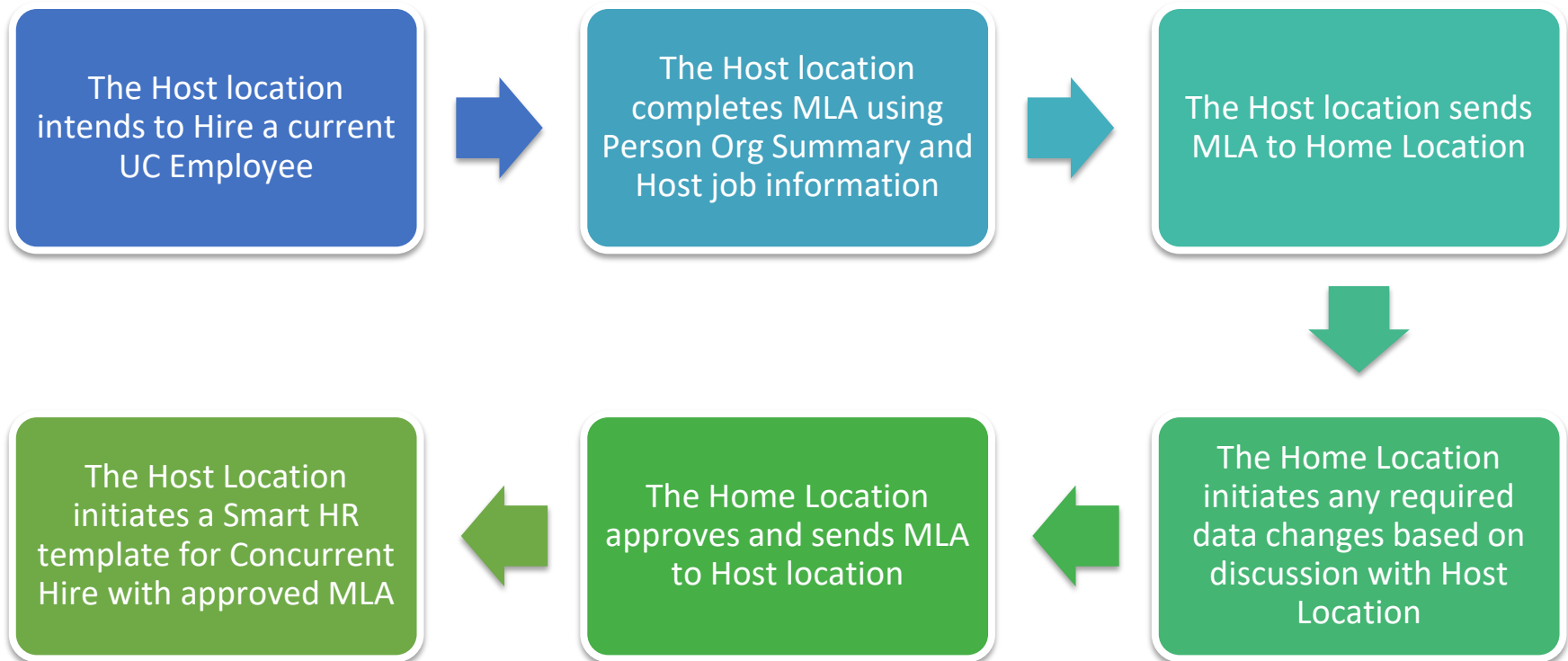
- ◆ Concurrent Hire process also covers **Dual Employment**.
- ◆ For Dual Employment, the additional appointment (job) is generally in another department.
 - Applies to **staff appointments only**.
 - Additional appointment is separate from any other job an employee holds.
 - Results in the employee 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



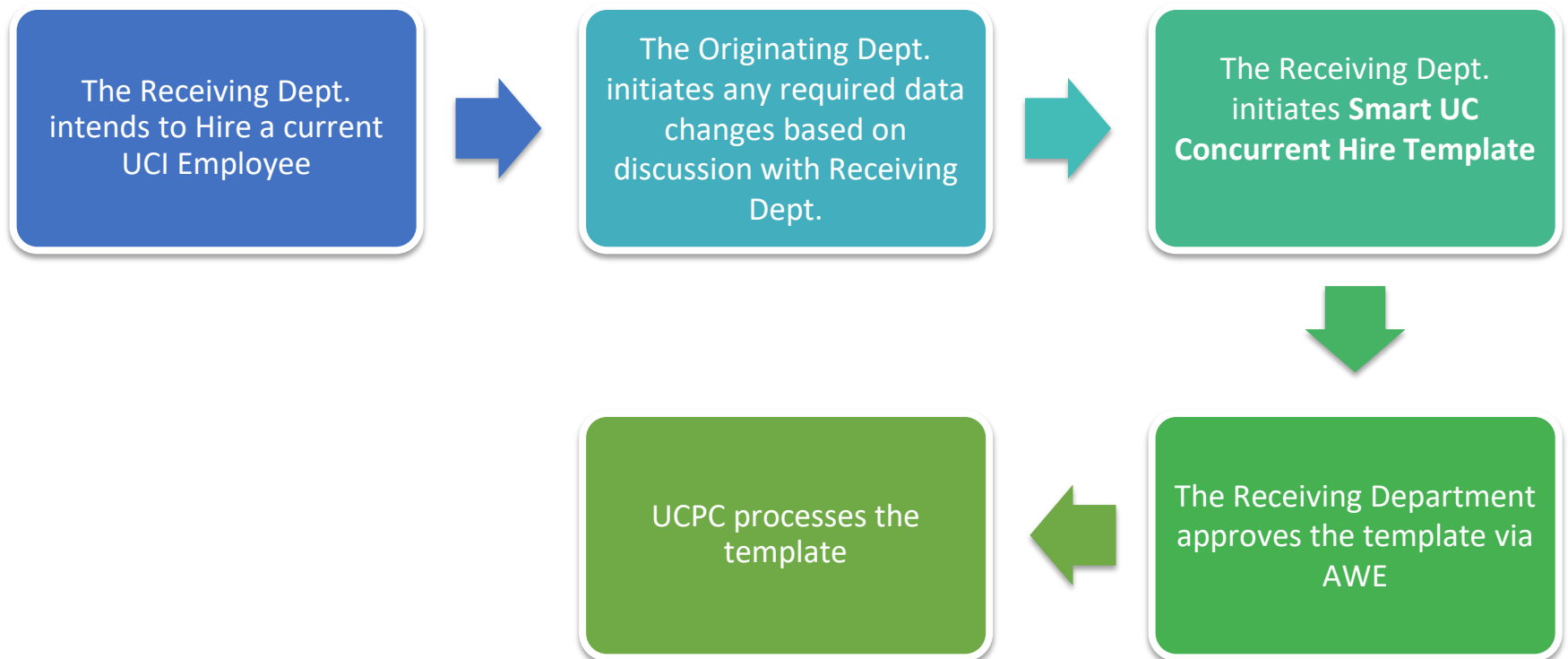
Process Overview for Inter-location Hires when **both locations are on UCPATH**.



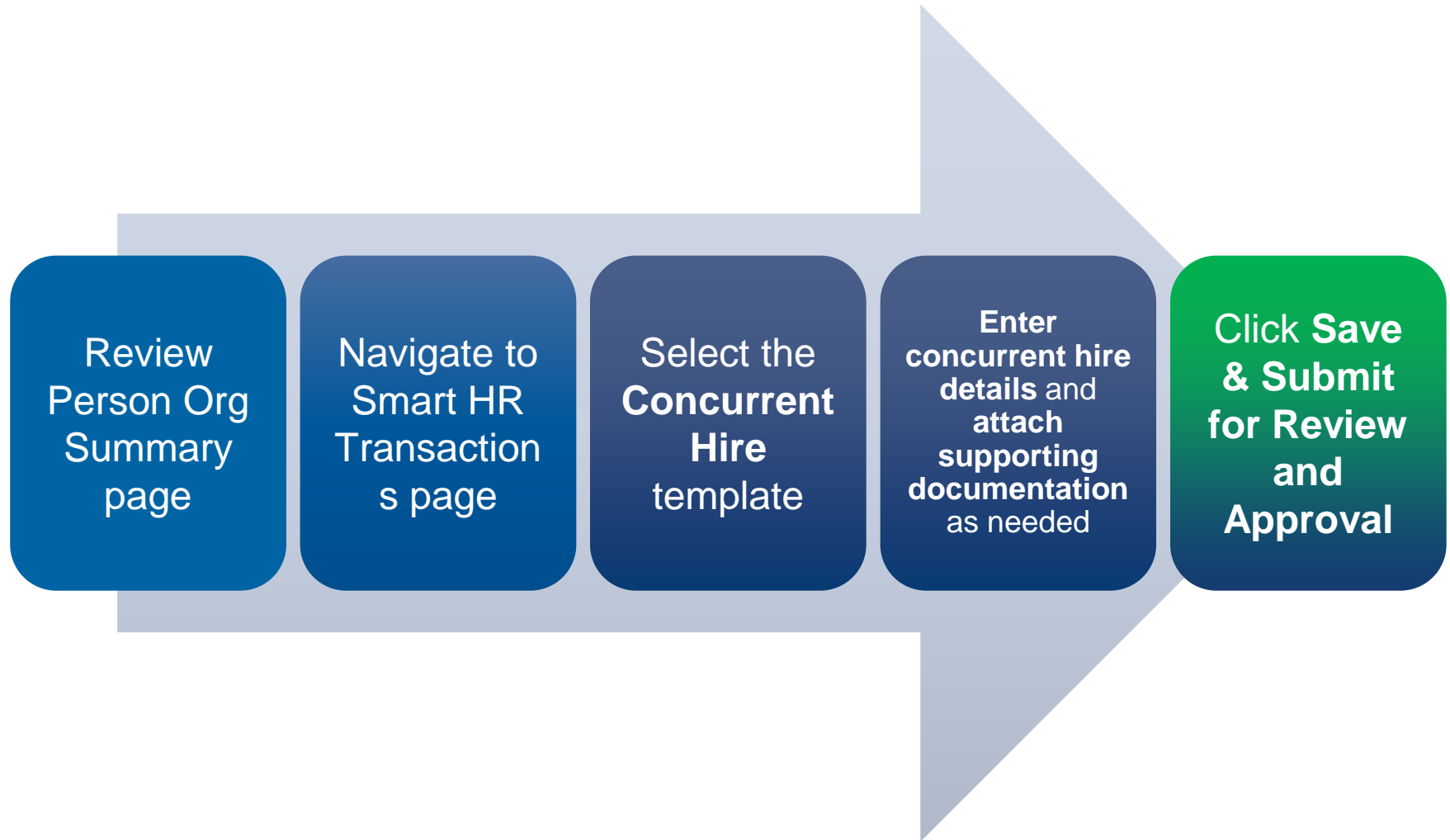
Intra-location Concurrent Jobs – Process Overview



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



Concurrent Hire – Key System Steps



Smart HR Transactions Page

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

Smart HR Transactions

Select a template and press Create Transaction.

Transaction Template ?

Transaction Type All

Select Template UC_CONC_HIRE x

Effective Date

Staff Concurrent Hire/Inter Location Transfer

Create Transaction

Refresh

Transactions in Progress ?

You do not have any transactions in progress.

Go To Transaction Status

Select the **concurrent hire** (staff or academic) template.

Enter the **effective date** of the transaction

Click **Create Transaction** to begin entry of the template transaction.



Enter Transaction Details Page

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

Smart HR Transactions

Enter Transaction Details

The following transaction details are required

Template: Academic Concurrent Hire/Inter Location Transfer

Organizational Relationship: Employee

*Employee ID: 10000000 Kirstin Bright

*Effective Date: 11/01

Action: Hire

*Reason Code:

*Address Format:

Important

Correct **Effective Date** and **Reason Code** are important entry points for many downstream processes.

Employee's current

Select the appropriate **Reason Code**.

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

Message

Person ID 10000000 already exists in the system for Kirstin Bright. (1007,61)

Select OK to continue the hire process with this Person ID. Select Cancel to enter a new Person ID.

*Reason Code

*Address Format

Concurrent Hire - Dual Empl

Concurrent Hire - Non Dual Emp

Transfer-Inter BU, Demotion

Transfer-Inter BU, Lateral

Transfer-Inter BU, Promotion

Transfer-Inter BU, Undefined



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.

Smart HR Transactions
Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_CONC_HIRE Name: Erin Greenfield
Effective Date: 06/25/2019 Action/Action Reason: HIR/DEE (Concurrent Hire - Dual Empl)
Employee ID: 10000495 Employee Record:

[Personal Data](#) | [Job Data](#) | [Earns Dist](#) | [Addl Pay](#)

Employee Information

Primary Name - English

*First Name Middle Name
*Last Name Name Suffix

Birthday Information

Date of Birth

Diversity - United States [Personalize](#) | [Find](#) | [View All](#) | [1](#) | [First](#) | [1 of 1](#) | [Last](#)

Ethnic Group
1

Person Education Level

Highest Education Level

Person Gender

*Gender Assigned at Birth

Person National ID United States

National ID Type National ID

Person Address 01 - United States

*Address Type Address Line 1
Address Line 2 City
State Postal Code
County



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.



Smart HR Templates – when to use which?

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.ucl.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!

