Advanced FOM ServiceLink Job Data Changes – v2
Trainer Introduction

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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
- HRDW Reporting
- UCPath Inquiry
- Additional Courses
- Training Resources
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
The Initiator role initiates a 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 the 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

#### HR Staff/AP Business Partner (Initiator)

The Initiator role initiates a Job Data & Comp Changes request using ServiceLink. This is a required role.
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

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
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
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

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

*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
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)

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.

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

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

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 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.
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

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.

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

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

When the Data Change reason “Update Locate 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

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.

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.
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

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.

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.

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

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.
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 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)

Extend Trial Employment Job Data Changes are requested via the ServiceLink Generic form, not the Job and Comp Data Changes form.
Select “Other” from the dropdown for Transaction Type.

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

When “Other” is selected as the Transaction Type, the “Other Reason” field appears. Enter “Extend Trial Employment” as the reason.
Employee Information

**Employee Information**

- **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

<table>
<thead>
<tr>
<th>Key Data Point</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
</tr>
<tr>
<td>Effective Date</td>
</tr>
<tr>
<td>Action</td>
</tr>
<tr>
<td>Action Reason</td>
</tr>
<tr>
<td>Employee Record Number</td>
</tr>
</tbody>
</table>
# UCPath Required Data (Staff)

## Job Data Change Requests

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expected Return Date</td>
<td>ServiceLink Form</td>
</tr>
<tr>
<td>FTE</td>
<td>ServiceLink Form</td>
</tr>
<tr>
<td>Empl Class</td>
<td>ServiceLink Form</td>
</tr>
<tr>
<td>Expected Job End Date</td>
<td>ServiceLink Form</td>
</tr>
<tr>
<td>Trial Employment End Date</td>
<td>ServiceLink Form</td>
</tr>
<tr>
<td>Probation Code</td>
<td>ServiceLink Form</td>
</tr>
<tr>
<td>Probation End Date</td>
<td>ServiceLink Form</td>
</tr>
</tbody>
</table>
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
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
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).
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.

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

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

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

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.

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

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

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.
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.

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

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

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

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

When the Data Change reason “Update Locate 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)

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

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.

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.

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.

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

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

<table>
<thead>
<tr>
<th>Number</th>
<th>RITM020630</th>
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<tbody>
<tr>
<td>Item</td>
<td>Job Data Changes</td>
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<tr>
<td>Opened</td>
<td>07/18/18 14:26:53</td>
</tr>
<tr>
<td>Requested for</td>
<td>Shannon Minter</td>
</tr>
<tr>
<td>State</td>
<td>Open</td>
</tr>
</tbody>
</table>

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 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

<table>
<thead>
<tr>
<th>Key Data Point</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
</tr>
<tr>
<td>Effective Date</td>
</tr>
<tr>
<td>Action</td>
</tr>
<tr>
<td>Action Reason</td>
</tr>
<tr>
<td>Employee Record Number</td>
</tr>
</tbody>
</table>
# UCPath Required Data (AP)

## Job Data Change Requests

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expected Return Date</td>
<td>ServiceLink Form</td>
</tr>
<tr>
<td>FTE</td>
<td>ServiceLink Form</td>
</tr>
<tr>
<td>Expected Job End Date</td>
<td>ServiceLink Form</td>
</tr>
<tr>
<td>End Job Automatically Checkbox</td>
<td>ServiceLink Form</td>
</tr>
<tr>
<td>Academic Duration of Appointment</td>
<td>ServiceLink Form</td>
</tr>
<tr>
<td>Post Doc Anniversary Date</td>
<td>ServiceLink Form</td>
</tr>
</tbody>
</table>
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.
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).
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.

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.
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)

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.

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.

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

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.

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.

<table>
<thead>
<tr>
<th>Number</th>
<th>Short description</th>
<th>Assignment group</th>
<th>Assigned to</th>
<th>Stage</th>
<th>State</th>
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</thead>
<tbody>
<tr>
<td>SCT43603954</td>
<td>Complete UCPath Transaction(s)</td>
<td>UCPATH ServiceLink Default Fulfiller Group</td>
<td></td>
<td></td>
<td>Open</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Key Data Point</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
</tr>
<tr>
<td>Effective Date</td>
</tr>
<tr>
<td>Action</td>
</tr>
<tr>
<td>Action Reason</td>
</tr>
<tr>
<td>Employee Record Number</td>
</tr>
</tbody>
</table>
UCPath Required Data (Staff)

<table>
<thead>
<tr>
<th>Data Point</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Earnings Distribution Type</td>
<td>ServiceLink Form (JED Reason)</td>
</tr>
<tr>
<td>Earnings Code</td>
<td>ServiceLink Form (Distribution)</td>
</tr>
<tr>
<td>Compensation Rate</td>
<td>ServiceLink Form (Distribution)</td>
</tr>
<tr>
<td>Percent of Distribution</td>
<td>ServiceLink Form (Distribution)</td>
</tr>
<tr>
<td>ERIT End Date</td>
<td>ServiceLink Form (JED End Date)</td>
</tr>
</tbody>
</table>
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 2nd 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 2nd 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 2nd 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
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
- Pay Rate Changes (PAY)
- Recurring 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.

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

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.

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

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.

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.
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
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)

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.

In the “Change Effective Date” field, enter the first day the One-time Additional Compensation or Recurring Additional Compensation should take effect.
One-Time Additional Compensation (Staff)

<table>
<thead>
<tr>
<th>Earnings Code</th>
<th>Pay Amount</th>
<th>Effective Date</th>
<th>End Date</th>
<th>Pay Period End Date</th>
</tr>
</thead>
</table>

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)

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 1st, 2nd, and 3rd Pay Periods will populate with date from UCPath.

Enter the maximum rows for Recurring Additional Compensation.
Recurring Additional Compensation (Staff) (continued)

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 1st, 2nd, and 3rd 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.

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.

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

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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.
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)

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)

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.

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.
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)

**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%.**

<table>
<thead>
<tr>
<th>Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Earnings Code</td>
</tr>
<tr>
<td>Earnings Code</td>
</tr>
<tr>
<td>Earnings Code</td>
</tr>
<tr>
<td>Earnings Code</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Distribution %</th>
<th>Total Compensation</th>
</tr>
</thead>
</table>

**COMP CHANGES**

[Diagram of the Distribution table and COMP CHANGES form]
Comments & Attachment

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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.

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.

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.

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Data Required for UCPath PayPath Transactions

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<thead>
<tr>
<th>Key Data Point</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
</tr>
<tr>
<td>Effective Date</td>
</tr>
<tr>
<td>Action</td>
</tr>
<tr>
<td>Reason Code</td>
</tr>
<tr>
<td>Employee Record Number</td>
</tr>
</tbody>
</table>
# UCPath Required Data (AP)

**JED**

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Earnings Distribution Type</td>
<td>ServiceLink Form (JED Reason)</td>
</tr>
<tr>
<td>Earnings Code</td>
<td>ServiceLink Form (Distribution)</td>
</tr>
<tr>
<td>Compensation Rate</td>
<td>ServiceLink Form (Distribution)</td>
</tr>
<tr>
<td>Percent of Distribution</td>
<td>ServiceLink Form (Distribution)</td>
</tr>
</tbody>
</table>
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
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
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)

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.

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.
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
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.
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 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.

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ServiceLink Fulfiller

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<tr>
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<th>Assignment group</th>
<th>Assigned to</th>
<th>Stage</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCT430035510</td>
<td>Complete UCPath Transaction(s)</td>
<td>UCPATH ServiceLink Default Fulfiller Group</td>
<td></td>
<td></td>
<td>Open</td>
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</table>

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 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
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 (AP)

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.

In the “Change Effective Date” field, enter the first day the One-time Additional Compensation or Recurring Additional Compensation should take effect.
One-Time Additional Compensation (AP)

<table>
<thead>
<tr>
<th>Earnings Code</th>
<th>Pay Amount</th>
<th>Effective Date</th>
<th>End Date</th>
<th>Pay Period End Date</th>
</tr>
</thead>
</table>

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.
Recruiring Additional Compensation (AP)

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\textsuperscript{st}, 2\textsuperscript{nd}, and 3\textsuperscript{rd} Pay Periods will populate with date from UCPath.
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 1st, 2nd, and 3rd Pay Period for the selected Academic Appointee.
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.

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.

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

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.
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.
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.”

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.
HRDW Reporting
HRDW Position Report

Human Resources / Academic Personnel Data Warehouse

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

Roles
- Fiscal Year
- Accounting Period
- Organization
- Division
- Department
- Home Dist Appt

Position
- Bargaining Unit Code
- Job Code
- Position Number
- Position Department

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

Compensation
- Job Probation End Date
- Exp. Job End Date
- Job FTE
- Emp. Class
- Job Termination Date
- Job Pay Rate
- Compensation Frq.
- Salary Grade
- Additional Pay Effective Date
- Additional Pay End Date
- Additional Pay Earn Code

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

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**UC Riverside FOM/UCPath Training**
UCPath Inquiry
## HR Inquiry

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<tr>
<th>Page/Job Aid Links</th>
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<td>Additional Names</td>
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<td>Main Menu &gt; Workforce Development &gt; Profile Management &gt; Profiles &gt; Person Profiles</td>
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<td><strong>Add/Update Position Info</strong></td>
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<td>Update Contract Pay NA</td>
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### FAU / SCT Inquiry

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Additional Courses

- UCRSL 110: ServiceLink Navigation for Initiators
- UCRSL 120: ServiceLink Navigation for Fulfillers
- UCRPDM 200: Advanced FOM ServiceLink Position Data Management
FOM|UCPath AP Team Email
(for AP-specific questions)

APUCPathSupport@o365ucr.onmicrosoft.com
Training Resources

http://fomucpath.ucr.edu/training/resources.html
Your Feedback Please

https://tinyurl.com/ucrfomucpathfeedback
Thank You