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
- New Hire – Staff
- New Hire – AP
- New Hire – Contingent Worker (CWR)
- Rehire – Staff
- Rehire – AP
- Rehire – CWR
- Intra Business Unit Transfer – Staff
- Intra Business Unit Transfer – AP
- Inter Business Unit Transfer – Staff
- Inter Business Unit Transfer – AP
Learning Topics (continued)

- Concurrent Hire – Staff
- Concurrent Hire - AP
- Person of Interest
- HRDW Reporting
- UCPath Inquiry
- Additional Courses
- Training Resources
ServiceLink Roles
# Onboarding Process

## Essential Roles

<table>
<thead>
<tr>
<th>Role</th>
<th>System</th>
</tr>
</thead>
<tbody>
<tr>
<td>1: Onboarding Initiator</td>
<td>ServiceLink</td>
</tr>
<tr>
<td>2: Onboarding Accountability Structure Fulfiller</td>
<td>ServiceLink</td>
</tr>
<tr>
<td>3: Onboarding Shared Services Center Fulfiller*</td>
<td>ServiceLink</td>
</tr>
<tr>
<td>4: Onboarding Shared Services Center AWE Approver*</td>
<td>UCPath</td>
</tr>
<tr>
<td>5: UCPath Center WFA Production</td>
<td>UCPath</td>
</tr>
</tbody>
</table>
The Onboarding Initiator role initiates an Onboarding request using ServiceLink. This is a required role.

Can be assigned to:
- HR Business Partner (HR)
- HR Generalist (HR)
- AP Business Partner (AP)

In some orgs, the AP Business Partner sends out new hire packet to Academic Appointee.

The process is flexible and the system accommodates for such variations.

The Onboarding Initiator is the individual responsible for correctness of transaction.
- Enters the transaction in ServiceLink
### Onboarding Process

#### Essential Roles

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsible for</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1: Onboarding Initiator</strong></td>
<td>ServiceLink</td>
<td></td>
</tr>
<tr>
<td><strong>2: Onboarding Accountability Structure Fulfiller</strong></td>
<td>ServiceLink</td>
<td>This is a required role.</td>
</tr>
<tr>
<td><strong>3: Onboarding Shared Services Center Fulfiller</strong></td>
<td>UCPath</td>
<td></td>
</tr>
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</tr>
<tr>
<td><strong>5: UCPath Center WFA Production</strong></td>
<td>UCPath</td>
<td></td>
</tr>
</tbody>
</table>

The Onboarding Accountability Structure Fulfiller is assigned tasks in ServiceLink as part of the Onboarding request.

- Responsible for completing tasks assigned to the ServiceLink task queue
- Orders equipment, creates/reactivates NetID, etc.
- Department or Org. gets assigned tasks by a SSC Fulfiller
Onboarding Process

Essential Roles

1: Onboarding Initiator → ServiceLink

2: Onboarding Accountability Structure Fulfiller → ServiceLink

3: Onboarding Shared Services Center Fulfiller* → UCPath

4: Onboarding Shared Services Center AWE Approver* → UCPath

5: UCPath Center WFA Production → UCPath

The Onboarding Shared Services Center Fulfiller:

- 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

*In UCPath documentation this role may be called Location Template Initiator.
Onboarding Process

Essential Roles

1: Onboarding Initiator → ServiceLink

2: Onboarding Accountability Structure Fulfiller → ServiceLink

3: Onboarding Shared Services Center Fulfiller* → UCPath

4: Onboarding Shared Services Center AWE Approver* → UCPath

5: UCPath Center WFA Production → UCPath

Onboarding Shared Services Center AWE Approver*

Once the Onboarding Shared Services Center Fulfiller submits the Onboarding transaction, the transaction is forwarded to the designated AWE approver in the Shared Services Center through UCPath AWE.

The Onboarding Shared Services Center AWE Approver cannot be the same person as the Onboarding Shared Services Center Fulfiller.

The Onboarding Shared Services Center AWE Approver serves as Quality Assurance by reviewing and approving the transaction.

*In UCPath documentation this role may be called Location Template Approver.
After the Onboarding Shared Services Center AWE Approver approves the transaction at the Location level (UCR), the Onboarding transaction is routed to UCPath Center WFA Production. UCPath Center WFA Production reviews and either approves, pushes back, cancels, and/or denies the transaction. When the Onboarding transaction is approved, the new hire is assigned an Employee ID by UCPath Center WFA Production.
New Hire - Staff
ServiceLink Form (Staff – New Hire)

The same ServiceLink Form – Onboarding – New Hire is used to hire Staff, Academic Appointees, and Contingent Workers. Employees who have not been on pay status at UC and who do not have a UCPath Employee Job Record, are considered New Hires.
Onboarding – New Hire (Staff)

HIR - Hire No Prior UC Affiliation

**Usage:** Use to hire a new employee. Employee has never been on pay status with UC.

**Example:** New hire has never been employed at a UC location in the past and does not have an employee record in UCPath.
Employee Information (Staff)

A personal email is needed for all Onboarding transactions. This email address will be used to send the incumbent the Onboarding packet via DocuSign. This same email will also be used by the UCPath Center to communicate with the employee regarding benefits and benefit eligibility.

Incumbent’s First Name
Nancy

Incumbent’s Last Name
Lee

Personal Email
nancylee@gmail.com
Employee Relationship Information (Staff)

- Organizational Relationship Type is “Employee”
- Employee Type is “Staff”
- Job Effective Date is the first day an employee is on pay status at UCR

<table>
<thead>
<tr>
<th>Employee Relationship Information</th>
<th>Onboarding Reason in ServiceLink is equivalent to Reason Code in UCPath. For a new staff hire, the onboarding reason is HIR – Hire no prior UC affiliation.</th>
<th>NEW HIRE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Type</td>
<td>Staff</td>
<td></td>
</tr>
<tr>
<td>Job Effective Date</td>
<td>07/30/18</td>
<td></td>
</tr>
<tr>
<td>Expected Job End Date</td>
<td>12/31/18</td>
<td></td>
</tr>
<tr>
<td>Probation Code</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Probation End Date</td>
<td>01/30/19</td>
<td></td>
</tr>
</tbody>
</table>

- Enter the incumbent’s expected job end date, if they have one. The following employee classes are required to have an expected job end date:
  - Student – Casual/Restricted
  - Per Diem
  - Floater
  - Contract
  - Limited
  - Staff Rehired Retiree

- Their expected job end date will need to be carefully monitored as they will be automatically offboarded on that date.

- Select the appropriate Probation Code for the employee. The Probation End Date will default to 6 months after the Job Effective Date. The field can be modified if needed. The system will automatically convert the employee to a non probationary status on this date. A Job Data change will need to be submitted if the Probation End Date changes.
Employees on Visa/Remote Hires

- If the incumbent is on a Visa, check the “On a Visa” box in the Employee Relationship Information section. Checking this box will prompt the system to send an email notification to International Students and Scholars Office. This email is for informational purposes only. When the SSC Fulfiller verifies documents and files paperwork, they will send an email notification to payroll Glacier.

- If the incumbent is a Remote Hire, or will not be able to attend an in-person Onboarding session, check the “Remote Hire” box. Checking this box will NOT prompt any ServiceLink tasks or automatic email notification. It is the responsibility of the SSC Fulfiller to make alternate arrangements, such as securing a notary, if the incumbent is unable to attend their Onboarding session.
Employee Work Information (Staff)

Position Number can be entered directly or searched by clicking on the magnifying glass icon.

Based on the Position Number selected, Job Code, Job Description, Organization, Organization Description, Division Code, Division Descriptions, Department Code, and Department Description populate based on Position Data.
Onboarding Tasks (Staff)

All SSC tasks are required and cannot be modified. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.

You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the “Create a single task for all Task Listed Below” will create one task that will need to be closed once completed. Individual tasks can also be selected. All selected tasks will be generated at once. Tasks assigned to the Shared Services Center will also be generated simultaneously.
ServiceLink Onboarding requests require that the Initiator attach an Offer Letter. For Staff, the Offer Letter contains additional information required for the SSC Fulfiller to transact in UCPath.

Comments can be added to ensure that all needed data to complete a UCPath Onboarding transaction is included.
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.

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 will similarly be assigned one composite task (except for R’SSC who will be assigned all tasks, per their request.). The SSC fulfiller will change the state of the task from “Open” to “Closed” when completed. When all tasks reflect a “Closed” state, the RITM stage will automatically change to “closed complete.”

Remember that we requested that only one task be assigned to the Accountability Structure Fulfiller. Once all tasks relating to the Onboarding have been completed, the designated Onboarding Accountability Structure fulfiller should change the state of the task from “Open” to “Closed.” This can be done by selecting the task and clicking on the Actions on selected rows button highlighted below in yellow.

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.
New Automated Processes

End Probation

In UCPath, once the employee’s end date is reached, an automatic program clears their Probation End Date and sets their Probation Code to Probation completed.

To modify an end probation date after hire, a Job Date Change request will need to be submitted.

Limited to Career

In UCPath, if an employee crosses the 1000 hour threshold, the system will automatically convert the employee to a career employee.

As a result, Departments must carefully monitor the Limited to Career report to identify who are reaching 1000 hours and Adjust their schedule, Terminate, or Open a recruitment to bring them on full-time.

End Job Automatically

In UCPath, employees with an Expected Job End Date where the ‘End Job Automatically’ checkbox is checked will be automatically terminated on their Expected Job End Date.

To modify end job automatically, a Job Date Change request will need to be submitted.
# Data Required for UCPath Onboarding Transactions

<table>
<thead>
<tr>
<th>Key Data Point</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee ID</strong></td>
<td>Employee ID (or Empl ID) is generated by UCPath after a New Hire has been successfully processed.</td>
</tr>
<tr>
<td><strong>Effective Date</strong></td>
<td>The JOB Effective Date (different from the Position Effective Date) is the first day a given employee should be paid or the first day a contingent worker is performing services for UCR.</td>
</tr>
<tr>
<td><strong>Action</strong></td>
<td>Actions in UCPath include Hire, Rehire, Transfer, Add Contingent Worker, and Contingent Worker Extension.</td>
</tr>
<tr>
<td><strong>Reason Code</strong></td>
<td>Reason Codes are the reason why the Onboarding is taking place (i.e. Action – Rehire, Reason Code – Rehire, &lt;120 days break).</td>
</tr>
<tr>
<td><strong>Employee Record Number</strong></td>
<td>An employee can have one or more Empl. Records.</td>
</tr>
</tbody>
</table>
## Additional Data Required for UCPATH Transaction (Staff) – New Hire

### Personal Data

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>First &amp; Last Names</td>
<td>ServiceLink Form – Employee Information &amp; UCR Personal Data Form</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>UCR Personal Data Form</td>
</tr>
<tr>
<td>Highest Education Level</td>
<td>UCR Personal Data Form</td>
</tr>
<tr>
<td>Gender</td>
<td>UCR Personal Data Form</td>
</tr>
<tr>
<td>National ID Type &amp; National ID</td>
<td>UCR Personal Data Form, in-person, via phone</td>
</tr>
<tr>
<td>Address Line 1, City, State, Postal Code</td>
<td>UCR Personal Data Form</td>
</tr>
<tr>
<td>Email Address</td>
<td>ServiceLink Form – Employee Information &amp; UCR Personal Data Form</td>
</tr>
<tr>
<td>Phone</td>
<td>UCR Personal Data Form</td>
</tr>
</tbody>
</table>
# Onboarding – New Hire (Staff)

## Job Data

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Number</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Employee Classification</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Establishment ID</td>
<td>Defaults from Position data, but is editable</td>
</tr>
<tr>
<td>Standard Hours</td>
<td>Defaults from Position data, but is editable</td>
</tr>
<tr>
<td>FTE</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Step (for step-based positions only)</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Probation Code</td>
<td>ServiceLink Form – Employee Relationship Information</td>
</tr>
<tr>
<td>Probation End Date</td>
<td>ServiceLink Form – Employee Relationship Information</td>
</tr>
<tr>
<td>PY Career Duration (partial-year Empl Classes only)</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Expected Job End Date (for Contract, Casual/Restricted, Floater, Per Diem, Limited and Staff Rehired Retiree)</td>
<td>ServiceLink Form – Employee Relationship Information</td>
</tr>
</tbody>
</table>
Onboarding – New Hire (Staff)

Job Data – Job Compensation & Pay Components

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compensation Frequency</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Comp Rate Code</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Compensation Rate</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Pay Components Frequency</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
</tbody>
</table>
UCR Personal Data Form

Please complete this form to the best of your ability. Data collected through this form will be used to establish you as a new employee at UCR.

The most current version of the UCR Personal Data Form is available as a template in DocuSign. Please make sure that you are capturing all required information if you are not using this version of the form.

Required data points are highlighted in red and listed in the slides above.
The most current version of the UCR Personal Data Form is available as a template in DocuSign. Please make sure that you are capturing all required information if you are not using this version of the form.

Required data points are highlighted in red and listed in the slides above.
New Hire - AP
The same ServiceLink Form – Onboarding – New Hire is used to hire Staff, Academic Appointees, and Contingent Workers. Employees who have not been on pay status at UC and who do not have a UCPath Employee Job Record, are considered New Hires.
Onboarding – New Hire (AP)

HIR - Hire No Prior UC Affiliation

Usage: Use to hire a new employee. Employee has never been on pay status with UC.

Example: New hire has never been employed at a UC location in the past and does not have an employee record in UCPath.
Employee Information (AP)

Incumbent’s First Name

Incumbent’s Last Name. All other fields are optional (Middle Name, Suffix, and Phone Number).

A personal email is needed for all Onboarding transactions. This email address will be used to send the incumbent the Onboarding packet via DocuSign. This same email will also be used by the UCPath Center to communicate with the employee regarding benefits and benefit eligibility.
Employee Relationship Information (AP)

Onboarding Reason in ServiceLink is equivalent to Reason Code in UCPath. For a new staff hire, the onboarding reason is HIR – Hire no prior UC affiliation.

Organizational Relationship Type is “Employee”

Employee Type is “Academic”

Job Effective Date is the first day an employee is on pay status at UCR
Academic Appointees on Visa/Remote Hires

If the incumbent is on a Visa, check the “On a Visa” box in the Employee Relationship Information section. Checking this box will prompt the system to send an email notification to International Students and Scholars Office. This email is for informational purposes only. When the SSC Fulfiller verifies documents and files paperwork, they will send an email notification to payroll Glacier.

If the incumbent is a Remote Hire, or will not be able to attend an in-person Onboarding session, check the “Remote Hire” box. Checking this box will NOT prompt any ServiceLink tasks or automatic email notification. It is the responsibility of the SSC Fulfiller to make alternate arrangements, such as securing a notary, if the incumbent is unable to attend their Onboarding session.
Employee Work Information (AP)

Position Number can be entered directly or searched by clicking on the magnifying glass icon.

Enter FTE for the Job. This can be < or = the position FTE. The position FTE will default, but can be changed.

If the Position is stepped, select the appropriate Step.

Based on the Position Number selected, Job Code, Job Description, Organization, Organization Description, Division Code, Division Descriptions, Department Code, and Department Description populate based on Position Data.
Choose how many rows for Components of Pay you would like to display (1-6). Row 1 is for stepped academic appointees and will automatically default once a step is selected. Row 2 will default for HSCP members with both X and X’ components. 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), enter compensation on Rows 3-6. Keep in mind that data cannot be manually entered on the first two compensation rows.

Choose a pay frequency from the dropdown. Select from the following:
- Monthly
- Hourly
- Contract
- UC 9/12 FY
- UC 1/9th Rate
- UC 1/10th Rate
- UC 1/11th Rate
- UC 1/12th Rate
- UC 12/12 FY
Components of Pay (AP)

To add Job Earnings Distribution (JED) for Summer Salary, check this box (can also be paid under additional pay).

To add Recurring Additional Compensation, check this box.

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), enter their compensation on Rows 3-6 after selecting the correct Comp Rate Code and Comp Rate.

Compensation Row 1 is for stepped academic appointees. It will automatically default once a step is selected. Data cannot be manually entered in this compensation row.

Compensation Row 2 is for HSCP members. Both the X and X’ components will default. Data cannot be manually entered in this compensation row.
Recurring Additional Compensation (AP)

When “Add Recurring Additional Compensation?” box is checked, the “Recurring Additional Compensation” section appears.

Enter the maximum number of rows (1-4) needed to enter the academic appointee’s Recurring Additional Compensation.

<table>
<thead>
<tr>
<th>Earnings Code</th>
<th>Pay Amount</th>
<th>Effective Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>HSG</td>
<td>8000.00</td>
<td>07/01/18</td>
<td>09/01/18</td>
</tr>
</tbody>
</table>

Enter appropriate Earnings Code for academic appointee’s Recurring Additional Compensation. Up to 4 Earnings Codes can be entered on 4 different rows.

Enter the Pay Amount (in dollars) of the Recurring Additional Compensation for the entered Earnings Code.

Enter the first day of the academic appointee’s Recurring Additional Compensation.

Enter the last day of the academic appointee’s Recurring Additional Compensation.
JED for Summer Salary (AP)

- When “Add Job Earnings Distribution for Summer Salary?” box is checked, the “Distribution” section appears.

  - Enter the maximum number of rows (1-2) needed to enter the academic appointee’s JED for Summer Salary.

  - Enter appropriate Earnings Code for academic appointee’s JED for Summer Salary. Up to 2 Earnings Codes can be entered on 2 different rows.

  - Enter the percentage of distribution.

  - Total Distribution Percentage will default from % of Distribution field for Row 1 & 2 (if used).

  - Enter the Comp Rate (in dollars) of the JED for Summer Salary for the entered Earnings Code.

  - Enter the appropriate Summer Salary Earnings code and associated percentage. In most cases it will be ACR or AFR at 100%.
Duration Information (AP)

Select appropriate Academic Duration of Employment. Choose from:
- Continuing (Unit 18)
- Indefinite
- Potential Security
- Tenure Track (Ladder Rank)
- Security (LSOE)
- Tenured
- End Date (Academic Term Appts)

If the academic appointee is in one of the following Appointee Classes or Academic Duration of Employment, an Expected Job End Date is required:
- Academic – Post Docs
- Academic – Recall
- Academic – Academic Student
- Potential Security
- Tenure Track
- Academic Term Appts.

If the incumbent is in the Academic Post Doc EMPL Class, the Post Doc Anniversary Date is required. It 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 “End Job Automatically” checkbox is initially unchecked for all Academic New Hires. If checked, the academic appointee’s job will automatically end in UCPath, once the End Date has been reached.
Onboarding Tasks (AP)

You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the “Create a single task for all Task Listed Below” will create one task that will need to be closed once completed. Individual tasks can also be selected. All selected tasks will be generated at once. Tasks assigned to the Shared Services Center will also be generated simultaneously.

All SSC tasks are required and cannot be modified. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.
Comments & Attachment (AP)

ServiceLink Onboarding requests require that the Initiator attach an Appointment/Offer Letter.

Comments can be added to ensure that all needed data to complete a UCPath Onboarding transaction is included.
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 will similarly be assigned one composite tasks (except for R'SSC who will be assigned all tasks, per their request.). The SSC fulfiller will change the state of the task from “Open” to “Closed” when completed. When all tasks reflect a “Closed” state, the RITM stage will automatically change to “closed complete.”
## Data Required for UCPath Onboarding Transactions

<table>
<thead>
<tr>
<th>Key Data Point</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
<td>Employee ID (or Empl ID) is generated by UCPath after a New Hire has been successfully processed.</td>
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<tr>
<td>Action</td>
<td>Actions in UCPath include Hire, Rehire, Transfer, Add Contingent Worker, and Contingent Worker Extension.</td>
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<td>Reason Code</td>
<td>Reason Codes are the reason why the Onboarding is taking place (i.e. Action – Rehire, Reason Code – Rehire, &lt;120 days break).</td>
</tr>
<tr>
<td>Employee Record Number</td>
<td>An employee can have one or more Empl. Records.</td>
</tr>
</tbody>
</table>
# Additional Data Required for UCPath Transaction (AP) – New Hire

## Personal Data

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<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
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<tbody>
<tr>
<td>First &amp; Last Names</td>
<td>ServiceLink Form – Employee Information &amp; UCR Personal Data Form</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>UCR Personal Data Form</td>
</tr>
<tr>
<td>Highest Education Level</td>
<td>UCR Personal Data Form</td>
</tr>
<tr>
<td>Gender</td>
<td>UCR Personal Data Form</td>
</tr>
<tr>
<td>National ID Type &amp; National ID</td>
<td>UCR Personal Data Form, in-person, via phone</td>
</tr>
<tr>
<td>Address Line 1, City, State, Postal Code</td>
<td>UCR Personal Data Form</td>
</tr>
<tr>
<td>Email Address</td>
<td>ServiceLink Form – Employee Information &amp; UCR Personal Data Form</td>
</tr>
<tr>
<td>Phone</td>
<td>UCR Personal Data Form</td>
</tr>
</tbody>
</table>
# Onboarding – New Hire (AP)

## Job Data

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Number</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Establishment ID</td>
<td>Defaults from Position data, but is editable</td>
</tr>
<tr>
<td>Standard Hours</td>
<td>Defaults from Position data, but is editable</td>
</tr>
<tr>
<td>FTE</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Step (for step-based positions only)</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Expected Job End Date (for Post Docs, Academic Recall, Academic Student)</td>
<td>ServiceLink Form – Duration Information</td>
</tr>
<tr>
<td>Academic Duration of Appointment (if Job Record End Date exists)</td>
<td>ServiceLink Form – Duration Information</td>
</tr>
</tbody>
</table>
Onboarding – New Hire (AP)

Job Data – Job Compensation & Pay Components

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compensation Frequency</td>
<td>ServiceLink Form – Compensation Information</td>
</tr>
<tr>
<td>Comp Rate Code</td>
<td>ServiceLink Form – Components of Pay</td>
</tr>
<tr>
<td>Compensation Rate</td>
<td>ServiceLink Form – Components of Pay</td>
</tr>
<tr>
<td>Pay Components Frequency</td>
<td>ServiceLink Form – Components of Pay</td>
</tr>
</tbody>
</table>
The most current version of the UCR Personal Data Form is available as a template in DocuSign. Please make sure that you are capturing all required information if you are not using this version of the form.

Required data points are highlighted in red and listed in the slides above.
The most current version of the UCR Personal Data Form is available as a template in DocuSign. Please make sure that you are capturing all required information if you are not using this version of the form.

Required data points are highlighted in red and listed in the slides above.
New Hire – Contingent Worker (CWR)
The same ServiceLink Form – Onboarding – New Hire is used to hire Staff, Academic Appointees, and Contingent Workers. Employees who have not been on pay status at UC and who do not have a UCPath Employee Job Record, are considered New Hires.
Onboarding – New Hire (CWR)

Add Contingent Worker (with Position)

**Usage:** Use to add a Contingent Worker (CWR) with position.

**Example:** Contractor supervises a group of three UCR employees, but is paid by the contracting company, not UCPC.

Add Contingent Worker (without Position)

**Usage:** Use to add a Contingent Worker (CWR) without position.

**Example:** Student volunteer needs to be tracked in the system and performs job-related duties for UCR, but is not paid by UCPC.
Employee Information (CWR)

Incumbent’s First Name: Cooper

Incumbent’s Last Name: Cash

Personal Email: coopetrooper@yahoo.com

A personal email is needed for all Onboarding transactions. This email address will be used to send the incumbent the Onboarding packet via DocuSign.
Employee Relationship Information (CWR)

- **Organizational Relationship Type** is “Contingent Worker”

- **When Contingent Worker is selected, Employee Type defaults to “N/A”**

- **Job Effective Date** is the Contingent Worker’s first day on the job

- **Expected Job End Date**
  - Enter the name of the employee who will supervise the Contingent Worker. This field will only appear if you responded “no” to the previous questions. The reports to data is part of position data, and is therefore not necessary if the CWR holds a position.

- **Onboarding Reason for CWR in ServiceLink is NOT equivalent to Reason Code in UCPath.** Regardless of whether or not the CWR supervises employees, select ADD – Add Contingent Worker. Your SSC will determine the correct UCPath code based on your answer to the question – Will contingent worker supervise employees?

- **Contingent workers should have an expected job end date.**
Contingent Workers on Visa/Remote Hires

If the incumbent is on a Visa, check the “On a Visa” box in the Employee Relationship Information section. Checking this box will prompt the system to send an email notification to International Students and Scholars Office. This email is for informational purposes only. When the SSC Fulfiller verifies documents and files paperwork, they will send an email notification to payroll Glacier.

If the incumbent is a Remote Hire, or will not be able to attend an in-person Onboarding session, check the “Remote Hire” box. Checking this box will NOT prompt any ServiceLink tasks or automatic email notification. It is the responsibility of the SSC Fulfiller to make alternate arrangements, such as securing a notary, if the incumbent is unable to attend their Onboarding session.
Employee Information (CWR)

- **Organizational Relationship type is Contingent Worker**
- **Employee Type defaults to N/A**
- **Select if CWR will supervise UCR Employee(s)**
- **Job Effective Date for CWR is first day access is needed (CWR are not paid through UCPath)**
- **Include an Expected Job End Date. This is not a required field in ServiceLink, but it is in UCPath**

UCPath Reason Code for “hiring” a CWR is ADD - Add Contingent Worker
If a contingent worker supervises UCR Employee(s), they will need to be Onboarded with a Position. When asked “Will Contingent Worker Supervise Employees,” select “Yes” from the dropdown.

Position Number can be entered directly or searched by clicking on the magnifying glass icon.

Based on the Position Number selected, Job Code, Job Description, Organization, Organization Description, Division Code, Division Descriptions, Department Code, and Department Description populate based on Position Data.
Employee Work Information (CWR)

**Without a Position**

If a contingent worker does NOT supervise UCR Employee(s), they can be Onboarded without a Position. When asked “Will Contingent Worker Supervise Employees,” select “No” from the dropdown.

Instead of entering a Position Number, enter the appropriate Job Code. Job Codes for Contingent Workers (with and without a Position) start with “CWR.” This was done during Conversion on UCR Job Codes designated as being appropriate for Contingent Workers.

The Job Description will default based on the Job Code selected. Organization Description will populate based on the Organization selected. The Division Description will populate based on the chosen Division Code. Department Code (required) will generate the corresponding Department Description.

Even if Organization and Division Code are not required for a ServiceLink request, it is highly recommended that this information (if known) be added to the request. Location, Empl Class (Staff/AP) and Supervisor Position Number are all required data points for the UCPath transaction.
Onboarding Tasks (CWR)

All SSC tasks are required and cannot be modified. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.

You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the “Create a single task for all Task Listed Below” will create one task that will need to be closed once completed. Individual tasks can also be selected. All selected tasks will be generated at once. Tasks assigned to the Shared Services Center will also be generated simultaneously.

All SSC tasks are required and cannot be modified. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.
Comments & Attachment (CWR)

ServiceLink Onboarding requests require that the Initiator attach an Offer Letter. In some instances (such as Student Volunteers), this can be an email or other informal notification of the “hire.”

Comments can be added to ensure that all data needed to complete a UCPath Onboarding transaction is included.
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.

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.

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 Shared Services Center will similarly be assigned one composite task (except for R’SSC who will be assigned all tasks, per their request.). The SSC fulfiller will change the state of the task from “Open” to “Closed” when completed. When all tasks reflect a “Closed” state, the RITM stage will automatically change to “closed complete.”

Remember that we requested that only one task be assigned to the Accountability Structure Fulfiller. Once all tasks relating to the Onboarding have been completed, the designated Onboarding Accountability Structure fulfiller should change the state of the task from “Open” to “Closed.” This can be done by selecting the task and clicking on the Actions on selected rows button highlighted below in yellow.

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.
# Additional Data Required for UCPath Transaction (CWR) – New Hire

## Personal Data

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>First &amp; Last Names</td>
<td>ServiceLink Form – Employee Information &amp; UCR Personal Data Form</td>
</tr>
<tr>
<td>Address Line 1, City, State, Postal Code</td>
<td>UCR Personal Data Form</td>
</tr>
</tbody>
</table>
## Onboarding – New Hire (CWR)

### Job Data

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>Populates Automatically – Riverside Campus</td>
</tr>
<tr>
<td>Department</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Location Code</td>
<td>Populates from Job Code</td>
</tr>
<tr>
<td>Job Code</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Employee class</td>
<td>Populated from Job Code</td>
</tr>
<tr>
<td>Supervisor ID</td>
<td>ServiceLink Form – Employee Relationship Information</td>
</tr>
<tr>
<td>Expected Job End Date</td>
<td>ServiceLink Form – Employee Relationship Information</td>
</tr>
</tbody>
</table>
Rehire – Staff
ServiceLink Form (Staff – Rehire)

Human Resources & Academic Personnel

Welcome to the HR and AP ServiceLink request page. These requests will route to your Shared Service provider for fulfillment in UCPath.

- Onboarding - New Hire
  Hire a new UC employee/contingent worker

- Onboarding - Rehire
  Rehire an employee/contingent worker previously employed at a UC Location

- Onboarding - Transfer
  Transfer in a current employee from another UC location or within UCR

- Onboarding - Concurrent
  Add a job to an existing employee

The same ServiceLink Form – Onboarding – Rehire is used to rehire Staff, Academic Appointees, and Contingent Workers. Rehired employees must have an existing Job Record in UCPath.
Onboarding – Rehire (Staff)

Rehire fr. Layoff – Pref, < 120

**Usage:** Use for rehires from the same business unit (UCR). Use to rehire following a layoff and secured through the preferential rehire process within 120 day of separation.

**Example:** UCR staff employee was laid off from position in December 2017. They secure re-employment through the preferential rehire process in February 2018.

Rehire fr. Layoff – Pref, >= 120

**Usage:** Use for rehires from the same business unit (UCR). Use to rehire following a layoff and secured through the preferential rehire process where there is greater or equal to 120 days of separation.

**Example:** UCR staff employee was laid off from position in December 2017. They secure re-employment through the preferential rehire process in August 2018.
Onboarding – Rehire (Staff) (continued)

Rehire, >= 120 days break

Usage: Use for rehires from the same business unit (UCR). Use for a regular rehire to return to pay status where there is greater or equal to 120 days of separation.

Example: UCR employee is voluntarily terminated in December 2017. They are rehired into a new position at UCR in August 2018.

Rehire, < 120 days break

Usage: Use for rehires from the same business unit (UCR). Use for a regular rehire to return to pay status following less than 120 days of break in service.

Example: UCR employee is voluntarily terminated in December 2017. They are rehired into a new position at UCR in February 2018.
Onboarding – Rehire (Staff) (continued)

Reinstatement

**Usage:** Use for rehires from the same business unit (UCR). Use to return to pay status following an involuntary break in service that was not a layoff.

**Example:** An error was made during conversion and an employee was avertedly terminated.

Rehired Retiree

**Usage:** Use for rehires from the same business unit (UCR). Use to return to pay status, in accordance with the Policy on Reemployment of UC Retired Employees, following a retirement, and the employee continues to draw retirement benefits.

**Example:** A UCR employee of 30 years retires in June 2018. They are rehired to work on a special project part-time from August to December 2018.
Onboarding – Rehire (Staff) (continued)

Rehire fr. Layoff – No Pref, < 120

Usage: Use for rehires from the same business unit (UCR). Use to rehire following a layoff and not secured through the preferential rehire process within 120 days of separation.

Example: UCR staff employee was laid off from position in December 2017. They are rehired into a new position in February 2018, but not through the preferential rehire process.

Rehire fr. Layoff – No Pref, >= 120

Usage: Use for rehires from the same business unit (UCR). Use to rehire following a layoff and not secured through the preferential rehire process where there is greater or equal to 120 days of separation.

Example: UCR staff employee was laid off from position in December 2017. They are rehired into a new position in August 2018, but not through the preferential rehire process.
Onboarding – Rehire (Staff) (continued)

Staff Recall, < 120

Usage: Use for rehires from the same business unit (UCR). Use to rehire a former UC employee eligible under layoff recall policies within 120 days of separation.

Example: UCR staff employee is laid off in December 2017. They are rehired into a new position at UCR in February 2018 under layoff recall policies.

Staff Recall, >= 120

Usage: Use for rehires from the same business unit (UCR). Use to rehire a former UC employee eligible under layoff recall policies greater or equal to 120 days of separation.

Example: UCR staff employee is laid off in December 2017. They are rehired into a new position at UCR in August 2018 under layoff recall policies.
Onboarding – Rehire (Staff) (continued)

Rehire – Retirement Suspended

**Usage:** Use for rehires from the same business unit (UCR). Use to return to pay status following a retirement suspended and employee become an active UCR member again.

**Example:** UCR staff employee retires in December 2017. Their retirement is suspended and they are rehired into a new full-time position at UCR.
Employee Information (Staff)

As a rehired employee, the incumbent once worked at a UC Campus. Select the correct UC Campus from the “Transfer From” dropdown.

A personal email is needed for all Onboarding transactions. This email address will be used to send the incumbent the Onboarding packet via DocuSign. This same email will also be used by the UCPath Center to communicate with the employee regarding benefits and benefit eligibility.
Transfer From (Staff)

From the dropdown, select the UC Campus where the incumbent was previously employed. You can choose from:
- UC Riverside Campus
- Associated Students, UCLA
- Lawrence Berkeley National Lab
- UC Agricultural & Natural Resources
- UC Berkeley Campus
- UC Davis Campus
- UC Davis Medical Center
- UC Hastings School of Law
- UC Irvine Campus
- UC Irvine Medical Center
- UC Merced Campus
- UC Office of President
- UC San Diego Campus
- UC San Francisco Campus
- UC San Francisco Medical Ctr
- UC Santa Barbara Campus
- UC Santa Cruz Campus
- UCLA Campus
Employee Relationship Information

Staff

Onboarding Reason in ServiceLink is equivalent to Reason Code in UCPath.

Organizational Relationship Information is “Employee”

Employee Type is “Staff”

Job Effective Date is the first day an employee is on pay status at UCR.

Onboarding Reason in ServiceLink is equivalent to Reason Code in UCPath.
Employees on Visa/Remote Hires

If the incumbent is on a Visa, check the “On a Visa” box in the Employee Relationship Information section. Checking this box will prompt the system to send an email notification to International Students and Scholars Office. This email is for informational purposes only. When the SSC Fulfiller verifies documents and files paperwork, they will send an email notification to payroll Glacier.

If the incumbent is a Remote Hire, or will not be able to attend an in-person Onboarding session, check the “Remote Hire” box. Checking this box will NOT prompt any ServiceLink tasks or automatic email notification. It is the responsibility of the SSC Fulfiller to make alternate arrangements, such as securing a notary, if the incumbent is unable to attend their Onboarding session.
Employee Work Information (Staff)

Position Number can be entered directly or searched by clicking on the magnifying glass icon.

Based on the Position Number selected, Job Code, Job Description, Organization, Organization Description, Division Code, Division Descriptions, Department Code, and Department Description populate based on Position Data.
Onboarding Tasks (Staff)

Gray checked boxes are required tasks assigned to the ServiceLink Assignment Group Accountability Structure_Onboarding Accountability Fulfiller. Additional tasks can be manually added, if needed. All checked tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.

All SSC tasks are required and cannot be modified. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.
ServiceLink Onboarding requests require that the Initiator attach an Offer Letter. For Staff, the Offer Letter contains additional information required for the SSC Fulfiller to transact in UCPath.

Comments can be added to ensure that all needed data to complete a UCPath Onboarding transaction is included.
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.
For a rehire, two tasks will be created simultaneously – to confirm the FAU and create/reactivate NetID. Once all tasks relating to the Onboarding have been completed, the designated Onboarding Accountability Structure fulfiller should change the state of the task from “Open” to “Closed.” This can be done by selecting the task and clicking on the Actions on selected rows button highlighted below in yellow.

The Shared Services Center will similarly be assigned three tasks as part of the rehire request. The SSC fulfiller will change the state of the tasks from “Open” to “Closed” when completed. When all tasks reflect a “Closed” state, the RITM stage will automatically change to “closed complete.”
# Data Required for UCPath Onboarding Transactions

<table>
<thead>
<tr>
<th>Key Data Point</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
<td>Employee ID (or Empl ID) is generated by UCPath after a New Hire has been successfully processed.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>The JOB Effective Date (different from the Position Effective Date) is the first day a given employee should be paid or the first day a contingent worker is performing services for UCR.</td>
</tr>
<tr>
<td>Action</td>
<td>Actions in UCPath include Hire, Rehire, Transfer, Add Contingent Worker, and Contingent Worker Extension.</td>
</tr>
<tr>
<td>Reason Code</td>
<td>Reason Codes are the reason why the Onboarding is taking place (i.e. Action – Rehire, Reason Code – Rehire, &lt;120 days break).</td>
</tr>
<tr>
<td>Employee Record Number</td>
<td>An employee can have one or more Empl. Records.</td>
</tr>
</tbody>
</table>
### Additional Data Required for UCPPath Transaction (Staff) – Rehire

#### Job Data

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Number</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Employee Classification</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Establishment ID</td>
<td>Defaults from Position data, but is editable</td>
</tr>
<tr>
<td>Standard Hours</td>
<td>Defaults from Position data, but is editable</td>
</tr>
<tr>
<td>FTE</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Step (for step-based positions only)</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
</tbody>
</table>
## Onboarding – Rehire (Staff)

### Job Data (continued)

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step (for step-based positions only)</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Probation Code</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Probation End Date</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>PY Career Duration (partial-year Empl Classes only)</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Expected Job End Date (for Contract, Casual/Restricted, Floater, and Staff Rehired Retiree)</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
</tbody>
</table>
Onboarding – Rehire (Staff)

Job Data – Job Compensation & Pay Components

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compensation Frequency</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Comp Rate Code</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Compensation Rate</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Pay Components Frequency</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
</tbody>
</table>
Rehire – AP
The same ServiceLink Form – Onboarding – Rehire is used to rehire Staff, Academic Appointees, and Contingent Workers. Rehired employees must have an existing Job Record in UCPath.
Onboarding – Rehire (AP)

Academic Recall

**Usage:** Use to recall retired academic appointees.

**Example:** UCR Academic Appointee retires in December 2017. Their retirement is recalled and they are rehired into a part-time position at UCR at 43%.

Emeritus Faculty

**Usage:** Use to add an emeritus job to a retired faculty.

**Example:** Retired UCR faculty is rehired as Emeritus Faculty.
Onboarding – Rehire (AP) (continued)

Rehire fr. Layoff – Pref, < 120

**Usage:** Use for rehires from the same business unit (UCR). Use to rehire following a layoff and secured through the preferential rehire process within 120 day of separation.

**Example:** UCR staff employee was laid off from position in December 2017. They secure reemployment through the preferential rehire process in February 2018.

Rehire fr. Layoff – Pref, >= 120

**Usage:** Use for rehires from the same business unit (UCR). Use to rehire following a layoff and secured through the preferential rehire process where there is greater or equal to 120 days of separation.

**Example:** UCR staff employee was laid off from position in December 2017. They secure reemployment through the preferential rehire process in August 2018.
Onboarding – Rehire (AP) (continued)

Rehire, >= 120 days break

**Usage:** Use for rehires from the same business unit (UCR). Use for a regular rehire to return to pay status where there is greater or equal to 120 days of separation.

**Example:** UCR employee is voluntarily terminated in December 2017. They are rehired into a new position at UCR in August 2018.

Rehire, < 120 days break

**Usage:** Use for rehires from the same business unit (UCR). Use for a regular rehire to return to pay status following less than 120 days of break in service.

**Example:** UCR employee is voluntarily terminated in December 2017. They are rehired into a new position at UCR in February 2018.
Onboarding – Rehire (AP) (continued)

Reinstatement
Usage: Use for rehires from the same business unit (UCR). Use to return to pay status following an involuntary break in service that was not a layoff.
Example: An error was made during conversion and an employee was avertedly terminated.

Rehired Retiree
Usage: Use for rehires from the same business unit (UCR). Use to return to pay status, in accordance with the Policy on Reemployment of UC Retired Employees, following a retirement, and the employee continues to draw retirement benefits.
Example: A UCR employee of 30 years retires in June 2018. They are rehired to work on a special project part-time from August to December 2018.
Onboarding – Rehire (AP) (continued)

Rehire fr. Layoff – No Pref, < 120

Usage: Use for rehires from the same business unit (UCR). Use to rehire following a layoff and not secured through the preferential rehire process within 120 days of separation.

Example: UCR staff employee was laid off from position in December 2017. They are rehired into a new position in February 2018, but not through the preferential rehire process.

Rehire fr. Layoff – No Pref, >= 120

Usage: Use for rehires from the same business unit (UCR). Use to rehire following a layoff and not secured through the preferential rehire process where there is greater or equal to 120 days of separation.

Example: UCR staff employee was laid off from position in December 2017. They are rehired into a new position in August 2018, but not through the preferential rehire process.
Onboarding – Rehire (AP) (continued)

Rehire – Retirement Suspended

**Usage**: Use for rehires from the same business unit (UCR). Use to return to pay status following a retirement suspended and employee become an active UCR member again.

**Example**: UCR staff employee retires in December 2017. Their retirement is suspended and they are rehired into a new full-time position at UCR.
Employee Information (AP)

Incumbent’s First Name

Incumbent’s Last Name. All other fields are optional (Middle Name, Suffix, Phone Number, and UCPath Employee ID).

As a rehired employee, the incumbent once worked at a UC Campus. Select the correct UC Campus from the “Transfer From” dropdown.

A personal email is needed for all Onboarding transactions. This email address will be used to send the incumbent the Onboarding packet via DocuSign. This same email will also be used by the UCPath Center to communicate with the employee regarding benefits and benefit eligibility.
Transfer From (AP)

From the dropdown, select the UC Campus where the incumbent was previously employed. You can choose from:

- UC Riverside Campus
- Associated Students, UCLA
- Lawrence Berkeley National Lab
- UC Agricultural & Natural Resources
- UC Berkeley Campus
- UC Davis Campus
- UC Davis Medical Center
- UC Hastings School of Law
- UC Irvine Campus
- UC Irvine Medical Center
- UC Merced Campus
- UC Office of President
- UC San Diego Campus
- UC San Francisco Campus
- UC San Francisco Medical Ctr
- UC Santa Barbara Campus
- UC Santa Cruz Campus
- UCLA Campus

REHIRE
<table>
<thead>
<tr>
<th>Organizational Relationship Type</th>
<th>Employee Type</th>
<th>Job Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Academic</td>
<td>07/01/18</td>
</tr>
</tbody>
</table>

- **Organizational Relationship Information** is "Employee".
- **Employee Type** is "Academic".
- **Job Effective Date** is the first day an employee is on pay status at UCR.
- **Onboarding Reason in ServiceLink** is equivalent to **Reason Code in UCPath**.

---

**Onboarding Reason Options**:
- ACA - Academic Recall
- EMR - Emeritus Faculty
- REH - Rehire - Break in Service
- PR2 - Rehire fr Layoff-Pref, < 120
- PRF - Rehire fr Layoff-Pref, >=120
- RE2 - Rehire, < 120 days break
- REH - Rehire, > or = 120 days break
- REI - Reinstatement
- RET - Rehired Retiree
- RL2 - Rehire fr Layoff-No Pref, <120
- RLO - Rehire fr Layoff-No Pref,>=120
- RSR - Rehire - Retirement Suspended

---

**UCRIVERSIDE FOMIUCPath Training**
Academic Appointees on Visa/Remote Hires

If the incumbent is on a Visa, check the “On a Visa” box in the Employee Relationship Information section. Checking this box will prompt the system to send an email notification to International Students and Scholars Office. This email is for informational purposes only.

When the SSC Fulfiller verifies documents and files paperwork, they will send an email notification to payroll Glacier.

If the incumbent is a Remote Hire, or will not be able to attend an in-person Onboarding session, check the “Remote Hire” box. Checking this box will NOT prompt any ServiceLink tasks or automatic email notification.

It is the responsibility of the SSC Fulfiller to make alternate arrangements, such as securing a notary, if the incumbent is unable to attend their Onboarding session.
Employee Work Information (AP)

Position Number can be entered directly or searched by clicking on the magnifying glass icon.

Enter FTE for the Job. This can be ≤ the position FTE.

If the Position is stepped, select the appropriate Step.

Based on the Position Number selected, Job Code, Job Description, Organization, Organization Description, Division Code, Division Description, Department Code, and Department Description populate based on Position Data.
Choose how many rows for Components of Pay you would like to display (1-6). Row 1 is for stepped academic appointees and will automatically default once a step is selected. Row 2 will default for HSCP members with both X and X’ components. 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), enter compensation on Rows 3-6. Keep in mind that data cannot be manually entered on the first two compensation rows.

Choose a pay frequency from the dropdown. Select from the following:
- Monthly
- Hourly
- Contract
- UC 9/12 FY
- UC 1/9th Rate
- UC 1/10th Rate
- UC 1/11th Rate
- UC 1/12th Rate
- UC 12/12 FY
## Components of Pay (AP)

### Compensation Row 1

For stepped academic appointees, this row will automatically default once a step is selected. For most academic appointees, one row will default. If the academic appointee has additional components of pay that do not default (e.g., off-scale amounts, Y Payments), enter their compensation on Row 3-6 after selecting the correct Comp Rate Code and Comp Rate.

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

<table>
<thead>
<tr>
<th>Comp Rate Code</th>
<th>Comp Rate</th>
<th>Job Compensation Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Compensation Row 2

For HSCP members, both X and X' components will default. Data cannot be manually entered in this compensation row.

<table>
<thead>
<tr>
<th>Comp Rate Code</th>
<th>Comp Rate</th>
<th>Job Compensation Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Additional Components

- **Add Recurring Additional Compensation?**
- **Add Job Earnings Distribution for Summer Salary?**

To add Recurring Additional Compensation, check this box.

To add Job Earnings Distribution (JED) for Summer Salary, check this box (can also be paid under additional pay).
Recurring Additional Compensation (AP)

When “Add Recurring Additional Compensation?” box is checked, the “Recurring Additional Compensation” section appears.

Enter the maximum number of rows (1-4) needed to enter the academic appointee’s Recurring Additional Compensation.

Enter appropriate Earnings Code for academic appointee’s Recurring Additional Compensation. Up to 4 Earnings Codes can be entered on 4 different rows.

Enter the Pay Amount (in dollars) of the Recurring Additional Compensation for the entered Earnings Code.

Enter the first day of the academic appointee’s Recurring Additional Compensation.

Enter the last day of the academic appointee’s Recurring Additional Compensation.
**JED for Summer Salary (AP)**

When “Add Job Earnings Distribution for Summer Salary?” box is checked, the “Distribution” section appears.

<table>
<thead>
<tr>
<th>Input maximum rows for summer salary distribution</th>
<th>1</th>
</tr>
</thead>
</table>

Enter the maximum number of rows (1-2) needed to enter the academic appointee’s JED for Summer Salary.

**Earnings Code**

<table>
<thead>
<tr>
<th>Earnings Code</th>
<th>ACR</th>
</tr>
</thead>
</table>

Enter appropriate Earnings Code for academic appointee’s JED for Summer Salary. Up to 2 Earnings Codes can be entered on 2 different rows.

<table>
<thead>
<tr>
<th>Comp Rate</th>
<th>8000.00</th>
</tr>
</thead>
</table>

Enter the Comp Rate (in dollars) of the JED for Summer Salary for the entered Earnings Code.

<table>
<thead>
<tr>
<th>% of Distribution</th>
<th>100</th>
</tr>
</thead>
</table>

Enter the percentage of distribution.

**Total Distribution %**

<table>
<thead>
<tr>
<th>Total Distribution %</th>
<th>100</th>
</tr>
</thead>
</table>

Total Distribution Percentage will default from % of Distribution field for Row 1 & 2 (if used).
Duration Information (AP)

Select appropriate Academic Duration of Employment. Choose from:
- Continuing (Unit 18)
- Indefinite
- Potential Security
- Tenure Track (Ladder Rank)
- Security (LSOE)
- Tenured
- End Date (Academic Term Appts)

If the academic appointee is in one of the following Appointee Classes or Academic Duration of Employment, an Expected Job End Date is required:
- Academic – Post Docs
- Academic – Recall
- Academic – Academic Student
- Potential Security
- Tenure Track
- Academic Term Appts.

If the incumbent is in the Academic Post Doc EMPL Class, the Post Doc Anniversary Date class is required. It 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 "End Job Automatically" checkbox is initially unchecked for all Academic New Hires. If checked, the academic appointee’s job will automatically end in UCPath once the End Date has been reached.
Onboarding Tasks (AP)

Gray checked boxes are required tasks assigned to the ServiceLink Assignment Group Accountability Structure_Onboarding Accountability Fulfiller. Additional tasks can be manually added, if needed. All checked tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.

All SSC tasks are required and cannot be modified (with the exception of the “Monitor Completion of Background Check”). These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.
ServiceLink Onboarding requests require that the Initiator attach an Appointment/Offer Letter.

Comments can be added to ensure that all needed data to complete a UCPath Onboarding transaction is included.
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 will similarly be assigned three tasks as part of the rehire request. The SSC fulfiller will change the state of the tasks from “Open” to “Closed” when completed. When all tasks reflect a “Closed” state, the RITM stage will automatically change to “closed complete.”

For a rehire, two tasks will be created simultaneously – to confirm the FAU and create/reactivate NetID. Once all tasks relating to the Onboarding have been completed, the designated Onboarding Accountability Structure fulfiller should change the state of the task from “Open” to “Closed.” This can be done by selecting the task and clicking on the Actions on selected rows button highlighted below in yellow.

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.
Data Required for UCPPath Onboarding Transactions

<table>
<thead>
<tr>
<th>Key Data Point</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
<td>Employee ID (or Empl ID) is generated by UCPPath after a New Hire has been successfully processed.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>The JOB Effective Date (different from the Position Effective Date) is the first day a given employee should be paid or the first day a contingent worker is performing services for UCR.</td>
</tr>
<tr>
<td>Action</td>
<td>Actions in UCPPath include Hire, Rehire, Transfer, Add Contingent Worker, and Contingent Worker Extension.</td>
</tr>
<tr>
<td>Reason Code</td>
<td>Reason Codes are the reason why the Onboarding is taking place (i.e. Action – Rehire, Reason Code – Rehire, &lt;120 days break).</td>
</tr>
<tr>
<td>Employee Record Number</td>
<td>An employee can have one or more Empl. Records.</td>
</tr>
</tbody>
</table>
## Additional Data Required for UCPath Transaction (AP) – Rehire

### Job Data

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Number</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Establishment ID</td>
<td>Defaults from Position data, but is editable</td>
</tr>
<tr>
<td>Standard Hours</td>
<td>Defaults from Position data, but is editable</td>
</tr>
<tr>
<td>FTE</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Step (for step-based positions only)</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Expected Job End Date (for Post Docs, Academic Recall, Academic Student)</td>
<td>ServiceLink Form – Duration Information</td>
</tr>
<tr>
<td>Academic Duration of Appointment (if Job Record End Date exists)</td>
<td>ServiceLink Form – Duration Information</td>
</tr>
</tbody>
</table>
Onboarding – Rehire (AP)

## Job Data – Job Compensation & Pay Components

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compensation Frequency</td>
<td>ServiceLink Form – Compensation Information</td>
</tr>
<tr>
<td>Comp Rate Code</td>
<td>ServiceLink Form – Components of Pay</td>
</tr>
<tr>
<td>Compensation Rate</td>
<td>ServiceLink Form – Components of Pay</td>
</tr>
<tr>
<td>Pay Components Frequency</td>
<td>ServiceLink Form – Components of Pay</td>
</tr>
</tbody>
</table>
Rehire – CWR
The same ServiceLink Form – Onboarding – Rehire is used to rehire Staff, Academic Appointees, and Contingent Workers. Rehired employees must have an existing Job Record in UCPath.
Onboarding – Rehire (CWR)

Contingent Worker Renewal

**Usage:** Use to renew a Contingent Worker with or without a position.

**Example:** A contingent worker performed job duties at UCR from January 2018 to March 2018. In August 2018, they are rehired at UCR to work on a project until the end of the year. They are still employed as a contingent worker and are not paid through UCPC.
Employee Information (CWR)

**Incumbent’s First Name**

**Incumbent’s Last Name**. All other fields are optional (Middle Name, Suffix, Phone Number, and UCPATH Employee ID).

A personal email is needed for all Onboarding transactions. This email address will be used to send the incumbent the Onboarding packet via DocuSign. This same email will also be used by the UCPATH Center to communicate with the employee regarding benefits and benefit eligibility.

As a rehired employee, the incumbent once worked at a UC Campus. Select the correct UC Campus from the “Transfer From” dropdown.
Transfer From (CWR)

From the dropdown, select the UC Campus where the incumbent was previously employed. You can choose from:

- UC Riverside Campus
- Associated Students, UCLA
- Lawrence Berkeley National Lab
- UC Agricultural & Natural Resources
- UC Berkeley Campus
- UC Davis Campus
- UC Davis Medical Center
- UC Hastings School of Law
- UC Irvine Campus
- UC Irvine Medical Center
- UC Merced Campus
- UC Office of President
- UC San Diego Campus
- UC San Francisco Campus
- UC San Francisco Medical Ctr
- UC Santa Barbara Campus
- UC Santa Cruz Campus
- UCLA Campus
Employee Relationship Information (CWR)

- Organizational Relationship Type: Contingent Worker
  - Select if CWR will supervise UCR Employee(s)
- Employee Type: N/A
  - Employee Type defaults to “N/A”
- Will Contingent Worker Supervise Employees?: No
  - Organizational Relationship Information is “Contingent Worker”
- Job Effective Date: 03/05/18
  - Job Effective Date for CWR is the first day access is needed (CWR are not paid through UCPath)
- Expected Job End Date: 07/01/18
  - Include an Expected Job End Date. This is not a required field in ServiceLink, but it is in UCPath
- Onboarding Reason in ServiceLink is equivalent to Reason Code in UCPath

---

Onboarding Reason:

- -- None --
- RNW - Contingent Worker Renewal
Contingent Workers on Visa/Remote Hires

If the incumbent is on a Visa, check the “On a Visa” box in the Employee Relationship Information section. Checking this box will prompt the system to send an email notification to International Students and Scholars Office. This email is for informational purposes only. When the SSC Fulfiller verifies documents and files paperwork, they will send an email notification to payroll Glacier.

If the Contingent Worker is a Remote Hire, or will not be able to attend an in-person Onboarding session, check the “Remote Hire” box. Checking this box will NOT prompt any ServiceLink tasks or automatic email notification. It is the responsibility of the SSC Fulfiller to make alternate arrangements, such as securing a notary, if the incumbent is unable to attend their Onboarding session.
Employee Work Information (CWR)

With a Position

If a contingent worker supervises UCR Employee(s), they will need to be Onboarded with a Position. When asked “Will Contingent Worker Supervise Employees,” select “Yes” from the dropdown.

Position Number can be entered directly or searched by clicking on the magnifying glass icon.

Based on the Position Number selected, Job Code, Job Description, Organization, Organization Description, Division Code, Division Descriptions, Department Code, and Department Description populate based on Position Data.
Employee Work Information (CWR)

Without a Position

If a contingent worker does NOT supervise UCR Employee(s), they can be Onboarded without a Position. When asked “Will Contingent Worker Supervise Employees,” select “No” from the dropdown.

Instead of entering a Position Number, enter the appropriate Job Code. Job Codes for Contingent Workers (with and without a Position) start with “CWR.” This was done during Conversion on UCR Job Codes designated as being appropriate for Contingent Workers.

The Job Description will default based on the Job Code selected. Organization Description will populate based on the Organization selected. The Division Description will populate based on the chosen Division Code. Department Code (required) will generate the corresponding Department Description.

Even if Organization and Division Code are not required for a ServiceLink request, it is highly recommended that this information (if known) be added to the request. Location, Empl Class (Staff/AP) and Supervisor Position Number are all required data points for the UCPath transaction.
Onboarding Tasks (CWR)

Gray checked boxes are required tasks assigned to the ServiceLink Assignment Group Accountability Structure_Onboarding Accountability Fulfiller. Additional tasks can be manually added, if needed. All checked tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.

All SSC tasks are required and cannot be modified. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.
ServiceLink Onboarding requests require that the Initiator attach an Offer Letter. In some instances (such as Student Volunteers), this can be an email or other informal notification of the “hire.”

Comments can be added to ensure that all needed data to complete a UCPath Onboarding transaction is included.
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.

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 will similarly be assigned three tasks as part of the rehire request. The SSC fulfiller will change the state of the tasks from “Open” to “Closed” when completed. When all tasks reflect a “Closed” state, the RITM stage will automatically change to “closed complete.”
## Data Required for UCPath Onboarding Transactions

<table>
<thead>
<tr>
<th>Key Data Point</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
<td>Employee ID (or Empl ID) is generated by UCPath after a New Hire has been successfully processed.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>The JOB Effective Date (different from the Position Effective Date) is the first day a given employee should be paid or the first day a contingent worker is performing services for UCR.</td>
</tr>
<tr>
<td>Action</td>
<td>Actions in UCPath include Hire, Rehire, Transfer, Add Contingent Worker, and Contingent Worker Extension.</td>
</tr>
<tr>
<td>Reason Code</td>
<td>Reason Codes are the reason why the Onboarding is taking place (i.e. Action – Rehire, Reason Code – Rehire, &lt;120 days break).</td>
</tr>
<tr>
<td>Employee Record Number</td>
<td>An employee can have one or more Empl. Records.</td>
</tr>
</tbody>
</table>
Additional Data Required for UCPaPath Transaction (CW) – New Hire

## Personal Data

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>First &amp; Last Names</td>
<td>ServiceLink Form – Employee Information &amp; UCR Personal Data Form</td>
</tr>
<tr>
<td>Address Line 1, City, State, Postal Code</td>
<td>UCR Personal Data Form</td>
</tr>
</tbody>
</table>
# Onboarding – New Hire (CWR)

## Job Data

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>Populates Automatically – Riverside Campus</td>
</tr>
<tr>
<td>Department</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Location Code</td>
<td>Populates from Job Code</td>
</tr>
<tr>
<td>Job Code</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Employee class</td>
<td>Populated from Job Code</td>
</tr>
<tr>
<td>Supervisor ID</td>
<td>ServiceLink Form – Employee Relationship Information</td>
</tr>
<tr>
<td>Expected Job End Date</td>
<td>ServiceLink Form – Employee Relationship Information</td>
</tr>
</tbody>
</table>
Intra BU Transfer – Staff
ServiceLink Form (Staff – Intra BU Transfer)

The same ServiceLink Form – Onboarding – Transfer is used to Transfer (both Intra and Inter BU) Staff and Academic Appointees. Transferred employees must NOT have a break in service.
Onboarding – Intra BU Transfer (Staff)

This transfer type is for transfers WITHIN UCR (BU=Campus/Location)

Involuntary Demotion

Usage: Use for involuntary transfer to lower salary range maximum for disciplinary reasons in a different department

Example: A UCR employee is involuntarily demoted (not their choice) to a position in a different department at UCR with a lower salary range maximum for disciplinary reasons. There is no break in service.

Lateral Transfer

Usage: Use for the transfer of an employee from one position to another position in a new department.

Example: A UCR employee is transferred to a position in a different department at UCR with the same salary range maximum. There is no break in service.
Onboarding – Intra BU Transfer (Staff) (continued)

Per Diem to Career

**Usage:** Use for the transfer of an appointment of a per diem employee into a career position. This is being tracked so that employees who receive less (in the career position) are not flagged as a demotion.

**Example:** A UCR employee is transferred from a per diem position to a career position at UCR. There is no break in service.

Promotion

**Usage:** Use to change an employee from one position to another in a new department which has a higher salary range maximum. Promotions are normally obtained through a competitive recruitment process.

**Example:** A UCR employee applies for and is offered a position in a different department at UCR with a higher salary range maximum. There is no break in service.
Onboarding – Intra BU Transfer (Staff) (continued)

Transfer – Dual Employment

**Usage:** Use to transfer to a concurrent dual-employment job.

**Example:** A UCR employee is transferred to a concurrent dual-employment job in a different department at UCR. There is no break in service.

Voluntary Demotion

**Usage:** Use for voluntary transfer to a position with a lower salary range maximum in a different department.

**Example:** A UCR employee is voluntarily demoted (their choice) to a position in a different department at UCR with a lower salary range maximum. There is no break in service.
Temp Out of Class Assignment

Usage:

Example:
Onboarding – Transfer (Staff)

Select from the dropdown where the employee is coming from. For an Intra BU Transfer (within UCR), the Transfer From location will always be UC Riverside Campus.

The Initiator and Request Date fields will populate automatically. These cannot be changed/updated.
You can type in the employee’s name (last name, first name) in the Employee Name field directly or click on the magnifying glass icon to search. You can search using different criteria, including Employee Name, Job Code, Job Description, etc. Based on the person selected, the Employee First Name, Middle Name, Employee Last Name, Suffix, UCR Employee ID, and UCR NetID will populate automatically. This data is pulled from UCPath via HRDW and is accurate as of 24 hours ago.

A personal email is needed for all Onboarding transactions. This email address will be used to send the incumbent the Onboarding packet via DocuSign. This same email will also be used by the UCPath Center to communicate with the employee regarding benefits and benefit eligibility.
Employee Relationship Information (Staff)

- Organizational Relationship Information is “Employee”
- Employee Type is “Staff”
- Job Effective Date is the first day an employee is on pay status at UCR
Employees on Visa/Remote Hires

If the incumbent is on a Visa, check the “On a Visa” box in the Employee Relationship Information section. Checking this box will prompt the system to send an email notification to International Students and Scholars Office. This email is for informational purposes only. When the SSC Fulfiller verifies documents and files paperwork, they will send an email notification to payroll Glacier.

If the incumbent is a Remote Hire, or will not be able to attend an in-person Onboarding session, check the “Remote Hire” box. Checking this box will NOT prompt any ServiceLink tasks or automatic email notification. It is the responsibility of the SSC Fulfiller to make alternate arrangements, such as securing a notary, if the incumbent is unable to attend their Onboarding session.
Employee Work Information (Staff)

Position Number can be entered directly or searched by clicking on the magnifying glass icon.

Based on the Position Number selected, Job Code, Job Description, Organization, Organization Description, Division Code, Division Descriptions, Department Code, and Department Description populate based on Position Data.
Onboarding Reason in ServiceLink is equivalent to Reason Code in UCPath. Select the appropriate Onboarding Transfer Reason from the following options:

- Involuntary Demotion
- Lateral Transfer
- Per Diem to Career
- Promotion
- Temp Out of Class Assignment
- Transfer Dual Employment
- Voluntary Demotion
Onboarding Tasks (Staff)

Two SSC tasks are required; the rest are optional. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.

You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the “Create a single task for all Task Listed Below” will create one task that will need to be closed once completed. Individual tasks can also be selected. All selected tasks will be generated at once. Tasks assigned to the Shared Services Center will also be generated simultaneously.
ServiceLink Onboarding requests require that the Initiator attach an Offer Letter. For Staff, the Offer Letter contains additional information required for the SSC Fulfiller to transact in UCPath.

Comments can be added to ensure that all needed data to complete a UCPath Onboarding transaction is included.
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 UCPPath.
The Shared Services Center will be assigned two tasks – Complete UCPATH Template Based Hire and Complete Onboarding Packet. The SSC fulfiller will change the state of the task from “Open” to “Closed” when completed. When all tasks reflect 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.

If you remember, we requested that only one task be assigned to the Accountability Structure Fulfiller. Once all tasks relating to the Onboarding have been completed, the designated Onboarding Accountability Structure fulfiller should change the state of the task from “Open” to “Closed.” This can be done by selecting the task and clicking on the Actions on selected rows button highlighted below in yellow.
# Data Required for UCPath Onboarding Transactions

<table>
<thead>
<tr>
<th>Key Data Point</th>
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</tr>
</thead>
<tbody>
<tr>
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<tr>
<td>Action</td>
<td>Actions in UCPath include Hire, Rehire, Transfer, Add Contingent Worker, and Contingent Worker Extension.</td>
</tr>
<tr>
<td>Reason Code</td>
<td>Reason Codes are the reason why the Onboarding is taking place (i.e. Action – Rehire, Reason Code – Rehire, &lt;120 days break).</td>
</tr>
<tr>
<td>Employee Record Number</td>
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</tr>
</tbody>
</table>
### Additional Data Required for UCPath Transaction (Staff) – Intra BU Transfer

#### Job Data

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Number</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Employee Classification</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Establishment ID</td>
<td>Defaults from Position data, but is editable</td>
</tr>
<tr>
<td>Standard Hours</td>
<td>Defaults from Position data, but is editable</td>
</tr>
<tr>
<td>FTE</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Step (for step-based positions only)</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
</tbody>
</table>
## Onboarding – Intra BU Transfer (Staff)

### Job Data (continued)

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Probation Code</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Probation End Date</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>PY Career Duration (partial-year Empl Classes only)</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Expected Job End Date (for Contract, Casual/Restricted, Floater, and Staff Rehired Retiree)</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
</tbody>
</table>
Onboarding – Intra BU Transfer (Staff)

Job Data – Job Compensation & Pay Components

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compensation Frequency</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Comp Rate Code</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Compensation Rate</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Pay Components Frequency</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
</tbody>
</table>
Intra BU Transfer – AP
ServiceLink Form (AP – Intra BU Transfer)

The same ServiceLink Form – Onboarding – Transfer is used to Transfer (both Intra and Inter BU) Staff and Academic Appointees. Transferred employees must NOT have a break in service.
Onboarding – Intra BU Transfer (AP)
This transfer type is for transfers WITHIN UCR (BU=Campus/Location)

Academic Intra-Campus Transfer

**Usage**: Use when a person moves to a new department and position.

**Example**: A UCR employee is transferred to a position in a different department at UCR. There is no information on whether the transfer is a demotion (voluntary or involuntary), a lateral transfer, or a promotion. There is no break in service.

Lateral Transfer

**Usage**: Use for the transfer of an employee from one position to another position in a new department.

**Example**: A UCR Academic Appointee is transferred to another position in a different department at UCR with the same salary range maximum. There is no break in service.
Onboarding – Intra BU Transfer (AP) (continued)

Involuntary Demotion

**Usage:** Use for involuntary transfer to lower salary range maximum for disciplinary reasons in a different department

**Example:** A UCR Academic Appointee is involuntarily transferred (not their choice) to a position in a different department at UCR with a lower salary range maximum for disciplinary reasons. There is no break in service.

Promotion

**Usage:** Use to change an employee from one position to another in a new department which has a higher salary range maximum. Promotions are normally obtained through a competitive recruitment process.

**Example:** A UCR Academic Appointee applies for and is offered a position in a different department at UCR with a higher salary range maximum. There is no break in service. This reason code is NOT used to promote a faculty member within the same series.
Onboarding – Intra BU Transfer (AP) (continued)

Transfer – Dual Employment

**Usage:** Use to transfer to a concurrent dual-employment job.

**Example:** A UCR Academic Appointee is transferred to a concurrent dual-employment job in a different department at UCR. There is no break in service.

Voluntary Demotion

**Usage:** Use for voluntary transfer to a position with a lower salary range maximum in a different department.

**Example:** A UCR Academic Appointee is voluntarily transferred (their choice) to a position in a different department at UCR with a lower salary range maximum. There is no break in service.
Onboarding – Transfer (AP)

The Initiator and Request Date fields will populate automatically. These cannot be changed/updated.

Select from the dropdown where the employee is coming from. For an Intra BU Transfer (within UCR), the Transfer From location will always be UC Riverside Campus.
Employee Information (AP)

You can type in the employee’s name (last name, first name) in the Employee Name field directly or click on the magnifying glass icon to search. You can search using different criteria, including Employee Name, Job Code, Job Description, etc. Based on the person selected, the Employee First Name, Middle Name, Employee Last Name, Suffix, UCR Employee ID, and UCR NetID will populate automatically. This data is pulled from UCPath via HRDW and is accurate as of 24 hours ago.

INTRA BU TRANSFER

A personal email is needed for all Onboarding transactions. This email address will be used to send the incumbent the Onboarding packet via DocuSign. This same email will also be used by the UCPath Center to communicate with the employee regarding benefits and benefit eligibility.
Employee Relationship Information (AP)

- Organizational Relationship Information is "Employee"
- Employee Type is "Academic"
- Job Effective Date is the first day an employee is on pay status at UCR
### Academic Appointee on Visa/Remote Hires

**Employee Relationship Information**

<table>
<thead>
<tr>
<th>Organizational Relationship Type</th>
<th>Employee Type</th>
<th>Job Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Academic</td>
<td>07/01/18</td>
</tr>
</tbody>
</table>

**If the incumbent is on a Visa,** check the “On a Visa” box in the Employee Relationship Information section. Checking this box will prompt the system to send an email notification to International Students and Scholars Office. This email is for informational purposes only. When the SSC Fulfiller verifies documents and files paperwork, they will send an email notification to payroll Glacier.

**If the incumbent is a Remote Hire,** or will not be able to attend an in-person Onboarding session, check the “Remote Hire” box. Checking this box will NOT prompt any ServiceLink tasks or automatic email notification. It is the responsibility of the SSC Fulfiller to make alternate arrangements, such as securing a notary, if the incumbent is unable to attend their Onboarding session.
Employee Work Information (AP)

Position Number can be entered directly or searched by clicking on the magnifying glass icon.

Based on the Position Number selected, Job Code, Job Description, Organization, Organization Description, Division Code, Division Descriptions, Department Code, and Department Description populate based on Position Data.
Onboarding Reason (AP)

Onboarding Reason in ServiceLink is equivalent to Reason Code in UCPath. Select the appropriate Onboarding Transfer Reason from the following options:

- Academic Intra-Campus Transfer
- Involuntary Demotion
- Lateral Transfer
- Promotion
- Transfer Dual Employment
- Voluntary Demotion
Choose how many rows for Components of Pay you would like to display (1-6). Row 1 is for stepped academic appointees and will automatically default once a step is selected. Row 2 will default for HSCP members with both X and X' components. 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), enter compensation on Rows 3-6. Keep in mind that data cannot be manually entered on the first two compensation rows.

Choose a pay frequency from the dropdown. Select from the following:
- Monthly
- Hourly
- Contract
- UC 9/12 FY
- UC 1/9th Rate
- UC 1/10th Rate
- UC 1/11th Rate
- UC 1/12th Rate
- UC 12/12 FY
Components of Pay (AP)

To add Recurring Additional Compensation, check this box.

To add Recurring Additional Compensation, check this box.

Compensation Row 1 is for stepped academic appointees. It will automatically default once a step is selected. Data cannot be manually entered in this compensation row.

Compensation Row 2 is for HSCP members. Both the X and X’ components will default. Data cannot be manually entered in this compensation row.

To add Job Earnings Distribution (JED) for Summer Salary, check this box (can also be paid under additional pay).

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), enter their compensation on Rows 3-6 after selecting the correct Comp Rate Code and Comp Rate.
Recurring Additional Compensation (AP)

When “Add Recurring Additional Compensation?” box is checked, the “Recurring Additional Compensation” section appears.

Enter the maximum number of rows (1-4) needed to enter the academic appointee’s Recurring Additional Compensation.

Enter appropriate Earnings Code for academic appointee’s Recurring Additional Compensation. Up to 4 Earnings Codes can be entered on 4 different rows.

Enter the Pay Amount (in dollars) of the Recurring Additional Compensation for the entered Earnings Code.

Enter the first day of the academic appointee’s Recurring Additional Compensation.

Enter the last day of the academic appointee’s Recurring Additional Compensation.
JED for Summer Salary (AP)

When “Add Job Earnings Distribution for Summer Salary?” box is checked, the “Distribution” section appears.

Enter the maximum number of rows (1-2) needed to enter the academic appointee’s JED for Summer Salary.

Enter appropriate Earnings Code for academic appointee’s JED for Summer Salary. Up to 2 Earnings Codes can be entered on 2 different rows.

Enter the percentage of distribution.

Enter the Comp Rate (in dollars) of the JED for Summer Salary for the entered Earnings Code.

Total Distribution Percentage will default from % of Distribution field for Row 1 & 2 (if used).
Select appropriate Academic Duration of Employment. Choose from:
- Continuing (Unit 18)
- Indefinite
- Potential Security
- Tenure Track (Ladder Rank)
- Security (LSOE)
- Tenured
- End Date (Academic Term Appts)

If the academic appointee is in one of the following Appointee Classes or Academic Duration of Employment, an Expected Job End Date is required:
- Academic – Post Docs
- Academic – Recall
- Academic – Academic Student
- Potential Security
- Tenure Track
- Academic Term Appts.

If the incumbent is in the Academic Post Doc EMPL Class, the Post Doc Anniversary Date class is required. It 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 "End Job Automatically" checkbox is initially unchecked for all Academic New Hires. If checked, the academic appointee’s job will automatically end in UCPath, once the End Date has been reached.
Onboarding Tasks (AP)

You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept_. Onboarding Accountability Structure Fulfiller). Clicking on the “Create a single task for all Task Listed Below” will create one task that will need to be closed once completed. Individual tasks can also be selected. All selected tasks will be generated at once. Tasks assigned to the Shared Services Center will also be generated simultaneously.

Two SSC tasks are required; the rest are optional. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.
ServiceLink Onboarding requests require that the Initiator attach an Offer Letter. For Staff, the Offer Letter contains additional information required for the SSC Fulfiller to transact in UCPath.

Comments & Attachment (AP)

Comments can be added to ensure that all needed data to complete a UCPath Onboarding transaction is included.
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.

This “Stage” icon allows you to track a transaction’s progress through fulfillment. Three green checks mean 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.
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 will be assigned two tasks – Complete UCPath Template Based Hire and Complete Onboarding Packet. The SSC fulfiller will change the state of the task from “Open” to “Closed” when completed. When all tasks reflect a “Closed” state, the RITM stage will automatically change to “closed complete.”

Remember that we requested that only one task be assigned to the Accountability Structure Fulfiller. Once all tasks relating to the Onboarding have been completed, the designated Onboarding Accountability Structure fulfiller should change the state of the task from “Open” to “Closed.” This can be done by selecting the task and clicking on the Actions on selected rows button highlighted below in yellow.
# Data Required for UCPath Onboarding Transactions

<table>
<thead>
<tr>
<th>Key Data Point</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
<td>Employee ID (or Empl ID) is generated by UCPath after a New Hire has been successfully processed.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>The JOB Effective Date (different from the Position Effective Date) is the first day a given employee should be paid or the first day a contingent worker is performing services for UCR.</td>
</tr>
<tr>
<td>Action</td>
<td>Actions in UCPath include Hire, Rehire, Transfer, Add Contingent Worker, and Contingent Worker Extension.</td>
</tr>
<tr>
<td>Reason Code</td>
<td>Reason Codes are the reason why the Onboarding is taking place (i.e. Action – Rehire, Reason Code – Rehire, &lt;120 days break).</td>
</tr>
<tr>
<td>Employee Record Number</td>
<td>An employee can have one or more Empl. Records.</td>
</tr>
</tbody>
</table>
### Additional Data Required for UCPATH Transaction (AP) – Intra BU Transfer

#### Job Data

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Number</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Establishment ID</td>
<td>Defaults from Position data, but is editable</td>
</tr>
<tr>
<td>Standard Hours</td>
<td>Defaults from Position data, but is editable</td>
</tr>
<tr>
<td>FTE</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Step (for step-based positions only)</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Expected Job End Date (for Post Docs, Academic Recall, Academic Student)</td>
<td>ServiceLink Form – Duration Information</td>
</tr>
<tr>
<td>Academic Duration of Appointment (if Job Record End Date exists)</td>
<td>ServiceLink Form – Duration Information</td>
</tr>
</tbody>
</table>
# Onboarding – Intra BU Transfer (AP)

## Job Data – Job Compensation & Pay Components

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compensation Frequency</td>
<td>ServiceLink Form – Compensation Information</td>
</tr>
<tr>
<td>Comp Rate Code</td>
<td>ServiceLink Form – Components of Pay</td>
</tr>
<tr>
<td>Compensation Rate</td>
<td>ServiceLink Form – Components of Pay</td>
</tr>
<tr>
<td>Pay Components Frequency</td>
<td>ServiceLink Form – Components of Pay</td>
</tr>
</tbody>
</table>
Inter BU Transfer – Staff
ServiceLink Form (Staff – Inter BU Transfer)

The same ServiceLink Form – Onboarding – Transfer is used to Transfer (both Intra and Inter BU) Staff and Academic Appointees. Transferred employees must NOT have a break in service.
Onboarding – Inter BU Transfer (Staff)

This transfer type is for transfers OUTSIDE UCR (BU=Campus/Location)

Transfer-Inter BU, Demotion

Usage: Use for an Inter-Business Unit transfer where there is no break in service and the transfer is a voluntary demotion for the employee. This is a transfer from a non-UCPath location to a UCPath location.

Example: A staff employee at UC Davis is transferred to a new position at UCR with a lower maximum salary range. There is no break in service.

Transfer-Inter BU, Lateral

Usage: Use for an Inter-Business Unit transfer where there is no break in service and the transfer is a lateral move for the employee. This is a transfer from a non-UCPath location to a UCPath location.

Example: A UC San Diego staff employee is transferred to a new position at UCR with the same maximum salary range. There is no break in service.
Onboarding – Inter BU Transfer
(Staff)

Transfer-Inter BU, Promotion

**Usage:** Use for Inter-Business Unit transfer where there is no break in service and the transfer is a promotion for the employee. This is a transfer from a non-UCPath location to a UCPath location.

**Example:** A UC San Francisco staff employee is transferred to a position at UCR with a higher maximum salary range. There is no break in service.

Transfer-Inter BU, Undefined

**Usage:** Use for intercampus transfers when there is no way of knowing if the transfer is a promotion, lateral, or demotion.

**Example:** A UC Santa Barbara staff employee is transferred to a new position at UCR. There is no way of knowing if the transfer is a demotion, a lateral transfer, or a promotion. There is no break in service.
Onboarding – Transfer (Staff)

Select from the dropdown where the employee is coming from. For an Inter BU Transfer (Location other than UCR to UCR), the Transfer From location will always be a UC Campus OTHER than UCR.

The Initiator and Request Date fields will populate automatically. These cannot be changed/updated.
A personal email is needed for all Onboarding transactions. This email address will be used to send the incumbent the Onboarding packet via DocuSign. This same email will also be used by the UCPath Center to communicate with the employee regarding benefits and benefit eligibility.
Employee Relationship Information (Staff)

- Organizational Relationship Information is “Employee”
- Employee Type is “Staff”
- Job Effective Date is the first day an employee is on pay status at UCR
Employees on Visa/Remote Hires

If the incumbent is on a Visa, check the “On a Visa” box in the Employee Relationship Information section. Checking this box will prompt the system to send an email notification to International Students and Scholars Office. This email is for informational purposes only. When the SSC Fulfiller verifies documents and files paperwork, they will send an email notification to payroll Glacier.

If the incumbent is a Remote Hire, or will not be able to attend an in-person Onboarding session, check the “Remote Hire” box. Checking this box will NOT prompt any ServiceLink tasks or automatic email notification. It is the responsibility of the SSC Fulfiller to make alternate arrangements, such as securing a notary, if the incumbent is unable to attend their Onboarding session.
Employee Work Information (Staff)

Position Number can be entered directly or searched by clicking on the magnifying glass icon.

Based on the Position Number selected, Job Code, Job Description, Organization, Organization Description, Division Code, Division Descriptions, Department Code, and Department Description populate based on Position Data.
Onboarding Reason in ServiceLink is equivalent to Reason Code in UCPath. Select the appropriate Onboarding Transfer Reason from the following options:

- Demotion
- Lateral
- Promotion
- Undefined
Onboarding Tasks (Staff)

All SSC tasks are required (except Complete Onboarding Packet) and cannot be modified. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.

You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the “Create a single task for all Task Listed Below” will create one task that will need to be closed once completed. Individual tasks can also be selected. All selected tasks will be generated at once. Tasks assigned to the Shared Services Center will also be generated simultaneously.

All SSC tasks are required (except Complete Onboarding Packet) and cannot be modified. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.
ServiceLink Onboarding requests require that the Initiator attach an Offer Letter. For Staff, the Offer Letter contains additional information required for the SSC Fulfiller to transact in UCPath.

Comments can be added to ensure that all needed data to complete a UCPath Onboarding transaction is included.
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

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.

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 Shared Services Center will be assigned a total of 6 tasks. The SSC fulfiller will change the state of the task from “Open” to “Closed” when completed. When all tasks reflect 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.

Remember that we requested that only one task be assigned to the Accountability Structure Fulfiller. Once all tasks relating to the Onboarding have been completed, the designated Onboarding Accountability Structure fulfiller should change the state of the task from “Open” to “Closed.” This can be done by selecting the task and clicking on the Actions on selected rows button highlighted below in yellow.
### Data Required for UCPPath Onboarding Transactions

<table>
<thead>
<tr>
<th>Key Data Point</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
<td>Employee ID (or Empl ID) is generated by UCPPath after a New Hire has been successfully processed.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>The JOB Effective Date (different from the Position Effective Date) is the first day a given employee should be paid or the first day a contingent worker is performing services for UCR.</td>
</tr>
<tr>
<td>Action</td>
<td>Actions in UCPPath include Hire, Rehire, Transfer, Add Contingent Worker, and Contingent Worker Extension.</td>
</tr>
<tr>
<td>Reason Code</td>
<td>Reason Codes are the reason why the Onboarding is taking place (i.e. Action – Rehire, Reason Code – Rehire, &lt;120 days break).</td>
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<td>Employee Record Number</td>
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</tbody>
</table>
# Additional Data Required for UCPath Transaction (Staff) – Inter BU Transfer

## Personal Data

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>First &amp; Last Names</td>
<td>ServiceLink Form – Employee Information &amp; UCR Personal Data Form</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>UCR Personal Data Form</td>
</tr>
<tr>
<td>Highest Education Level</td>
<td>UCR Personal Data Form</td>
</tr>
<tr>
<td>Gender</td>
<td>UCR Personal Data Form</td>
</tr>
<tr>
<td>National ID Type &amp; National ID</td>
<td>UCR Personal Data Form, in-person, via phone</td>
</tr>
<tr>
<td>Address Line 1, City, State, Postal Code</td>
<td>UCR Personal Data Form</td>
</tr>
<tr>
<td>Email Address</td>
<td>ServiceLink Form – Employee Information &amp; UCR Personal Data Form</td>
</tr>
<tr>
<td>Phone</td>
<td>UCR Personal Data Form</td>
</tr>
</tbody>
</table>
## Onboarding – Inter BU Transfer (Staff)

### Job Data

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## Onboarding – Inter BU Transfer (Staff)

### Job Data (continued)

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<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
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</thead>
<tbody>
<tr>
<td>Probation Code</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
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<tr>
<td>Probation End Date</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
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## Onboarding – Inter BU Transfer (Staff)

### Job Data – Job Compensation & Pay Components

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<td>Compensation Frequency</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Comp Rate Code</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Compensation Rate</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>Pay Components Frequency</td>
<td>Offer Letter (Attached to ServiceLink form)</td>
</tr>
<tr>
<td>UFIN 301</td>
<td>Receive from terminating location</td>
</tr>
</tbody>
</table>

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[UCR Riverside Logo]
Inter BU Transfer – AP
ServiceLink Form (AP – Inter BU Transfer)

The same ServiceLink Form – Onboarding – Transfer is used to Transfer (both Intra and Inter BU) Staff and Academic Appointees. Transferred employees must NOT have a break in service.
Onboarding – Inter BU Transfer (AP)
This transfer type is for transfers OUTSIDE UCR (BU=Campus/Location)

Academic Inter BU Transfer

**Usage:** Use for an inter location transfer of an academic employee

**Example:** A faculty member from UCLA is transferred to a new position at UCR. There is no break in service.
Onboarding – Transfer (AP)

Select from the dropdown where the employee is coming from. For an Inter BU Transfer (Location other than UCR to UCR), the Transfer From location will always be a UC Campus OTHER than UCR.

The Initiator and Request Date fields will populate automatically. These cannot be changed/updated.
A personal email is needed for all Onboarding transactions. This email address will be used to send the incumbent the Onboarding packet via DocuSign. This same email will also be used by the UCPath Center to communicate with the employee regarding benefits and benefit eligibility.
Employee Relationship Information (AP)

- Employee Type is “Staff”
- Organizational Relationship Information is “Employee”
- Job Effective Date is the first day an employee is on pay status at UCR
Academic Appointee on Visa/Remote Hires

If the incumbent is on a Visa, check the “On a Visa” box in the Employee Relationship Information section. Checking this box will prompt the system to send an email notification to International Students and Scholars Office. This email is for informational purposes only. When the SSC Fulfiller verifies documents and files paperwork, they will send an email notification to payroll Glacier.

If the incumbent is a Remote Hire, or will not be able to attend an in-person Onboarding session, check the “Remote Hire” box. Checking this box will NOT prompt any ServiceLink tasks or automatic email notification. It is the responsibility of the SSC Fulfiller to make alternate arrangements, such as securing a notary, if the incumbent is unable to attend their Onboarding session.
Employee Work Information (AP)

Position Number can be entered directly or searched by clicking on the magnifying glass icon.

Based on the Position Number selected, Job Code, Job Description, Organization, Organization Description, Division Code, Division Descriptions, Department Code, and Department Description populate based on Position Data.

There is only one Transfer code for this type of request for Academic Appointees.

INTER BU TRANSFER
Choose how many rows for Components of Pay you would like to display (1-6). Row 1 is for stepped academic appointees and will automatically default once a step is selected. Row 2 will default for HSCP members with both \(X\) and \(X'\) components. 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), enter compensation on Rows 3-6. Keep in mind that data cannot be manually entered on the first two compensation rows.

Choose a pay frequency from the dropdown. Select from the following:
- Monthly
- Hourly
- Contract
- UC 9/12 FY
- UC 1/9th Rate
- UC 1/10th Rate
- UC 1/11th Rate
- UC 1/12th Rate
- UC 12/12 FY
Components of Pay (AP)

To add Job Earnings Distribution (JED) for Summer Salary, check this box (can also be paid under additional pay).

To add Recurring Additional Compensation, check this box.

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), enter their compensation on Rows 3-6 after selecting the correct Comp Rate Code and Comp Rate.

Compensation Row 1 is for stepped academic appointees. It will automatically default once a step is selected. Data cannot be manually entered in this compensation row.

Compensation Row 2 is for HSCP members. Both the X and X' components will default. Data cannot be manually entered in this compensation row.
Recurring Additional Compensation (AP)

When “Add Recurring Additional Compensation?” box is checked, the “Recurring Additional Compensation” section appears.

Enter the maximum number of rows (1-4) needed to enter the academic appointee’s Recurring Additional Compensation.

Enter appropriate Earnings Code for academic appointee’s Recurring Additional Compensation. Up to 4 Earnings Codes can be entered on 4 different rows.

Enter the Pay Amount (in dollars) of the Recurring Additional Compensation for the entered Earnings Code.

Enter the first day of the academic appointee’s Recurring Additional Compensation.

Enter the last day of the academic appointee’s Recurring Additional Compensation.
JED for Summer Salary (AP)

When “Add Job Earnings Distribution for Summer Salary?” box is checked, the “Distribution” section appears.

Enter the maximum number of rows (1-2) needed to enter the academic appointee’s JED for Summer Salary.

Enter appropriate Earnings Code for academic appointee’s JED for Summer Salary. Up to 2 Earnings Codes can be entered on 2 different rows.

Enter the percentage of distribution.

Enter the Comp Rate (in dollars) of the JED for Summer Salary for the entered Earnings Code.

Total Distribution Percentage will default from % of Distribution field for Row 1 & 2 (if used).
Duration Information (AP)

Select appropriate Academic Duration of Employment. Choose from:
- Continuing (Unit 18)
- Indefinite
- Potential Security
- Tenure Track (Ladder Rank)
- Security (LSOE)
- Tenured
- End Date (Academic Term Appts)

If the academic appointee is in one of the following Appointee Classes or Academic Duration of Employment, an Expected Job End Date is required:
- Academic – Post Docs
- Academic – Recall
- Academic – Academic Student
- Potential Security
- Tenure Track
- Academic Term Appts.

If the incumbent is in the Academic Post Doc EMPL Class, the Post Doc Anniversary Date class is required. It 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 "End Job Automatically" checkbox is initially unchecked for all Academic New Hires. If checked, the academic appointee’s job will automatically end in UCPath once the End Date has been reached.
Onboarding Tasks (AP)

You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the “Create a single task for all Task Listed Below” will create one task that will need to be closed once completed. Individual tasks can also be selected. All selected tasks will be generated at once. Tasks assigned to the Shared Services Center will also be generated simultaneously.

All SSC tasks are required (except Complete Onboarding Packet) and cannot be modified. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.
Comments & Attachment (AP)

ServiceLink Onboarding requests require that the Initiator attach an Offer Letter. For Staff, the Offer Letter contains additional information required for the SSC Fulfiller to transact in UCPath.

Comments can be added to ensure that all needed data to complete a UCPath Onboarding transaction is included.
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.
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.

Remember that we requested that only one task be assigned to the Accountability Structure Fulfiller. Once all tasks relating to the Onboarding have been completed, the designated Onboarding Accountability Structure fulfiller should change the state of the task from “Open” to “Closed.” This can be done by selecting the task and clicking on the Actions on selected rows button highlighted below in yellow.

The Shared Services Center will be assigned a total of 6 tasks. The SSC fulfiller will change the state of the task from “Open” to “Closed” when completed. When all tasks reflect a “Closed” state, the RITM stage will automatically change to “closed complete.”
## Data Required for UCPath Onboarding Transactions

<table>
<thead>
<tr>
<th>Key Data Point</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
<td>Employee ID (or Empl ID) is generated by UCPath after a New Hire has been successfully processed.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>The JOB Effective Date (different from the Position Effective Date) is the first day a given employee should be paid or the first day a contingent worker is performing services for UCR.</td>
</tr>
<tr>
<td>Action</td>
<td>Actions in UCPath include Hire, Rehire, Transfer, Add Contingent Worker, and Contingent Worker Extension.</td>
</tr>
<tr>
<td>Reason Code</td>
<td>Reason Codes are the reason why the Onboarding is taking place (i.e. Action – Rehire, Reason Code – Rehire, &lt;120 days break).</td>
</tr>
<tr>
<td>Employee Record Number</td>
<td>An employee can have one or more Empl. Records.</td>
</tr>
</tbody>
</table>
# Additional Data Required for UCPath Transaction (AP) – Inter BU Transfer

## Personal Data

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>First &amp; Last Names</td>
<td>ServiceLink Form – Employee Information &amp; UCR Personal Data Form</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>UCR Personal Data Form</td>
</tr>
<tr>
<td>Highest Education Level</td>
<td>UCR Personal Data Form</td>
</tr>
<tr>
<td>Gender</td>
<td>UCR Personal Data Form</td>
</tr>
<tr>
<td>National ID Type &amp; National ID</td>
<td>UCR Personal Data Form, in-person, via phone</td>
</tr>
<tr>
<td>Address Line 1, City, State, Postal Code</td>
<td>UCR Personal Data Form</td>
</tr>
<tr>
<td>Email Address</td>
<td>ServiceLink Form – Employee Information &amp; UCR Personal Data Form</td>
</tr>
<tr>
<td>Phone</td>
<td>UCR Personal Data Form</td>
</tr>
</tbody>
</table>
# Onboarding – Inter BU Transfer (AP)

## Job Data

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Number</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Establishment ID</td>
<td>Defaults from Position data, but is editable</td>
</tr>
<tr>
<td>Standard Hours</td>
<td>Defaults from Position data, but is editable</td>
</tr>
<tr>
<td>FTE</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Step (for step-based positions only)</td>
<td>ServiceLink Form – Employee Work Information</td>
</tr>
<tr>
<td>Expected Job End Date (for Post Docs, Academic Recall, Academic Student)</td>
<td>ServiceLink Form – Duration Information</td>
</tr>
<tr>
<td>Academic Duration of Appointment (if Job Record End Date exists)</td>
<td>ServiceLink Form – Duration Information</td>
</tr>
</tbody>
</table>
# Onboarding – Inter BU Transfer (AP)

## Job Data – Job Compensation & Pay Components

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compensation Frequency</td>
<td>ServiceLink Form – Compensation Information</td>
</tr>
<tr>
<td>Comp Rate Code</td>
<td>ServiceLink Form – Components of Pay</td>
</tr>
<tr>
<td>Compensation Rate</td>
<td>ServiceLink Form – Components of Pay</td>
</tr>
<tr>
<td>Pay Components Frequency</td>
<td>ServiceLink Form – Components of Pay</td>
</tr>
<tr>
<td>UFIN 301</td>
<td>Receive from Terminating Location</td>
</tr>
</tbody>
</table>
Concurrent Hire – Staff
ServiceLink Form (Staff – Concurrent Hire)

Once developed and tested, ServiceLink Initiators will request Concurrent Onboarding for both Staff and Academic Appointees using the Onboarding – Concurrent ServiceLink form.

Pending development and testing of the Onboarding – Concurrent ServiceLink form, the ServiceLink Generic request form is used to request Concurrent Hires for both Staff and Academic Appointees.
Onboarding – Concurrent Hire (Staff)

Concurrent Hire – Dual Employment

Usage: Use to add a concurrent dual-employment job.

Example: A UCR employee holds a full-time position in facilities and performs additional work at in another department at UCR on a regular basis.

Concurrent Hire – Non Dual Employment

Usage: Use to add a concurrent employee record (appointment). This means that an employee is working in two or more jobs at the same time in different departments and/or job codes.

Example: A part-time student employee at the UCR rec center is hired concurrently into another part-time position at UCR.
Request Information

On the Generic Request form, select “Onboarding – Person of Interest” from the Transaction Type dropdown.

Select the Effective Date. This should be the first day the Person of Interest needs to be tracked in the system.
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.

Select the Accountability Structure requesting the “Onboarding” of the Person of Interest. This will ensure that the request is routed to the appropriate Shared Services Center.

Enter the Person of Interest’s name in the comment field if the “Employee Name” field does not populate (as in this example). Other pertinent information such as POI type (Staff or AP) and End Date should be entered in the comments field.
An attachment is required for this type of transaction. An email or other informal document supporting the “Onboarding” of the Person of Interest can be attached. Be mindful of confidentiality policy and guidelines when uploading documentation.
# Data Required for UCPaPath Onboarding Transactions

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<tr>
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<tr>
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<tr>
<td>Action</td>
<td>Actions in UCPaPath include Hire, Rehire, Transfer, Add Contingent Worker, and Contingent Worker Extension.</td>
</tr>
<tr>
<td>Reason Code</td>
<td>Reason Codes are the reason why the Onboarding is taking place (i.e. Action – Rehire, Reason Code – Rehire, &lt;120 days break).</td>
</tr>
<tr>
<td>Employee Record Number</td>
<td>An employee can have one or more Empl. Records.</td>
</tr>
</tbody>
</table>
## Additional Data Required for UCPath Transaction (Staff) – Concurrent Hire

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dual Employment Letter</td>
<td>Signed letter stating:</td>
</tr>
<tr>
<td></td>
<td>• It would be impractical to employ another person;</td>
</tr>
<tr>
<td></td>
<td>• Additional job will not exceed 12 calendar months;</td>
</tr>
<tr>
<td></td>
<td>• Time worked on the additional appointment will not be detrimental to employee’s performance;</td>
</tr>
<tr>
<td></td>
<td>• Employee’s full-time department head agrees to the arrangement.</td>
</tr>
<tr>
<td>Multi-Location Agreement</td>
<td>Signed UPAY 560</td>
</tr>
</tbody>
</table>
Concurrent Hire – AP
ServiceLink Form (AP – Concurrent Hire)

Once developed and tested, ServiceLink Initiators will request Concurrent Onboarding for both Staff and Academic Appointees using the Onboarding – Concurrent ServiceLink form.

Pending development and testing of the Onboarding – Concurrent ServiceLink form, the ServiceLink Generic request form is used to request Concurrent Hires for both Staff and Academic Appointees.
Onboarding – Concurrent Hire (AP)

Academic Concurrent Hire

**Usage:** Use to add a concurrent job (either Dual or Non-Dual employment).

**Example:** A UCR Faculty member is a Professor in Biology and holds an Administrative position in the same department.
On the Generic Request form, select “Onboarding – Person of Interest” from the Transaction Type dropdown.

Select the Effective Date. This should be the first day the Person of Interest needs to be tracked in the system.
Employee Information

Select the Accountability Structure requesting the “Onboarding” of the Person of Interest. This will ensure that the request is routed to the appropriate Shared Services Center.

Enter the Person of Interest’s name in the comment field if the “Employee Name” field does not populate (as in this example). Other pertinent information such as POI type (Staff or AP) and End Date should be entered in the comments field.
An attachment is required for this type of transaction. An email or other informal document supporting the “Onboarding” of the Person of Interest can be attached. Be mindful of confidentiality policy and guidelines when uploading documentation.
# Data Required for UCPPath Onboarding Transactions

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**Additional Data Required for UCPath Transaction (AP) – Inter BU Transfer**

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Person of Interest
ServiceLink Form (Person of Interest)

Once developed and tested, ServiceLink Initiators will request Person of Interest Onboarding using the Onboarding – Person of Interest ServiceLink form.

Pending development and testing of the Onboarding – Person of Interest ServiceLink form, the ServiceLink Generic request form is used to request Person of Interest Onboarding.
Onboarding – Person of Interest

**Definition:** A Person of Interest (POI) is someone who is tracked by UCR for various reasons; such as a potential hire or potential external source.

**POIs do NOT:**
- Have a Job Data pages in UCPPath
- Have UCPPath Self Service access
- Receive POI compensation through UCPPath

**POI Examples:** Associates of the President or Chancellor, Potential Academic Hires, Potential Staff Hire, External Compliance Auditor
Request Information

On the Generic Request form, select “Onboarding – Person of Interest” from the Transaction Type dropdown.

Select the Effective Date. This should be the first day the Person of Interest needs to be tracked in the system.
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.

Select the Accountability Structure requesting the “Onboarding” of the Person of Interest. This will ensure that the request is routed to the appropriate Shared Services Center.

Enter the Person of Interest’s name in the comment field if the “Employee Name” field does not populate (as in this example). Other pertinent information such as POI type (Staff or AP) and End Date should be entered in the comments field.
An attachment is required for this type of transaction. An email or other informal document supporting the “Onboarding” of the Person of Interest can be attached. Be mindful of confidentiality policy and guidelines when uploading documentation.
## Data Required for UCPATH Onboarding Transactions

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</table>
# Additional Data Required for UCPath Transaction (POI)

<table>
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<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>First &amp; Last Names</td>
<td></td>
</tr>
<tr>
<td>POI Type</td>
<td>Staff or Academic</td>
</tr>
<tr>
<td>POI Business Unit</td>
<td>Defaults to Riverside Campus</td>
</tr>
<tr>
<td>POI Expected End Date</td>
<td></td>
</tr>
</tbody>
</table>
HRDW Reporting
HRDW Position Report
<table>
<thead>
<tr>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Unfilled</td>
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<td>40006792</td>
<td>001210 - ASSOC DEAN</td>
<td>P</td>
<td>503910</td>
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<td>100</td>
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<td>12/01/2017</td>
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<td>001210 - ASSOC DEAN</td>
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<td>STP</td>
<td>305130</td>
<td>A01953</td>
<td>10000</td>
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<td>QEIC</td>
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<td>P</td>
<td>205110</td>
<td>A01000</td>
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<td></td>
<td></td>
<td></td>
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<td>Unfilled</td>
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<td>40006626</td>
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<td>19000</td>
<td>40</td>
<td>QEIC</td>
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<td>12/01/2017</td>
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<td>19000</td>
<td>40</td>
<td>QEIC</td>
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UCPath Inquiry
## HR Inquiry

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<td>Inquiry role to view the main WFA pages</td>
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<tr>
<th>Page/Job Aid Links</th>
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<tbody>
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<td><strong>Person Organizational Summary</strong></td>
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**Page/Job Aid Links**

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<tr>
<td>Add/Update Position Info</td>
<td>Main Menu &gt; Organizational Development &gt; Position Management &gt; Maintain Positions/Budgets &gt; Add/Update Position Info</td>
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<td>Person Checklist</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 Training Team Email

FOMUCPathtraining@ucr.edu
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/ucrfomucopathfeedback
Thank You