



UNIVERSITY OF CALIFORNIA  
**UC RIVERSIDE**   
**FOM|UCPath Training**

**Advanced FOM  
ServiceLink Job  
Data Changes – v2**

# Trainer Introduction

## Kathleen Cool

Title: Principal Trainer

Department: HR | UCPath

Years @ UC: 1 year

Previous Experience: 10+ years of experience in instructional design and training in higher education. Taught Information System Management at the undergraduate and graduate levels.



# Your Questions and Input

<https://tinyurl.com/ucrtraining>



# Housekeeping



Cell Phones



Breaks



Restrooms



# Learning Topics

- [ServiceLink Roles](#)
- [Job Data vs. Position Data](#)
- [Job Data Changes for Staff](#)
- [Job Data Changes for AP](#)
- [Compensation Changes for Staff](#)
- [Compensation Changes for AP](#)
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# ServiceLink Roles

# Job Data Changes FOM Process

## Essential Roles

1: HR Staff/AP Business Partner (Initiator) → ServiceLink

2: Shared Services Center Fulfiller(s) → UCPath

3: Shared Services Center AWE Approver → UCPath

4: Org./Dept./SSC Inquirers → ServiceLink

5: APO/AP & HRO/HR Business Partner Inquirers → UCPath



# JDC FOM Process

## Essential Roles

**1: HR Staff/AP Business Partner (Initiator) → ServiceLink**

2: Shared Services Center Fulfiller(s) → UCPATH

3: Shared Services Center AWE Approver → UCPATH

4: Org./Dept./SSC Inquirers → ServiceLink

5: APO/AP & HRO/HR Business Partner Inquirers → UCPATH

## HR Staff/AP Business Partner (Initiator)

The Initiator role initiates an Job Data & Comp Changes request using ServiceLink.

This is a required role.

Can be assigned to:

- HR Business Partner (HR)
- HR Generalist (HR)
- AP Business Partner (AP)

The Initiator is the individual responsible for correctness of transaction.

- Enters the transaction in ServiceLink



# JDC FOM Process

## Essential Roles

1: HR Staff /AP Business Partner (Initiator) → ServiceLink

2: Shared Services Center Fulfiller(s) → UCPATH

3: Shared Services Center AWE Approver → UCPATH

4: Org./Dept./SSC Inquirers → ServiceLink

5: APO/AP & HRO/HR Business Partner Inquirers → UCPATH

## Shared Services Center Fulfiller(s)

The Shared Services Center Fulfiller(s):

- Receives Onboarding transaction from Initiator through ServiceLink
- Initiates transactions in UCPATH
- Consults with Initiator as necessary to complete transactions
- Is assigned tasks in ServiceLink task queue

# JDC FOM Process Essential Roles

1: HR Staff /AP Business Partner (Initiator) → ServiceLink

2: Shared Services Center Fulfiller(s) → UCPATH

**3: Shared Services Center AWE Approver → UCPATH**

4: Org./Dept./SSC Inquirers → ServiceLink

5: APO/AP & HRO/HR Business Partner Inquirers → UCPATH

## Shared Services Center AWE Approver

Once the Shared Services Center Fulfiller(s) submit the Onboarding transaction, the transaction is forwarded to the designated AWE approver in the Shared Services Center through UCPATH AWE.

The SSC AWE Approver cannot be the same person as the Shared Services Center Fulfiller(s).

The SSC AWE Approver serves as Quality Assurance by reviewing and approving the transaction.

# JDC FOM Process

## Essential Roles

1: HR Staff/AP Business Partner (Initiator) → ServiceLink

2: Shared Services Center Fulfiller(s) → UCPath

3: Shared Services Center AWE Approver → UCPath

4: Org./Dept./SSC Inquirers → ServiceLink

5: APO/AP & HRO/HR Business Partner Inquirers → UCPath

## Org./Dept./SSC Inquirers

The Inquirer role has the ability to monitor and view the status of the request and assigned tasks.

Individuals in Orgs., Departments and in Shared Services Centers can have an Inquiry role.

Will be identified by departments.

# JDC FOM Process

## Essential Roles

1: AP Business Partner (Initiator) → ServiceLink

2: Shared Services Center Fulfiller(s) → UCPath

3: Shared Services Center AWE Approver → UCPath

4: Org./Dept./SSC Inquirers → ServiceLink

5: APO/AP & HRO/HR Business Partner Inquirers → UCPath

**APO staff/AP  
Business Partner  
HRO staff/HR  
Business Partner  
Inquirers**

The Inquirer role has the ability to monitor and view the request in UCPath after the transaction has been transacted in the system.

The Central APO Office has inquiry access to UCPath for auditing, oversight, and troubleshooting purposes.

# Job Data vs. Position Data

# What is a Job?



A Job, in PeopleSoft terms, is an employee assignment. That job may be assigned to a Position, but it also has information unique to the employee such as compensation rate. Upon hire or transfer to a Position, an employee's Job record inherits certain attributes of the Position. Others, such as "Reports to Position" exist only on the Position.

# Position vs. Job

**Scenario:** Three different departments at UCR are recruiting for Blank Assistant 2.

Job Code 004723  
**BLANK AST 2**

Before they started recruitment, each department created new positions. The three positions using the Job Code 004723 were created on 1/3/2018.

**Position 40072527**  
Career Services Center



Jasmine was hired into Position 40072527 on 2/26/2018

**Position 40014830**  
Housing Services



Jessica was hired into Position 40014830 on 3/5/2018

**Position 40018808**  
Intl. Student & Scholar



Jorge was hired into Position 40018808 on 2/19/2018



# What is the Relationship between Position Data and Job Data?

## Position Data

- Established key job-related data elements
- Establishes departmental structure and organizational hierarchy, including Reports to Supervisor
- Maintained whether position is filled or vacant

## Employee Job Data

- Key job-related data defaults from position data when employee is assigned to a position.
- Some position changes affect employee job data; for some updates UCPath automatically maintains the current incumbent's job data.





# What is a Job Record?

## Position Data:

- Department
- Job Code
- Salary Admin Plan & Grade
- Reports to
- FTE\*



## Job Data:

- Employee Class
- Compensation Rate
- Expected Appointment  
End Date
- FTE\*



**Job  
Record**

\*FTE data is located on both Position and Job. While the two values CAN be different, the Position FTE CANNOT be less than the Job FTE. Remember that a Position is a foundation. The FTE on the Position is a “best case scenario.” The incumbent can have the same FTE as the Position or less. For example, if Jessica is hired in a Position with an FTE of 0.5, but after a year, it becomes clear that the department needs a full-time Blank Asst. 2. The FTE on BOTH the Position and the Job would need to be updated to a 1 FTE using the ServiceLink Update Position form.

# Job Data Changes for Staff



# Job Data Changes (DTA) for Staff



## Limited to Career

**UCPath Reason Code:** CAR

**Description:** Used to update an employee's Employee Class from Limited to Career due to 1,000 hours rule



## Change in Percent Time (FTE)

**UCPath Reason Code:** CPT

**Description:** Used to increase or decrease percent time (Job Data FTE) on a staff appointment



# Job Data Changes (DTA) for Staff (continued)



## Add/Extend Appointment

**UCPath Reason Code:** EXT

**Description:** Used to add or extend a temporary appointment



## Update Location Use End Date

**UCPath Reason Code:** LUE

**Description:** Used to update the Location Use End Date field on the UC Job Data page



# Job Data Changes (DTA) for Staff (continued)



## Update Probation Code/End Date

**UCPath Reason Code:** PRB

**Description:** Used to update probation code and its related information



## Update Auto Termination Flag

**UCPath Reason Code:** TMF

**Description:** Used to update the auto termination flag



# Job Data Changes (DTA) for Staff (continued)



## Update Trial Employment

**UCPath Reason Code:** TRL

**Description:** Used to update an employee's Trial Employment Date

Update Trial Employment Job Data Changes are now requested via the Generic Request form.

**Generic**  
Submit other requests to Shared Services

# ServiceLink Form (Job & Comp Data Changes)



## Job and Comp Data Changes

Change job or compensation data for an employee



## Extended Leave Administration

Place, extend, or return an employee on extended leave



## Payroll Adjustments

Make adjustments for over/under payment or request an offcycle check



## Short Work Break

Place, extend, or return an employee on a short work break

The same ServiceLink Form – Job and Comp Data Changes – is used to update both Staff and AP Job Data and Compensation Data (including JED and Pay Rate Changes)

# Employee Information (Staff)

Enter Employee's Name (Last Name, First Name) whose UCPATH Job Data needs to be changed

Job and Position Data will populate the remainder of the fields, including the employee's UCPATH Employee ID.

**Employee Information**

\* Employee Name(LN, FN)  
 MELLO, WENDY Z

Employee First Name  
 WENDY

Job Code  
 004722

Division Code

\* Position Number  
 40016118

Employee Last Name  
 MELLO

Job Description  
 BLANK AST 3

Division Description

Employee ID  
 10028268

Organization  
 ORG12

Department Code  
 D01332

Organization Description  
 Coll of Hum, Arts & Social Sci

Department Description  
 Econ/Pol Sci Admin Unit

By clicking on the magnifying glass icon, you can search for an employee by:

- Employee Name
- Employee ID (UCPath Empl ID)
- Home Department Dept Code
- Home Department Dept Description
- Home Department Division Code
- Home Department Division Description
- Home Department Division Org Code
- Home Department Division Org Description
- Visa Permit Type

Based on the Employee Name, the employee's Position Number(s) will default in the Position Number field. If the employee has more than one job, the employee's primary job will appear first. Additional jobs can be selected by clicking the down arrow and clicking on the other position numbers. Position data associated with the selected Position Number will automatically populate in the fields below.



# Job Changes (Staff)

**Job Changes**(select all that apply)

---

**Data Changes**

<input type="checkbox"/> Academic Extension Pending Review (DTA/EPR)	<input type="checkbox"/> Limited to career (DTA/CAR)	<input type="checkbox"/> Return From Active Service Modified Duties (DTA/ASR)
<input checked="" type="checkbox"/> Academic Reappointment (DTA/REA)	<input type="checkbox"/> Modify Probation (DTA/PRB)	<input checked="" type="checkbox"/> Update Auto-Termination (DTA/TMF)
<input type="checkbox"/> Extend Appointment (DTA/EXT)	<input checked="" type="checkbox"/> Partial Year Career Duration (DTA/SCC)	<input type="checkbox"/> Update Location Use End Date (DTA/LUE)
<input type="checkbox"/> FTE Changes (DTA/CPT)	<input checked="" type="checkbox"/> Place on Active Service Modified Duties (DTA/ASM)	<input checked="" type="checkbox"/> Update postdoc Anniversary Date (DTA/PST)

Job Data Changes for which the selected employee is eligible for will appear next to white boxes. Gray boxes designate Job Data Changes for which the selected employee (based on Job Code) is not eligible for. Per request, one or many Job Data Changes can be selected. In the above example (Employee selected has Job Code 004722 – Blank Assistant 3), the following Job Data Changes can be selected: Extended Appointment, FTE Change, Limited to Career, Modify Probation, Update Location Use End Date.




# Change Effective Date (Staff)

- Job Earnings Distribution (JED)
- One-time Additional Compensation

- Pay Rate Changes (PAY)
- Recurring Additional Compensation

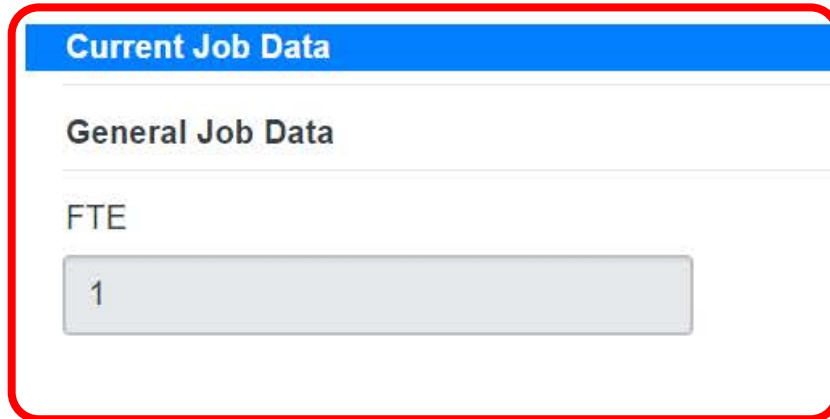
\* Change Effective Date

07/30/18 

Enter the date when you want the changes (either Job Data or Compensation changes) to take effect. If you are submitting several requests for the same employee with different effective dates, you will need to submit them separately. All changes submitted on one form should have the same Change Effective Date.

# FTE Changes (Staff)

UCPath REASON Code is – Change in Percent Time / ServiceLink REASON Code is FTE Changes



The screenshot shows a blue header bar labeled "Current Job Data". Below it is a section titled "General Job Data". Underneath, there is a label "FTE" and a text input field containing the number "1".

When the Data Change reason “FTE Changes” is selected, a section titled “General Job Data” will appear towards the bottom of the page. UCPath data for the selected employee will populate under “Current Job Data.” This is Job Data currently in the system for the employee.



The screenshot shows a blue header bar labeled "Updated Job Data". Below it, there is a red asterisk followed by the label "FTE" and an empty text input field.

Under “Updated Job Data,” enter the new data for the selected employee. In this example, you will want to enter the employee’s updated FTE in the designated field. Keep in mind that you are changing the FTE on the Job, not the Position. The Position FTE will need to be equal to or greater than the new FTE.

# Modify Probation (Staff)

UCPath REASON Code is – Update Probation Code / ServiceLink REASON Code is Modify Probation

**Current Job Data**

---

**Probation and Trial Employment**

Probation Code

Probation Completed

Probation End Date

01/01/17

**Updated Job Data**

---

\* Probation Code

-- None --

\* Probation End Date

📅

When the Data Change reason “Modify Probation” is selected, a section titled “Probation and Trial Employment” will appear towards the bottom of the page. UCPath data for the selected employee will populate under “Current Job Data.” This is Job Data currently in the system for the employee.

Under “Updated Job Data,” enter the new data for the selected employee. In this example, you will want to enter the employee’s updated Probation Code and Probation End Date in the designated fields. The calendar function may be used to select the end date.

# Update Location Use End Date (Staff)

UCPath REASON Code is – Update Location Use End Date/ ServiceLink REASON Code is Update Location Use End Date

**Current Job Data**

---

**Appointment Duration**

---

Location Use Type	Location Use End Date
<input style="width: 95%; height: 25px;" type="text"/>	<input style="width: 95%; height: 25px;" type="text"/>

**Updated Job Data**

---

* Location Use Type	* Location Use End Date
<input style="width: 95%; height: 25px;" type="text" value="-- None --"/>	<input style="width: 95%; height: 25px;" type="text"/> <input style="float: right; width: 20px; height: 20px; border: none; background: none; cursor: pointer;" type="button" value="📅"/>

When the Data Change reason “Update Location Use End Date” is selected, a section titled “Appointment Duration” will appear towards the bottom of the page. UCPath data for the selected employee will populate under “Current Job Data.” This is Job Data currently in the system for the employee. This particular data point does not drive anything in the system, but does allow to flag a future date when there is a need to review Job Details and/or Funding for an employee.

Under “Updated Job Data,” enter the new data for the selected employee. In this example, you will want to enter the employee’s updated Location Use Type (select from: Funding End Date, Review Remaining Budget, and Review Job) and Employee Class in the designated fields. The calendar function may be used to select the end date.  
**UCPath has additional Location Use Types that include: NSTP Review, Temporary Off-Scale, and Temporary Reduction in Time.**

# Limited to Career (Staff)

UCPath REASON Code is – Limited to Career / ServiceLink REASON Code is Limited to Career

### Current Job Data

General Job Data

FTE	Employee Class
<input type="text" value="1"/>	<input type="text" value="Staff:Career"/>

When the Data Change reason “Limited to Career” is selected, a section titled “General Job Data” will appear towards the bottom of the page. UCPath data for the selected employee will populate under “Current Job Data.” This is Job Data currently in the system for the employee.

### Updated Job Data

FTE	* Employee class
<input type="text"/>	<input type="text"/>

Under “Updated Job Data,” enter the new data for the selected employee. In this example, you will want to enter the employee’s updated FTE (if applicable) and Employee Class in the designated fields.

# Additional Job Data Changes (Staff)

Job Changes(select all that apply)

## Data Changes

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Academic Extension Pending Review (DTA/EPR) | <input type="checkbox"/> Limited to career (DTA/CAR)                       | <input type="checkbox"/> Return From Active Service Modified Duties (DTA/ASR) |
| <input type="checkbox"/> Academic Reappointment (DTA/REA)            | <input type="checkbox"/> Modify Probation (DTA/PRB)                        | <input type="checkbox"/> Update Auto-Termination (DTA/TMF)                    |
| <input type="checkbox"/> Extend Appointment (DTA/EXT)                | <input checked="" type="checkbox"/> Partial Year Career Duration (DTA/SCC) | <input type="checkbox"/> Update Location Use End Date (DTA/LUE)               |
| <input type="checkbox"/> Extend Trial Employment (DTA/TRL)           | <input type="checkbox"/> Place on Active Service Modified Duties (DTA/ASM) | <input type="checkbox"/> Update postdoc Anniversary Date (DTA/PST)            |
| <input type="checkbox"/> FTE Changes (DTA/CPT)                       |  |   |

If an employee's 'Expected Job End Date' field is populated and their 'End Job Automatically' checkbox is checked in the template based hire (UCPath), the job will be automatically terminated on their Expected Job End Date.

For staff, certain employee classes require a Expected Job End Date, and will have the 'End Job Automatically' checkbox automatically checked. Staff Employee classes that should have Expected Job End Dates include:

- Student – Casual/Restricted
- Contract
- Floater
- Limited
- Per Diem

# Update Auto-Termination (Staff)

UCPath REASON Code is – Update Auto Termination Flag / ServiceLink REASON Code is Update Auto-Termination

**Current Job Data**

---

**General Job Data**

---

FTE

**Appointment Duration**

---

Job End Date

 End Job Automatically

**Updated Job Data**

---

FTE

Job End Date

 End Job Automatically

When the Data Change reason “Update Auto-Termination” is selected, a section titled “General Job Data” will appear towards the bottom of the page. UCPath data for the selected employee will populate under “Current Job Data.” This is Job Data currently in the system for the employee.

Under “Updated Job Data,” enter the new data for the selected employee. In this example, you will want to enter the employee’s updated FTE (if applicable) and Job End Date in the designated fields. If you would like for the Job to terminate automatically in UCPath, check the “End Job Automatically” box. The job will terminate automatically in UCPath on that date.



# Comments & Attachment

Comments are NOT required, but should be added. For example, no pay information is included in the ServiceLink request. Any additional information that you believe your SSC OR the UCPath Center should know about the leave should be included in the Comments section.

Comments

## Attachment

Attachments are not required to submit a Job Data change. Additional information can and should be provided to better support your request and ensure that all data points needed for your Shared Services Center are provided to transact in UCPath.

Add Attachment

Submit

Cancel

To submit the request click on "submit." You will be directed to a confirmation page.

If you opt NOT to submit the request, click on Cancel. This action will delete the request form from the system and redirect you to the ServiceLink homepage.

# ServiceLink Initiator

Once a ServiceLink form is successfully submitted, the Initiator will be directed to this confirmation page.

natneen.cool | Logout



Thank you, your request has been submitted

Request Number: [REQ0019997](#)

Number	Description	Stage
<a href="#">RITM0020030</a>		

Response time(ms): 6043, Network: 5501, server: 312, browser: 230

Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

Clicking on the RITM Number and Description will take you to a view-only of the ServiceLink Fulfiller of the submitted Onboarding Transaction.

This "Stage" icon allows you to track a transactions' progress through fulfillment. Three green checks means that all tasks are closed, and the submitted transaction is complete.

# ServiceLink Initiator

Requested Item  
RITM0020030

Clicking on the RITM (from previous screen) will take you to your request. This page has information that will tell you the stage of the ticket, as well as who is working on your request.

Number: RITM0020030  
Item: Job and Comp Data Changes  
Opened: 07/10/18 14:25:53  
Requested for: Shannon Minter  
State: Open

Stage: Fulfillment

Initiator: Kathleen Cool  
Request Date: 07/10/18

Employee Information

\* Employee Name(LN, FN): MELLO, WENDY Z  
\* Position Number: 40016118

Employee First Name: WENDY  
Employee Last Name: MELLO  
Employee ID: 10028268

The Stage field gives information pertaining to the status of your request. Once all tasks associated with this request are closed, the stage will update automatically to "Closed Complete." This means that your request has been successfully completed and transacted in UCPath.

# ServiceLink Fulfiller

Scroll down to the bottom of the RITM to the Catalog Task. In this area, you will see all the related tasks for the request.

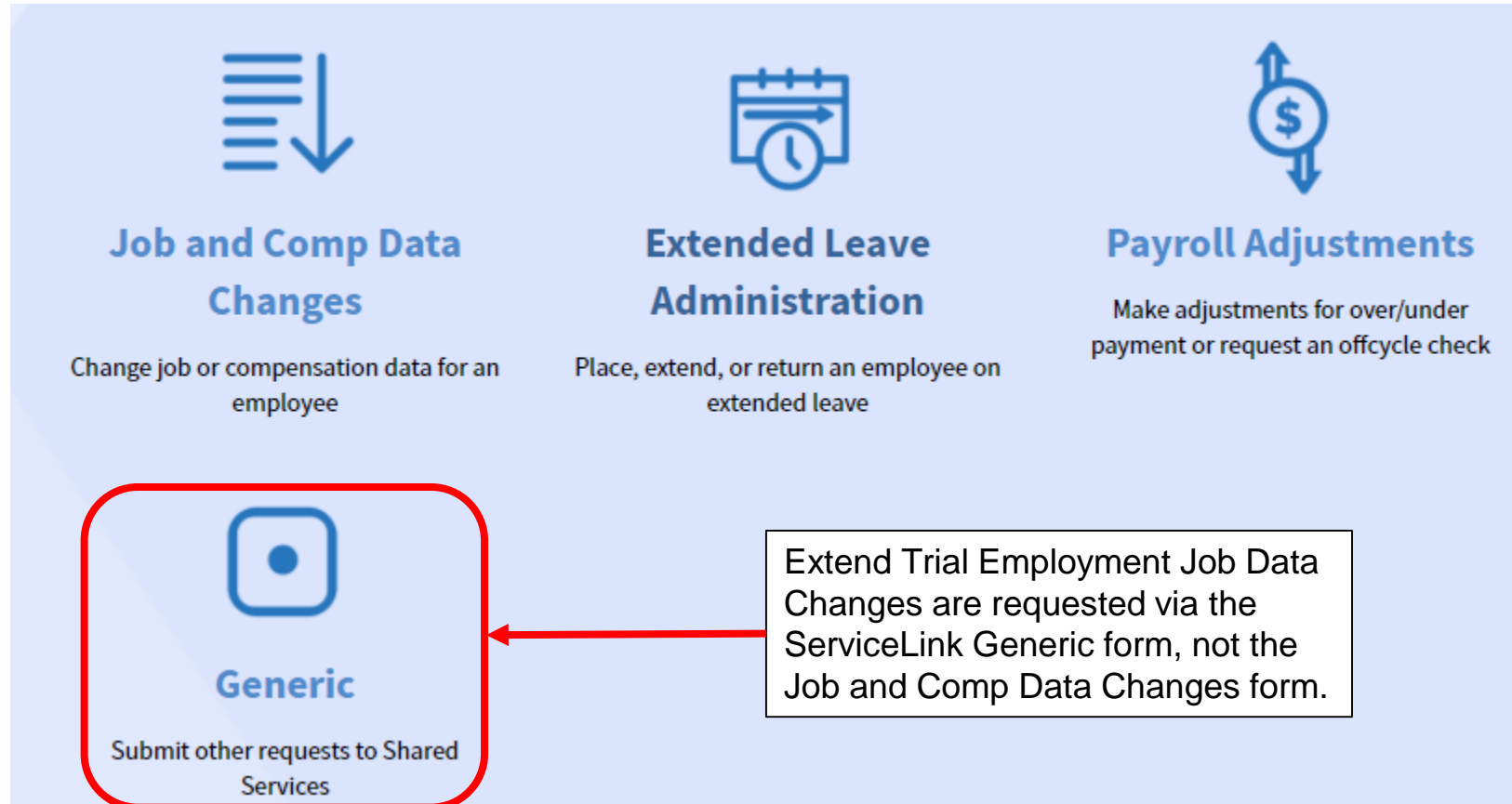
The screenshot displays the 'Catalog Tasks (1)' section of the ServiceLink Fulfiller interface. The interface includes a navigation bar with 'Catalog Tasks', 'Go to', 'State', and 'Search' options. Below the navigation bar, the request item is identified as 'RITM0020030'. The main table lists the task details:

Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0035518	Complete UCPATH Transaction(s)	UCPATH ServiceLink Default Fulfiller Group		▶ ✓ → ○ ○	Open

The 'Catalog Tasks (1)' tab is highlighted with a red box, and the task row is also highlighted with a red box. A red arrow points from the text box above to the 'Catalog Tasks (1)' tab, and another red arrow points from the text box below to the task row.

The Shared Services Center fulfiller will be assigned one task – to complete the UCPATH Transaction(s). The SSC fulfiller will change the state of the task from “Open” to “Closed” when completed. When the task reflects a “Closed” state, the RITM stage will automatically change to “closed complete.”

# Extend Trial Employment (Staff)



# Request Information

## Request Information

▼ Note

For Catastrophic Leave

1. Complete the [Catastrophic Leave Request Form](#). See [Catastrophic Leave Guidelines](#) for eligibility information.
2. Complete the [Catastrophic Leave Donation Form](#). See [Catastrophic Leave Guidelines](#) for recipient option.

Select "Other" from the dropdown for Transaction Type

The Effective Date should be the date when the extension takes effect

\* Transaction Type

Other

\* Effective Date

\* Other Reason

When "Other" is selected as the Transaction Type, the "Other Reason" field appears. Enter "Extend Trial Employment" as the reason.

# Employee Information

## Employee Information

▼ Note:

For Multi-location Appointments, Onboarding - Concurrent Hire, Onboarding - Transfer and Other transaction types you must select Employee Name or Accountability Structure before submitting request

Employee Name (Last Name, First Name)

Enter or search for the employee whose Trial Employment you wish to extend

Accountability Structure

Select the employee's Accountability Structure. This field will ensure that the request is routed to the correct Shared Services Center.

\* Comments

Comments are required for these types of Request. Include any additional information needed, including the new Trial Employment End Date.



# Data Required for UCPath PayPath Transactions

Key Data Point
Employee ID
Effective Date
Action
Action Reason
Employee Record Number







# UCPath Required Data (Staff)

## Job Data Change Requests

Data Point	Data Location on UCR Forms
Expected Return Date	ServiceLink Form
FTE	ServiceLink Form
Empl Class	ServiceLink Form
Expected Job End Date	ServiceLink Form
Trial Employment End Date	ServiceLink Form
Probation Code	ServiceLink Form
Probation End Date	ServiceLink Form

# Job Data Changes for AP



# Job Data Changes (DTA) for AP



## Active Service Modified Duties

**UCPath Reason Code:** ASM

**Description:** Used for tracking modified service when an academic appointee has substantial responsibility for a newborn child or adoptee



## Return from Active Service Modified Duties

**UCPath Reason Code:** ASR

**Description:** Used to return a faculty member to regular service after a period of Active Modified Duties



# Job Data Changes (DTA) for AP (continued)



## Change in Percent Time (FTE)

**UCPath Reason Code:** CPT

**Description:** Used to increase/decrease percent time (Job Data FTE) on an academic appointment



## Add/Extend Appointment

**UCPath Reason Code:** EXT

**Description:** Used to add or extend temporary appointment



# Job Data Changes (DTA) for AP (continued)



## Update Location Use End Date

**UCPath Reason Code:** LUE

**Description:** Used to update the Location Use End Date field on the UC Job Data page



## Update Post Doc Anniversary Date

**UCPath Reason Code:** PST

**Description:** Used to update the Post Doc Anniversary Date



# Job Data Changes (DTA) for AP (continued)



## Academic Reappointment

**UCPath Reason Code:** REA

**Description:** Used with Assistant Professors and any other term appointment academics



## Update Auto Termination Flag

**UCPath Reason Code:** TMF

**Description:** Used to either select or deselect the “End Job Automatically” check box

# ServiceLink Form (Job and Comp Data Changes)



## Job and Comp Data Changes

Change job or compensation data for an employee



## Extended Leave Administration

Place, extend, or return an employee on extended leave



## Payroll Adjustments

Make adjustments for over/under payment or request an offcycle check



## Short Work Break

Place, extend, or return an employee on a short work break

The same ServiceLink Form – Job and Comp Data Changes – is used to update both Staff and AP Job Data and Compensation Data (including JED and Pay Rate Changes)

# Employee Information (AP)

Enter Employee's Name (Last Name, First Name) whose UCPATH Job Data needs to be changed

Job and Position Data will populate the remainder of the fields, including the employee's UCPATH Employee ID.

**Employee Information**

\* Employee Name(LN, FN)  
GALELLA, DONATELLA

\* Position Number  
40005179

Employee ID  
10009307

Employee First Name: DONATELLA  
Employee Last Name: GALELLA  
Job Code: 001300  
Job Description: ASST PROF-AY  
Division Code: DIV108  
Division Description: Arts

Organization: ORG12  
Organization Description: Coll of Hum, Arts & Social Sci  
Department Code: D01038  
Department Description: Theatre

- By clicking on the magnifying glass icon, you can search for an employee by:
- Employee Name
  - Employee ID (UCPath Empl ID)
  - Home Department Dept Code
  - Home Department Dept Description
  - Home Department Division Code
  - Home Department Division Description
  - Home Department Division Org Code
  - Home Department Division Org Description
  - Visa Permit Type

Based on the Employee Name, the employee's Position Number(s) will default in the Position Number field. If the employee has more than one job, the employee's primary job will appear first. Additional jobs can be selected by clicking the down arrow and clicking on the other position numbers. Position data associated with the selected Position Number will automatically populate in the fields below.



# Job Changes (AP)

**Job Changes(select all that apply)**

**Data Changes**

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Academic Extension Pending Review (DTA/EPR)  | <input type="checkbox"/> Limited to career (DTA/CAR)                       | <input type="checkbox"/> Return From Active Service Modified Duties (DTA/ASR) |
| <input type="checkbox"/> Academic Reappointment (DTA/REA)             | <input type="checkbox"/> Modify Probation (DTA/PRB)                        | <input type="checkbox"/> Update Auto-Termination (DTA/TMF)                    |
| <input type="checkbox"/> Extend Appointment (DTA/EXT)                 | <input type="checkbox"/> Partial Year Career Duration (DTA/SCC)            | <input type="checkbox"/> Update Location Use End Date (DTA/LUE)               |
| <input checked="" type="checkbox"/> Extend Trial Employment (DTA/TRL) | <input type="checkbox"/> Place on Active Service Modified Duties (DTA/ASM) | <input checked="" type="checkbox"/> Update postdoc Anniversary Date (DTA/PST) |
| <input type="checkbox"/> FTE Changes (DTA/CPT)                        |  |   |

Job Data Changes for which the selected employee is eligible for will appear next to white boxes. Gray boxes designate Job Data Changes for which the selected employee (based on Job Code) is not eligible for. Per request, one or many Job Data Changes can be selected. In the above example (Employee selected has Job Code 001300 – Asst Prof-AY), the following Job Data Changes can be selected: Academic Extension Pending Review, Academic Reappointment, Extend Appointment, FTE Changes, Place on Active Service Modified Duties, Return from Active Service Modified Duties, Update Auto-Termination, Update Location Use End Date.

# Change Effective Date (AP)

- Job Earnings Distribution (JED)
- One-time Additional Compensation

- Pay Rate Changes (PAY)
- Recurring Additional Compensation

\* Change Effective Date

07/30/18



Enter the date when you want the changes (either Job Data or Compensation changes) to take effect. If you are submitting several requests for the same employee with different effective dates, you will need to submit them separately. All changes submitted on one form should have the same Change Effective Date.

# Academic Extension Pending Review (AP)

UCPath REASON Code is – Extension Pending Review / ServiceLink REASON Code is Academic Extension Pending Review

**Current Job Data**

**General Job Data**

---

FTE

**Appointment Duration**

---

Job End Date

 End Job Automatically

When the Data Change reason “Academic Extension Pending Review” is selected, a section titled “General Job Data” will appear towards the bottom of the page. UCPath data for the selected Academic Appointee will populate under “Current Job Data.” This is Job Data currently in the system for the Academic Appointee.

**Updated Job Data**

FTE

\* Job End Date

 End Job Automatically

Under “Updated Job Data,” enter the new data for the selected Academic Appointee. In this example, you will want to enter the academic appointee’s updated FTE (if applicable) and Job End Date in the designated fields. If you would like for the Job to terminate automatically in UCPath, check the “End Job Automatically” box. The job will terminate automatically in UCPath on that date.

# Academic Reappointment (AP)

UCPath REASON Code is – Academic Reappointment / ServiceLink REASON Code is Academic Reappointment

## Current Job Data

### General Job Data

FTE

1

### Appointment Duration

Job End Date

End Job Automatically

## Updated Job Data

FTE

\* Job End Date




End Job Automatically

When the Data Change reason “Academic Reappointment” is selected, a section titled “General Job Data” will appear towards the bottom of the page. UCPath data for the selected Academic Appointee will populate under “Current Job Data.” This is Job Data currently in the system for the Academic Appointee.

Under “Updated Job Data,” enter the new data for the selected Academic Appointee. In this example, you will want to enter the academic appointee’s updated FTE (if applicable) and Job End Date in the designated fields. If you would like for the Job to terminate automatically in UCPath, check the “End Job Automatically” box. The job will terminate automatically in UCPath on that date.

# Extend Appointment (AP)

UCPath REASON Code is – Add/Extend Appointment / ServiceLink REASON Code is Extend Appointment

**Current Job Data**

---

**General Job Data**

FTE

**Appointment Duration**

Job End Date

 End Job Automatically

**Updated Job Data**

---

FTE

\* Job End Date

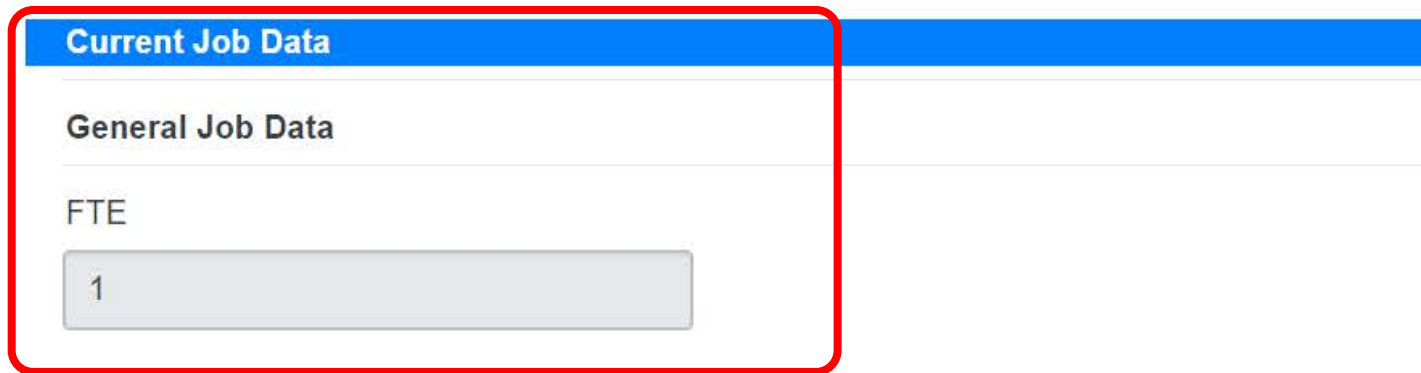
 End Job Automatically

When the Data Change reason “Extend Appointment” is selected, a section titled “General Job Data” will appear towards the bottom of the page. UCPath data for the selected Academic Appointee will populate under “Current Job Data.” This is Job Data currently in the system for the Academic Appointee.

Under “Updated Job Data,” enter the new data for the selected Academic Appointee. In this example, you will want to enter the academic appointee’s updated FTE (if applicable) and Job End Date in the designated fields. If you would like for the Job to terminate automatically in UCPath, check the “End Job Automatically” box. The job will terminate automatically in UCPath on that date.

# FTE Changes (AP)

UCPath REASON Code is – Change in Percent Time / ServiceLink REASON Code is FTE Changes



The screenshot shows a blue header bar labeled "Current Job Data". Below it is a section titled "General Job Data". Underneath, there is a label "FTE" and a text input field containing the number "1". The entire section is enclosed in a red rectangular box.

When the Data Change reason “FTE Changes” is selected, a section titled “General Job Data” will appear towards the bottom of the page. UCPath data for the selected employee will populate under “Current Job Data.” This is Job Data currently in the system for the employee.



The screenshot shows a blue header bar labeled "Updated Job Data". Below it, there is a red asterisk followed by the label "FTE" and an empty text input field. The entire section is enclosed in a red rectangular box.

Under “Updated Job Data,” enter the new data for the selected employee. In this example, you will want to enter the employee’s updated FTE in the designated field. Keep in mind that you are changing the FTE on the Job, not the Position. The Position FTE will need to be equal to or greater than the new FTE.

# Place on Active Service Modified Duties (AP)

UCPath REASON Code is – Active Service Modified Duties / ServiceLink REASON Code is Place on Active Service Modified Duties

\* Change Effective Date



Active Service Modified Duties (ASMD) is a reduction of duties, not a type of leave. It can also be requested using the Extended Leave Administration ServiceLink form when putting an Academic Appointee on childbearing leave. Using the Job Data and Comp Changes form will ONLY place the Academic Appointee on ASMD, where they remain in service to the University, but with modified duties.

For additional information on ASMD, consult the [Academic Personnel Office website](#).

To request that an eligible Academic Appointee be placed on Active Service Modified Duties, enter the first day the Academic Appointee will be on ASMD in the “Change Effective Date” field.

# Return from Active Service Modified Duties (AP)

UCPath REASON Code is – Return from ASMD / ServiceLink REASON Code is Return from Active Service Modified Duties

\* Change Effective Date



To return an Academic Appointee from Active Service Modified Duties, enter the first day the Academic Appointee will return to their regular duties in the “Change Effective Date” field.

For additional information on ASMD, consult the [Academic Personnel Office website](#).



# Update Auto-Termination (AP)

UCPath REASON Code is – Update Auto Termination Flag / ServiceLink REASON Code is Update Auto-Termination

**Current Job Data**

---

**General Job Data**

---

FTE

**Appointment Duration**

---

Job End Date

 End Job Automatically

**Updated Job Data**

---

FTE

Job End Date

 End Job Automatically

When the Data Change reason “Update Auto-Termination” is selected, a section titled “General Job Data” will appear towards the bottom of the page. UCPath data for the selected Academic Appointee will populate under “Current Job Data.” This is Job Data currently in the system for the Academic Appointee.

Under “Updated Job Data,” enter the new data for the selected employee. In this example, you will want to enter the academic appointee’s updated FTE (if applicable) and Job End Date in the designated fields. If you would like for the Job to terminate automatically in UCPath, check the “End Job Automatically” box. The job will terminate automatically in UCPath on that date.

# Update Location Use End Date (AP)

UCPath REASON Code is – Update Location Use End Date/ ServiceLink REASON Code is Update Location Use End Date

## Current Job Data

### Appointment Duration

Location Use Type

Location Use End Date

## Updated Job Data

\* Location Use Type

\* Location Use End Date



When the Data Change reason “Update Location Use End Date” is selected, a section titled “Appointment Duration” will appear towards the bottom of the page. UCPath data for the selected employee will populate under “Current Job Data.” This is Job Data currently in the system for the employee. This particular data point does not drive anything in the system, but does allow to flag a future date when there is a need to review Job Details and/or Funding for an employee.

Under “Updated Job Data,” enter the new data for the selected employee. In this example, you will want to enter the employee’s updated Location Use Type (select from: Funding End Date, Review Remaining Budget, and Review Job) and Employee Class in the designated fields. The calendar function may be used to select the end date.

**UCPath has additional Location Use Types that include: NSTP Review, Temporary Off-Scale, and Temporary Reduction in Time.**

# Additional Job Data Changes (AP)

Job Changes(select all that apply)

## Data Changes

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Academic Extension Pending Review (DTA/EPR) | <input type="checkbox"/> Limited to career (DTA/CAR)                       | <input type="checkbox"/> Return From Active Service Modified Duties (DTA/ASR) |
| <input type="checkbox"/> Academic Reappointment (DTA/REA)            | <input type="checkbox"/> Modify Probation (DTA/PRB)                        | <input type="checkbox"/> Update Auto-Termination (DTA/TMF)                    |
| <input type="checkbox"/> Extend Appointment (DTA/EXT)                | <input checked="" type="checkbox"/> Partial Year Career Duration (DTA/SCC) | <input type="checkbox"/> Update Location Use End Date (DTA/LUE)               |
| <input type="checkbox"/> Extend Trial Employment (DTA/TRL)           | <input type="checkbox"/> Place on Active Service Modified Duties (DTA/ASM) | <input type="checkbox"/> Update postdoc Anniversary Date (DTA/PST)            |
| <input type="checkbox"/> FTE Changes (DTA/CPT)                       |  |   |

The "Update Post Doc Anniversary Date" will only be clickable if the selected Academic Employee is a Post Doc (Academic Post Doc EMPL Class in UCPath).

# Update PostDoc Anniversary Date (AP)

UCPath REASON Code is Update Post Doc Anniversary Date / ServiceLink REASON Code is Update Post Doc Anniversary Date

## Current Job Data

### Appointment Duration

Postdoc Anniversary Date

## Updated Job Data

\* Postdoc Anniversary Date



When the Data Change reason “Update Post Doc Anniversary Date” is selected, a section titled “Appointment Duration” will appear towards the bottom of the page. UCPath data for the selected employee will populate under “Current Job Data.” This is Job Data currently in the system for the Academic Appointee.

Under “Updated Job Data,” enter the new data for the selected Academic Appointee. In this example, you will want to enter the Post Doc’s updated Post Doc Anniversary Date. The Post Doc Anniversary date reflects their first year anniversary as a Post Doc (e.g., if hired 1/1/18, the anniversary date would be 1/1/19). The calendar function may be used to select the end date.

# Comments & Attachment

Comments are NOT required, but should be added. For example, no pay information is included in the ServiceLink request. Any additional information that you believe your SSC OR the UCPATH Center should know about the leave should be included in the Comments section.

Comments



## Attachment

Attachments are not required to submit a Job Data change. Additional information can and should be provided to better support your request and ensure that all data points needed for your Shared Services Center are provided to transact in UCPATH.

Add Attachment



Submit

To submit the request click on "submit." You will be directed to a confirmation page. Keep in mind that your SSC will only receive the request once the Accountability Structure fulfiller has closed the Send/Receive Leave Packet task.



Cancel



If you opt NOT to submit the request, click on Cancel. This action will delete the request form from the system and redirect you to the ServiceLink homepage.

# ServiceLink Initiator

Once a ServiceLink form is successfully submitted, the Initiator will be directed to this confirmation page.

natneen.cool | Logout



Thank you, your request has been submitted

Request Number: [REQ0019997](#)

Number	Description	Stage
<a href="#">RITM0020030</a>		

Response time(ms): 6043, Network: 5501, server: 312, browser: 230

Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

Clicking on the RITM Number and Description will take you to a view-only of the ServiceLink Fulfiller of the submitted Onboarding Transaction.

This "Stage" icon allows you to track a transactions' progress through fulfillment. Three green checks means that all tasks are closed and the submitted transaction is complete.

# ServiceLink Initiator

The screenshot displays the ServiceLink Initiator interface. On the left, a navigation bar shows a 'Requested Item' with ID 'RITM0020030' highlighted in a red box. A red arrow points from this box to a text box. The main content area shows request details: Number (RITM0020030), Item (Job and Comp Data Changes), Opened (07/10/18 14:25:53), Requested for (Shannon Minter), and State (Open). On the right, the 'Stage' field is highlighted in a red box and contains the value 'Fulfillment'. A red arrow points from this box to another text box. At the bottom left, the 'Initiator' field shows 'Kathleen Cool' and the 'Request Date' is '07/10/18'.

Clicking on the RITM (from previous screen) will take you to your request. This page has information that will tell you the stage of the ticket, as well as who is working on your request.

The Stage field gives information pertaining to the status of your request. Once all tasks associated with this request are closed, the stage will update automatically to "Closed Complete." This means that your request has been successfully completed and transacted in UCPath.

# ServiceLink Fulfiller

Scroll down to the bottom of the RITM to the Catalog Task. In this area, you will see all the related tasks for the request.

The screenshot displays the ServiceLink Fulfiller interface. At the top, there are tabs for 'Catalog Tasks (1)', 'Approvals', and 'Group approvals'. Below the tabs is a search bar and a 'Go to' dropdown menu. The main content area shows a table of tasks for the request item RITM0020030. The table has columns for 'Number', 'Short description', 'Assignment group', 'Assigned to', 'Stage', and 'State'. A single row is highlighted with a red box, showing the task 'SCTASK0035518' with the description 'Complete UCPATH Transaction(s)', assigned to the 'UCPATH ServiceLink Default Fulfiller Group', and in the 'Open' state. The 'Stage' column contains a progress indicator with a green checkmark and a blue arrow.

Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0035518	Complete UCPATH Transaction(s)	UCPATH ServiceLink Default Fulfiller Group		▶ ✓ → ○ ○	Open

The Shared Services Center fulfiller will be assigned one task – to complete the UCPATH Transaction(s). The SSC fulfiller will change the state of the task from “Open” to “Closed” when completed. When the task reflects a “Closed” state, the RITM stage will automatically change to “closed complete.”





# Data Required for UCPath PayPath Transactions

Key Data Point
Employee ID
Effective Date
Action
Action Reason
Employee Record Number



# UCPath Required Data (AP)

## Job Data Change Requests

Data Point	Data Location on UCR Forms
Expected Return Date	ServiceLink Form
FTE	ServiceLink Form
Expected Job End Date	ServiceLink Form
End Job Automatically Checkbox	ServiceLink Form
Academic Duration of Appointment	ServiceLink Form
Post Doc Anniversary Date	ServiceLink Form

# Compensation Changes for Staff

# Job Earnings Distribution (JED) for Staff



## ERIT-EE Reduction in Time

**UCPath Reason Code:** ERT

**Description:** Used to place an employee (Exempt & Non Exempt) on ERIT. The employee's Job FTE is not reduced. This action requires manual entry of Job Earnings Distribution in UCPath



## Negotiated Compensation Plans

**UCPath Reason Code:** JED

**Description:** For Health Sciences Comp Plan, MSP Staff Physician Comp Plan or Negotiated Trial Salary Program use only. This can also be used for Summer Salary where the Earn Code for a given Salary Plan/Grade is not REG. This action required manual entry of Job Earnings Distribution in UCPath



# Job Earnings Distribution (JED) for Staff (continued)



## Return to Normal Hours/Distribution

**UCPath Reason Code:** RET

**Description:** Used to return employees to normal hours or distribution. This action requires manual entry of Job Earnings Distribution in UCPath

# ServiceLink Form (Job and Comp Data Changes)



## Job and Comp Data Changes

Change job or compensation data for an employee



## Extended Leave Administration

Place, extend, or return an employee on extended leave



## Payroll Adjustments

Make adjustments for over/under payment or request an offcycle check



## Short Work Break

Place, extend, or return an employee on a short work break

The same ServiceLink Form – Job and Comp Data Changes – is used to update both Staff and AP Job Data and Compensation Data (including JED and Pay Rate Changes)


# JED Change (Staff)

## Compensation Changes

- Job Earnings Distribution (JED)
- One-time Additional Compensation

- Pay Rate Changes (PAY)
- Recurring Additional Compensation

\* Change Effective Date

Enter the date for which the Job Earnings Distribution (JED) change takes effect for the selected employee. The calendar function may be used to select the change effective date.

To request a Job Earnings Distribution (JED) change for an employee, click the checkbox next to Job Earnings Distribution (JED). A section called “Job Data Distribution” will appear towards the bottom of the page once selected.

# JED Reason (Staff)

Job Earnings Distribution

Request Information

Current Job Data

JED Reason

JED End Date

Updated Job Data

JED Reason

-- None --  
Employee Initiated Reduction in Time (ERIT)  
Negotiated Comp Plan or Other JED  
Return to Normal Distribution

Select the JED Reason from the dropdown list.  
Staff employees are eligible for:

- Employee Initiated Reduction in Time (ERIT)
- Negotiated Comp Plan or Other JED
- Return to Normal Distribution



# Distribution (Staff)

## Distribution

Earnings Code	% of Distribution	Comp Rate
<input type="text"/>	<input type="text"/>	<input type="text"/>
Earnings Code	% of Distribution	Comp Rate
<input type="text"/>	<input type="text"/>	<input type="text"/>
Earnings Code	% of Distribution	Comp Rate
<input type="text"/>	<input type="text"/>	<input type="text"/>
Earnings Code	% of Distribution	Comp Rate
<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Distribution %		Total Compensation
<input type="text"/>		<input type="text"/>

Earnings Code	% of Distribution	Comp Rate
<input type="text" value=""/>	<input type="text"/>	<input type="text"/>
Earnings Code	% of Distribution	Comp Rate
<input type="text" value=""/>	<input type="text"/>	<input type="text"/>
Earnings Code	% of Distribution	Comp Rate
<input type="text" value=""/>	<input type="text"/>	<input type="text"/>
Earnings Code	% of Distribution	Comp Rate
<input type="text" value=""/>	<input type="text"/>	<input type="text"/>
Total Distribution %		Total Compensation
<input type="text"/>		<input type="text"/>

If the employee currently has a JED, the JED information will appear under the Current Data section.

To change the JED, enter the Earnings Code, % of Distribution, and Comp Rate. Up to 4 entries may be added/changed. The Total Distribution and Total Compensation will be automatically calculated and will appear in the corresponding fields. Total Distribution % for all rows must equal 100%.

# Comments & Attachment

Comments are NOT required, but should be added. For example, no pay information is included in the ServiceLink request. Any additional information that you believe your SSC OR the UCPATH Center should know about the leave should be included in the Comments section.

Comments

## Attachment

Attachments are not required to submit a Job Data change. Additional information can and should be provided to better support your request and ensure that all data points needed for your Shared Services Center are provided to transact in UCPATH.

Add Attachment

Submit

Cancel

To submit the request click on "submit." You will be directed to a confirmation page.

If you opt NOT to submit the request, click on Cancel. This action will delete the request form from the system and redirect you to the ServiceLink homepage.

# ServiceLink Initiator

Once a ServiceLink form is successfully submitted, the Initiator will be directed to this confirmation page.

natneen.cool | Logout



Thank you, your request has been submitted

Request Number: REQ0019997

Number	Description	Stage
<u>RITM0020030</u>		▶ ✓ ▶ ○

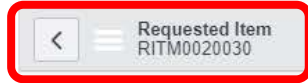
Response time(ms): 6043, Network: 5501, server: 312, browser: 230

Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

Clicking on the RITM Number and Description will take you to a view-only of the ServiceLink Fulfiller of the submitted Onboarding Transaction.

This "Stage" icon allows you to track a transactions' progress through fulfillment. Three green checks means that all tasks are closed and the submitted transaction is complete.

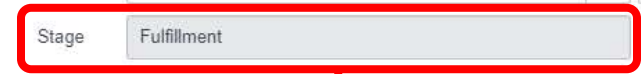
# ServiceLink Initiator



Clicking on the RITM (from previous screen) will take you to your request. This page has information that will tell you the stage of the ticket, as well as who is working on your request.

Number: RITM0020030  
Item: Job and Comp Data Changes  
Opened: 07/10/18 14:25:53  
Requested for: Shannon Minter  
State: Open

Group: [ ]  
Assigned to: [ ]  
Request: REQ0019997  
Stage: Fulfillment



The Stage field gives information pertaining to the status of your request. Once all tasks associated with this request are closed, the stage will update automatically to "Closed Complete." This means that your request has been successfully completed and transacted in UCPath.

Initiator: Kathleen Cool  
Request Date: 07/10/18  
Employee Information

# ServiceLink Fulfiller

Scroll down to the bottom of the RITM to the Catalog Task. In this area, you will see all the related tasks for the request.

The screenshot displays the ServiceLink interface for a Request Item (RITM) with ID RITM0020030. At the top, there is a navigation bar with 'Catalog Tasks (1)' highlighted in a red box. Below this is a search and filter bar. The main content area shows a table of tasks. The first task is highlighted with a red border:

Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0035518	Complete UCPATH Transaction(s)	UCPATH ServiceLink Default Fulfiller Group		▶ ✓ ↻ ○ ○	Open

Below the table, there is an 'Actions on selected rows...' dropdown menu and a pagination indicator showing '1 to 1 of 1'.

The Shared Services Center fulfiller will be assigned one task – to complete the UCPATH Transaction(s). The SSC fulfiller will change the state of the task from “Open” to “Closed” when completed. When the task reflects a “Closed” state, the RITM stage will automatically change to “closed complete.”



# Data Required for UCPath PayPath Transactions

Key Data Point
Employee ID
Effective Date
Action
Action Reason
Employee Record Number



# UCPath Required Data (Staff)

## JED

Data Point	Data Location on UCR Forms
Earnings Distribution Type	ServiceLink Form (JED Reason)
Earnings Code	ServiceLink Form (Distribution)
Compensation Rate	ServiceLink Form (Distribution)
Percent of Distribution	ServiceLink Form (Distribution)
ERIT End Date	ServiceLink Form (JED End Date)



# Pay Rate Changes (PAY) for Staff



## Across-The-Board

**UCPath Reason Code:** ATB

**Description:** Used for an across the board mass increase due to contract negotiations or other across-the-board increases



## Demotion

**UCPath Reason Code:** DEM

**Description:** The pay rate change for an employee who has moved from one position to another which has a lower salary range maximum





# Pay Rate Changes (PAY) for Staff (continued)



## Equity

**UCPath Reason Code:** EQU

**Description:** A pay rate change for a salary increase granted to correct an internal or external/market inequity



## Job Reclass - Downward

**UCPath Reason Code:** JRD

**Description:** Used to add a pay rate change for the job reclassification. This action/reason should be a 2<sup>nd</sup> row inserted in Job (in UCPath) upon the position change



# Pay Rate Changes (PAY) for Staff (continued)



## Job Reclass - Lateral

**UCPath Reason Code:** JRL

**Description:** Used to add a pay rate change for the job reclassification. This action/reason should be a 2<sup>nd</sup> row inserted in Job (in UCPath) upon the position change



## Job Reclass - Upward

**UCPath Reason Code:** JRU

**Description:** Used to add a pay rate change for the job reclassification. This action/reason should be a 2<sup>nd</sup> row inserted in Job (in UCPath) upon the position change



# Pay Rate Changes (PAY) for Staff (continued)



## Merit

**UCPath Reason Code:** MER

**Description:** A pay rate change that is a performance-based salary increase granted in accordance with the applicable merit program guidelines or contract provision



## Bring to Meet Minimum

**UCPath Reason Code:** MIN

**Description:** A salary increase granted in order to raise an employee's salary to meet a new minimum salary range or step rate



# Pay Rate Changes (PAY) for Staff (continued)



## Promotion

**UCPath Reason Code:** PRO

**Description:** Used for pay rate change that occurs due to a promotion



## Step Increase/Progression

**UCPath Reason Code:** STI

**Description:** A pay rate change that is an advancement to a higher step in accordance with applicable contract provisions

# ServiceLink Form (Job and Comp Data Changes)



## Job and Comp Data Changes

Change job or compensation data for an employee



## Extended Leave Administration

Place, extend, or return an employee on extended leave



## Payroll Adjustments

Make adjustments for over/under payment or request an offcycle check



## Short Work Break

Place, extend, or return an employee on a short work break

The same ServiceLink Form – Job and Comp Data Changes – is used to update both Staff and AP Job Data and Compensation Data (including JED and Pay Rate Changes)

# Pay Rate Changes (Staff)

## Compensation Changes

- Job Earnings Distribution (JED)
- One-time Additional Compensation

\* Change Effective Date



Enter the date for which the Pay Rate change takes effect for the selected employee. The calendar function may be used to select the change effective date.

- Pay Rate Changes (PAY)
- Recurring Additional Compensation

To request a Pay Rate Change change for an employee, click the checkbox next to Pay Rate Changes (PAY). A section called "Pay Rate Changes" will appear towards the bottom of the page once selected.

# Pay Rate Change Reason (Staff)

**Pay Rate Changes**

▼ Note:

Compensation row(s) for stepped academic appointees will automatically default once a step is selected. For most academic appointees, one row will default. For HSCP members, both the X and X' components will default. If the academic appointee has additional components of pay that do not default (e.g., off-scale amounts, Y Payments) or if the appointee is not stepped (e.g., BYA appointments, above-scale faculty), please enter their compensation on the third or fourth compensation row after selecting the correct Comp Rate Code.

Data cannot be manually entered on the first two compensation rows.

Job Code: 004722      Job Title: BLANK AST 3      Job Code:       Job Title:

\* Pay Rate Change Reason

- Across- The-Board (ATB)
- Demotion (DEM)
- Equity (EQU)
- Job Reclass - Downward (JRD)
- Job Reclass - Lateral (JRL)
- Job Reclass - Upward (JRU)
- Merit (MER)
- Bring to Meet Minimum (MIN)
- Promotion (PRO)
- Step Increase/Progression (STI)

Under the Pay Rate Changes section, select the Pay Rate Change Reason code. Staff employees are eligible for:

- Across-The-Board
- Demotion
- Equity
- Job Reclass – Downward
- Job Reclass – Lateral
- Job Reclass – Upward
- Merit
- Bring to Meet Minimum
- Promotion
- Step Increase/Progression

# Compensation Information (Staff)

**Compensation Information**

Compensation Frequency	Step
H	None

Regardless of Pay Rate Change Reason selected, a section titled "Compensation Information" will appear towards the bottom of the page. UCPath data for the selected employee will populate under "Current Job Data." This is the Compensation Frequency and Step currently in UCPath for the selected employee.

Compensation Frequency	Step
-- None --	

Changes for Compensation Frequency and Step (if applicable) can be made under the "Updated Job Data" column.



# Components of Pay (Staff)

**Components of Pay**

Comp Rate Code	Comp Rate	Comp Frequency
UCHRLY ⓘ	21.85	H
Comp Rate Code	Comp Rate	Comp Frequency
Comp Rate Code	Comp Rate	Comp Frequency
Comp Rate Code	Comp Rate	Comp Frequency
Comp Rate Code	Comp Rate	Comp Frequency
Comp Rate Code	Comp Rate	Comp Frequency

Comp Rate Code	Comp Rate	Comp Frequency
Comp Rate Code	Comp Rate	Comp Frequency
Comp Rate Code	Comp Rate	Comp Frequency
Comp Rate Code	Comp Rate	Comp Frequency
Comp Rate Code	Comp Rate	Comp Frequency
Comp Rate Code	Comp Rate	Comp Frequency

Regardless of Pay Rate Change Reason selected, a section titled “Components of Pay” will appear towards the bottom of the page. UCPATH data for the selected employee will populate under “Current Job Data.” This is the Comp Rate Code, Comp Rate and Comp Frequency currently in UCPATH for the selected employee.

Changes to Comp Rate Code and Comp Rate (up to four rows) can be made in the “Updated Job Data” section. Data cannot be manually entered on the first two compensation rows. The first row will default automatically for stepped Academic Appointees. X and X’ components will default on the second row for HSCP members.

# Comments & Attachment

Comments are NOT required, but should be added. For example, no pay information is included in the ServiceLink request. Any additional information that you believe your SSC OR the UCPATH Center should know about the leave should be included in the Comments section.

Comments

## Attachment

Attachments are not required to submit a Job Data change. Additional information can and should be provided to better support your request and ensure that all data points needed for your Shared Services Center are provided to transact in UCPATH.

Add Attachment

Submit

Cancel

To submit the request click on "submit." You will be directed to a confirmation page.

If you opt NOT to submit the request, click on Cancel. This action will delete the request form from the system and redirect you to the ServiceLink homepage.

# ServiceLink Initiator

Once a ServiceLink form is successfully submitted, the Initiator will be directed to this confirmation page.

natneen.cool | Logout



Thank you, your request has been submitted

Request Number: [REQ0019997](#)

Number	Description	Stage
<a href="#">RITM0020030</a>		

Response time(ms): 6043, Network: 5501, server: 312, browser: 230

Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

Clicking on the RITM Number and Description will take you to a view-only of the ServiceLink Fulfiller of the submitted Onboarding Transaction.

This "Stage" icon allows you to track a transactions' progress through fulfillment. Three green checks means that all tasks are closed and the submitted transaction is complete.

# ServiceLink Initiator

< Requested Item  
RITM0020030

Clicking on the RITM (from previous screen) will take you to your request. This page has information that will tell you the stage of the ticket, as well as who is working on your request.

Number RITM0020030  
Item Job and Comp Data Changes  
Opened 07/10/18 14:25:53  
Requested for Shannon Minter  
State Open

group  
Assigned to  
Request REQ0019997  
Stage Fulfillment

Initiator Kathleen Cool  
Request Date 07/10/18  
Employee Information

The Stage field gives information pertaining to the status of your request. Once all tasks associated with this request are closed, the stage will update automatically to "Closed Complete." This means that your request has been successfully completed and transacted in UCPath.

# ServiceLink Fulfiller

Scroll down to the bottom of the RITM to the Catalog Task. In this area, you will see all the related tasks for the request.

The screenshot displays the ServiceLink Fulfiller interface. At the top, there is a navigation bar with 'Catalog Tasks (1)' highlighted in a red box. Below this, a search bar and pagination controls are visible. The main content area shows a table of tasks. The first task is highlighted with a red border:

Number	Short description	Assignment group	Assigned to	Stage	State
<a href="#">SCTASK0035518</a>	Complete UCPATH Transaction(s)	<a href="#">UCPATH ServiceLink Default Fulfiller Group</a>			Open

Below the table, there is an 'Actions on selected rows...' dropdown menu and pagination controls showing '1 to 1 of 1'.

The Shared Services Center fulfiller will be assigned one task – to complete the UCPATH Transaction(s). The SSC fulfiller will change the state of the task from “Open” to “Closed” when completed. When the task reflects a “Closed” state, the RITM stage will automatically change to “closed complete.”



# Other Comp Changes for Staff



## One-Time Additional Compensation

**Description:** Used to request a one-time additional compensation for an employee



## Recurring Additional Compensation

**Description:** Used to request recurring additional compensation for an employee

# ServiceLink Form (Job and Comp Data Changes)



## Job and Comp Data Changes

Change job or compensation data for an employee



## Extended Leave Administration

Place, extend, or return an employee on extended leave



## Payroll Adjustments

Make adjustments for over/under payment or request an offcycle check



## Short Work Break

Place, extend, or return an employee on a short work break

The same ServiceLink Form – Job and Comp Data Changes – is used to update both Staff and AP Job Data and Compensation Data (including JED and Pay Rate Changes)

# Other Compensation Changes (Staff)

## Compensation Changes

- Job Earnings Distribution (JED)
- One-time Additional Compensation
- Pay Rate Changes (PAY)
- Recurring Additional Compensation

\* Change Effective Date

In the "Change Effective Date" field, enter the first day the One-time Additional Compensation or Recurring Additional Compensation should take effect.

Other compensation changes for Academic Appointee that can be requested using the Job and Comp Data Changes ServiceLink form include One-time Additional Compensation and Recurring Additional Compensation.



# One-Time Additional Compensation (Staff)

## One-Time Additional Compensation

\* Earnings Code

\* Pay Amount

\* Effective Date

\* End Date

\* Pay Period End Date

\* Comments

▼ Note:

In the comments field, enter the FAU for the One-Time Pay request.

Enter the Earnings Code, Pay Amount, Effective Date, End Date, and Pay Period End Date for the One-Time Additional Compensation

Please include the FAU distribution supplied by your Financial Analyst for this One Time Pay request. The FAU distribution is required to transact in UCPath.

# Recurring Additional Compensation (Staff)

**Add/Change Recurring Additional Compensation**

Input maximum rows for Recurring Additional Compensation

2

Enter the maximum rows for Recurring Additional Compensation.

**Current Job Data**

Earnings Code	Pay Amount	Effective Date	Goal Amount	End Date	1st Pay Period	2nd Pay Period	3rd Pay Period
STP	1666.67	01/01/17	0	12/31/17	Y	N	N

Under the Add/Change Recurring Additional Compensation section, the “Current Job Data” section will appear. This is the current data in UCPATH for the selected employee. If the employee is on Recurring Additional Compensation, the current Earnings Code, Pay Amount, Effective Date, Goal Amount, End Date and 1<sup>st</sup>, 2<sup>nd</sup>, and 3<sup>rd</sup> Pay Periods will populate with data from UCPATH.

# Recurring Additional Compensation (Staff) (continued)

Updated Job Data

Earnings Code	Pay Amount	Effective Date	Goal Amount	End Date	1st Pay Period	2nd Pay Period	3rd Pay Period
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	-- None --	-- None --	-- None --
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	-- None --	-- None --	-- None --

The number of rows entered in the “Add/Change Recurring Additional Compensation will appear under the “Updated Job Data” Section. Enter the updated Earnings Code, Pay Amount, Effective Date, Goal Amount, End Date and 1<sup>st</sup>, 2<sup>nd</sup>, and 3<sup>rd</sup> Pay Period for the selected employee.

# Comments & Attachment

Comments are NOT required, but should be added. For example, no pay information is included in the ServiceLink request. Any additional information that you believe your SSC OR the UCPATH Center should know about the leave should be included in the Comments section.

Comments

## Attachment

Attachments are not required to submit a Job Data change. Additional information can and should be provided to better support your request and ensure that all data points needed for your Shared Services Center are provided to transact in UCPATH.

Add Attachment

Submit

Cancel

To submit the request click on "submit." You will be directed to a confirmation page.

If you opt NOT to submit the request, click on Cancel. This action will delete the request form from the system and redirect you to the ServiceLink homepage.

# ServiceLink Initiator

Once a ServiceLink form is successfully submitted, the Initiator will be directed to this confirmation page.

natneen.cool | Logout



Thank you, your request has been submitted

Request Number: [REQ0019997](#)

Number	Description	Stage
<a href="#">RITM0020030</a>		

Response time(ms): 6043, Network: 5501, server: 312, browser: 230

Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

Clicking on the RITM Number and Description will take you to a view-only of the ServiceLink Fulfiller of the submitted Onboarding Transaction.

This "Stage" icon allows you to track a transactions' progress through fulfillment. Three green checks means that all tasks are closed and the submitted transaction is complete.

# ServiceLink Initiator

Requested Item  
RITM0020030

Clicking on the RITM (from previous screen) will take you to your request. This page has information that will tell you the stage of the ticket, as well as who is working on your request.

Number: RITM0020030  
Item: Job and Comp Data Changes  
Opened: 07/10/18 14:25:53  
Requested for: Shannon Minter  
State: Open

group: [ ]  
Assigned to: [ ]  
Request: REQ0019997  
Stage: Fulfillment

Initiator: Kathleen Cool  
Request Date: 07/10/18  
Employee Information

The Stage field gives information pertaining to the status of your request. Once all tasks associated with this request are closed, the stage will update automatically to "Closed Complete." This means that your request has been successfully completed and transacted in UCPath.

# ServiceLink Fulfiller

Scroll down to the bottom of the RITM to the Catalog Task. In this area, you will see all the related tasks for the request.

The screenshot displays the ServiceLink Fulfiller interface. At the top, there is a navigation bar with 'Catalog Tasks (1)' highlighted in a red box. Below this is a search bar and a table of tasks. The table has columns for 'Number', 'Short description', 'Assignment group', 'Assigned to', 'Stage', and 'State'. A single task is listed with the following details:

Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0035518	Complete UCPATH Transaction(s)	UCPATH ServiceLink Default Fulfiller Group		▶ ✓ → ○ ○	Open

Below the table, there is an 'Actions on selected rows...' dropdown menu. The 'State' column shows 'Open' and a pagination indicator '1 to 1 of 1'.

The Shared Services Center fulfiller will be assigned one task – to complete the UCPATH Transaction(s). The SSC fulfiller will change the state of the task from “Open” to “Closed” when completed. When the task reflects a “Closed” state, the RITM stage will automatically change to “closed complete.”

# Compensation Changes for AP



# Job Earnings Distribution (JED) for AP



## Negotiated Compensation Plans

**UCPath Reason Code:** JED

**Description:** For Health Sciences Comp Plan, MSP Staff Physician Comp Plan or Negotiated Trial Salary Program use only. This can also be used for Summer Salary where the Earn Code for a given Salary Plan/Grade is not REG. This action requires manual entry of Job Earnings Distribution in UCPath



## Return to Normal Hours/Dist

**UCPath Reason Code:** RET

**Description:** Used to return academic appointees to normal hours or distribution

# ServiceLink Form (Job and Comp Data Changes)



## Job and Comp Data Changes

Change job or compensation data for an employee



## Extended Leave Administration

Place, extend, or return an employee on extended leave



## Payroll Adjustments

Make adjustments for over/under payment or request an offcycle check



## Short Work Break

Place, extend, or return an employee on a short work break

The same ServiceLink Form – Job and Comp Data Changes – is used to update both Staff and AP Job Data and Compensation Data (including JED and Pay Rate Changes)

# JED Change (AP)

## Compensation Changes

- Job Earnings Distribution (JED)
- One-time Additional Compensation

- Pay Rate Changes (PAY)
- Recurring Additional Compensation

\* Change Effective Date

Enter the date for which the Job Earnings Distribution (JED) change takes effect for the selected Academic Appointee. The calendar function may be used to select the change effective date.

To request a Job Earnings Distribution (JED) change for an Academic Appointee, click the checkbox next to Job Earnings Distribution (JED). A section called "Job Data Distribution" will appear towards the bottom of the page once selected.

# JED Reason (AP)

Job Earnings Distribution

Request Information

Current Job Data

Updated Job Data

JED Reason

JED End Date

JED Reason

-- None --

-- None --

Employee Initiated Reduction in Time (ERIT)

Negotiated Comp Plan or Other JED

Return to Normal Distribution

Select the JED Reason from the dropdown list.

Academic Appointees are eligible for:

- Negotiated Comp Plan or Other JED
- Return to Normal Distribution

Do NOT use the JED Reason “Employee Initiated Reduction in Time (ERIT)” for Academic Appointees

# Distribution (AP)

## Distribution

Earnings Code	% of Distribution	Comp Rate
<input type="text"/>	<input type="text"/>	<input type="text"/>
Earnings Code	% of Distribution	Comp Rate
<input type="text"/>	<input type="text"/>	<input type="text"/>
Earnings Code	% of Distribution	Comp Rate
<input type="text"/>	<input type="text"/>	<input type="text"/>
Earnings Code	% of Distribution	Comp Rate
<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Distribution %		Total Compensation
<input type="text"/>		<input type="text"/>

Earnings Code	% of Distribution	Comp Rate
<input type="text" value=""/>	<input type="text"/>	<input type="text"/>
Earnings Code	% of Distribution	Comp Rate
<input type="text" value=""/>	<input type="text"/>	<input type="text"/>
Earnings Code	% of Distribution	Comp Rate
<input type="text" value=""/>	<input type="text"/>	<input type="text"/>
Earnings Code	% of Distribution	Comp Rate
<input type="text" value=""/>	<input type="text"/>	<input type="text"/>
Total Distribution %		Total Compensation
<input type="text"/>		<input type="text"/>

If the Academic Employee currently has a JED, the JED information will appear under the Current Data section.

To change the JED, enter the Earnings Code, % of Distribution, and Comp Rate. Up to 4 entries may be added/changed. The Total Distribution and Total Compensation will be automatically calculated and will appear in the corresponding fields. Total Distribution % for all rows must equal 100%.

# Comments & Attachment

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Comments

## Attachment

Attachments are not required to submit a Job Data change. Additional information can and should be provided to better support your request and ensure that all data points needed for your Shared Services Center are provided to transact in UCPATH.

Add Attachment

Submit

Cancel

To submit the request click on "submit." You will be directed to a confirmation page.

If you opt NOT to submit the request, click on Cancel. This action will delete the request form from the system and redirect you to the ServiceLink homepage.

# ServiceLink Initiator

Once a ServiceLink form is successfully submitted, the Initiator will be directed to this confirmation page.

natneen.cool | Logout



Thank you, your request has been submitted

Request Number: REQ0019997

Number	Description	Stage
<u>RITM0020030</u>		

Response time(ms): 6043, Network: 5501, server: 312, browser: 230

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# ServiceLink Initiator

< Requested Item  
RITM0020030

Clicking on the RITM (from previous screen) will take you to your request. This page has information that will tell you the stage of the ticket, as well as who is working on your request.

Number: RITM0020030  
Item: Job and Comp Data Changes  
Opened: 07/10/18 14:25:53  
Requested for: Shannon Minter  
State: Open

group: [input]  
Assigned to: [input]  
Request: REQ0019997  
Stage: Fulfillment

Initiator: Kathleen Cool  
Request Date: 07/10/18  
Employee Information

The Stage field gives information pertaining to the status of your request. Once all tasks associated with this request are closed, the stage will update automatically to "Closed Complete." This means that your request has been successfully completed and transacted in UCPath.



# ServiceLink Fulfiller

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Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0035518	Complete UCPATH Transaction(s)	UCPATH ServiceLink Default Fulfiller Group		▶ ✓ → ○ ○	Open

Below the table, there is an 'Actions on selected rows...' dropdown menu and a pagination indicator showing '1 to 1 of 1'.

The Shared Services Center fulfiller will be assigned one task – to complete the UCPATH Transaction(s). The SSC fulfiller will change the state of the task from “Open” to “Closed” when completed. When the task reflects a “Closed” state, the RITM stage will automatically change to “closed complete.”



# Data Required for UCPath PayPath Transactions

Key Data Point
Employee ID
Effective Date
Action
Reason Code
Employee Record Number





# UCPath Required Data (AP)

## JED

Data Point	Data Location on UCR Forms
Earnings Distribution Type	ServiceLink Form (JED Reason)
Earnings Code	ServiceLink Form (Distribution)
Compensation Rate	ServiceLink Form (Distribution)
Percent of Distribution	ServiceLink Form (Distribution)



# Pay Rate Changes (PAY) for AP



## Advancement to Above-Scale

**UCPath Reason Code:** AAS

**Description:** Used to enter compensation data when the EE has exceeded the maximum Step in his current Salary Grade. The user would remove the step value and enter Pay Components for the Above Scale Rates (for example: Above Scale, X, X', etc.)



## Academic Merit/Reappointment

**UCPath Reason Code:** AMR

**Description:** The pay rate change that is a performance-based salary increase or related to academic reappointment



# Pay Rate Changes (PAY) for AP (continued)



## Across-The-Board

**UCPath Reason Code:** ATB

**Description:** Used for an across the board mass increase due to contract negotiations or other across-the-board increases



## Demotion

**UCPath Reason Code:** DEM

**Description:** The pay rate change for an employee who has moved from one position to another which has a lower salary range maximum

# Pay Rate Changes (PAY) for AP (continued)



## Equity

**UCPath Reason Code:** EQU

**Description:** A pay rate change for a salary increase granted to correct an internal or external/market inequity



## Bring to Minimum

**UCPath Reason Code:** MIN

**Description:** A salary increase granted in order to raise an academic appointee's salary to meet a new minimum salary range or step rate



# Pay Rate Changes (PAY) for AP (continued)



## Change in Negotiated Salary

**UCPath Reason Code:** NEG

**Description:** Change in annual negotiated salary. Negotiated compensation plan members only (for example: HSCP, NSTP, etc.)



## Off Scale Increase

**UCPath Reason Code:** OFF

**Description:** New or increased off-scale component as a result of a retention, equity or academic review



# Pay Rate Changes (PAY) for AP (continued)



## Off Scale Decrease

**UCPath Reason Code:** OSD

**Description:** Decrease in off-scale salary component



## Academic Promotion

**UCPath Reason Code:** PRO

**Description:** Used for pay rate change that occurs due to a promotion





# Pay Rate Changes (PAY) for AP (continued)



## Change to Record-Only Pay Rate

**UCPath Reason Code:** ROP

**Description:** Change the rate of pay from a non-UC source that is being tracked for records purposes only, such as for Post Docs Paid Direct



## Step Increase/Progression

**UCPath Reason Code:** STI

**Description:** A pay rate change that is an advancement to a higher step in accordance with applicable contract provisions

# Pay Rate Changes (PAY) for AP (continued)



## Unit 18 Salary Increase

**UCPath Reason Code:** U18

**Description:** Contracted salary increased based on quarters of service or other reason



## Move to WOS (Without Salary)

**UCPath Reason Code:** WOS

**Description:** Used to move someone to the WOS comp rate code. The overnight paygroup assignment program will then move the EE to the 'WOS' paygroup based on the newly added 'UCWOS' Pay Component

# ServiceLink Form (Job and Comp Data Changes)



## Job and Comp Data Changes

Change job or compensation data for an employee



## Extended Leave Administration

Place, extend, or return an employee on extended leave



## Payroll Adjustments

Make adjustments for over/under payment or request an offcycle check



## Short Work Break

Place, extend, or return an employee on a short work break

The same ServiceLink Form – Job and Comp Data Changes – is used to update both Staff and AP Job Data and Compensation Data (including JED and Pay Rate Changes)

# Pay Rate Changes (AP)

## Compensation Changes

- Job Earnings Distribution (JED)
- One-time Additional Compensation

\* Change Effective Date



Enter the date for which the Pay Rate change takes effect for the selected Academic Appointee. The calendar function may be used to select the change effective date.

- Pay Rate Changes (PAY)
- Recurring Additional Compensation

To request a Pay Rate Change change for an Academic Appointee, click the checkbox next to Pay Rate Changes (PAY). A section called "Pay Rate Changes" will appear towards the bottom of the page once selected.

# Pay Rate Change Reason (AP)

Job Code: 001100      Job Title: PROF-AY      Job Code: [ ]      Job Title: [ ]

Under the Pay Rate Changes section, select the Pay Rate Change Reason code. Academic Appointees are eligible for:

- Academic Merit/Reappointment
- Across-The-Board
- Advancement to Above-Scale
- Bring to Meet Minimum
- Change Negotiated Salary
- Change to Record – Only Pay Rate
- Demotion
- Equity
- Move to/from Without Salary
- Off Scale Decrease
- Off Scale Increase
- Promotion/Academic Promotion
- Step Increase/Progression
- Unit 18 Salary Increase

\* Pay Rate Change Reason

- Academic Merit/Reappointment (AMR)
- Across- The-Board (ATB)
- Advancement to Above - Scale (AAS)
- Bring To Meet Minimum (MIN)
- Change Negotiated Salary (NEG)
- Change to Record - Only Pay Rate (ROP)
- Demotion (DEM)
- Equity (EQU)
- Move to/from Without Salary (WOS)
- Off Scale Decrease (OSD)
- Off Scale Increase (OFF)
- Promotion / Academic Promotion (PRO)
- Step Increase/Progression (STI)
- Unit 18 Salary Increase (U18)

Step: [ ]

Comp Frequency: [ ]

# Compensation Information (AP)



**Compensation Information**

---

Compensation Frequency      Step

H      None

Compensation Frequency      Step

-- None --     

Regardless of Pay Rate Change Reason selected, a section titled "Compensation Information" will appear towards the bottom of the page. UCPATH data for the selected Academic Appointee will populate under "Current Job Data." This is the Compensation Frequency and Step currently in UCPATH for the selected Academic Appointee.

Changes for Compensation Frequency and Step (if applicable) can be made under the "Updated Job Data" column.

# Components of Pay (AP)

Components of Pay

Comp Rate Code	Comp Rate	Comp Frequency
UCANNL ⓘ	160800	A
UCOFF1 ⓘ	9000	A

Comp Rate Code	Comp Rate	Comp Frequency

Regardless of Pay Rate Change Reason selected, a section titled “Components of Pay” will appear towards the bottom of the page. UCPath data for the selected Academic Appointee will populate under “Current Job Data.” This is the Comp Rate Code, Comp Rate and Comp Frequency currently in UCPath for the selected Academic Appointee.

Changes to Comp Rate Code and Comp Rate (up to four rows) can be made in the “Updated Job Data” section. Data cannot be manually entered on the first two compensation rows. The first row will default automatically for stepped Academic Appointees. X and X’ components will default on the second row for HSCP members.

# Comments & Attachment

Comments

Comments are NOT required, but should be added. For example, no pay information is included in the ServiceLink request. Any additional information that you believe your SSC OR the UCPATH Center should know about the leave should be included in the Comments section.

## Attachment

Add Attachment

Attachments are not required to submit a Job Data change. Additional information can and should be provided to better support your request and ensure that all data points needed for your Shared Services Center are provided to transact in UCPATH.

Submit

To submit the request click on "submit." You will be directed to a confirmation page.

Cancel

If you opt NOT to submit the request, click on Cancel. This action will delete the request form from the system and redirect you to the ServiceLink homepage.



# ServiceLink Initiator

Once a ServiceLink form is successfully submitted, the Initiator will be directed to this confirmation page.

natneen.cool | Logout



Thank you, your request has been submitted

Request Number: REQ0019997

Number	Description	Stage
<u>RITM0020030</u>		▶ ✓ ▶ ○

Response time(ms): 6043, Network: 5501, server: 312, browser: 230

Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

Clicking on the RITM Number and Description will take you to a view-only of the ServiceLink Fulfiller of the submitted Onboarding Transaction.

This "Stage" icon allows you to track a transactions' progress through fulfillment. Three green checks means that all tasks are closed and the submitted transaction is complete.

# ServiceLink Initiator

Requested Item  
RITM0020030

Clicking on the RITM (from previous screen) will take you to your request. This page has information that will tell you the stage of the ticket, as well as who is working on your request.

Number: RITM0020030  
Item: Job and Comp Data Changes  
Opened: 07/10/18 14:25:53  
Requested for: Shannon Minter  
State: Open

group: [ ]  
Assigned to: [ ]  
Request: REQ0019997  
Stage: Fulfillment

Initiator: Kathleen Cool  
Request Date: 07/10/18  
Employee Information

The Stage field gives information pertaining to the status of your request. Once all tasks associated with this request are closed, the stage will update automatically to "Closed Complete." This means that your request has been successfully completed and transacted in UCPath.

# ServiceLink Fulfiller

Scroll down to the bottom of the RITM to the Catalog Task. In this area, you will see all the related tasks for the request.

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Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0035518	Complete UCPATH Transaction(s)	UCPATH ServiceLink Default Fulfiller Group		▶ ✓ → ○ ○	Open

Below the table, there is a dropdown menu for 'Actions on selected rows...' and a pagination indicator showing '1 to 1 of 1'.

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# Other Comp Changes for AP



## One-Time Additional Compensation

**Description:** Used to request one-time additional compensation for an Academic Appointee



## Recurring Additional Compensation

**Description:** Used to request recurring additional compensation for an Academic Appointee

# ServiceLink Form (Job and Comp Data Changes)



## Job and Comp Data Changes

Change job or compensation data for an employee



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Place, extend, or return an employee on extended leave



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# Other Compensation Changes (AP)

## Compensation Changes

- Job Earnings Distribution (JED)
- One-time Additional Compensation
- Pay Rate Changes (PAY)
- Recurring Additional Compensation

\* Change Effective Date

In the "Change Effective Date" field, enter the first day the One-time Additional Compensation or Recurring Additional Compensation should take effect.

Other compensation changes for Academic Appointee that can be requested using the Job and Comp Data Changes ServiceLink form include One-time Additional Compensation and Recurring Additional Compensation.

# One-Time Additional Compensation (AP)

## One-Time Additional Compensation

\* Earnings Code

\* Pay Amount

\* Effective Date

\* End Date

\* Pay Period End Date

\* Comments

▼ Note:

In the comments field, enter the FAU for the One-Time Pay request.

Enter the Earnings Code, Pay Amount, Effective Date, End Date, and Pay Period End Date for the One-Time Additional Compensation

Please include the FAU distribution supplied by your Financial Analyst for this One Time Pay request. The FAU distribution is required to transact in UCPath.

# Recurring Additional Compensation (AP)

**Add/Change Recurring Additional Compensation**

Input maximum rows for Recurring Additional Compensation

2

Enter the maximum rows for Recurring Additional Compensation.

**Current Job Data**

Earnings Code	Pay Amount	Effective Date	Goal Amount	End Date	1st Pay Period	2nd Pay Period	3rd Pay Period
STP	1666.67	01/01/17	0	12/31/17	Y	N	N

Under the Add/Change Recurring Additional Compensation section, the “Current Job Data” section will appear. This is the current data in UCPATH for the selected Academic Appointee. If the Academic Appointee is on Recurring Additional Compensation, the current Earnings Code, Pay Amount, Effective Date, Goal Amount, End Date and 1<sup>st</sup>, 2<sup>nd</sup>, and 3<sup>rd</sup> Pay Periods will populate with data from UCPATH.



# Recurring Additional Compensation (AP) (continued)

Updated Job Data

Earnings Code	Pay Amount	Effective Date	Goal Amount	End Date	1st Pay Period	2nd Pay Period	3rd Pay Period
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	-- None --	-- None --	-- None --
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	-- None --	-- None --	-- None --

The number of rows entered in the “Add/Change Recurring Additional Compensation will appear under the “Updated Job Data” Section. Enter the updated Earnings Code, Pay Amount, Effective Date, Goal Amount, End Date and 1<sup>st</sup>, 2<sup>nd</sup>, and 3<sup>rd</sup> Pay Period for the selected Academic Appointee.

# Comments & Attachment

Comments

Comments are NOT required, but should be added. For example, no pay information is included in the ServiceLink request. Any additional information that you believe your SSC OR the UCPATH Center should know about the leave should be included in the Comments section.

## Attachment

Add Attachment

Attachments are not required to submit a Job Data change. Additional information can and should be provided to better support your request and ensure that all data points needed for your Shared Services Center are provided to transact in UCPATH.

Submit

To submit the request click on "submit." You will be directed to a confirmation page.

Cancel

If you opt NOT to submit the request, click on Cancel. This action will delete the request form from the system and redirect you to the ServiceLink homepage.

# ServiceLink Initiator

Once a ServiceLink form is successfully submitted, the Initiator will be directed to this confirmation page.

natneen.cool | Logout



Thank you, your request has been submitted

Request Number: REQ0019997

Number	Description	Stage
<u>RITM0020030</u>		▶ ✓ ▶ ○

Response time(ms): 6043, Network: 5501, server: 312, browser: 230

Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

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# ServiceLink Initiator

Requested Item  
RITM0020030

Clicking on the RITM (from previous screen) will take you to your request. This page has information that will tell you the stage of the ticket, as well as who is working on your request.

Number: RITM0020030  
Item: Job and Comp Data Changes  
Opened: 07/10/18 14:25:53  
Requested for: Shannon Minter  
State: Open

group: [ ]  
Assigned to: [ ]  
Request: REQ0019997  
Stage: Fulfillment

Initiator: Kathleen Cool  
Request Date: 07/10/18  
Employee Information

The Stage field gives information pertaining to the status of your request. Once all tasks associated with this request are closed, the stage will update automatically to "Closed Complete." This means that your request has been successfully completed and transacted in UCPath.

# ServiceLink Fulfiller

Scroll down to the bottom of the RITM to the Catalog Task. In this area, you will see all the related tasks for the request.

The screenshot displays the ServiceLink Fulfiller interface. At the top, there is a navigation bar with 'Catalog Tasks (1)' highlighted in a red box. Below this is a search bar and a 'Go to' dropdown menu. The main content area shows a table of tasks. The first task is highlighted with a red border. The task details are as follows:

Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0035518	Complete UCPATH Transaction(s)	UCPATH ServiceLink Default Fulfiller Group		▶ ✓ → ○ ○	Open

Below the table, there is an 'Actions on selected rows...' dropdown menu and a pagination indicator showing '1 to 1 of 1'.

The Shared Services Center fulfiller will be assigned one task – to complete the UCPATH Transaction(s). The SSC fulfiller will change the state of the task from “Open” to “Closed” when completed. When the task reflects a “Closed” state, the RITM stage will automatically change to “closed complete.”

# HRDW Reporting

# HRDW Position Report

Human Resources / Academic Personnel Data Warehouse

Manage | Open Save Run Export Reset

Position Report HRDW V1 Exit

Query Display Settings

View: Basic Advanced Query Type: Detail Summary (Sum) Summary (Avg)

**Scope**  
Fiscal Year  
Accounting Period  
Organization  
Division  
Department:  Home  Dist  Appt

**Job**  
Probation End Date:  
Exp. Job End Date:  
Job FTE  
Emp. Class  
Job Termination Date

**Employee Info**  
Employee ID:  
Last Name:  
First Name:  
HR Status  
Primary Job Most Recent Hire Date  
Original Hire Date:  
Perm. Addr. Country  
FICA Elg. Code  
Termination Reason Code

**Compensation**  
Job Pay Rate:  
Compensation Freq.  
Salary Grade  
Additional Pay Effective Date  
Additional Pay End Date  
Additional Pay Earn Code

**Academic Info**  
Duration of Appt. Cd  
Off/Above Scale Ind.

**Financial Info**  
Funding Effective Date  
 Future  Current  Past  All  
Funding Earn Code  
Account  
Fund  
Function  
Cost Center  
Project Code

Query Name: Adhoc

# HRDW Position Report (continued)

Department Position Report														
D01000 - Graduate School of Education														
First Name	Last Name	Employee ID	Position Number	Job Code	Budg. Lev. Ind.	ERN	Acct.	Actv.	Fund	Funct.	Cost Ctr	Proj. Cd.	Dist. %	Effective Dt.
Unfilled			40006792	001010 - ASSOC DEAN	P		503910	A01000	69993	40			100	12/01/2017
Unfilled			40006792	001010 - ASSOC DEAN	P	STP	305130	A01000	19900	40			42.5	12/01/2017
Unfilled			40006792	001010 - ASSOC DEAN	P	STP	305130	A01953	19900	40	QEIC		57.5	12/01/2017
Unfilled			40008626	001010 - ASSOC DEAN	P		305110	A01000	19900	40			100	12/01/2017
Unfilled			40008626	001010 - ASSOC DEAN	P		305130	A01000	19900	40			56.67	12/01/2017
Unfilled			40008626	001010 - ASSOC DEAN	P		305130	A01953	19900	40	QEIC		43.33	12/01/2017
Unfilled			40008626	001010 - ASSOC DEAN	P		503910	A01000	69993	40			100	12/01/2017
Unfilled			40008626	001010 - ASSOC DEAN	P	STP	305130	A01000	19900	40			56.67	12/01/2017
Unfilled			40008626	001010 - ASSOC DEAN	P	STP	305130	A01953	19900	40	QEIC		43.33	12/01/2017
Unfilled			40009146	002310 - TEACHG ASST-GSHIP	P		303110	A01024	57168	44			100	12/01/2017
Unfilled			40009146	002310 - TEACHG ASST-GSHIP	P		303120	A01000	19900	40	QETA		100	12/01/2017
Unfilled			40009639	002310 - TEACHG ASST-GSHIP	P		303110	A01024	57168	44			100	12/01/2017
Unfilled			40009639	002310 - TEACHG ASST-GSHIP	P		303120	A01000	19900	40	QETA		100	12/01/2017
Unfilled			40010786	004921 - STDT 2	P		504120	A01000	19931	40	QECNF		100	12/01/2017
Unfilled			40019703	003276 - GSR-PARTIAL FEE REM	P		303110	A01000	62166	62	QEUSD		100	01/01/2018
Unfilled			40019704	002310 - TEACHG ASST-GSHIP	P		303120	A01000	19900	40	QETA		100	01/01/2018
Unfilled			40019782	009605 - LAB AST 1										01/16/2018
Unfilled			40019783	009605 - LAB AST 1										01/16/2018
Unfilled			40020079	002310 - TEACHG ASST-GSHIP	P		303120	A01000	19900	40	QETA		100	01/01/2018
Unfilled			40020491	004922 - STDT 1	P		504120	A01000	19900	40			100	01/01/2018
Unfilled			40020981	001300 - ASST PROF-AY	P		300130	A01000	19900	40			100	02/01/2018



# UCPath Inquiry

# HR Inquiry

<b>EACS Role</b>	HR Inquiry
<b>UCPath Role</b>	WFA Inquiry
<b>UCPath Role Description</b>	Inquiry role to view the main WFA pages
<b>Page/Job Aid Links</b>	<b>Path</b>
<a href="#">Person Organizational Summary</a>	Main Menu > Workforce Administration > Personal Information > Person Organizational Summary
<a href="#">Additional Names</a>	Main Menu > Workforce Administration > Personal Information > Biographical > Additional Names
<a href="#">Modify a Person</a>	Main Menu > Workforce Administration > Personal Information > Modify a Person
<a href="#">Emergency Contact</a>	Main Menu > Workforce Administration > Personal Information > Personal Relationships > Emergency Contact
<a href="#">Security Clearance</a>	Main Menu > Workforce Administration > Personal Information > Security Clearance
<a href="#">Workforce Job Summary</a>	Main Menu > Workforce Administration > Job Information > Review Job Information > Workforce Job Summary

# HR Inquiry (continued)

<b>EACS Role</b>	HR Inquiry
<b>UCPath Role</b>	WFA Inquiry
<b>UCPath Role Description</b>	Inquiry role to view the main WFA pages
<b>Page/Job Aid Links</b>	<b>Path</b>
<a href="#">Job Data</a>	Main Menu > Workforce Administration > Job Information > Job Data
<a href="#">Person Profiles</a>	Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles
<a href="#">Add/Update Position Info</a>	Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info
<a href="#">Person Checklist</a>	Main Menu > Workforce Administration > Personal Information > Organizational Relationships > Person Checklist
<a href="#">Transaction Status</a>	Main Menu > Workforce Administration > Smart HR Template > Transaction Status

# HR Inquiry (continued)

<b>EACS Role</b>	HR Inquiry
<b>UCPath Role</b>	Contract Pay Inquiry
<b>UCPath Role Description</b>	Monitor contract pay details before and after a person is paid on contract pay.
<b>Page/Job Aid Links</b>	<b>Path</b>
Contract Payment Details	Main Menu > Payroll for North America > Employee Pay Data USA > Contract Payment Details
Update Contract Pay NA	Main Menu > Workforce Administration > Job Information > Contract Administration > Update Contract Pay NA

# HR Inquiry (continued)

<b>EACS Role</b>	HR Inquiry
<b>UCPath Role</b>	PayPath Inquiry
<b>UCPath Role Description</b>	Inquiry role to view an employee's current Job Data, Position Data, and Additional Pay in one location.
<b>Page/Job Aid Links</b>	<b>Path</b>
<a href="#">Person Organizational Summary</a>	Main Menu > Workforce Administration > Personal Information > Person Organizational Summary
<a href="#">Workforce Job Summary</a>	Main Menu > Workforce Administration > Job Information > Review Job Information > Workforce Job Summary
<a href="#">Add/Update Position Info</a>	Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info
<a href="#">Employee Details Page</a>	Main Menu > UC Customizations > UC Extensions > Employee Details Page
<a href="#">PayPath Actions</a>	Main Menu > UC Customizations > UC Extensions > PayPath Actions

# FAU / SCT Inquiry

<b>EACS Role</b>	FAU / SCT Inquiry
<b>UCPath Role</b>	Funding Inquiry
<b>UCPath Role Description</b>	View approved and saved funding transactions
<b>Page/Job Aid Links</b>	<b>Path</b>
<a href="#">Funding Entry</a>	PeopleSoft Menu > Set Up HCM > Product Related > Commitment Accounting > UC Customizations > Funding Entry
<a href="#">Funding Entry Inquiry</a>	PeopleSoft Menu > Set Up HCM > Product Related > Commitment Accounting > UC Customizations > Funding Entry Inquiry
<b>UCPath Role</b>	Funding Inquiry
<b>UCPath Role Description</b>	View approved and saved funding transactions
<b>Page/Job Aid Links</b>	<b>Path</b>
<a href="#">Review Retro Distribution</a>	PeopleSoft Menu > Payroll for North America > Payroll Distribution > UC Customizations > Review Retro Distribution



# Additional Courses

- UCRSL 110: ServiceLink Navigation for Initiators
- UCRSL 120: ServiceLink Navigation for Fulfillers
- UCRPDM 200: Advanced FOM ServiceLink Position Data Management



# FOM|UCPath Training Team Email

[FOMUCPathtraining@ucr.edu](mailto:FOMUCPathtraining@ucr.edu)

# FOM|UCPath AP Team Email (for AP-specific questions)

[APUCPathSupport@o365ucr.onmicrosoft.com](mailto:APUCPathSupport@o365ucr.onmicrosoft.com)

# Training Resources

<http://fomucpath.ucr.edu/training/resources.html>

# Your Feedback Please

<https://tinyurl.com/ucrfomucpathfeedback>

Thank You