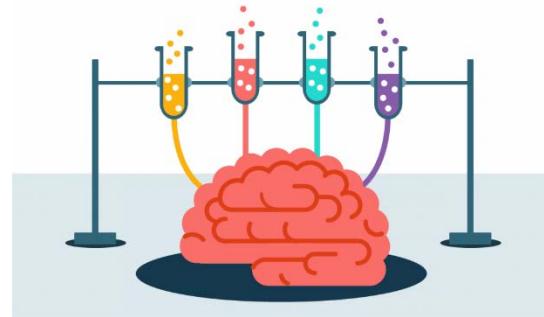


Template Transactions – Part 1

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



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)



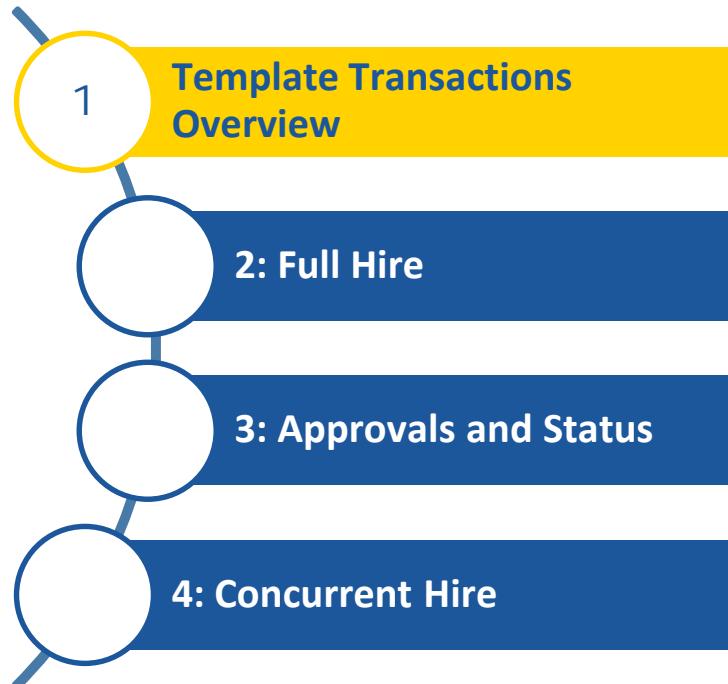


LESSON 1

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.

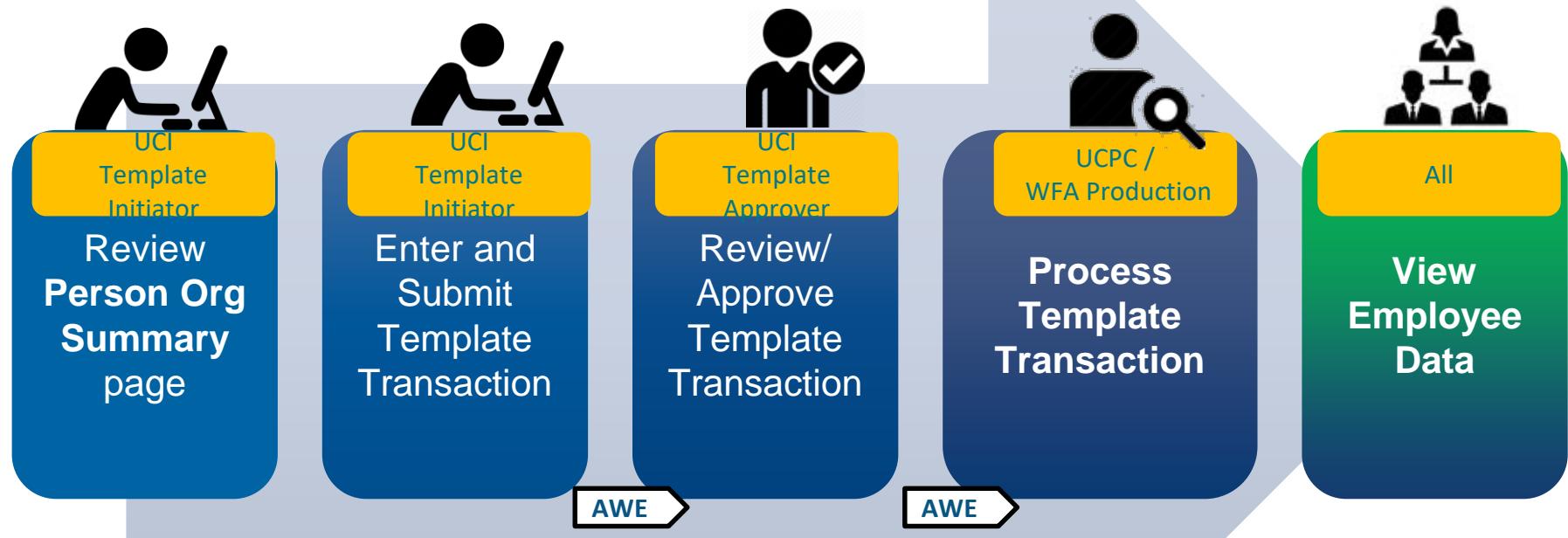
- ◆ Below is an example of what type of security is enabled for certain templates.

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	



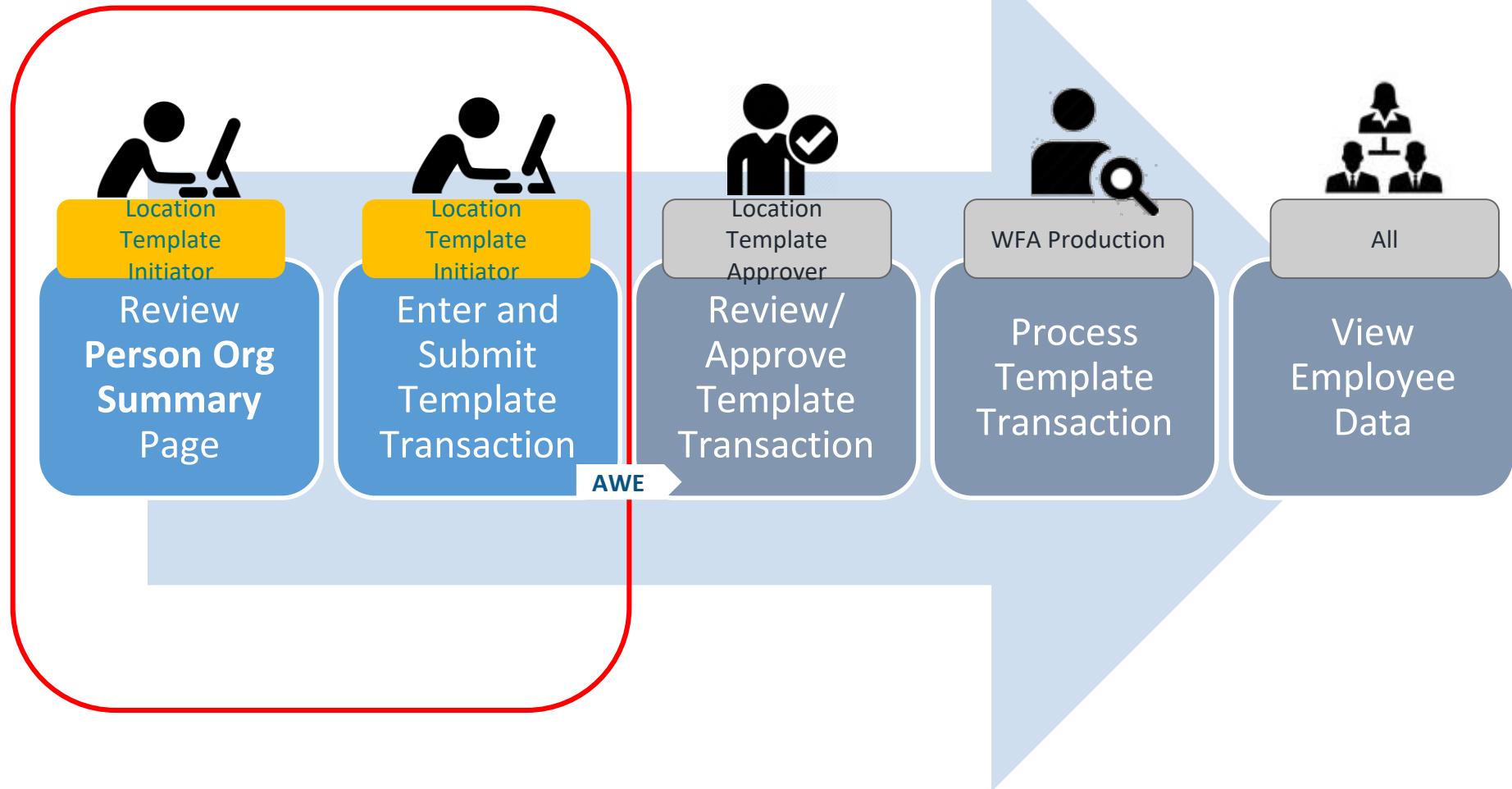
Template Transactions – System Process

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																																																													
<table border="1"><tr><td>ORG Instance</td><td>0</td><td>HR Status</td><td>Active</td><td>Last Hire</td><td>01/01/2016</td><td colspan="9"></td></tr><tr><td colspan="2">Primary Job: <input checked="" type="checkbox"/></td><td>Payroll Status</td><td>Active</td><td colspan="11">Termination Date</td></tr></table>															ORG Instance	0	HR Status	Active	Last Hire	01/01/2016										Primary Job: <input checked="" type="checkbox"/>		Payroll Status	Active	Termination Date																											
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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.



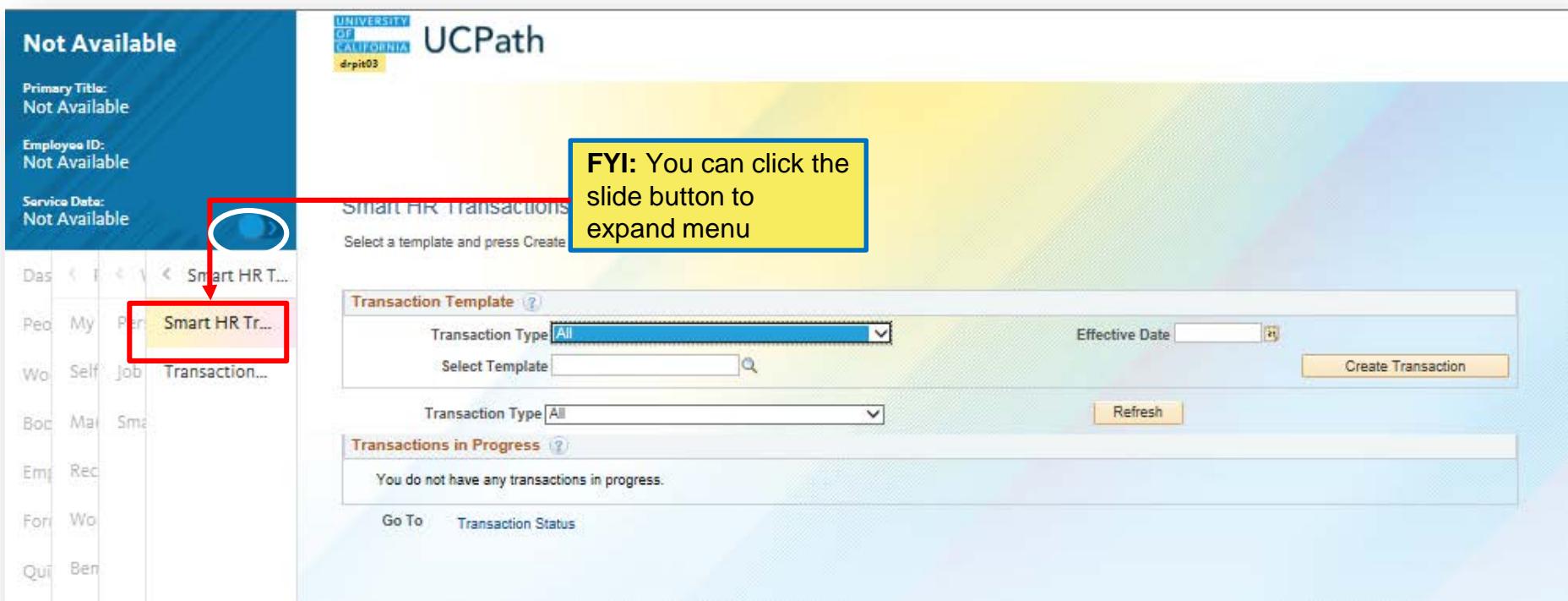
Navigating to SS Smart HR Templates



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 shows the 'Smart HR Transactions' page. On the left, a sidebar displays 'Not Available' for Primary Title, Employee ID, and Service Date. The main area has a blue header 'UCPath' with a user icon 'drpt03'. A red box highlights the 'Smart HR T...' link in the navigation bar, and a red circle highlights the slide button icon to its right. A yellow callout box with a blue border contains the text: 'FYI: You can click the slide button to expand menu'. The central content area includes a 'Transaction Template' section with dropdowns for 'Transaction Type' (set to 'All') and 'Select Template', and a 'Create Transaction' button. Below this is a 'Transactions in Progress' section stating 'You do not have any transactions in progress.' Navigation links 'Go To' and 'Transaction Status' are at the bottom.



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' page. At the top, a message says 'Select a template and press Create Transaction.' Below it, the 'Transaction Template' section is highlighted with a red border. It contains a 'Transaction Type' dropdown set to 'All', a 'Select Template' input field with a magnifying glass icon, an 'Effective Date' input field with a calendar icon, and a 'Create Transaction' button. A yellow callout box points to the 'Select Template' field with the text: 'Use the **Select Template** field to select the appropriate template.' Another yellow callout box points to the 'Effective Date' field with the text: 'Enter the **Effective Date** for the selected template.' A third yellow callout box points to the 'Create Transaction' button with the text: 'Click **Create Transaction** to enter the template details.' Below this, the 'Transactions in Progress' section is also highlighted with a red border. It shows a table with columns: Select, Transaction Type, Effective Date, Name, Person ID, Action, and Country. One row is visible: a checkbox, 'JOB', '09/25/2018', 'Jennifer Salazar', '10000021', 'Terminatn', and 'United States'. At the bottom of this section is a 'Delete Selected Transactions' button. A yellow callout box points to this button with the text: '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 very bottom of the page are links for 'Go To' and 'Transaction Status'.

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



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 [?](#)

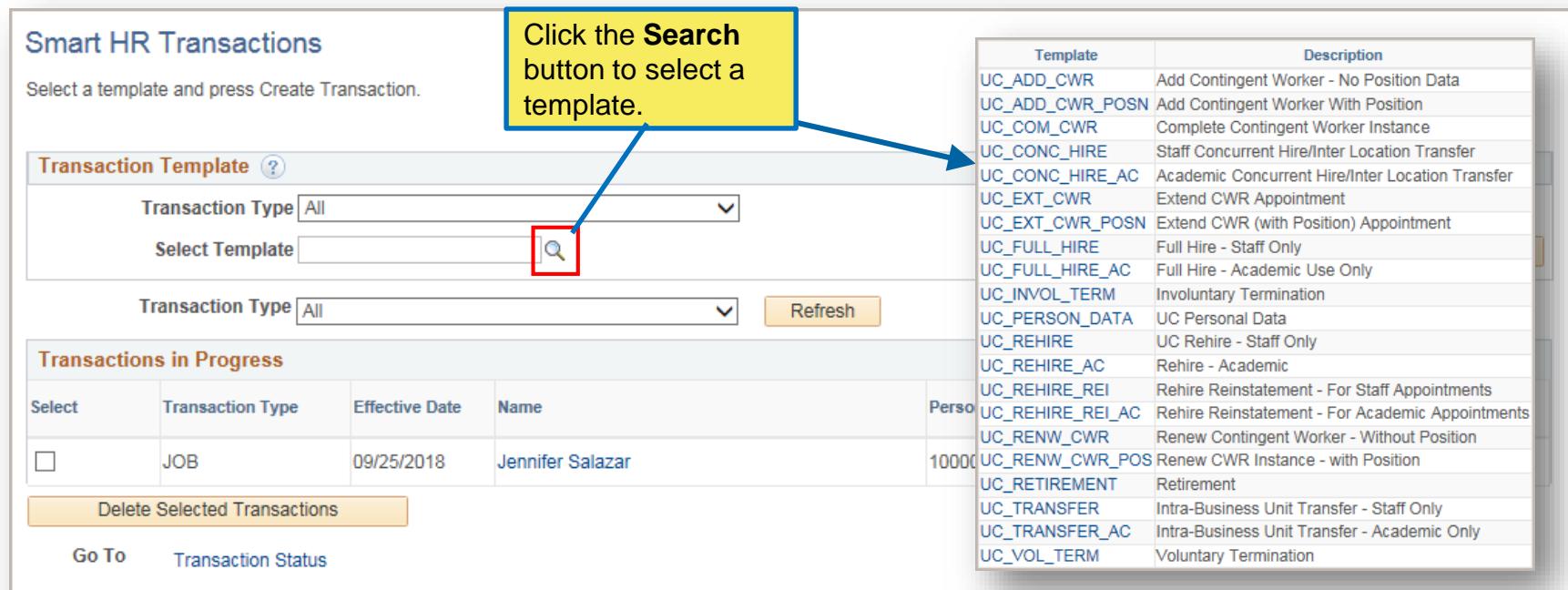
Transaction Type	All	<input type="button" value="▼"/>
Select Template	<input type="text"/>	
Transaction Type	All	<input type="button" value="▼"/>
<input type="button" value="Refresh"/>		

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_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



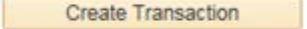
Smart HR Transactions – Create Transaction

- ◆ 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	
Transaction Type	All	Refresh		

Transactions in Progress

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** 

***Effective Date** 

Action Hire

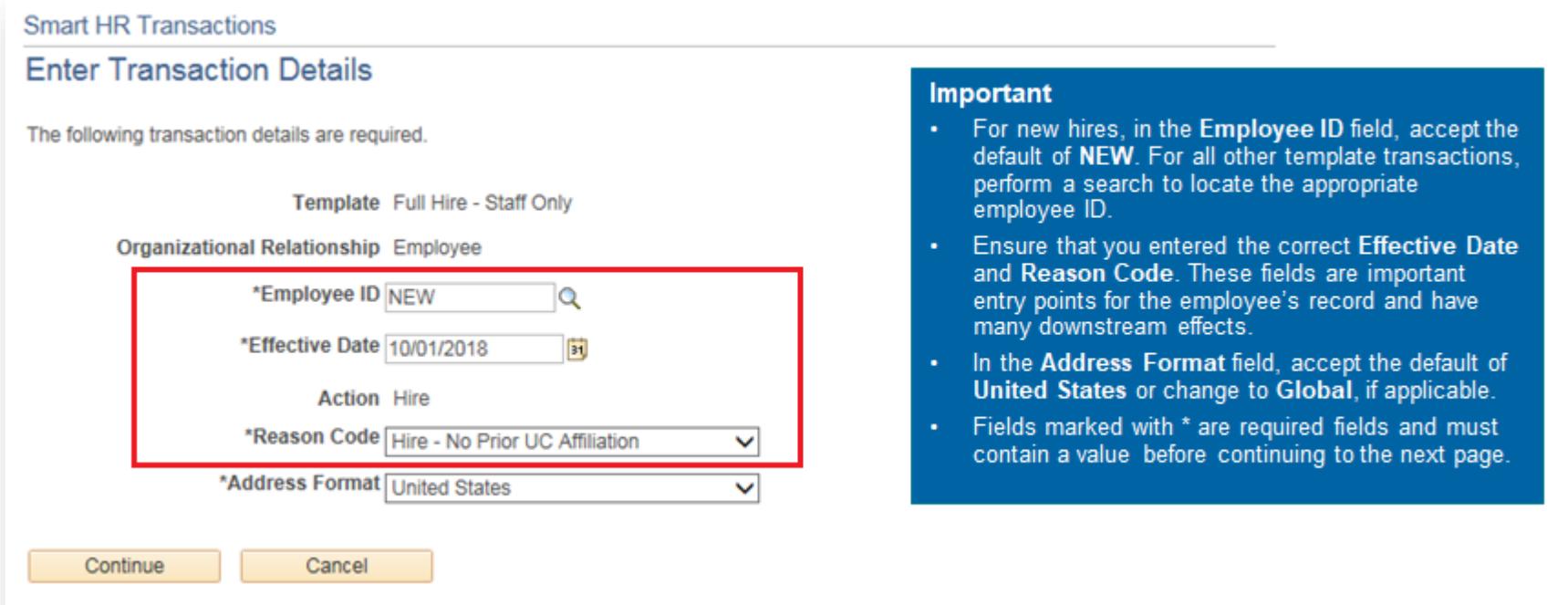
***Reason Code**

***Address Format**

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.

Continue Cancel





Template Transactions – Action Reason Codes and Descriptions

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



Template Transactions - Key Points



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



Lesson Objectives Review



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

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



Lesson Review

Knowledge Check:

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



Multiple Choice

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

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

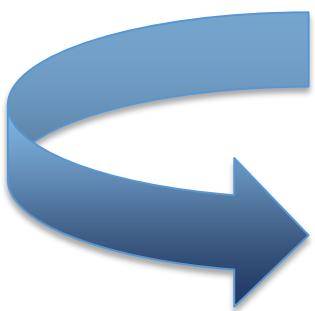


True or False

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

True.





LESSON 2

Full Hire



Lesson Objectives



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 employee's 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

Search Criteria

Search Type Person Ad Hoc Search

Search Parameter PERSON_SEARCH Person Search

Search Result Rule [?](#)

Search Result Code PERSON_RESULTS

User Default

Search Criteria [?](#)

Search Fields

National Id

First Name Search

Last Name Search

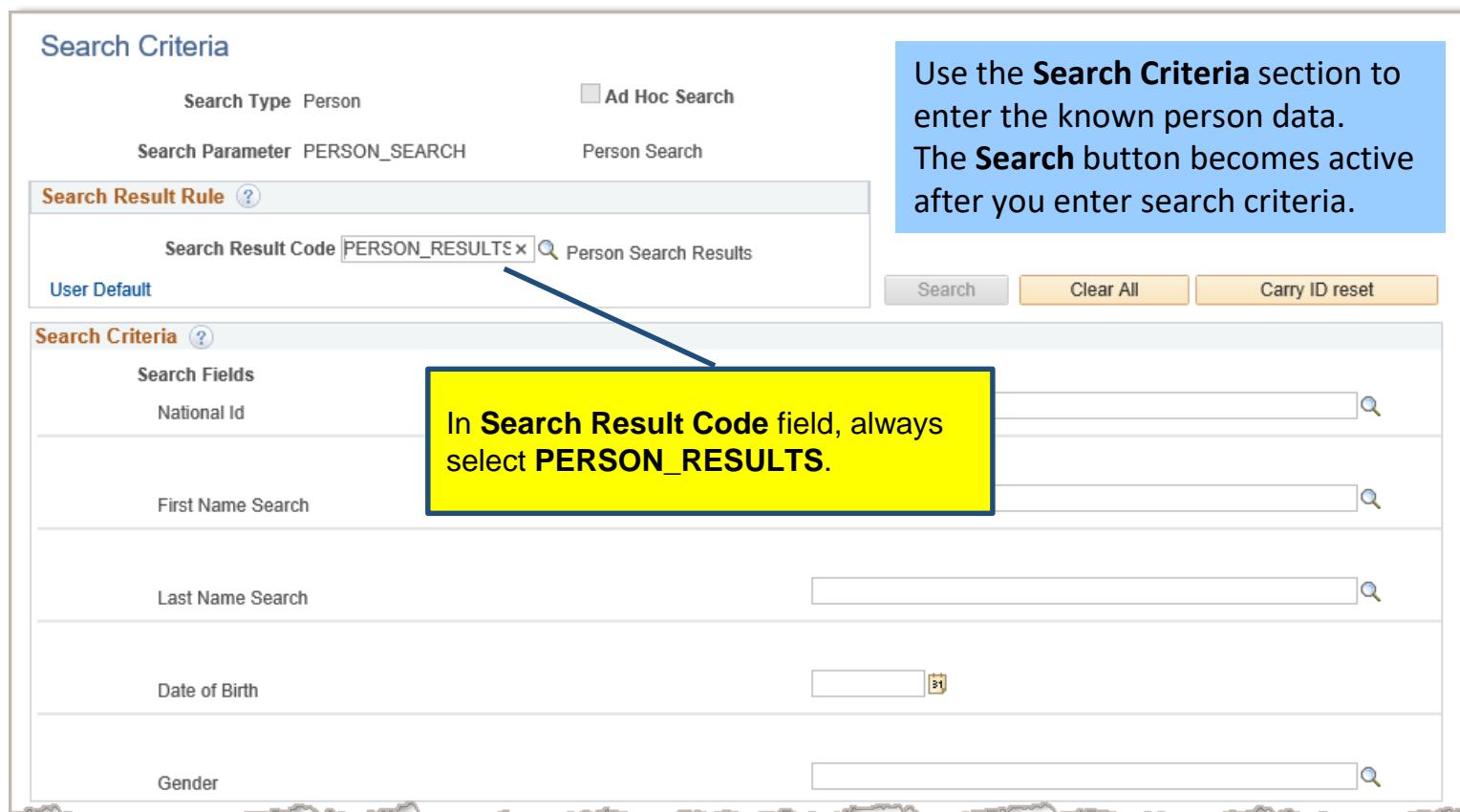
Date of Birth

Gender

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**.

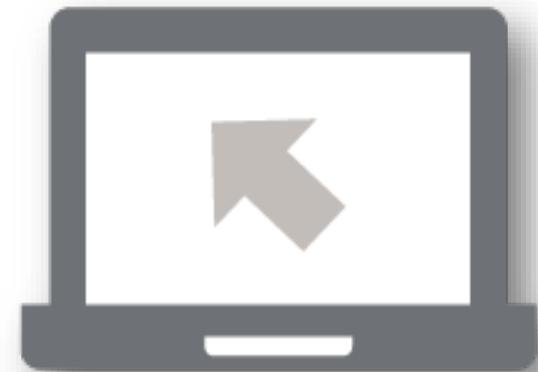
Search Clear All Carry ID reset



Instructor Demo UPK

Searching for People Using Search/Match

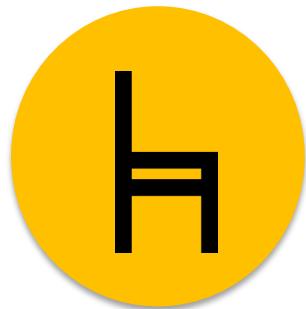
- This is your opportunity to view this task on your own.
 - Open the [UCPath Help site](#) and refer to the Searching for People Using Search/Match
- Launch the **See It** version of the topic.
- Ask your instructor for assistance.



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

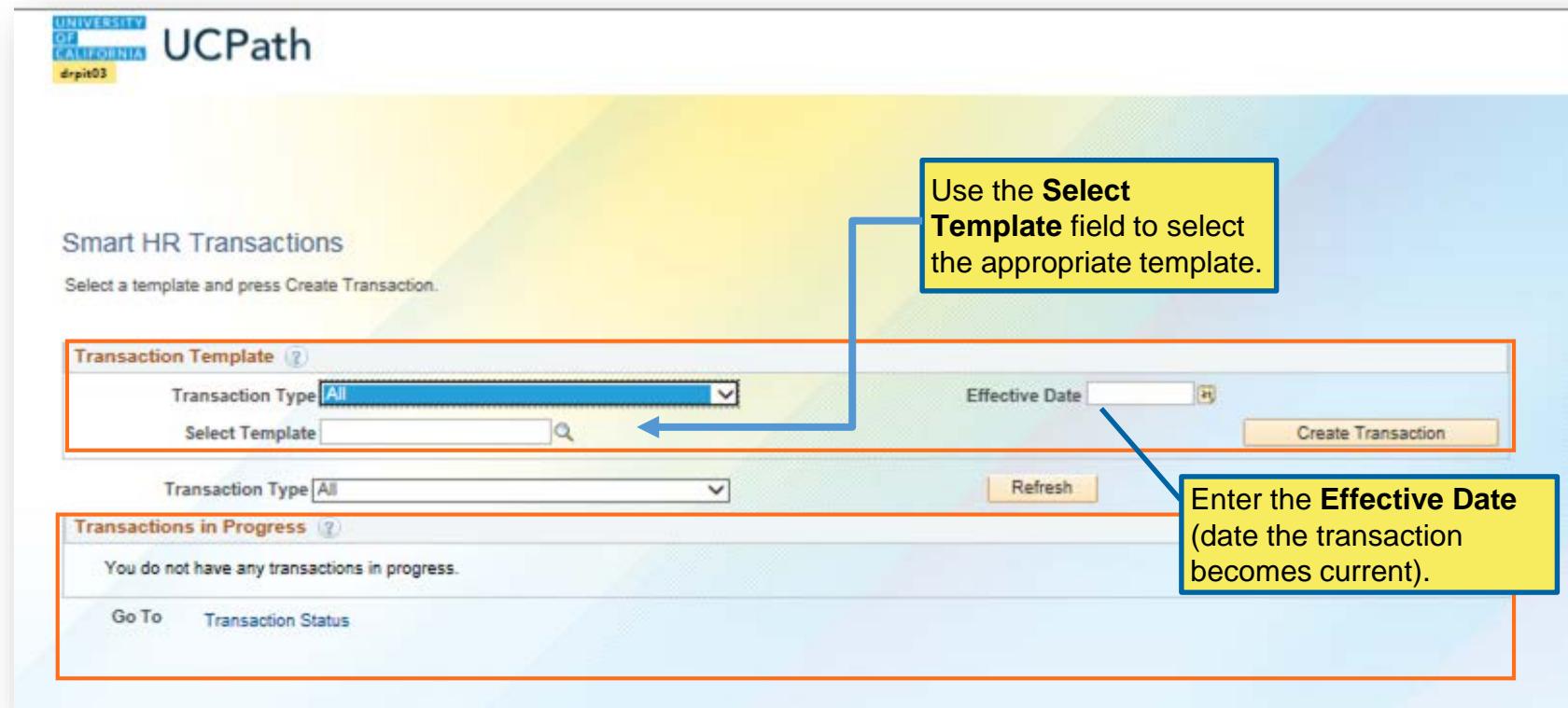
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UC_INVOL_TERM	Involuntary Termination
UC_PERSON_DATA	UC Personal Data
UC_REHIRE	UC Rehire - All Employees
UC_REHIRE_AC	Rehire - Academic
UC_RENW_CWR	Renew Contingent Worker - Without Position
UC_RENW_CWR_POS	Renew CWR Instance - with Position
UC_RETIREMENT	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 from the UCPath system. The page title is 'Smart HR Transactions' and the sub-section is 'Transactions in Progress'. A message at the top says 'Select a template and press Create Transaction.' Below this, there are two main sections: 'Transaction Template' and 'Transactions in Progress'. The 'Transaction Template' section contains a 'Transaction Type' dropdown set to 'All', a 'Select Template' input field with a magnifying glass icon, and an 'Effective Date' input field. A blue box highlights the 'Select Template' field with the annotation: 'Use the **Select Template** field to select the appropriate template.' The 'Transactions in Progress' section shows a message: 'You do not have any transactions in progress.' It includes a 'Refresh' button and 'Go To Transaction Status' links. A blue box highlights the 'Effective Date' field with the annotation: 'Enter the **Effective Date** (date the transaction becomes current).'

UNIVERSITY OF CALIFORNIA
UCPath
drpit03

Smart HR Transactions

Select a template and press Create Transaction.

Transaction Template

Transaction Type: All

Select Template

Effective Date

Create Transaction

Transactions in Progress

You do not have any transactions in progress.

Refresh

Go To Transaction Status

Use the **Select Template** field to select the appropriate template.

Enter the **Effective Date** (date the transaction becomes current).



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.

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.

Template UC Full Hire - Staff Only

Organizational Relationship Employee

*Employee ID **NEW** 

* Effective Date **08/18/2017** 

Action Hire

*Reason Code **Hire - No Prior UC Affiliation** 

*Address Format **United States** 

Continue Cancel

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



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.

Smart HR Transactions
Enter Transaction Information

Click here to view Header Details

Staff Full Hire Template

Personal Data | Job Data | Earnings 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
1

Personal Data - United States

Military Status

Person Education Level

Highest Education Level

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



Full Hire Template

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 | Earnings | 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
1

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.

The screenshot shows the 'Personal Data' tab of the UCPATH system. It includes sections for 'UC Oath Date' (with a 'Oath Signature Date' field), 'Person Phone Number' (with 'Phone Type', 'Telephone', and 'Preferred' fields), 'Person Email Address' (with 'Email Type' and 'Email Address' fields), 'UC Patent Acknowledgment' (with 'Patent Acknowledgment' and 'Sign Dt' fields), 'UC External System ID' (with 'Business Unit' and 'External System' fields), 'UC I-9 Information' (with 'Tracker Profile ID' and 'Remote I-9 Section 2' checkbox), and a 'Comments' section with a large text area. At the bottom, there are buttons for 'Save and Submit', 'Save for Later', 'Cancel', and 'Supporting documents'.

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.

The screenshot shows the 'Personal Data' tab with fields for 'Transaction ID' (set to 'NEW'), 'Initiator Comments' (containing 'NEW'), 'Requester ID' (set to '10268904'), and 'Requested' (set to '\$Angel Rivera - UCI').

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



Exercise 3

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

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



Full Hire Template

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: 00120014

Work Location - Job Fields
Business Unit: IRCPMP
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 Seniority Date:

Job Information - Reporting Information
Reports To Position Number:

Job Information - Employee Classification
*Employee Classification:

Job Information - Standard Hours
Standard Hours: 17.200000 FTE: 0.430000

Classified/Unclassified Management & Sr Professional Ind

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	Changing Job FTE
<ol style="list-style-type: none">Vacant positon – changes to FTE for vacant positions can be done via the Position Control Form (PeopleSoft Menu > UC Customizations > UC Extensions > Position Control Request).Filled position – changes to FTE for filled positions can be done via PayPath.<ul style="list-style-type: none">See UPK “Initiate Position Data Change PayPath Transaction (Acad FTE Change) or (Staff FTE Change) for step by step instructions.	<ol style="list-style-type: none">You can also keep the position FTE as 1.00 and only change the job FTE. This will require you to first <u>decouple the position and job FTE</u> so they are independent. Once decoupled the job FTE can be adjusted as needed.<ul style="list-style-type: none">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

Probation Code	Probation End Date
Trial Employment End Date	ERIT/Phased Retirement End Dt
Location Use End Date	Location Use Type
Alternate Work Week 7/40	PY Career Duration

Review Type	Next Review Date
-------------	------------------

Job - Salary Plan
Salary Administration Plan
Step

Salary Grade

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

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.



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 Type

Location Use End Date

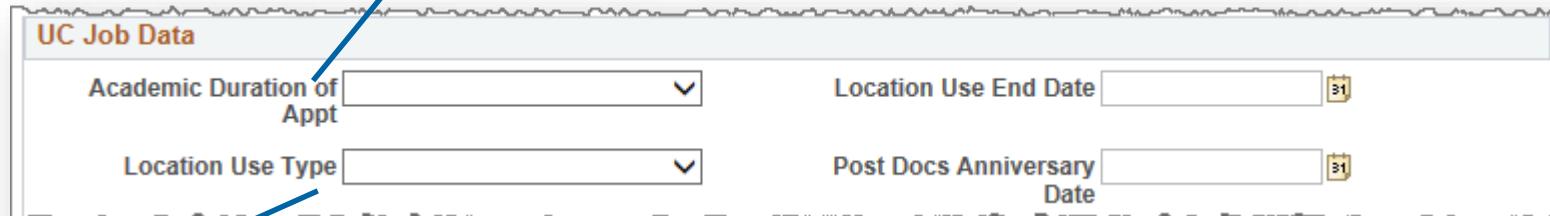
Post Docs Anniversary Date

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.

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

Location Use Type

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



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



Full Hire Template

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

The screenshot shows a table with columns: Comp Rate Code, Compensation Rate, and Compensation Frequency. The first row has values: 1 UCHRLY, 18.550000, and H. The 'Compensation Frequency' field is highlighted with a red box. Below the table, there is a 'Work Location - Expected Job End Date' section with an 'Expected Job End Date' field. At the bottom, there is a 'Job Compensation - Payroll Currency and Frequency' section with a 'Compensation Frequency' field, also highlighted with a red box.

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

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



Compensation Details

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

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



Multiple Components of Pay (MCOP)

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

Job Compensation - Pay Components			
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



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																																																																																																																																																																																																																																																																																																																																																																																																		
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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 shows the Oracle HCM Job - Salary Plan screen. At the top, 'Job - Salary Plan' is selected. In the 'Salary Administration Plan' section, 'T001' is in the 'Salary Grade' field and 'Step 7' is in the 'Step' field. A yellow callout box points to the 'Step' field with the text: 'The Step entry defaults the UCANNL Comp Rate Code and the Compensation Rate.' In the 'Job Compensation - Pay Components' section, there are two rows of data:

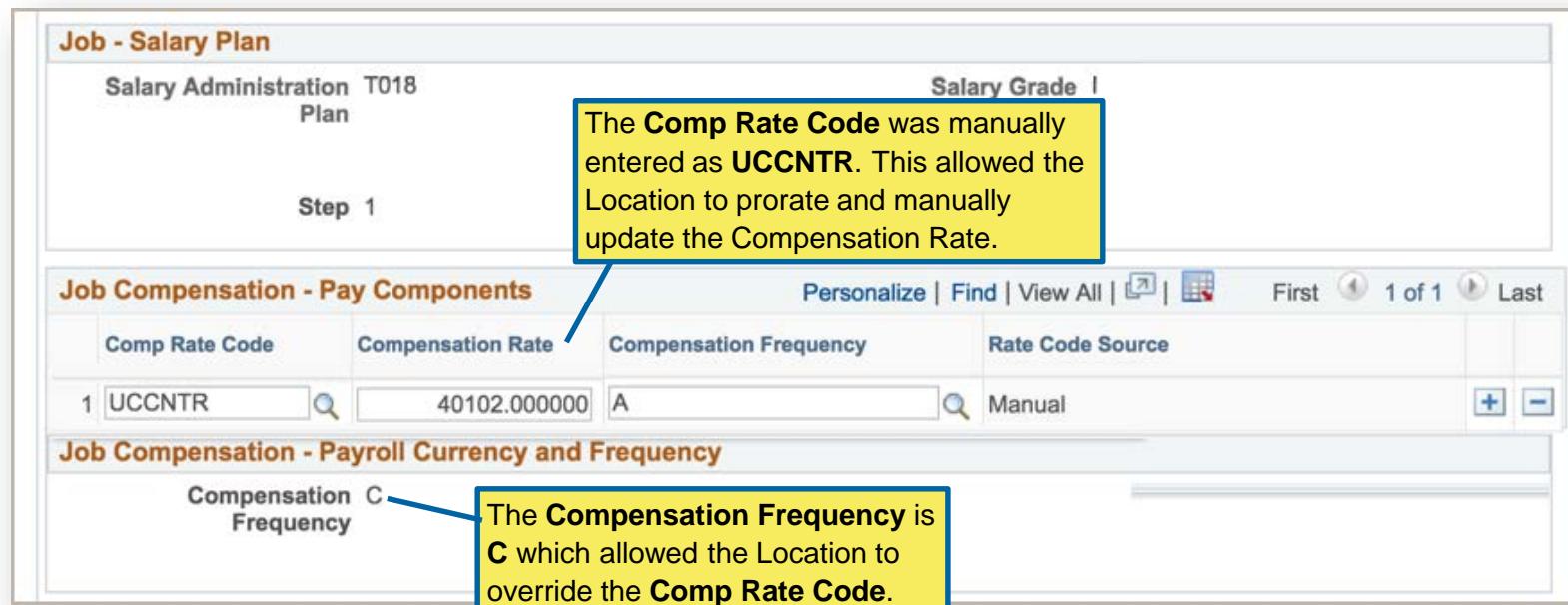
Comp Rate Code	Compensation Rate	Compensation Frequency	Rate Code Source
1 UCANNL	137000.000000	A	Salary Step
2 UCOFF1	47500.000000	A	Manual

A blue arrow points from the 'Step' callout to the 'Comp Rate Code' column of the first row. A yellow callout box points to the 'Compensation Rate' field of the first row with the text: 'The UCOFF1 amount may also be added.' In the 'Job Compensation - Payroll Currency and Frequency' section, there is a field for 'Compensation Frequency' with the value 'C'. A blue arrow points from the 'Compensation Frequency' field to a yellow callout box with the text: 'The Compensation Frequency is C.' Other fields in this section include 'Expected Job End Date' and 'End Job Automatically'.



Contract Pay – Prorated Sample

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



The screenshot shows the 'Job - Salary Plan' application interface. At the top, it displays 'Salary Administration T018 Plan' and 'Salary Grade I'. Below this, a yellow box highlights the 'Comp Rate Code' field in the 'Job Compensation - Pay Components' section, stating: 'The Comp Rate Code was manually entered as UCCNTR. This allowed the Location to prorate and manually update the Compensation Rate.' A blue arrow points from this text to the 'Comp Rate Code' field, which contains 'UCCNTR'. The 'Compensation Rate' field shows '40102.000000' and the 'Compensation Frequency' field shows 'A'. The 'Rate Code Source' is listed as 'Manual'. In the 'Job Compensation - Payroll Currency and Frequency' section, a blue arrow points to the 'Compensation Frequency' field, which contains 'C', with the text: '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.



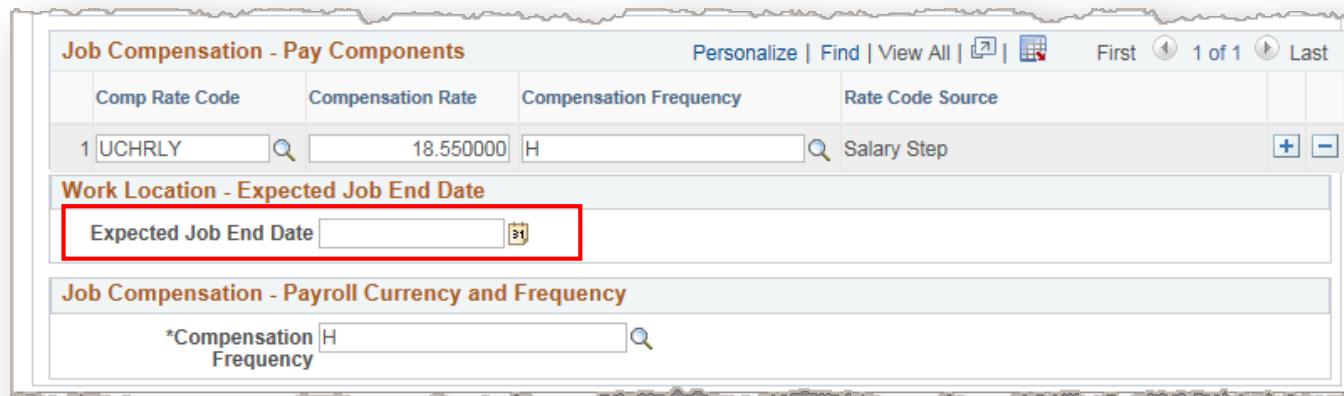
Full Hire Template

Expected Job End Date



Expected Job End Date Field – Staff

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



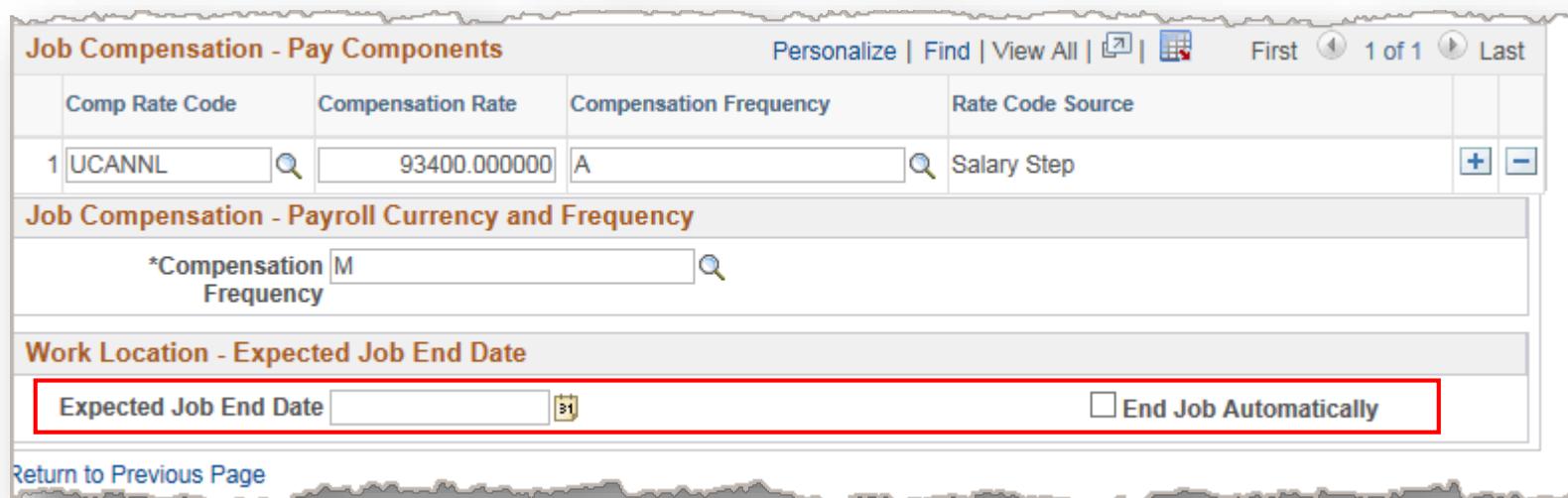
The screenshot shows a software interface for managing job compensation. At the top, there's a header with 'Job Compensation - Pay Components' and various navigation links like 'Personalize', 'Find', 'View All', and search functions. Below the header, there's a table with columns for 'Comp Rate Code', 'Compensation Rate', 'Compensation Frequency', and 'Rate Code Source'. The 'Comp Rate Code' field contains '1 UCHRLY'. The 'Compensation Rate' field contains '18.550000'. The 'Compensation Frequency' field contains 'H'. The 'Rate Code Source' field has a '+' and '-' button. Below this table, there's a section titled 'Work Location - Expected Job End Date' with a sub-section for 'Expected Job End Date'. This sub-section contains a text input field and a calendar icon, both of which are highlighted with a red box. At the bottom of the screen, there's another section titled 'Job Compensation - Payroll Currency and Frequency' with a 'Frequency' field containing 'H'.

- ◆ 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 shows a software interface for managing job compensation. At the top, there's a header bar with the title "Job Compensation - Pay Components" and various navigation links like "Personalize", "Find", "View All", and "First 1 of 1 Last". Below this is a table with columns for "Comp Rate Code", "Compensation Rate", "Compensation Frequency", and "Rate Code Source". The first row contains the value "1 UCANNL" in the Comp Rate Code field, "93400.000000" in the Compensation Rate field, "A" in the Compensation Frequency field, and "Salary Step" in the Rate Code Source field. Below the table is a section titled "Job Compensation - Payroll Currency and Frequency" with a search field for "Compensation Frequency". At the bottom, there's a section titled "Work Location - Expected Job End Date" containing a "Expected Job End Date" input field with a calendar icon and an "End Job Automatically" checkbox. The "Expected Job End Date" field is highlighted with a red border.



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	<input type="button" value="Search"/>	
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 <input type="button" value="Calendar"/>	
Job Information - Reporting Information				
Reports To Position Number				
Job Information - Employee Classification				
*Employee Classification		2	<input type="button" value="Search"/>	
Classified/Unclassified		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		
Earnings Code	Compensation Rate	Percent of Distribution
1		

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

Return to Enter Transaction Details Page

Save and Submit Save for Later Cancel 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 | Aggregate Comp Rate: 7933.330000

Job Earnings Distribution		Personalize	Find	View All	Print	First	1-2 of 2	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).

Effective Date	Earnings Code	Reason for Additional Pay	Earnings End Date	Add'l Pay Amount
1 06/24/2019	SAS	New Additional Pay	06/26/2020	500.00

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.

Employee Experience					
				Personalize Find View All  	
Employer Name		Job Description		Start Date	End Date
1	<input type="text"/>	<input type="text"/>		<input type="text"/> 	<input type="text"/>  <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: _____
Effective Date: 10/07/2019 Action/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation)
Employee ID: NEW Employee Record: _____

Personal Data Job Data Earnings Dist Addl Pay **Person Profile**

Employee Information

JPM Degrees

*Effective Date	<input type="text" value="10/07/2019"/>	<input type="button" value="b1"/>	*Degree	<input type="text"/>	<input type="button" value="b1"/>
Education Field	<input type="text"/>			<input type="button" value="b1"/>	<input type="button" value="b1"/>
State	<input type="text"/>			<input type="button" value="b1"/>	<input type="button" value="b1"/>
School Description	<input type="text"/>			Scho	<input type="button" value="b1"/>
Year Acquired	<input type="text"/>			<input type="checkbox"/> Terminal Degree for Discipline	

Caution: If you click anywhere in this box, all fields will be required.

UC Oath Date

Oath Signature Date	<input type="text"/>	<input type="button" value="b1"/>
---------------------	----------------------	-----------------------------------

UC Patent Acknowledgment

Patent Acknowledgment	<input type="text"/>	<input type="button" value="b1"/>	<input type="checkbox"/> Modified Patent Ackmnt Sign Dt
Sign Dt	<input type="text"/>		

Employee Experience

Employer Name	Job Description	Start Date	End Date	UC Relevant Experience	UC Relevant
1	<input type="text"/>	<input type="text"/>	<input type="button" value="b1"/>	<input type="text"/>	<input type="button" value="b1"/>

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

Return to Enter Transaction Details Page

Save and Submit Save for Later Cancel 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.



- 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 shows the UCI UCPath system interface for searching job codes. The search criteria are set to "Job Code begins with CWR" and "Description begins with CWR". A red arrow points to the "Job Code" search field in the main search panel. The search results table lists 22 job codes, all of which begin with "CWR".

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_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



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.



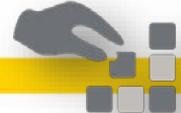
Templates – Additional Notes

- ◆ 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.



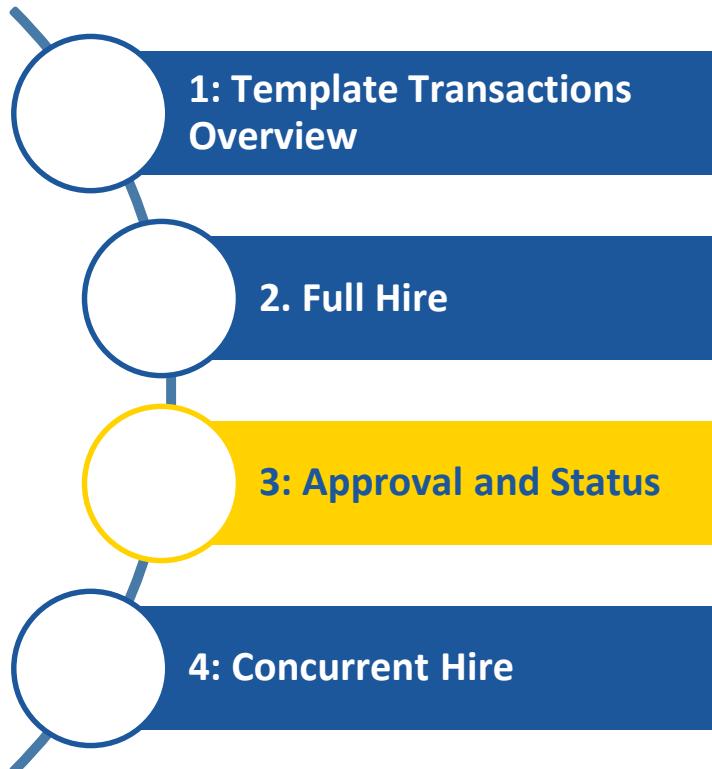


LESSON 3

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

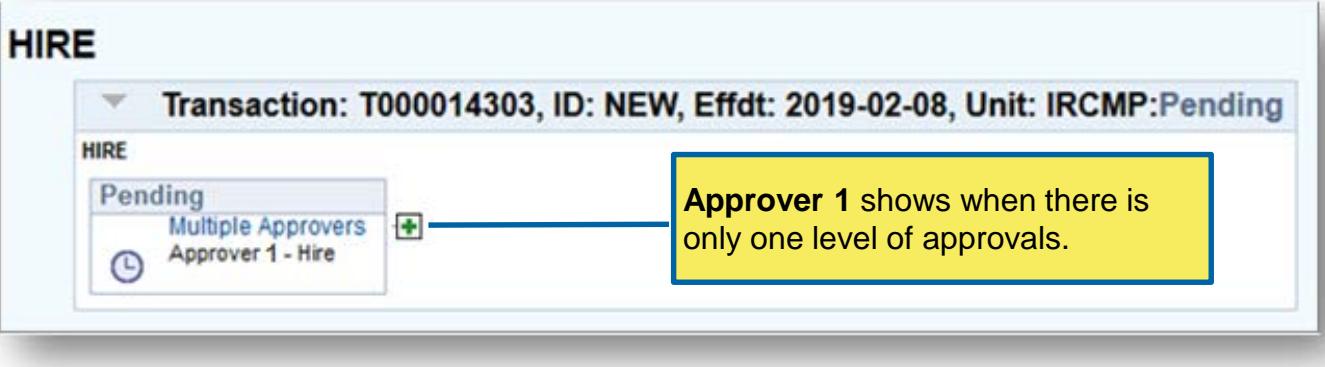
Transaction: T000014303, ID: NEW, Effdt: 2019-02-08, Unit: IRCMP:Pending

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

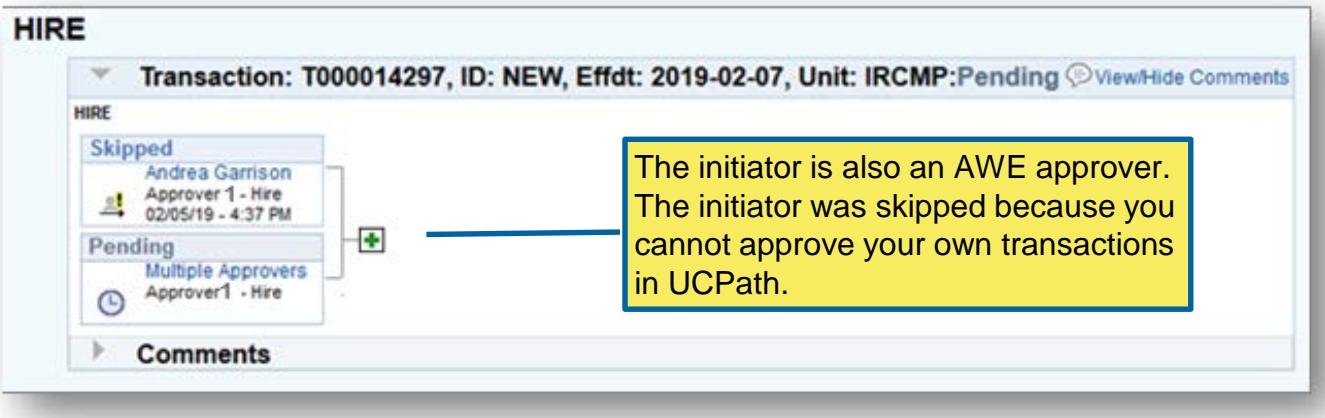
Skipped
Andrea Garrison
Approver 1 - Hire
02/05/19 - 4:37 PM

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 UCPPath.

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.

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
68

Pending
SAngel Rivera - UCI
Inserted Approver
L



Location AWE Approver Options

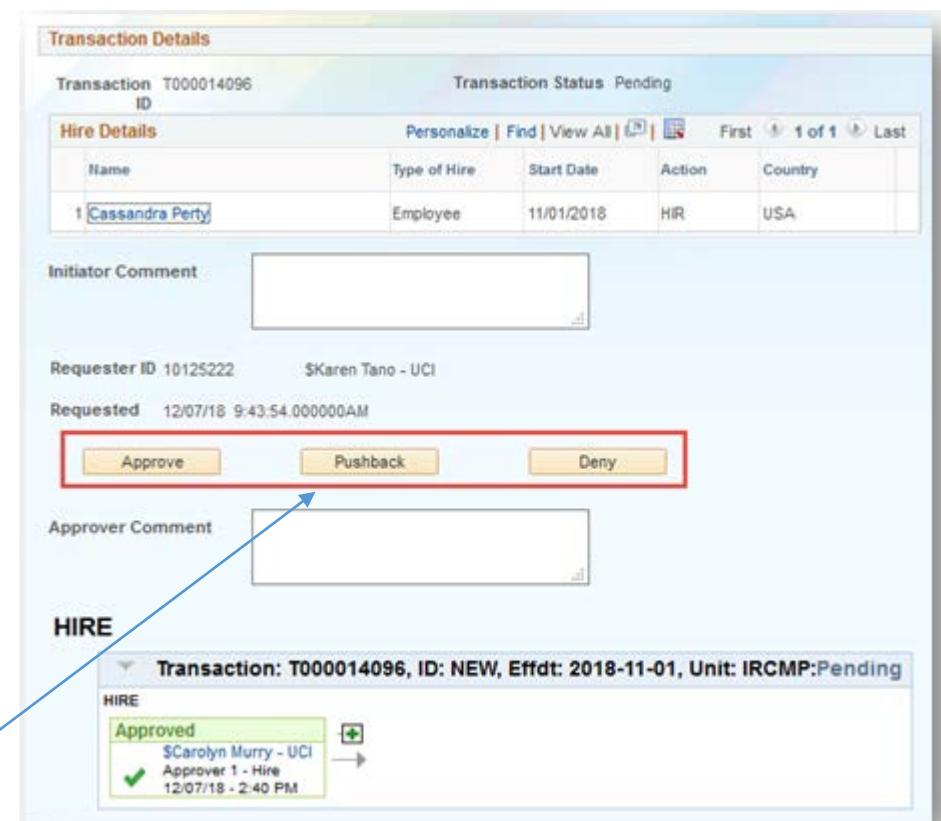
1st AWE Approver (Approver 2)

Approve	<ul style="list-style-type: none">a) Edit transaction, if needed andb) Route to the next level of approval* and/orc) Submit for processing by UCPC.
Deny	Enter comments and deny transaction. It routes back to initiator - no additions or changes reflected in UCPath.

2nd AWE Approver*

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

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



The screenshot shows the UCI UCPath software interface for a 'HIRE' transaction. At the top, it displays 'Transaction Details' for Transaction ID T000014096, which is in a 'Pending' status. Below this, the 'Hire Details' section shows a single record for 'Cassandra Petty' with an 'Employee' status, hire date 11/01/2018, and action HIR, all in the USA. An 'Initiator Comment' field is empty. Below the details, it shows 'Requester ID: 10125222' and 'Requested: 12/07/18 9:43:54.000000AM'. At the bottom of the main window, there are three buttons: 'Approve' (highlighted with a red border), 'Pushback' (highlighted with a red border), and 'Deny'. A blue arrow points from the 'Pushback' button to a 'HIRE' sub-panel at the bottom. The sub-panel shows the transaction details again and lists an 'Approved' entry for 'SCarolyn Murry - UCI' with a checkmark, the approver name, and the approval date and time: 'Approver 1 - Hire 12/07/18 - 2:40 PM'.



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**

The screenshot shows the UCPath interface for 'SS Smart HR Transactions'. The main page title is 'UCPath' with a sub-header 'drpit03'. The page content is titled 'SS Smart HR Transactions' with a sub-instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are search criteria fields for Transaction ID, Name, Empl ID, Action, and Approval Status, along with a 'Case Sensitive' checkbox, a search button, and a clear button. To the left, a vertical navigation menu is visible, showing links like 'Workforce Admin...', 'Job Information', 'Smart HR Template', 'Rec...', and 'Ben...'. The 'Smart HR Template' link is currently selected.



SS Smart HR Transactions Page

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

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

The screenshot shows the SS Smart HR Transactions page. At the top, it displays 'Transaction ID T000013646' and 'Transaction Status Approved'. Below this, the 'Hire Details' section shows a table with columns: Name, Type of Hire, Start Date, Action, and Country. The data for Bojan Petrovic is: Employee, Employee, 06/02/2018, TER, USA. An 'Initiator Comment' field is empty. Below it, 'Requester ID' is 10272906 and the 'Requested' date is 10/29/18 10:17:45.000000AM. An 'Approver Comment' field is also empty. At the bottom, the 'Vol Termination' section shows a table for Transaction T000013646, ID 10123918, Effdt 2018-06-02, Unit: IR CMP. It lists two approvers: 'Approved' (Sheila Mercer - UCI, Vol Termination A2, 10/29/18 - 11:01 AM) and 'Skipped' (Mick Fisher, Vol Termination A2, 10/29/18 - 10:17 AM). A 'Comments' section is below this.

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.

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



Transaction Status Page

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

Transaction Status

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

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

Business Unit	<input type="text"/>
Empl ID	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>

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	View Text			
<input type="checkbox"/>	UC_REHIRE	09/16/2018	Hired/Added	10025725	0	Rehire		RVCMP	Chris	Desarzant						
<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	Clone	RVCMP	Jing	Nytray	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	Clone	RVCMP								
<input type="checkbox"/>	UC_CONC_HIRE_AC	09/16/2018	Hired/Added					RVCMP								

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.

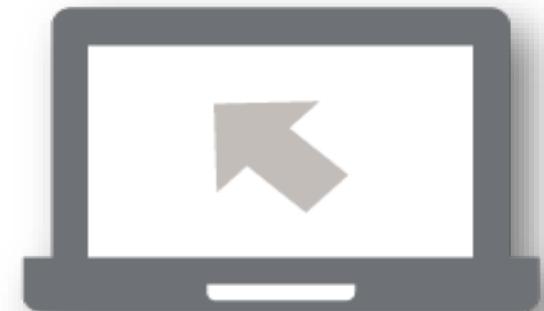


Exercise 7

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: All
Transaction Type: All
Transaction Status: All
Start Date From: 03/11/2017 To: 03/13/2017
Refresh Clear

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.

Transaction Status						
Select	Transaction Type	Effective Date	Transaction Status	Person ID	Empl Record	Action
<input type="checkbox"/>	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003135		Hire
<input type="checkbox"/>	Hire/Rehire and Profile Data	03/13/2017	Cancel	NEW		Hire
<input type="checkbox"/>	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003131		Hire
<input type="checkbox"/>	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003130		Hire
<input type="checkbox"/>	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003132		Hire
<input type="checkbox"/>	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003134		Hire

Select All Deselect All
Delete Selected Transactions



Instructor Demo UPK

Clone Template Transaction

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



Lesson Objectives Review



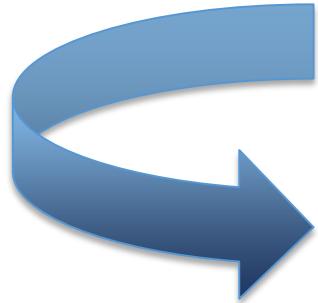
✓ Having completed this Lesson, you should now be able to:

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



Break



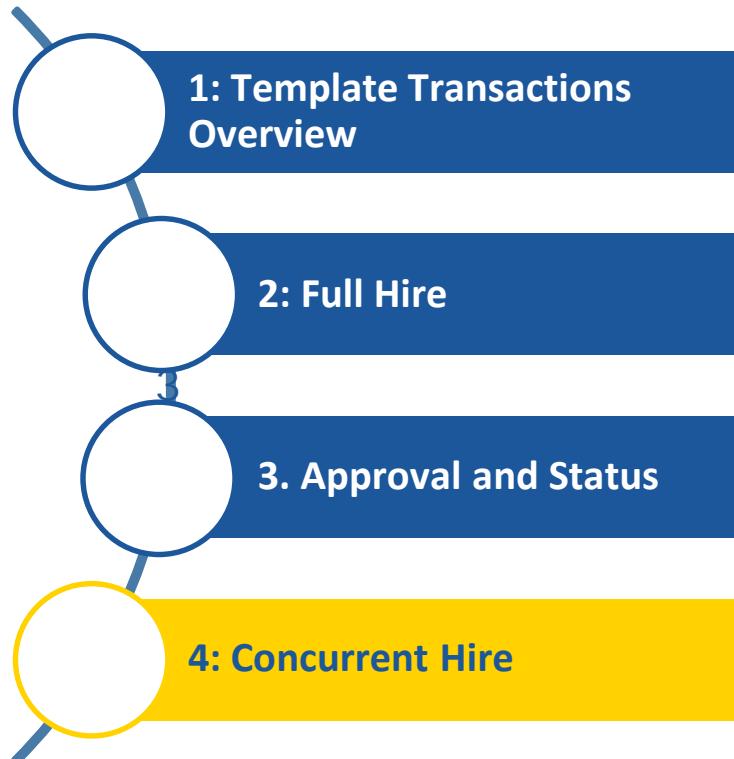


LESSON 4

Concurrent Hire



Lesson Objectives



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)



Originating Department
(where the current job exists)

Receiving Department
(where the new job is being created)



Concurrent Hires – Additional Notes

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



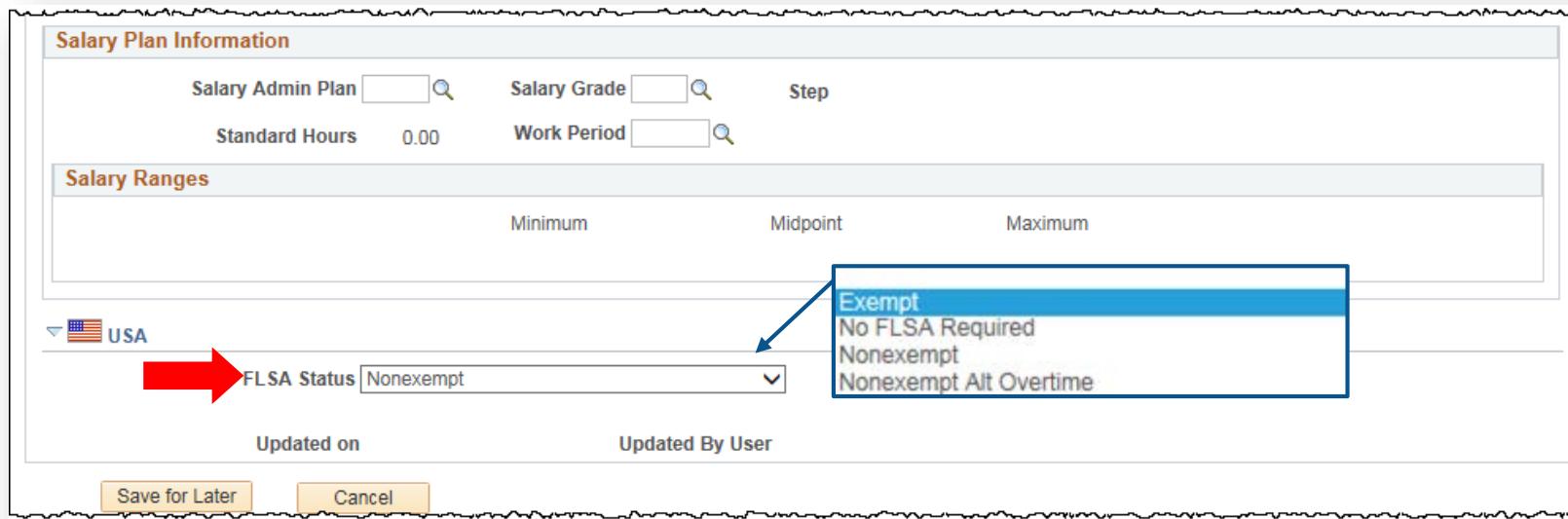
Concurrent Hire - FLSA Status Management

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

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

For more guidelines on updating the FLSA statuses visit:

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



The screenshot shows a 'Salary Plan Information' form. At the top, there are fields for 'Salary Admin Plan' (with a search icon), 'Salary Grade' (with a search icon), and 'Step'. Below these are 'Standard Hours' (0.00) and 'Work Period' (with a search icon). The 'Salary Ranges' section shows 'Minimum', 'Midpoint', and 'Maximum' fields. Under the 'USA' flag, there is a dropdown menu for 'FLSA Status' with the value 'Nonexempt'. A red arrow points to this dropdown. A blue callout box is overlaid on the dropdown menu, listing four options: 'Exempt', 'No FLSA Required', 'Nonexempt', and 'Nonexempt Alt Overtime'. The 'Nonexempt' option is the selected item. At the bottom of the form are buttons for 'Save for Later' and 'Cancel'.



Concurrent Hires - Dual Employment

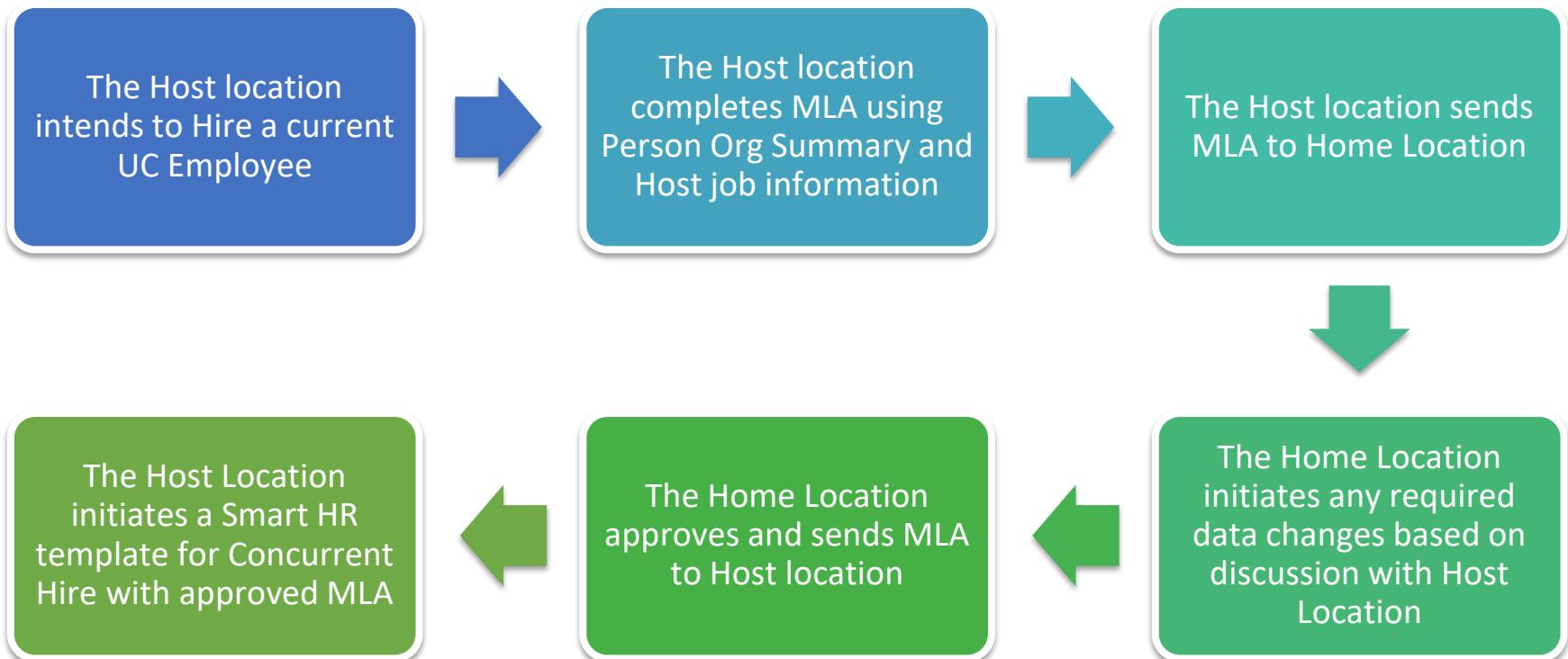
- ◆ Concurrent Hire process also covers **Dual Employment**.
- ◆ For Dual Employment, the additional appointment (job) is generally in another department.
 - Applies to **staff appointments only**.
 - Additional appointment is separate from any other job an employee holds.
 - Results in the employee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



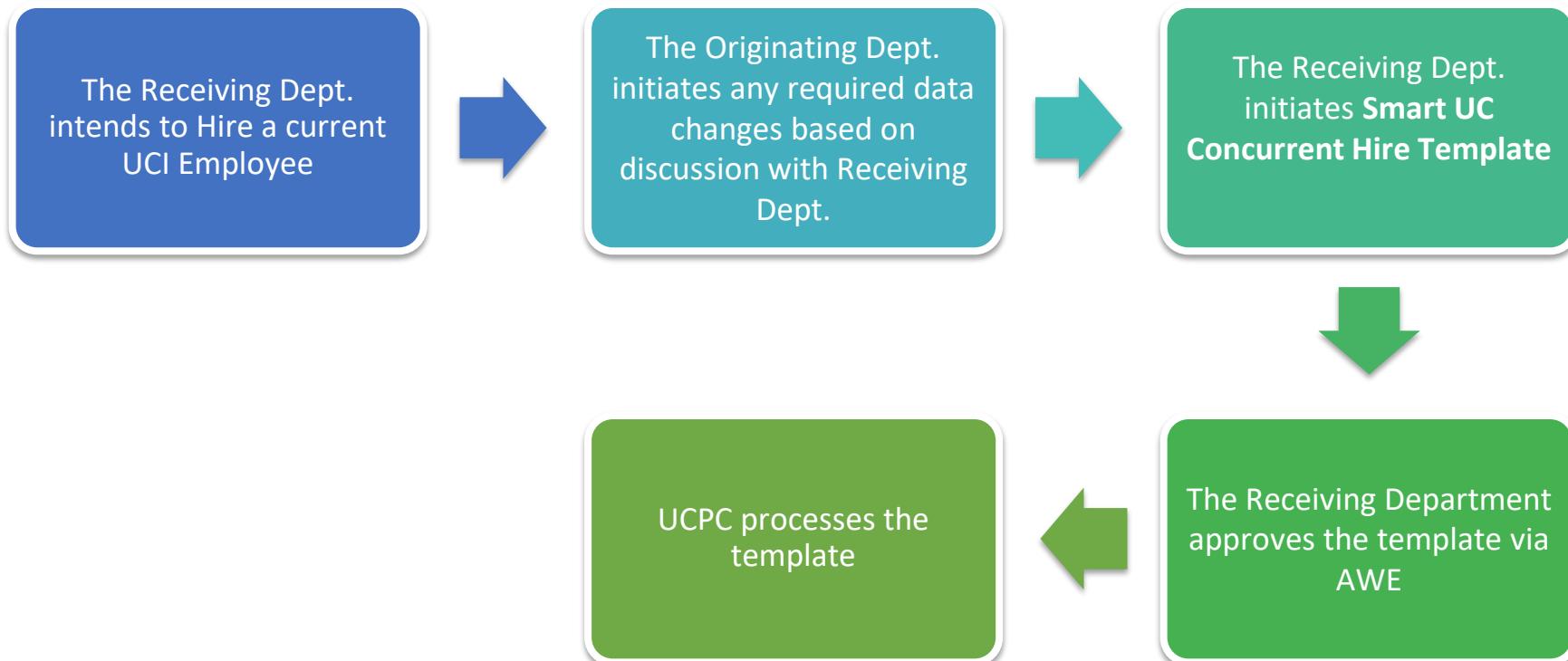
Process Overview for Inter-location Hires when **both** locations are on UCPath.



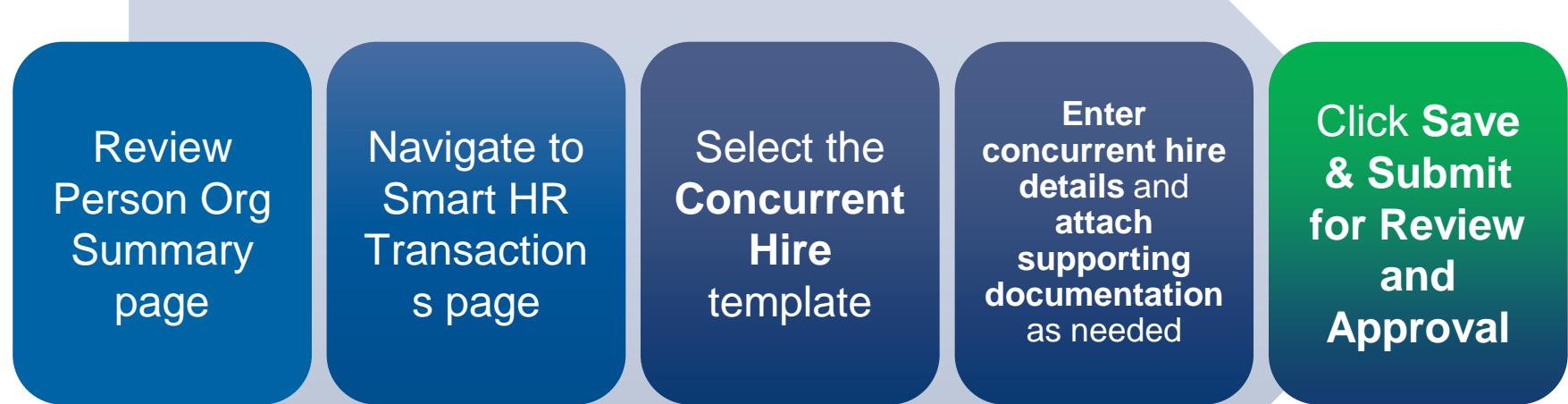
Intra-location Concurrent Jobs – Process Overview



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

Select Template

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.

Effective Date

Staff Concurrent Hire/Inter Location Transfer

Create Transaction

Transaction Type

Refresh

Transactions in Progress ?

You do not have any transactions in progress.

Go To [Transaction Status](#)



Enter Transaction Details Page

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

The screenshot shows the 'Smart HR Transactions' application with the 'Enter Transaction Details' page. The page has a template for 'Academic Concurrent Hire/Inter Location Transfer'. It includes fields for 'Employee ID' (10000000), 'Effective Date' (11/01/2023), 'Reason Code' (Academic), and 'Address Format' (United States). A message box is displayed, stating: 'Person ID 10000000 already exists in the system for Kirstin Bright. (1007,81). Select OK to continue the hire process with this Person ID. Select Cancel to enter a new Person ID.' There are 'OK' and 'Cancel' buttons. Below the message box, there are 'Continue' and 'Cancel' buttons. A dropdown menu is open for 'Reason Code', showing options: 'Concurrent Hire - Dual Empl', 'Concurrent Hire - Non Dual Emp', 'Transfer-Inter BU, Demotion', 'Transfer-Inter BU, Lateral', 'Transfer-Inter BU, Promotion', and 'Transfer-Inter BU, Undefined'. The 'Concurrent Hire - Dual Empl' option is highlighted with a red border.

Important

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

Employee's current location is the **Employee ID**.

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

Select the appropriate **Reason Code**.



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: 05/25/2019 Action/Action Reason: HIR/DEE (Concurrent Hire - Dual Empl)
Employee ID: 10000495 Employee Record:

Personal Data Job Data Earnings Dist Add'l 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 | First 1 of 1 Last

Ethnic Group

Person Education Level

Highest Education Level

Person Gender

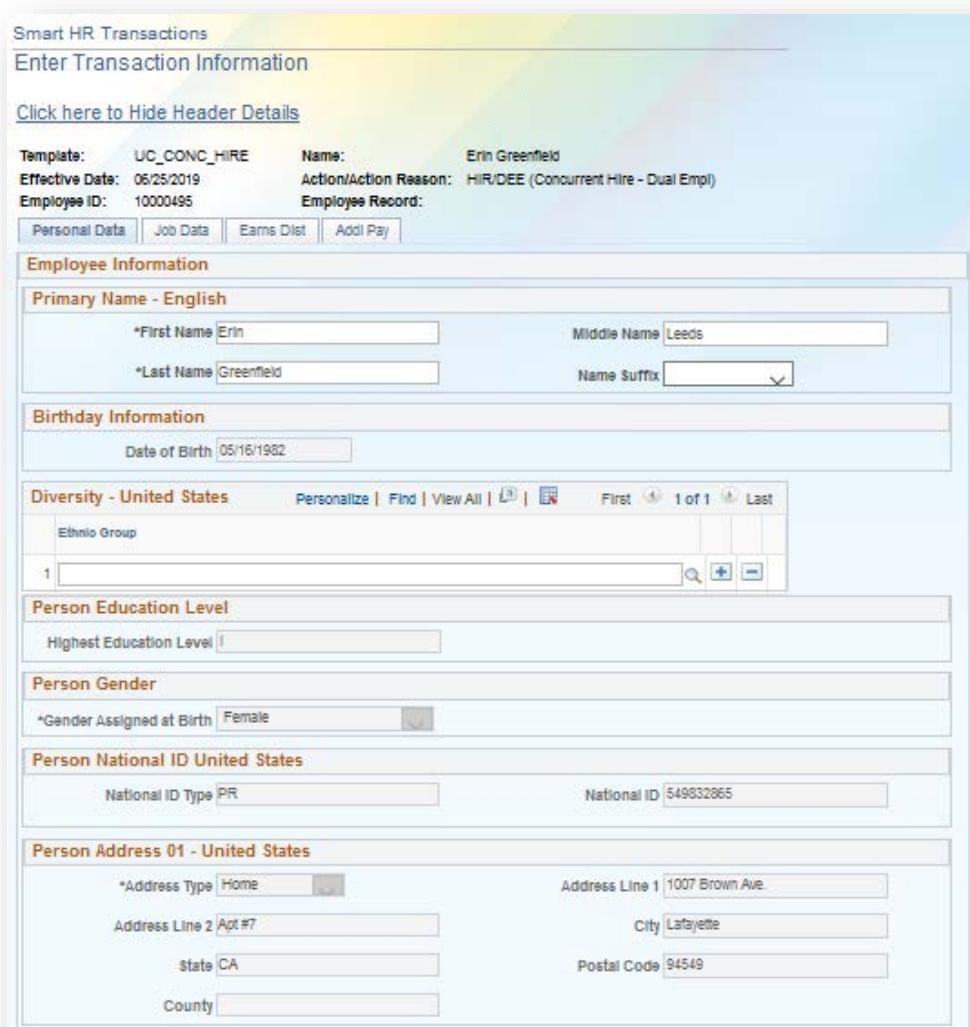
*Gender Assigned at Birth

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.uclc.uci.edu/> - UC Learning Center Website
- ◆ <https://ucpath.uci.edu/training/index.php> - UCI UCPATH Training Website

List of Other Relevant UPKs:

- ◆ [Initiate New Position Control Request](#)
- ◆ [Initiate New Position Control Request – Copy Existing Position](#)
- ◆ [Initiate Update Vacant Position Request](#)
- ◆ [Job Aid: Template Transactions – Action Reason Codes and Descriptions](#)



Where to Get Help

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



Additional UCPath Pages

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

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



Training End

Thank You!

