UNIVERSITY OF CALIFORNIA
UC RIVERSIDE

FOM|UCPath Training

Advanced FOM ServiceLink Position Data Management – v2

Trainer Introduction

Kathleen Cool

Title: Principal Trainer

Department: HR | UCPath

Years @ UC: 1 year

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

Your Questions and Input

https://tinyurl.com/ucrtraining

Housekeeping

Cell Phones

Breaks

Restrooms

Learning Topics

ServiceLink Roles

PDM FOM Process

Essential Roles

1: HR/AP Staff (Initiator) → ServiceLink

2: HR/AP Central Office (Approver) → ServiceLink

3: Financial Manager (Approver) → ServiceLink

4: Shared Services Center Fulfiller(s) → UCPath

5: Shared Services Center AWE Approver → UCPath

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

PDM FOM Process

Essential Roles

1: HR/AP Staff (Initiator) → ServiceLink

2: HR/AP Central Office (Approver) → ServiceLink

3: Financial Manager (Approver) → ServiceLink

4: Shared Services Center Fulfiller(s) → UCPath

5: Shared Services Center AWE Approver → UCPath

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

HR/AP Staff (Initiator)

First is the Initiator role, who initiates an Position (new or update) request using ServiceLink. The FAU associated with the position should be entered in the comments section.

This is a required role.

Can be assigned to:

- HR or AP Business Partner

The Initiator is the individual responsible for correctness of transaction.

- Identifies the need to create a new position or make a position management change
- Obtains appropriate authorization and completes the necessary pre-approval

PDM FOM Process
Essential Roles

1: HR/AP Staff (Initiator) → ServiceLink

2: HR/AP Central Office (Approver) → ServiceLink

3: Financial Manager (Approver) → ServiceLink

4: Shared Services Center Fulfiller(s) → UCPath

5: Shared Services Center AWE Approver → UCPath

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

HR/AP Central Office (Approver)

The Central Office Approver role is a conditional role. In this case, the approver reviews and approves certain high-risk position transactions.

These include:

- Changes to the FLSA status
- Change to Employee Relations Code to 'Manager Confidential'

Approval process is done in ServiceLink through an assigned task in the Fulfillment queue.

PDM FOM Process

Essential Roles

1: HR/AP Staff (Initiator) → ServiceLink

2: HR/AP Central Office (Approver) → ServiceLink

3: Financial Manager (Approver) → ServiceLink

4: Shared Services Center Fulfiller(s) → UCPath

5: Shared Services Center AWE Approver → UCPath

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

Financial Manager (Approver)

When initiating the new or updated position request, the initiator should have included correct position FAU.

The FAU Approver must review and approve the FAU changes. If the FAU is incorrect, the FAU Approver needs to add the correct FAU in the comment section and notify the HR/AP Staff (initiator) offline.

Approval process is done in ServiceLink through an assigned task in the Fulfillment queue.

PDM FOM Process

Essential Roles

1: HR/AP Staff (Initiator) → ServiceLink

2: HR/AP Central Office (Approver) → ServiceLink

3: Financial Manager (Approver) → ServiceLink

4: Shared Services Center Fulfiller(s) → UCPath

5: Shared Services Center AWE Approver → UCPath

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

Shared Services Center Fulfiller(s)

After FAU Approval, the new/updated position request is received by the Shared Services Center Fulfiller as a task in the ServiceLink Fulfillment queue.

This is a required role.

The Shared Services Center Fulfiller(s) initiates the transaction in UCPath.

The position transaction then goes through the UCPath AWE for quality assurance. Once a position number is generated, the Shared Services Center Fulfiller(s) needs to enter funding for the position in UCPath.

PDM FOM Process

Essential Roles

1: HR/AP Staff (Initiator) → ServiceLink

2: HR/AP Central Office (Approver) → ServiceLink

3: Financial Manager (Approver) → ServiceLink

4: Shared Services Center Fulfiller(s) → UCPath

5: Shared Services Center AWE Approver→ UCPath

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

Shared Services Center AWE Approver

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

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

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

Once approved by the SSC AWE Approver, a position number is automatically generated.

PDM FOM Process
Essential Roles

1: HR/AP Staff (Initiator) → ServiceLink

2: HR/AP Central Office (Approver) → ServiceLink

3: Financial Manager (Approver) → ServiceLink

4: Shared Services Center Fulfiller(s) → UCPath

5: Shared Services Center AWE Approver → UCPath

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

Org./Dept./SSC Inquirers

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

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

Position vs. Job

What is a Position? (1 of 2)

A position represents a role in a department. A position is the foundation for an employee's job record.

Positions dictate some of the Job attributes of the employees who occupy them and helps UCR manage funding.

A Position is similar to a requisition. It is NOT equivalent to hiring, onboarding or a job. A Position can be created with no incumbent in mind.

What is a Position? (2 of 2)

In UCPath, a Position is like a chair. Like chairs, positions…

- Can be filled or vacant
- Can have different people sitting in them at different times.

Positions can outlast incumbents who “sit” in them.

What is a Job?

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

Positions DO NOT follow employees. The position belongs to the department. The exception being if there is a natural progression with the same series (e.g., Assistant Prof. to Associate Prof.) and the position is re-classified.

Position vs. Job

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

Job Code 004723
BLANK AST 2

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

Position 40072527
Career Services Center

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

Position 40014830
Housing Services

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

Position 40018808
Intl. Student & Scholar

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

Position Data
vs.
Job Data

What is Position Management?

Position Management is the process of managing these “empty chairs”. It is not job classification or recruitment.

- Each position has a unique position number
- Fully integrated with Funding
- Give a clear picture of the organizational structure, staffing needs, and how salary expenses attach to both filled and unfilled positions
- Report on organizational relationships independent of the employees in those positions

What is the Relationship between Position Data and Job Data?

Position Data

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

Employee Job Data

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

What is a Job Record?

Position Data:

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

Job Data:

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

Job Record

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

How does Position Data Work?

POSITION ATTRIBUTES

When an employee is hired, promoted or transferred they are assigned a new position. All position attributes flow to job data; re-entry of data is not required.

JOB DATA TABLES

Incumbent history is stored in Job Data tables, which allows for reporting of data.

POSITION IS STATIC

While an employee may change position, position data remains constant.

POSITION ATTRIBUTES

Reclassification and other position changes begin with an update to the position record. If the effective date is a current or future date, the system automatically updates the incumbent’s job data.

Position Types

Single-Headcount Positions

Definition

- Most positions at UCR have a one-to-one position to employee relationship (one position for one employee)*
- All existing jobs at UCR were converted to single-headcount positions by go-live.

Use Case

- The HR department is expanding. The department has determined that a Senior Analyst position is needed.

*An employee/appointee can be assigned to more than one position (e.g., Dean and Professor). In that case, the incumbent would have multiple positions, jobs, and job records in UCPath.

Multi-Headcount Positions

Definition	Attributes	Possible Uses
Jobs with the same attributes can be grouped into one position, rather than creating a unique position for every job.	• Business Unit, Dept., Location • Job Code, Union Code, Employee Relations Code, Special Training Code • Reports To, Personnel Program • FTE, Salary Plan, Grade, FAU	• Per Diem, Recreation Program Instructors • Limited and Students • TAs, Readers, Tutors • Emeriti (WOS), Summer Session Instructors, UNEX Instructors

Position Pools

Definition	Use Case
Position pools are used to group similar positions in the same department that share Funding.	At UCR, all Work Study Positions are assigned to a designated Position Pool. This mechanism helps manage the split between department funding and work study program funding.

Work Study Programs

Set ID	Pool ID	Description	Short Desc.
RVCMP	A	WS – America Reads	WS AM-READ
RVCMP	C	WS – Community Service	WS COMM
RVCMP	F	WS – Federal	WS FED
RVCMP	E	WS – America Counts	WS AM-CT
RVCMP	T	WS – State Teach Int	WS STTEACH
RVCMP	P	WS – President S	WS PRESDNT

Contingent Workers

- A Contingent Worker is an individual engaged by the University on a non-permanent basis to complete a specific function or task who does not have an employee relationship with UCR and does not receive remuneration through UCPath. An example for a Contingent Worker is a contractor.

- Contingent Workers will NOT require positions in UCPath unless they are supervising UCR employee(s). If that is the case, a position in UCPath would need to be created.

New Position
vs.
Update Position

When should a new Position be created?

A new position should be created if a need for a position is identified (e.g., an appointee/employee must be hired or transferred into a department), and there is not an appropriate vacant position

When possible, existing vacant positions should be reused to avoid creating many unnecessary positions

When should a Position be updated?

Updates can be made on Positions using the ServiceLink Update Position form. Position Data that can be updated include: Department, Job Code, Grade, Salary Plan, FLSA Status, Reports to

Updates to position can be made on Vacant Positions and Filled Positions.

Scenario: Updating a Vacant Position

Description

Vacant Positions can be updated whenever a department discovers a need to change the data on a position

Business Case

My principal analyst retired, and I need to hire someone at the senior analyst level

What you need to know

Updates to Vacant Positions will be approved using the AWE-enabled Position Control Form in UCPath

Fields that can be updated include:

- Department
- Job Code
- Grade, Step, Salary Plan
- FLSA Status
- Reports to

Scenario: Updating a Filled Position

Description

Filled position can be updated if there is a change to a position's details. Position Changes may or may not affect the incumbent's job data, which can be updated in several ways

Business Case

- I need to reclassify one of my employees
- I need to change the 'Reports To' field on a Position

What you need to know

The following fields on Position can be cascaded directly to an incumbent's Job record:

- Department
- Job Code
- Grade & Salary Plan
- FLSA Status

Additional Job Fields that can be cascaded

- EMPL Class
- Expected Job End Date
- Job FTE
- Academic Duration of Appointment

Scenario: Inactivating/Freezing a Position

Description

Positions can be inactivated or frozen when a department determines that position is vacant or will become vacant and will not be recruited for

Business Case

I had to layoff a number of employees in my unit. I've completed all the involuntary terminations, but what do I do with the positions?

What you need to know

Only Vacant Positions can be in 'Frozen' or 'Inactive' statuses

Position Update Scenario

Scenario: An incumbent is concurrently hired into a Position with Job Code 009605 (TX unit position) with Salary Admin Plan UCTX, Grade 190, at step 5, $16.81/hr

The Position is updated a day later to reflect Job Code 004921 (Student 2) with no updated to the Salary Admin Plan or Grade.

A week later, the position is again updated to correct the Pay Rate (retro) to the rate of $23.50/hr

A Word of Caution when Updating Position Data

Scenario Results: The update to the Position results in a misalignment between the Salary Admin Plan/Grade and the Job Code

Keep in mind, when updating a Position that there can be downstream effects. When requesting an update, ask yourself: Will this change make our position history illogical and/or hard to study over time? Will this change cause a misalignment in the data? If the answer is “yes,” opt to create a new position and transfer the incumbent, if the position is filled.

Updating Position & Job Data - Academic Promotions

Academic Promotions should be transacted by making an update in PayPath to the appointee's position and job record. As a ServiceLink Initiator, this should be requested using the Update Position form (to update the position data) and the Job and Comp Data Changes form (to update job and compensation data).

Updates can be made using the mass PayPath upload feature (standard practice for updates approved and ready for upload during the 7/1 academic advancement cycle) or individually through the PayPath Actions page in UCPath.

Promoted appointees should not be transferred into a new position

Steps for Promoting an Academic Appointee

To promote an appointee in UCPath, the following changes should be made to the appointee's position:

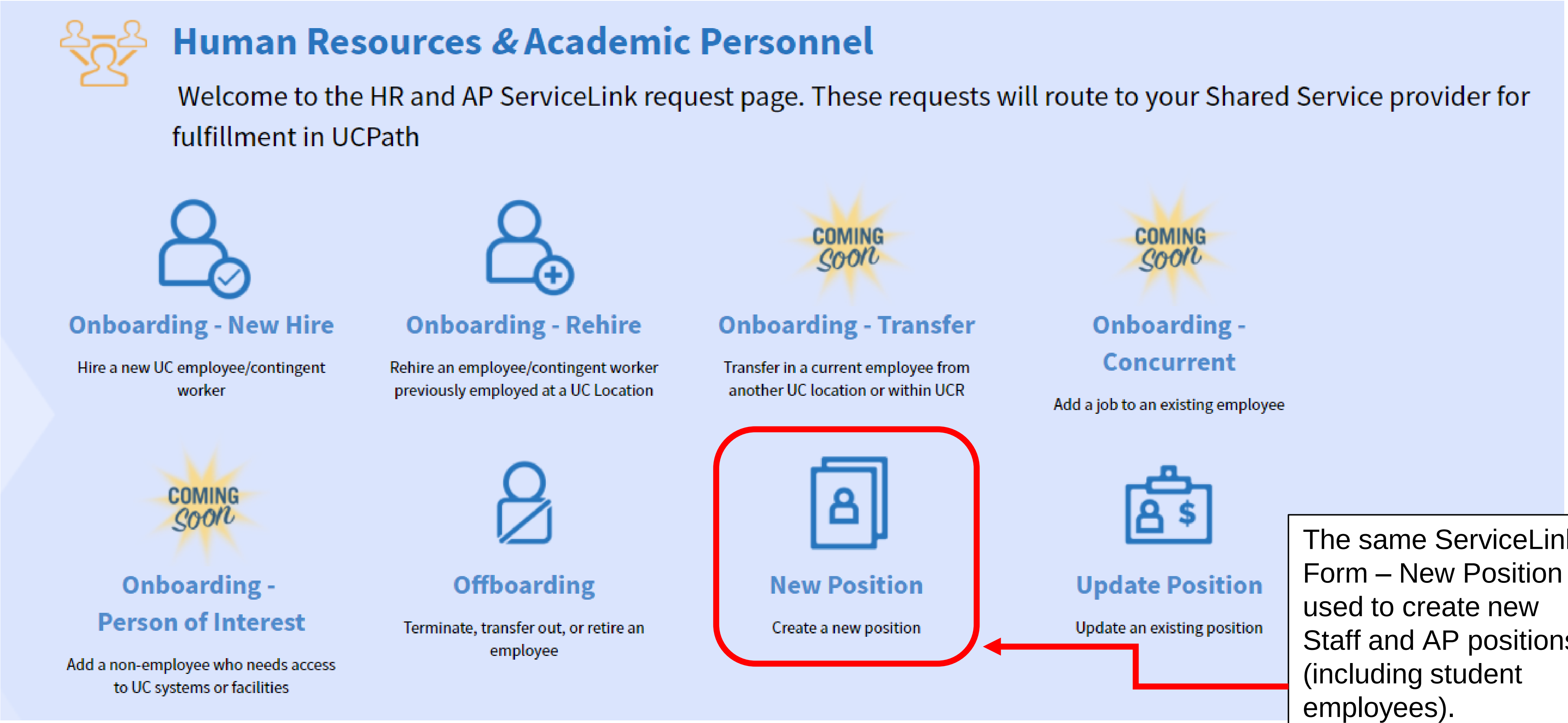
- Job Code should be updated
- Salary Plan and grade should be updated after the Job Code is updated

The following updates should be made concurrently, using the Job data page of PayPath:

- The step should be updated
- Once the step is selected, base compensation row(s) should populate in the compensation section. If the appointee has off-scale/above-scale amounts, they should be added to the compensation section
- The appointee's expected job end date may need to be updated or made blank
- The appointee's Academic Duration of Appointment may need to be updated if the appointee has been granted tenure or security of employment

New Position

ServiceLink Form – New Position



The same ServiceLink Form – New Position is used to create new Staff and AP positions (including student employees).

Position Information

The Effective Data on a Position should NEVER be the same as the Position incumbent's Job Effective Date. Having both dates be the same can have major downstream impacts. In general, the Position Effective Date should be the date on which the request is made. Once the position is in UCPath, recruitment for the Position can begin. The Position incumbent would naturally have a Job Effective that is chronologically later than the Position Effective Date.

Positions should only be created in the Approved or Proposed status, but never in the Frozen status. See next two slides for additional information on Effective Status and Position Status.

Effective Status Definitions

Active – Approved

Used for vacant or filled positions that have been approved and have the correct funding and/or budget established

Employees should only be hired into 'Active – Approved' Positions

Inactive

Used for vacant Positions that a department does not plan to recruit for in the future.

Use Case: An employee retired and the department eliminated the position

Position Status Definitions

Active - Proposed

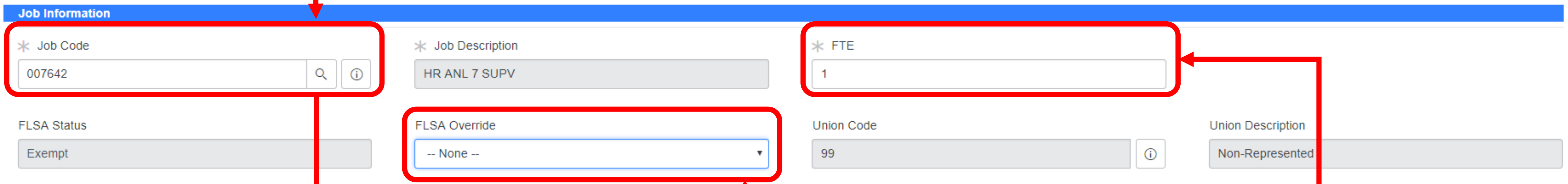
- Used for Vacant Positions where the details of the position may change before hiring or transferring an incumbent in the position (e.g., during open rank recruitment)

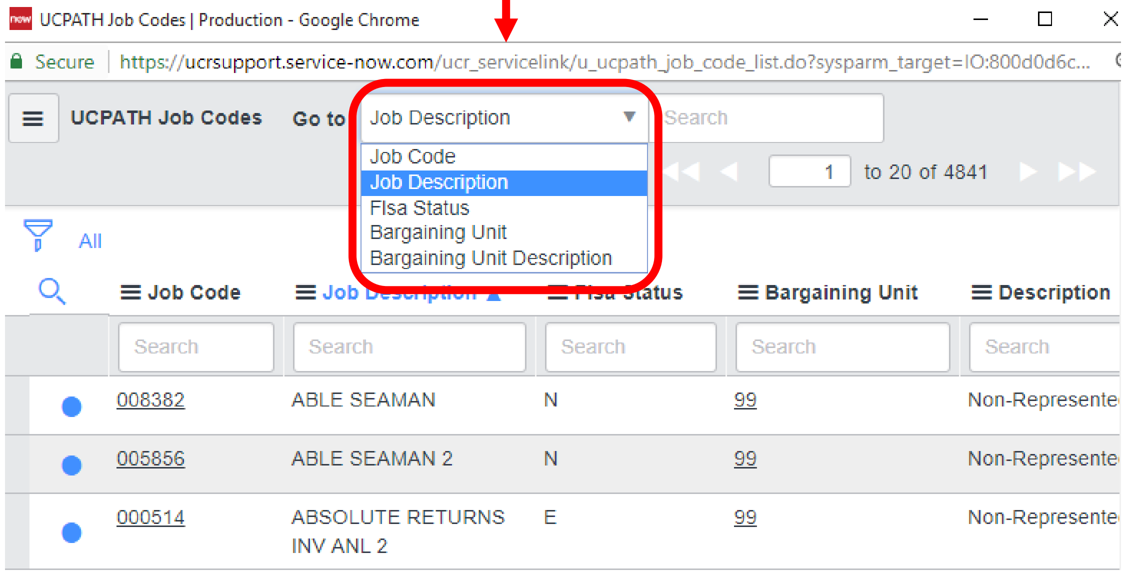
Active - Frozen

- Used for Vacant Positions that have had their funding and/or budget revoked (e.g., during a layoff). Position Data is maintained for reporting purposes

Job Information

The Position Job Code can be entered manually or search for by Job Code, Job Description, FLSA Status, Bargaining Unit, and Bargaining Unit Description

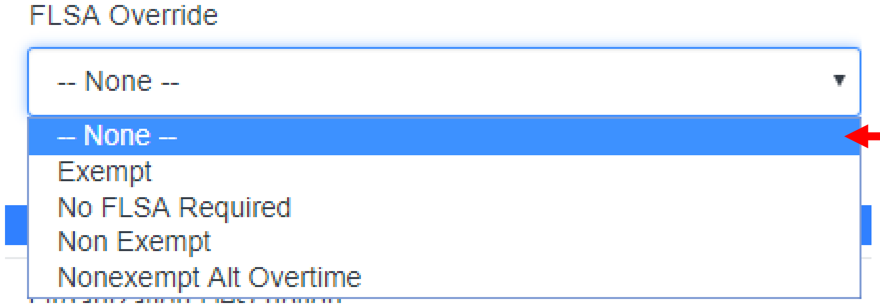




FTE on a Position is different that the Job FTE. It should reflect the position expectations rather than an incumbent's actual FTE.

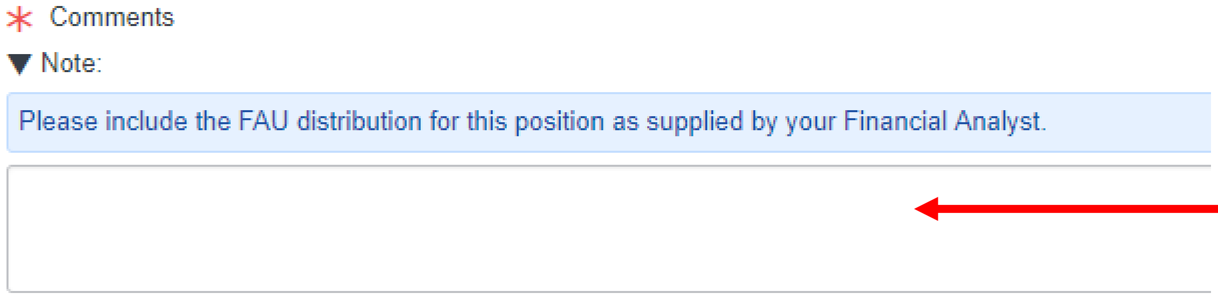
Once the Job Code is selected, the Job Description, FLSA status, Union Code and Union Description will default automatically. The FLSA can be changed, but required an additional level of approval.

FLSA Override



If the FLSA on the Position needs to be changed, select the appropriate FLSA from the FLSA Override dropdown.

When overriding the FLSA, Attachments become a required field. You will need to provide supporting documentation for the change as well as a brief comment explaining the circumstances.



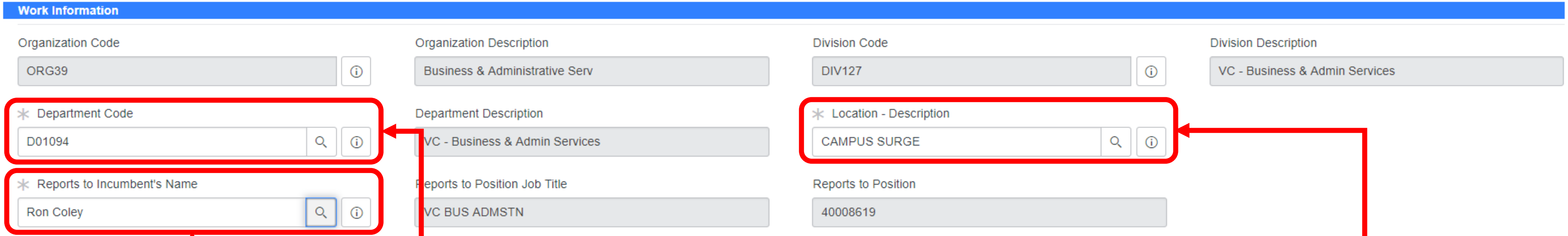
When overriding an FLSA, include a reminder in the comments for the SSC Fulfiller to also update the pay frequency to biweekly vs. monthly to avoid any negative downstream impacts.

FLSA Override (continued)

When a New Position request is submitted with an FLSA Override, additional approval is needed. The request will be routed to HR for review and approval. One of the seven approvers listed under the “Approvers” tab in the Task Catalog is required to review and approve the request.

Once one of the seven approve approve the request, the New Position request will follow a normal New Position Workflow. Upon approval, the Accountability Structure FAU Reviewer will receive a task to review the Position FAU.

Work Information



‘Reports To’ is part of Position Data. You can enter the Position incumbent’s direct report directly in the field or by clicking on the magnifying glass icon to search for the individual. Keep in mind that in UCPath, the ‘Reports To’ Position number will be used. Based on the Name selected, the ‘Reports to Position Job Title’ and ‘Reports to Position’ will populate automatically.

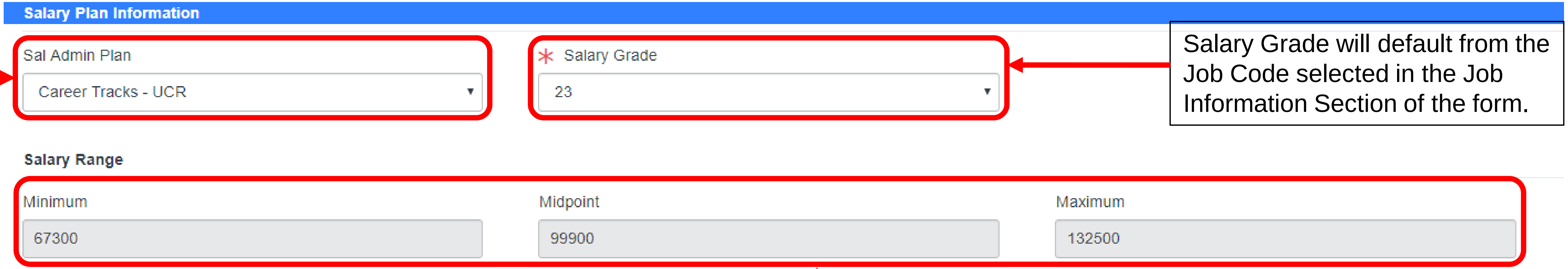
The Department Code for the New Position can be entered directly in the field or can be search for using the lookup tool (magnifying glass icon). Once selected, the Organization Code, Organization Description, Division Code, Division Description, Department Description, and Location Description will default automatically.

In most cases, a Location Description will default automatically from the Department Code. The Location Description can be edited, if needed. This change does NOT require an additional layer of approval in the system.

Reports to Position

- In the new TARS system, Supervisors are maintained use the "Reports To" field in UCPath's Position Data Management feature, **NOT** in Enterprise Directory.
- This includes students
- The change allows TARS to identify a supervisor for each job
- If an employee's "Reports To" information is incorrect, needs to be changed, or the supervisor is not receiving the correct timesheets in TARS, you may need request that an update to the "Reports To" field in Position Management be made
- Updates to the "Reports To" field are made using the ServiceLink Update Position form

Salary Plan Information



Salary Grade will default from the Job Code selected in the Job Information Section of the form.

Salary Admin Plan will default from the Job Code selected in the Job Information Section of the Form.

Salary Range Minimum, Midpoint, and Maximum will default automatically. This is for reference purposes. The actual compensation will be entered once an incumbent is onboarded into the Position. If the Position is stepped, steps would populate below the Salary Range. Again, this is for reference purposes.

Specific Information

Specific Information

Max Head Count

1

Enter Max Head Count. If this is a Single Headcount Position, leave the Max Head at 1.

Position Pool ID

Enter or search of the Position Pool ID if this Position is for a Work Study

Employee Relations Code

All Others Not Confidential

Select the Employee Relations Code from the dropdown. If a confidential Employee Relations Code is chosen, the request will require an additional layer of approval.

* Special Training Code

Note: Indicate any required certifications and/or required training or licenses. Hold down Ctrl key to select multiple items.

Not Applicable
Exclude NSF, RCR, and SHP
Exempt - Sexual Harassment not Required
Include NSF, RCR

Select Special Training Code, if needed.
If none is required, select 'Not Applicable'

* Security Clearance

Note: Hold down Ctrl key to select multiple items.

Not Applicable
Previous Employer's Reference Check
Criminal Convictions Record
Financial Disclosure

Select Security Clearance, if needed.
If none is required, select 'Not Applicable'

Max Head Count

* Max Head Count

1

A Position with a Max Head of One is a single headcount position, which means One Position for One Incumbent. There may be times, however, when it is more convenient to have One Position for Several Incumbents. Instead of needing to manage several positions, as is the case with single-headcount positions, only one position needs to be managed with a Multiple-Headcount Position.

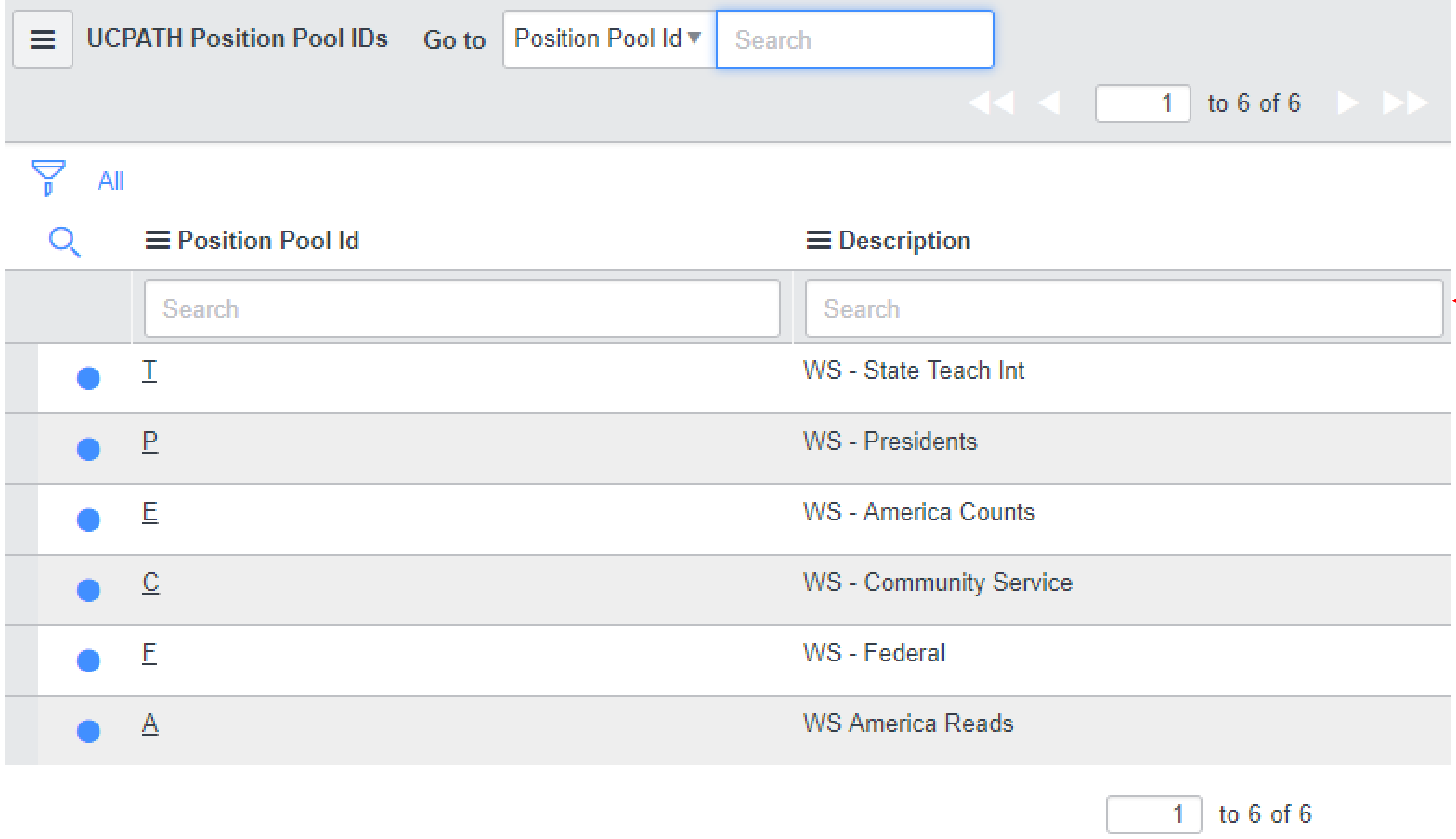
* Max Head Count

5

A Max Head Count of 5 means that five incumbents can be Onboarded into one position. While reducing the need to manage several positions, there are rules that need to be met to create a multi-headcount positions. All 5 incumbents in this position CANNOT be Career Employees and will need to have the same:

- Position Data (including reports to, job code, FAU, etc.)
- If position data (such as Reports to) needs to be changed in UCPath, the delivered Position Management screen (not PayPath) must be used.

Position Pool ID


UCPATH Position Pool IDs Go to Position Pool Id Search

1 to 6 of 6

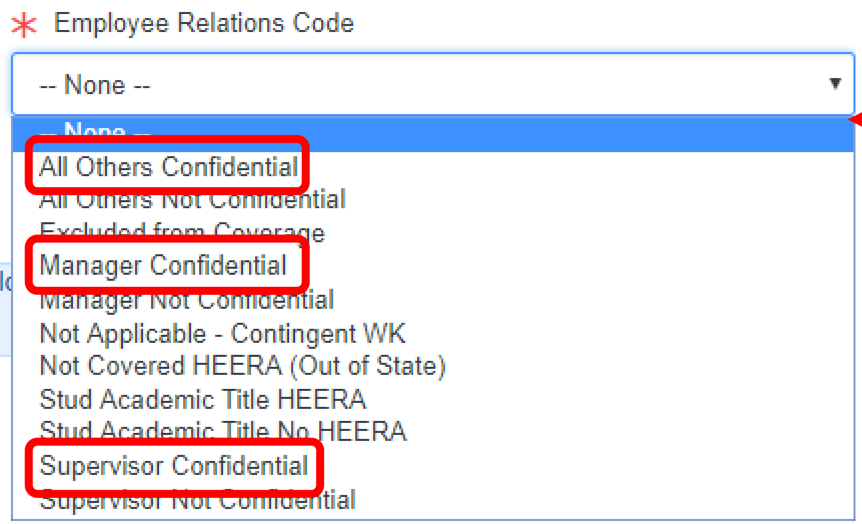
All

Position Pool Id	Description
I	WS - State Teach Int
P	WS - Presidents
E	WS - America Counts
C	WS - Community Service
F	WS - Federal
A	WS America Reads

1 to 6 of 6

At UCR, Position Pools are used exclusively for Work Study positions. When requesting a new position for a Work Study, select the appropriate Position Pool ID. These can be search by Description, which corresponds to their Work Study Program.
If a Work Study position is multi-headcount, all incumbents MUST belong to the same Position Pool.

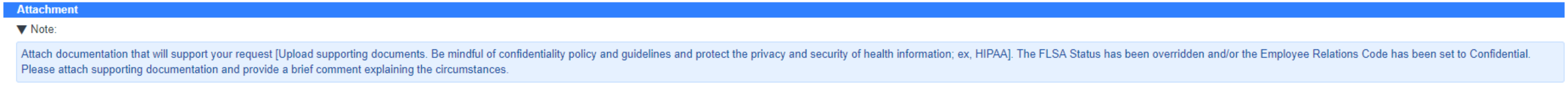
Employee Relations Code

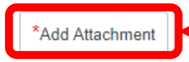


Confidential [titles], per the Higher Education Employer-Employee Relations Act (HEERA) is defined as:

- "An employee required to develop or present management positions for collective bargaining, and/or an employee whose duties normally require access to information which contributes significantly to the development of such management positions."

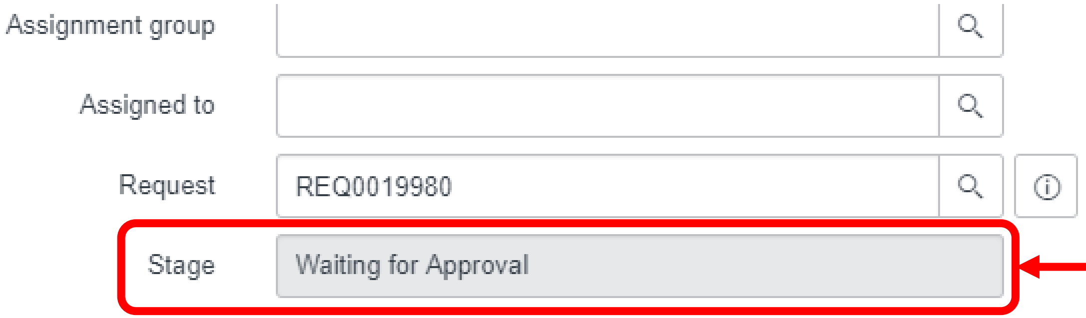
Refer to http://hr.ucr.edu/erelcodechart.html for additional policy-related information.



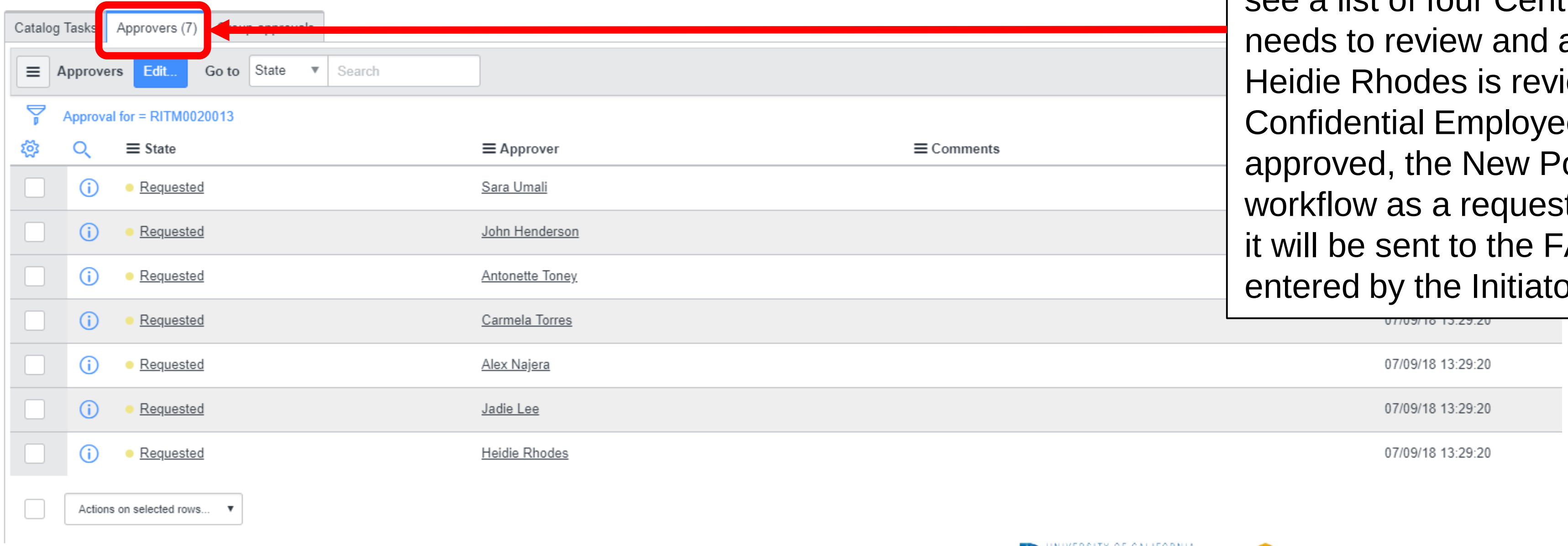


When selecting a Confidential Employee Relations Code, attachments become a required field. You will need to provide supporting documentation explaining the circumstances.

Employee Relations Code (continued)

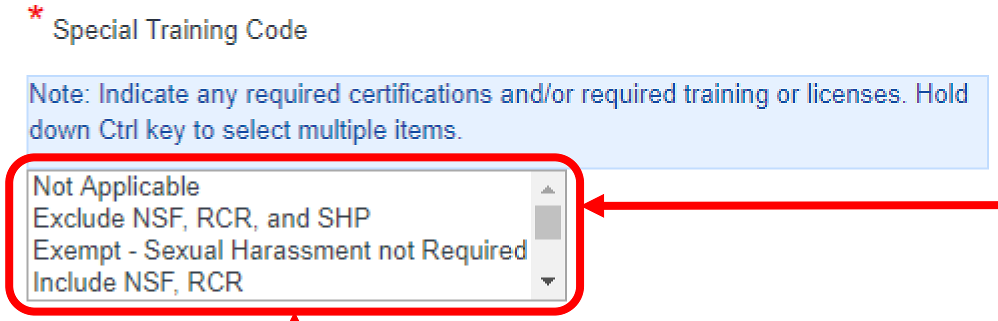


When a Confidential Employee Relations Code is chosen, an extra level of approval becomes required. This additional level of approval is represented by the “Waiting for Approval” Stage in the ServiceLink Initiator View.



In the “Catalog Task” at the bottom of the RITM, you will see a list of four Central HR approvers. Only one of these needs to review and approve the request. Currently, Heidie Rhodes is reviewing and approving ALL Confidential Employee Relations Code requests. Once approved, the New Position request will follow the same workflow as a request without this extra layer of approval; it will be sent to the FAU reviewer to ensure the FAU entered by the Initiator is correct.

Special Training Code



You can select from the following (more than one can be selected):

- Not Applicable
- Exclude NSF, RCR, and SHP
- Exempt – Sexual Harassment not Required
- Include NSF, RCR
- Include NSF and RCR, Exempt SHP
- NSF and SHP Required
- Sexual Harassment Prevention (SHP)

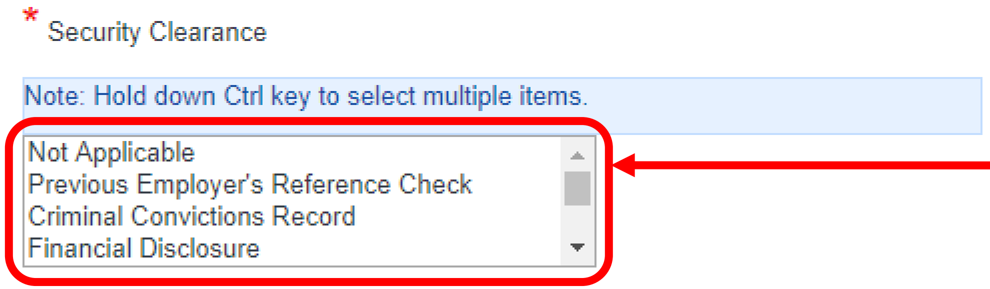
Special Training Codes are used to track certain requirements to hold a position. If none listed are required, select "Not Applicable."

Entering a "Special Training Code" on a Position is NOT mandatory, nor is it appropriate for all employees. It is mainly used by a department who has an employee performing supervisory duties who is NOT is a supervisory title code. For example, a Blank Assistant who supervises student employees or an employee acting as an interim supervisor during a recruitment.

There is a "Special Training Code" that is strictly used to require or exempt someone from the supervisory version of the UC Sexual Violence and Sexual Harassment Prevention Training (Sexual Harassment Prevention and Exempt – Sexual Harassment not Required).

Other "Special Training Code" include requiring or exempting an employee from Responsible Conduct of Research (RCR) Training and National Science Foundation (NSF) Training.

Security Clearance



Security Clearance codes are used to track certain requirements to hold a position. If none listed are required, select "Not Applicable."

You can select from (more than one can be selected):

- Not Applicable
- Previous Employer's Reference Check
- Criminal Convictions Record
- Financial Disclosure
- Security Clearance
- Police Officer Background Check
- Professional License or Certificate Verification
- Educational Degree Check
- DMV Driving Record Check
- E-Verify
- NRC Background Check - used to identify Individuals with Unescorted Access to Radioactive Material in Quantities of Concern
- CANRA Acknowledgement
- I9 Completion
- CLERY Act
- Form 700 – Statement of Economic Interests

Comments & FAU

* Comments

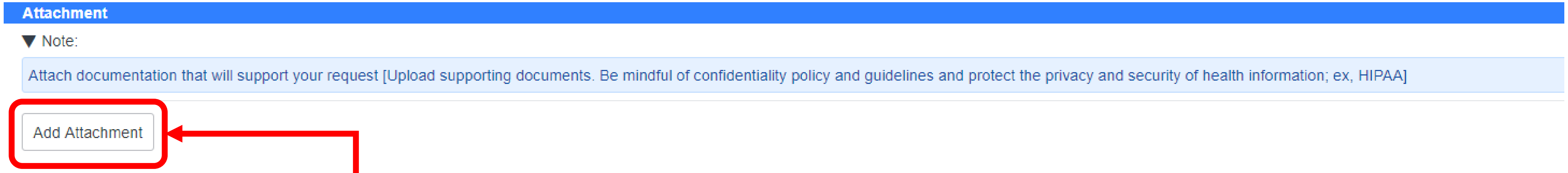
▼ Note:

Please include the FAU distribution for this position as supplied by your Financial Analyst.

FAU 40404040222229999343

In addition to information not included elsewhere in the form, the ServiceLink Initiator should enter the New Position FAU in the comments section. The FAU will be reviewed by the "FAU Reviewer" via the Fulfiller View of ServiceLink by a designated Financial Analyst or Manager.

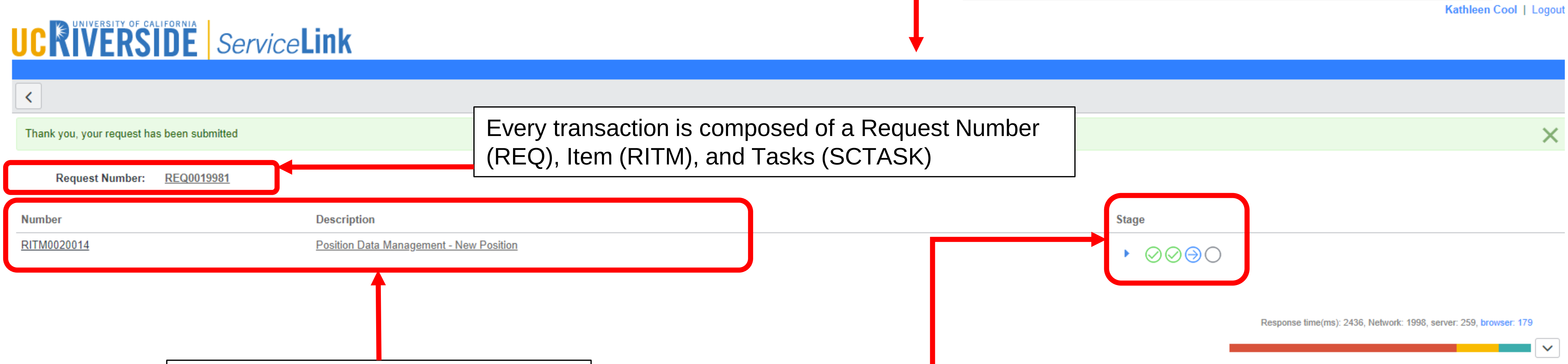
Attachment



The “Add Attachment” field on a New Position form is not required unless the FLSA on the position was overridden and/or is the Employee Relations Code is Confidential. In these instances, supporting documentation, such as a job description or rationale for the request is required.

ServiceLink Initiator

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



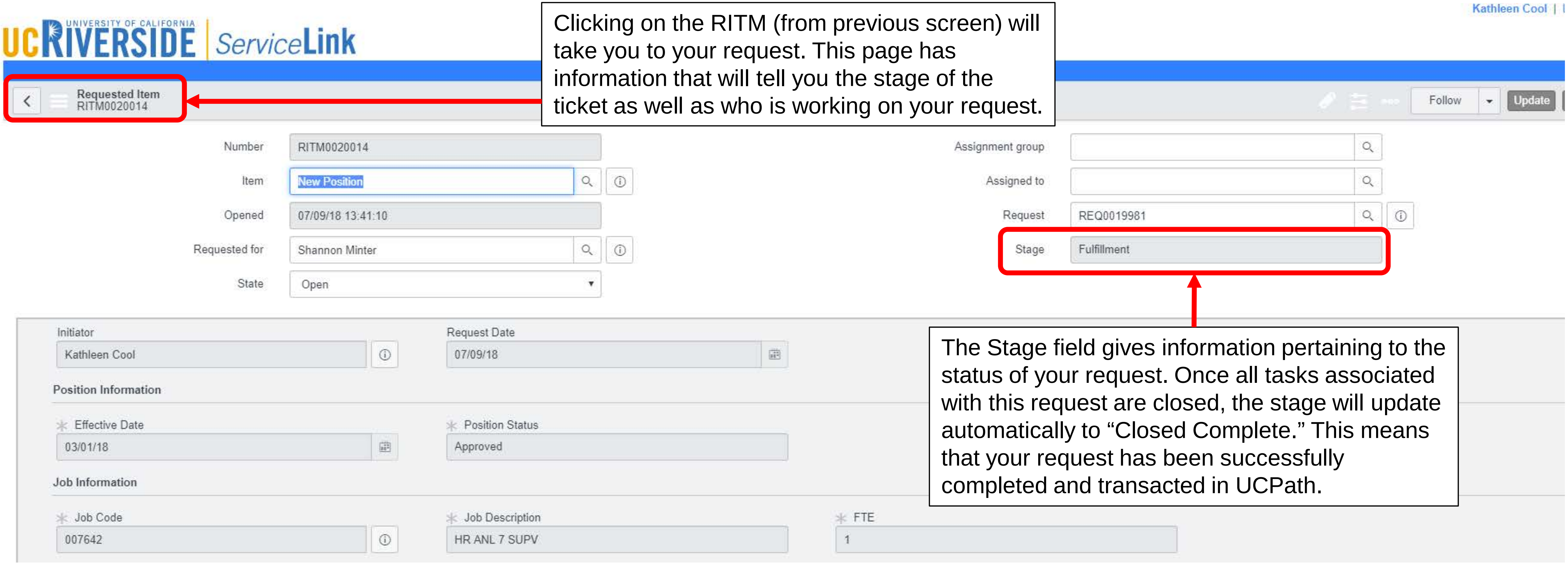
Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

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.

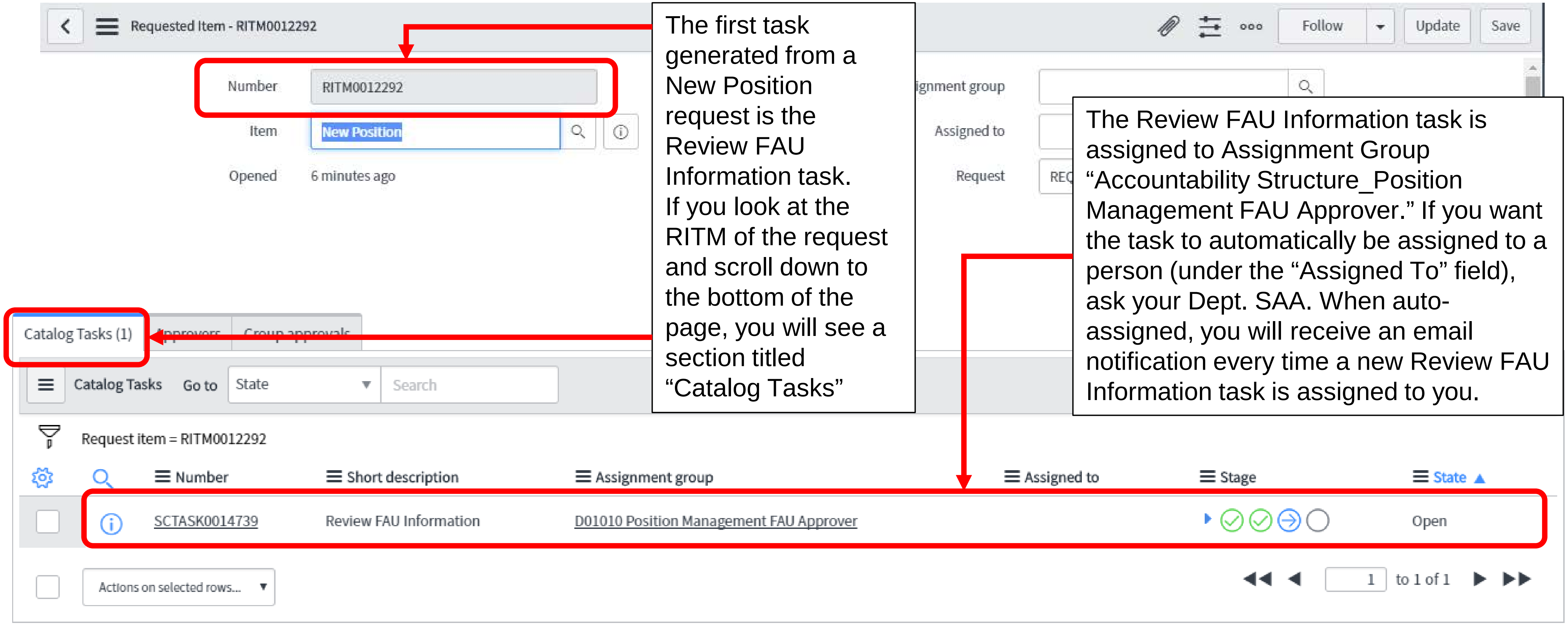
ServiceLink Initiator

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.

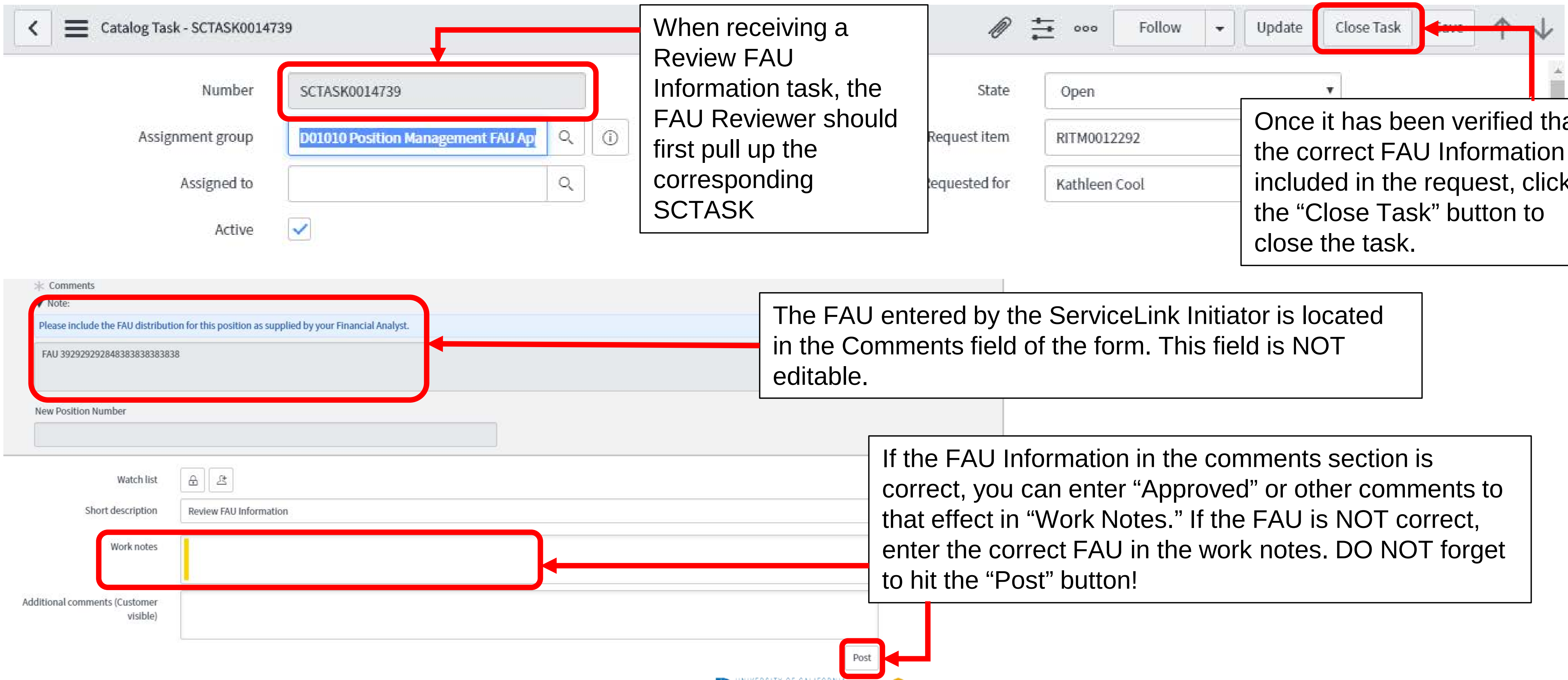
FAU Reviewer



The first task generated from a New Position request is the Review FAU Information task. If you look at the RITM of the request and scroll down to the bottom of the page, you will see a section titled “Catalog Tasks”

The Review FAU Information task is assigned to Assignment Group “Accountability Structure_Position Management FAU Approver.” If you want the task to automatically be assigned to a person (under the “Assigned To” field), ask your Dept. SAA. When auto-assigned, you will receive an email notification every time a new Review FAU Information task is assigned to you.

FAU Reviewer (cont.)



When receiving a Review FAU Information task, the FAU Reviewer should first pull up the corresponding SCTASK

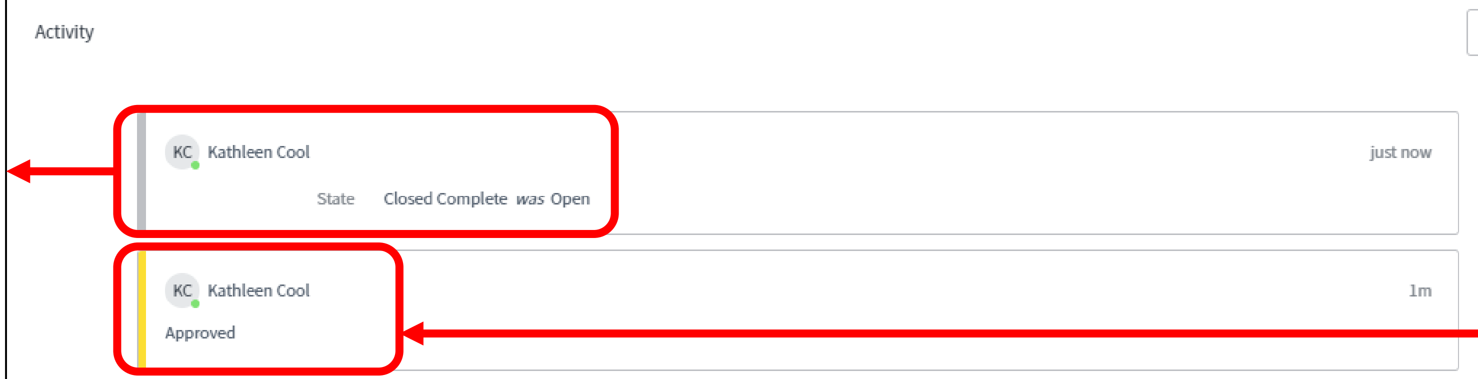
Once it has been verified that the correct FAU Information is included in the request, click the “Close Task” button to close the task.

The FAU entered by the ServiceLink Initiator is located in the Comments field of the form. This field is NOT editable.

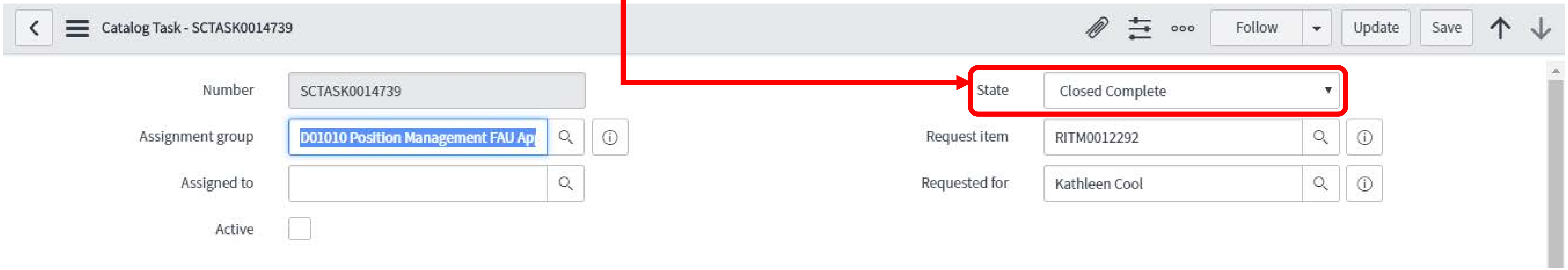
If the FAU Information in the comments section is correct, you can enter “Approved” or other comments to that effect in “Work Notes.” If the FAU is NOT correct, enter the correct FAU in the work notes. DO NOT forget to hit the “Post” button!

FAU Reviewer (cont.)

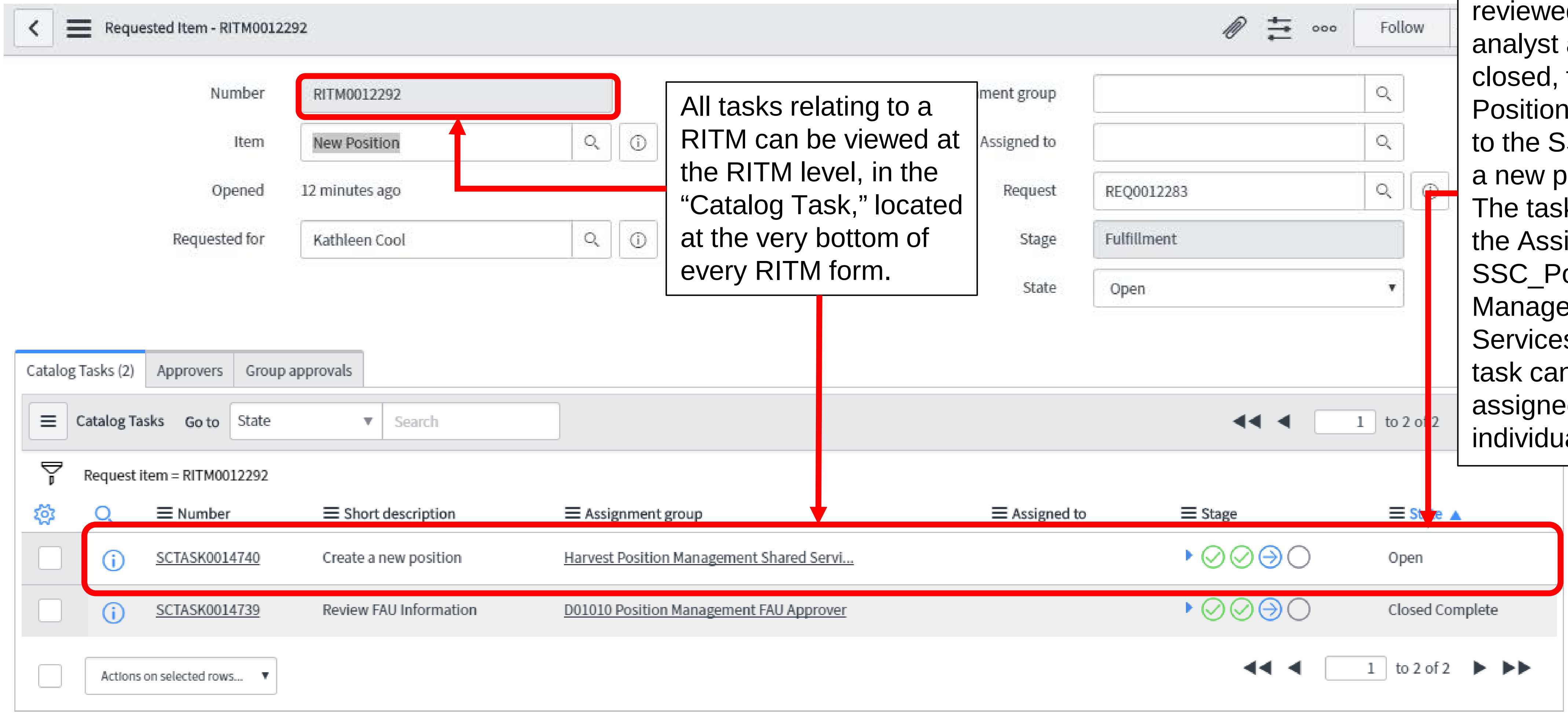
After closing the task, you will see a note in the Activity Stream notifying everyone that you closed the task. This information will also appear under the SCTASK State at the top of the form.



After entering comments in the Work Notes section, ensure that an entry was generated with the comments you entered. If you do not click on the “Post” button, the note will not be posted!



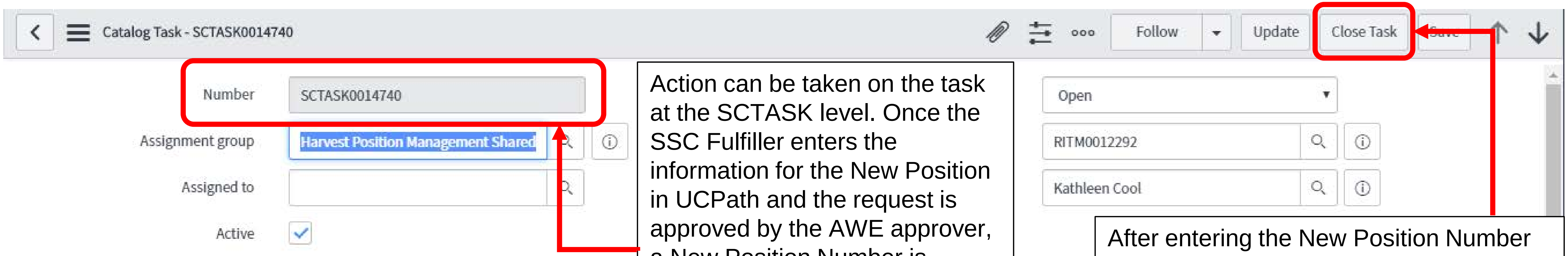
SSC Fulfiller



All tasks relating to a RITM can be viewed at the RITM level, in the "Catalog Task," located at the very bottom of every RITM form.

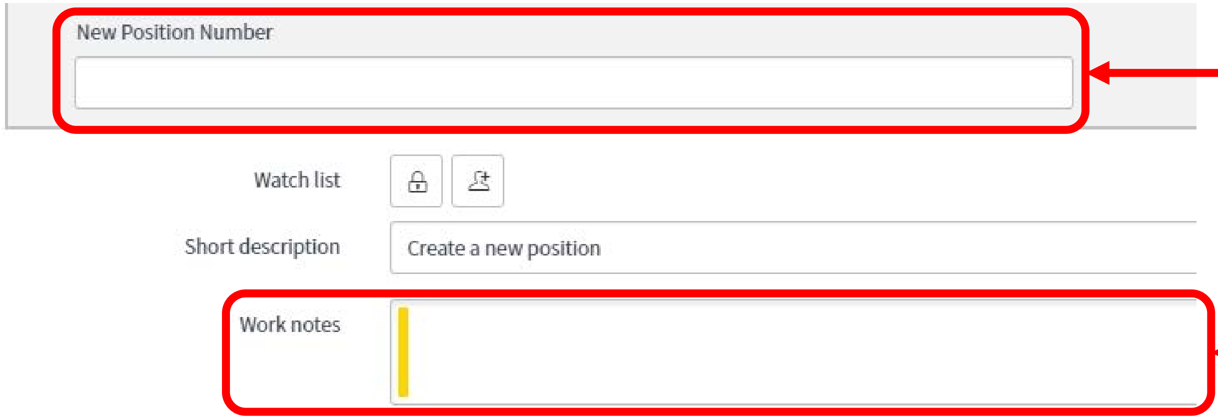
Once the FAU Information has been reviewed by a financial analyst and the task is closed, the New Position request is sent to the SSC as a "Create a new position" task. The task is assigned to the Assignment Group SSC_Position Management Shared Services Center. The task can also be assigned to an individual.

SSC Fulfiller – Create a New Position



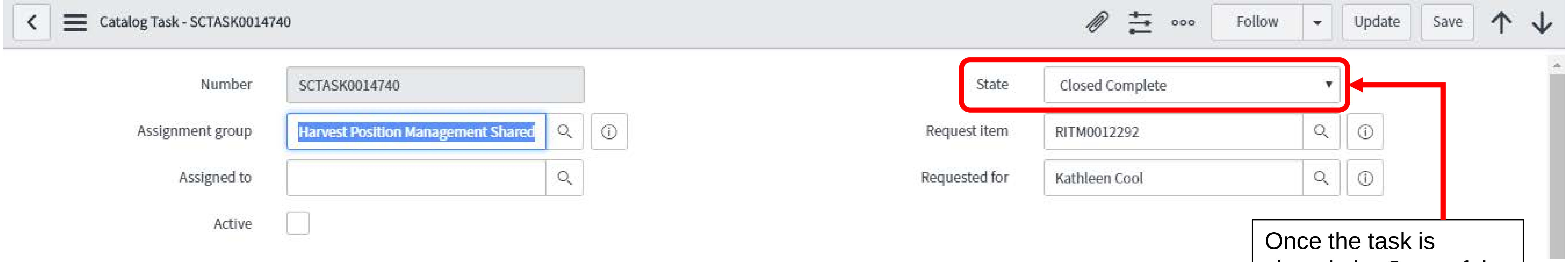
Action can be taken on the task at the SCTASK level. Once the SSC Fulfiller enters the information for the New Position in UCPath and the request is approved by the AWE approver, a New Position Number is automatically generated.

After entering the New Position Number at the SCTASK level, the task can be closed by clicking on the "Close Task" button.

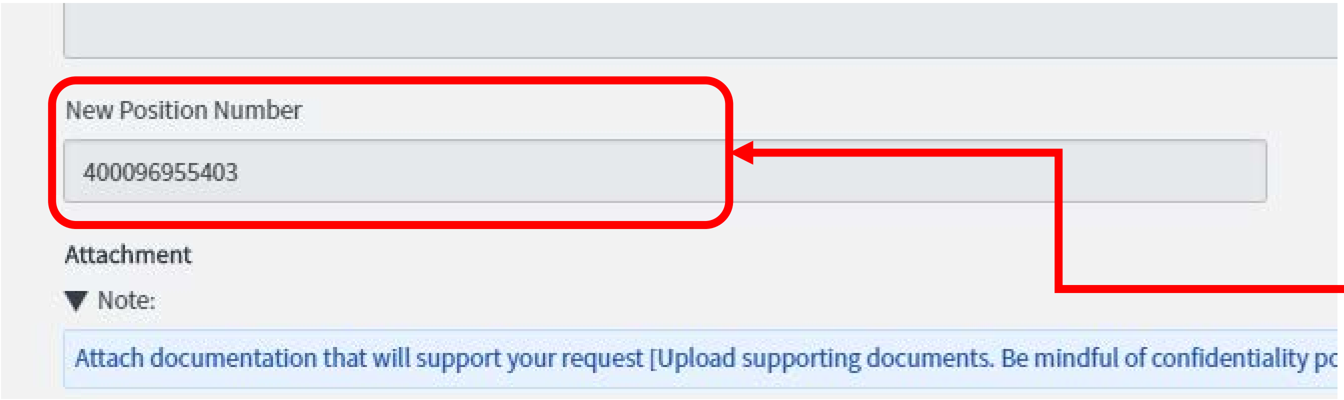


It is the responsibility of the SSC Position Data Management Fulfiller to enter the New Position Number at the SCTASK level once the new position number is generated by UCPath. Comments can be added to the Work Notes as necessary to keep the Initiator and Accountability Structure Fulfiller in the loop.

SSC Fulfiller – Create a New Position

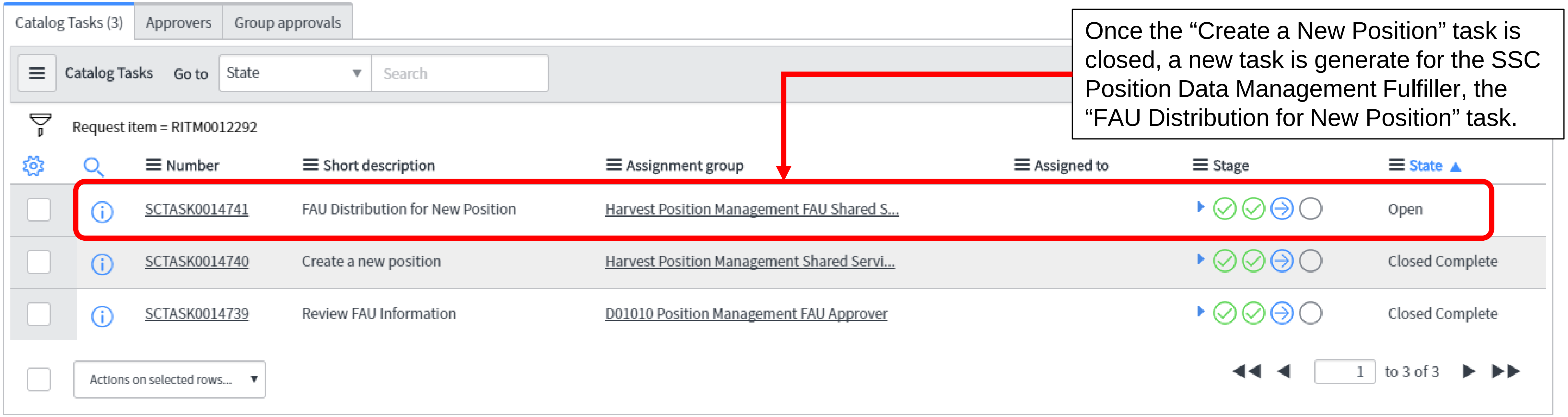


Once the task is closed, the State of the tasks at the SCTASK level will display "Closed Complete."

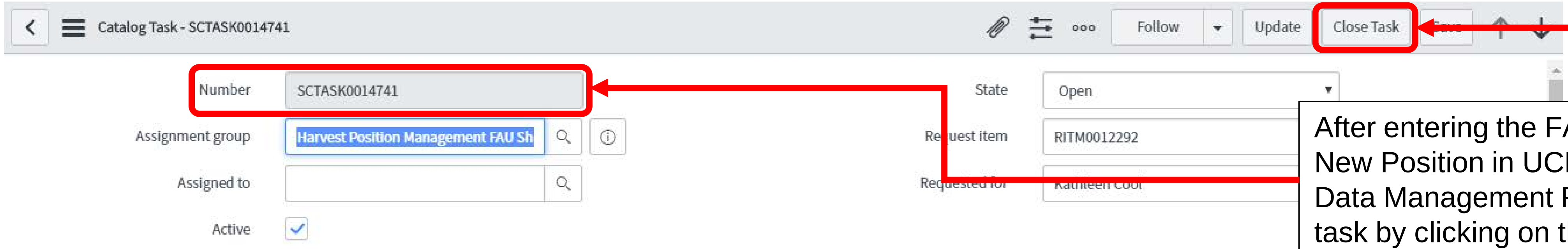


The New Position Number entered by the SSC Fulfiller at the SCTASK level will also appear in the same field at the RITM level, as shown here.

SSC Fulfiller – FAU Distribution

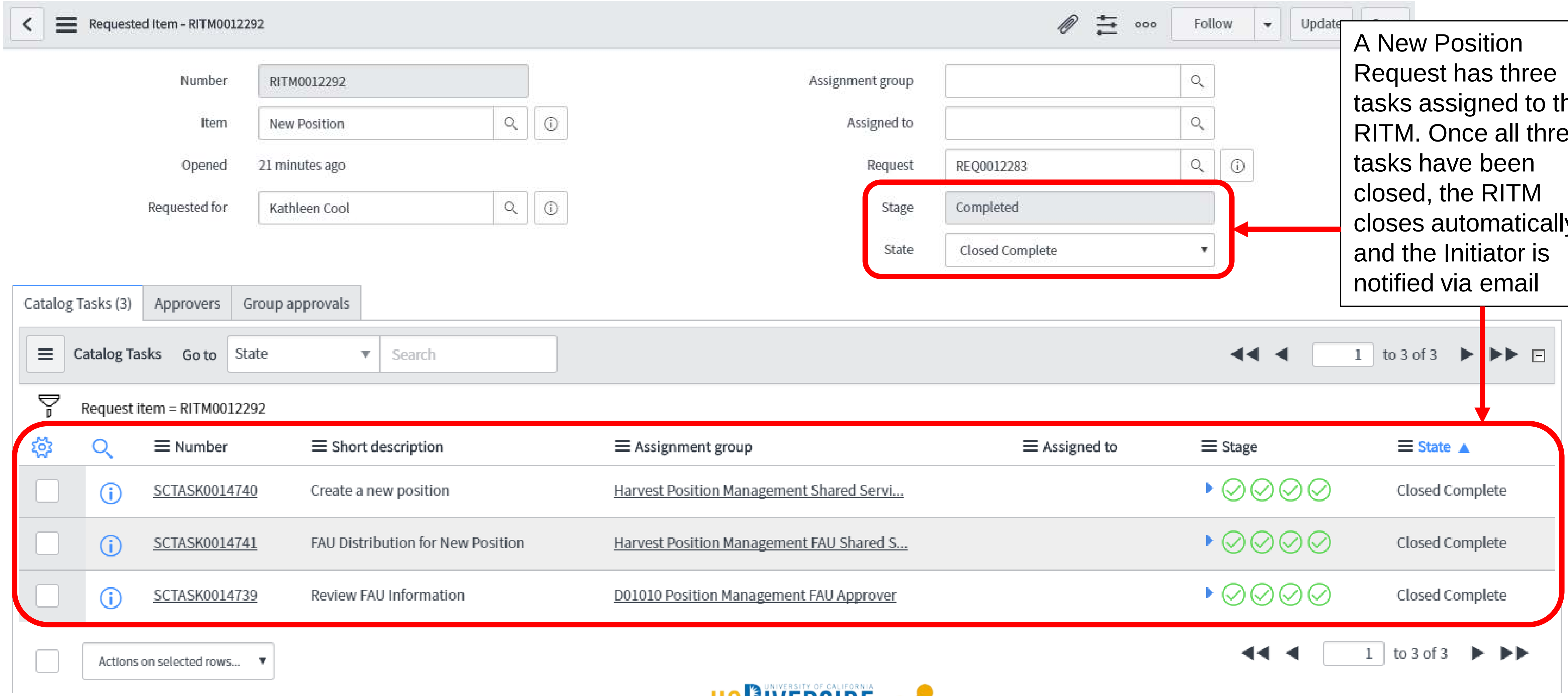


Once the "Create a New Position" task is closed, a new task is generate for the SSC Position Data Management Fulfiller, the "FAU Distribution for New Position" task.



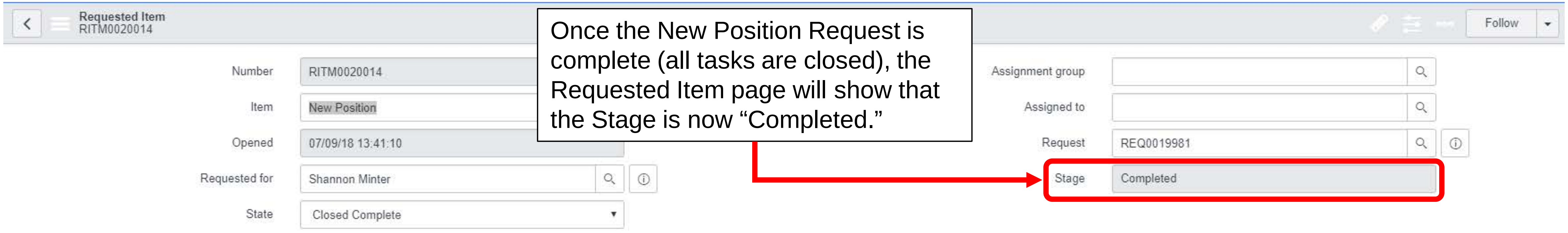
After entering the FAU Distribution for the New Position in UCPath, the SSC Position Data Management Fulfiller will close the task by clicking on the "Close Task" button.

SSC Fulfiller – FAU Distribution

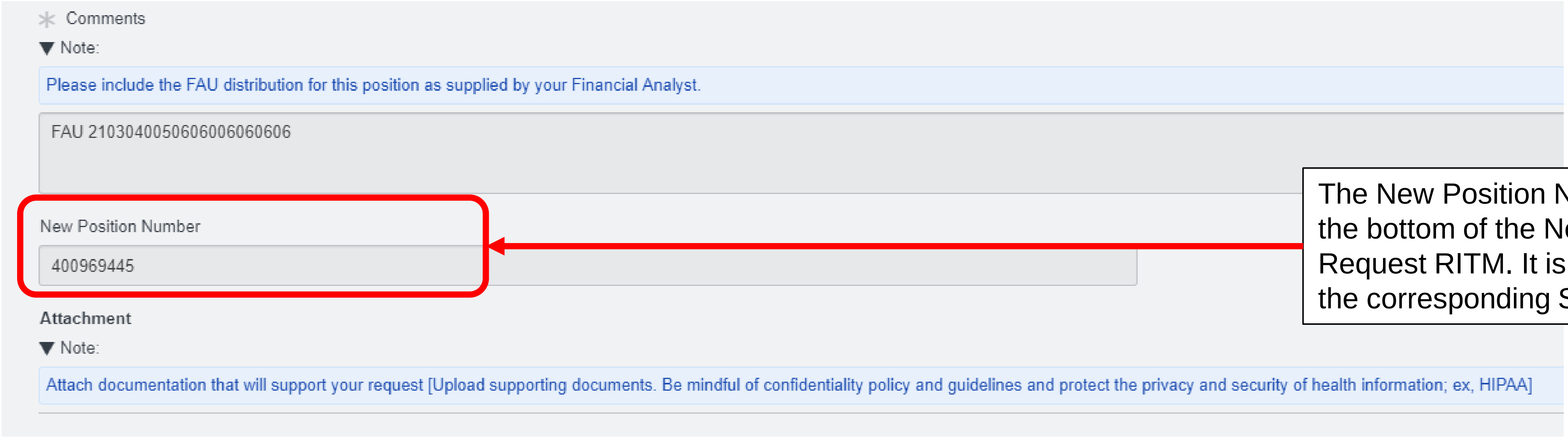


A New Position Request has three tasks assigned to the RITM. Once all three tasks have been closed, the RITM closes automatically and the Initiator is notified via email

Initiator View



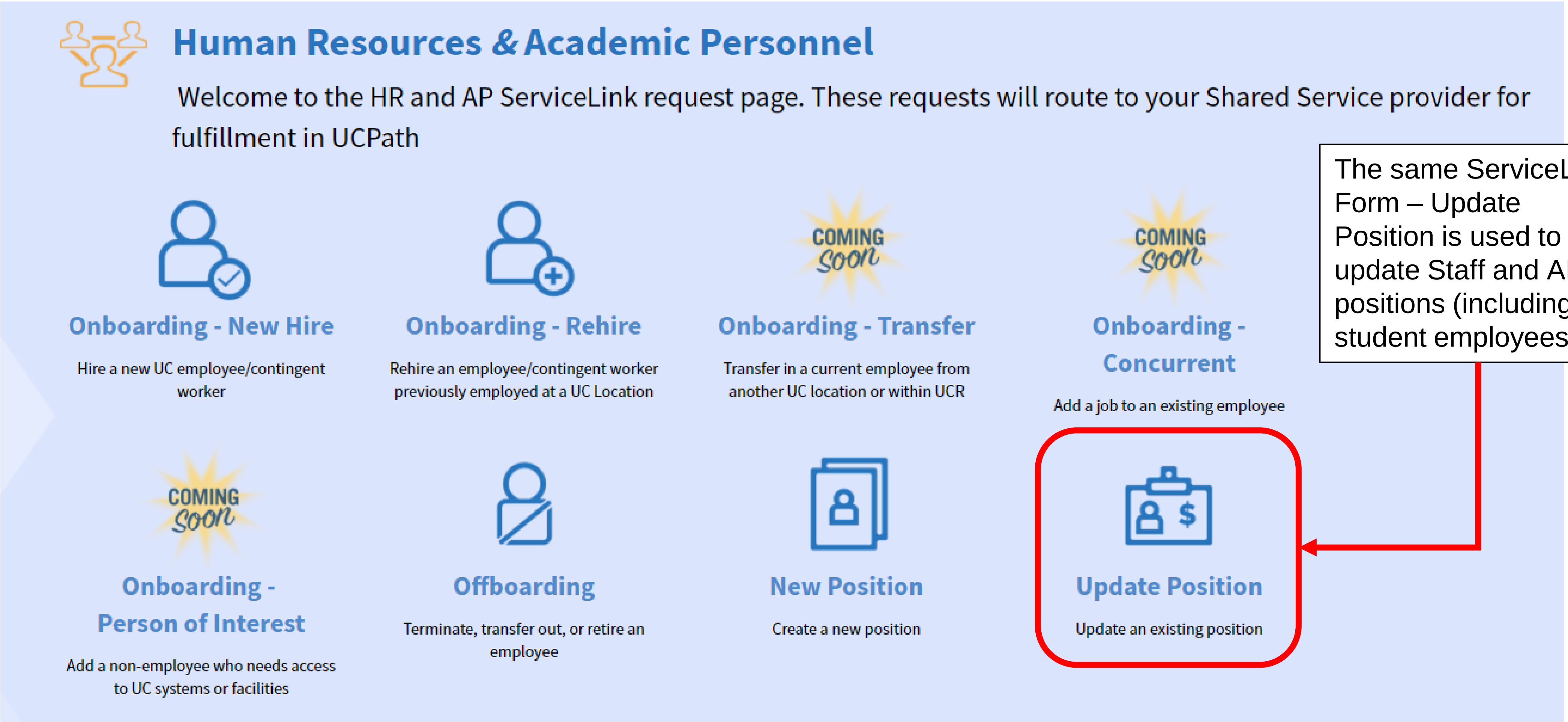
Once the New Position Request is complete (all tasks are closed), the Requested Item page will show that the Stage is now "Completed."



The New Position Number displays at the bottom of the New Position Request RITM. It is pulled directly from the corresponding SCTASK.

Update Position

ServiceLink Form – Update Position

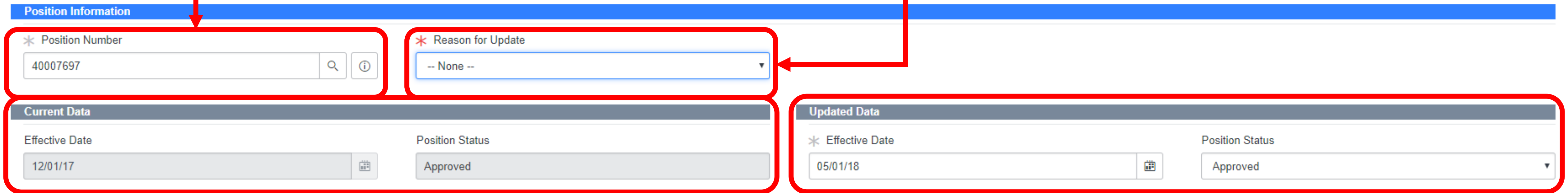


The same ServiceLink Form – Update Position is used to update Staff and AP positions (including student employees).

Position Information

Enter the Position Number needing a Position Data update.

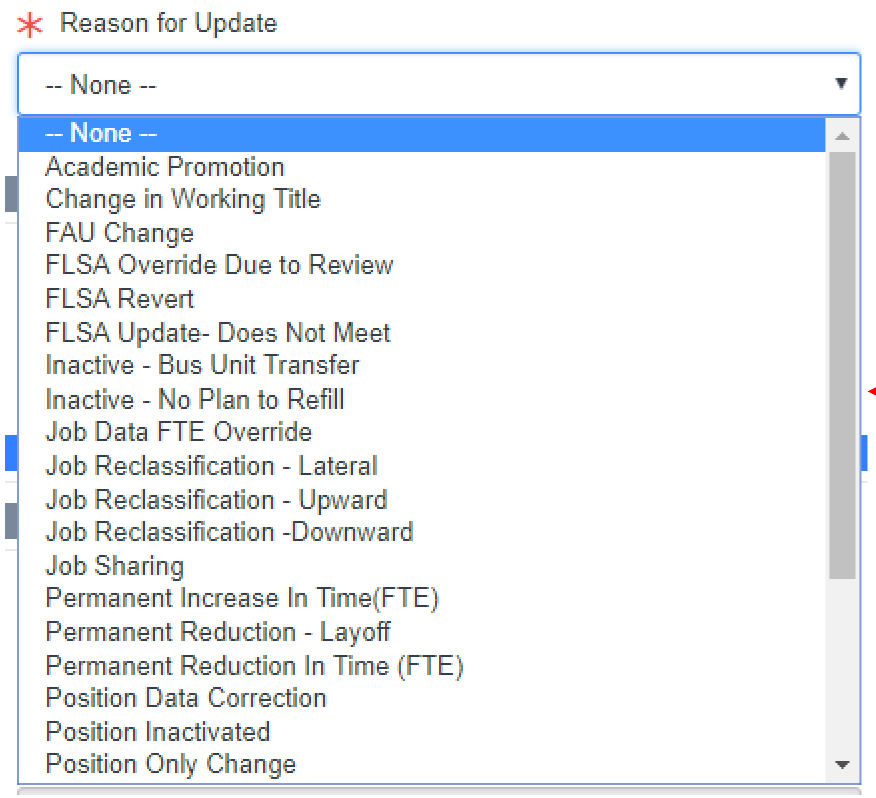
Select from the dropdown why a Position Data update needs to be made. This information will inform how the request is transacted in UCPath.



Current Position Data on the Position will appear in the left-hand column. This is Data currently in UCPath Production.

Changes to Position Data can be made on the right-hand side of the screen, under "Updated Data." Required Data for the transaction will be determined based on the Reason for Update chosen. For example, if you are changing the FTE, only the Effective Date, FTE, Employee Relations Code, Special Training Code, and Security Clearance are required.

Reason for Update

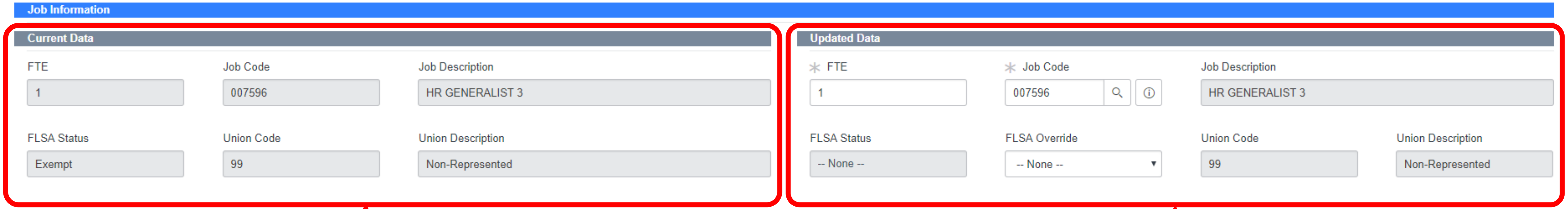


There are many Reason for Update codes to select from. Please select the most accurate reason for the update. This information helps the SSC Fulfiller determine the kind of Position Update requested as well as how it is transacted in UCPath. Different Reason for Update require different information on the ServiceLink form. All requests, regardless of Reason for Update Code, will require entry of the following fields:

- Effective Date (this is the date you want these changes to the position to go into effect)
- Employee Relations Code
- Special Training Code
- Security Clearance

These fields are required because any update to a position can have serious downstream impacts. Also make sure that Position Updates are consistent with the position Salary Admin Plan and Grade as well as with the current Employee Relations Code, training, and security clearance. As with a New Position, if the Employee Relations Code is set to “Confidential”, an additional layer of approval will be required – it will need approval from Central HR.

Job Information

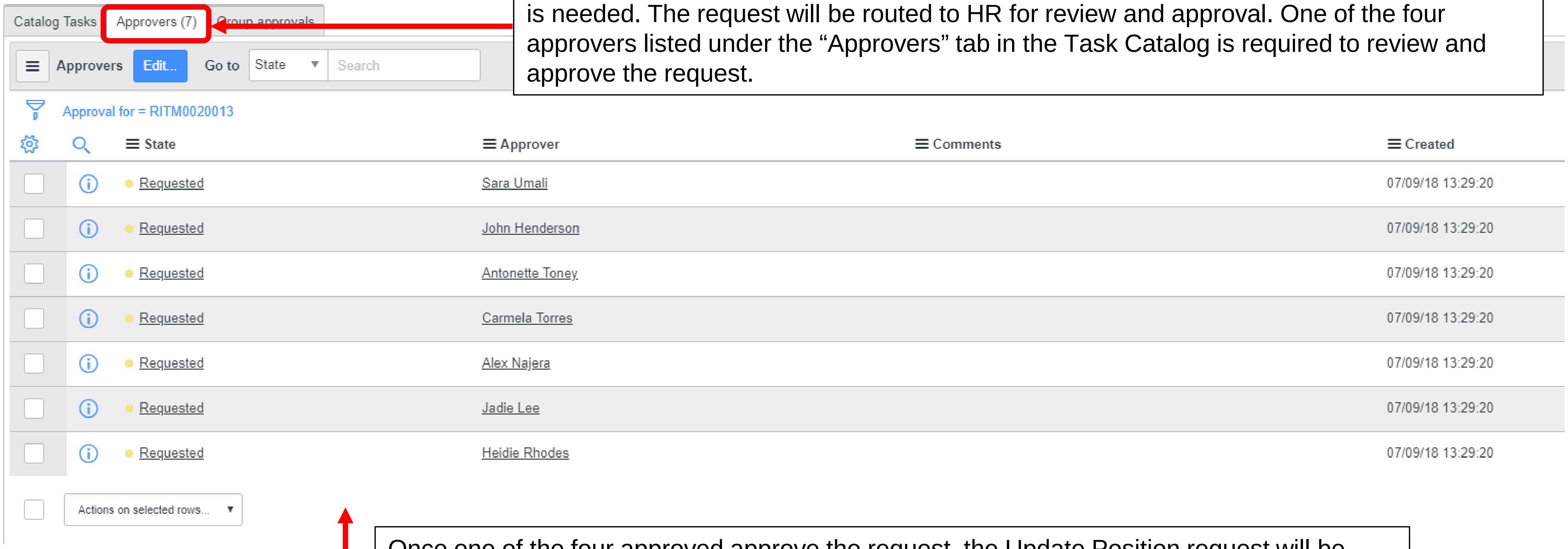


The left-hand column of Job Information displays Current Position Data in UCPath production.

If any of the Job Information on the position needs to be updated, updates can be made in the right-hand column. Data in the fields default from current data in the UCPath production environment. Changes can be made to any white field. Gray field default automatically from the white-colored fields. For example, Job Code populated the Job Description, FLSA Status, Union Code and Union Description fields.

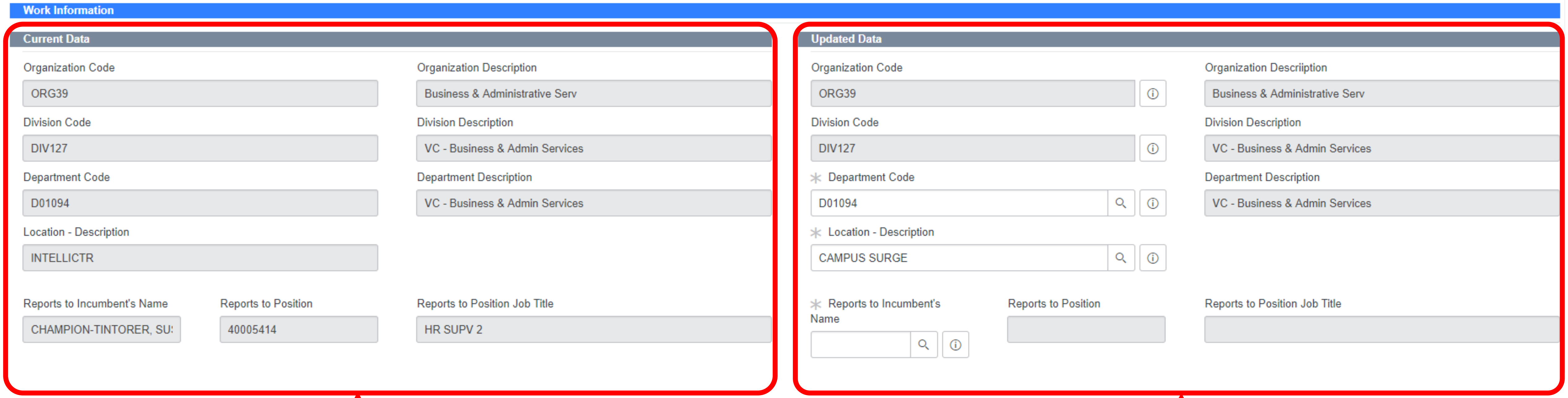
FLSA Override

When an update Position request is submitted with an FLSA Override, additional approval is needed. The request will be routed to HR for review and approval. One of the four approvers listed under the “Approvers” tab in the Task Catalog is required to review and approve the request.



Once one of the four approved approve the request, the Update Position request will be sent to the SSC for processing. The FAU Approver will NOT be sent the request to approve.

Work Information


Work Information

Current Data

Organization Code: ORG39
Organization Description: Business & Administrative Serv
Division Code: DIV127
Division Description: VC - Business & Admin Services
Department Code: D01094
Department Description: VC - Business & Admin Services
Location - Description: INTELLICTR
Reports to Incumbent's Name: CHAMPION-TINTORER, SU:
Reports to Position: 40005414
Reports to Position Job Title: HR SUPV 2

Updated Data

Organization Code: ORG39
Organization Description: Business & Administrative Serv
Division Code: DIV127
Division Description: VC - Business & Admin Services
*Department Code: D01094
Department Description: VC - Business & Admin Services
*Location - Description: CAMPUS SURGE
*Reports to Incumbent's Name
Reports to Position
Reports to Position Job Title

The left-hand column of Work Information displays Current Position Data in UCPath production.

If any of the Work Information on the position needs to be updated, updates can be made in the right-hand column. Data in the fields default from current data in the UCPath production environment. Changes can be made to any white field. Gray field default automatically from the white-colored fields.

Salary Plan Information

The left-hand column of Salary Plan Information displays Current Position Data in UCPath production.

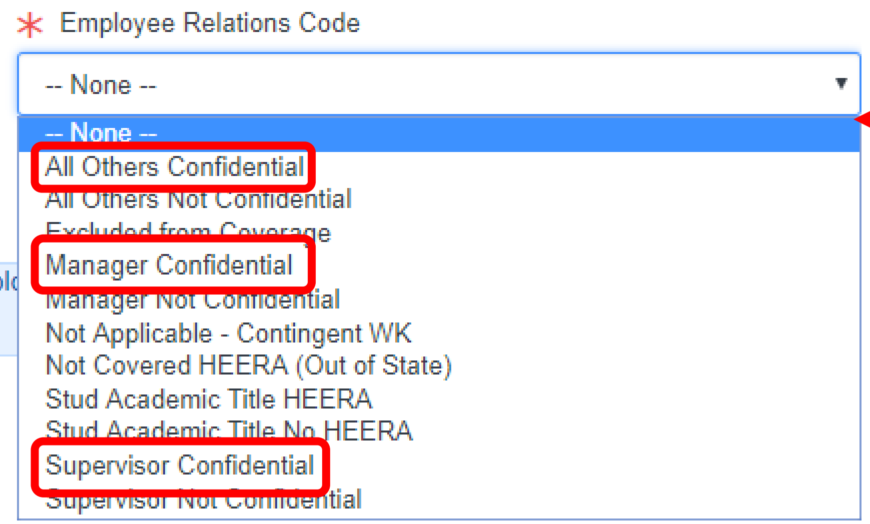
If any of the Salary Plan Information on the position needs to be updated, updates can be made in the right-hand column. Data in the fields default from current data in the UCPath production environment. Changes can be made to any white field. Gray field default automatically from the white-colored fields.

Specific Information

The left-hand column of Specific Information displays Current Position Data in UCPath production.

If any of the Specific Information on the position needs to be updated, updates can be made in the right-hand column. Regardless of the type of Position Update, the Employee Relations Code, Special Training Code, and Security Clearance are always required if the system data is blank.

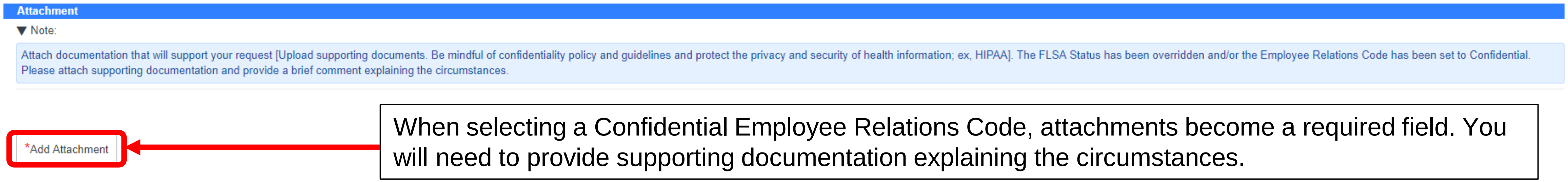
Employee Relations Code



Confidential [titles], per the Higher Education Employer-Employee Relations Act (HEERA) is defined as:

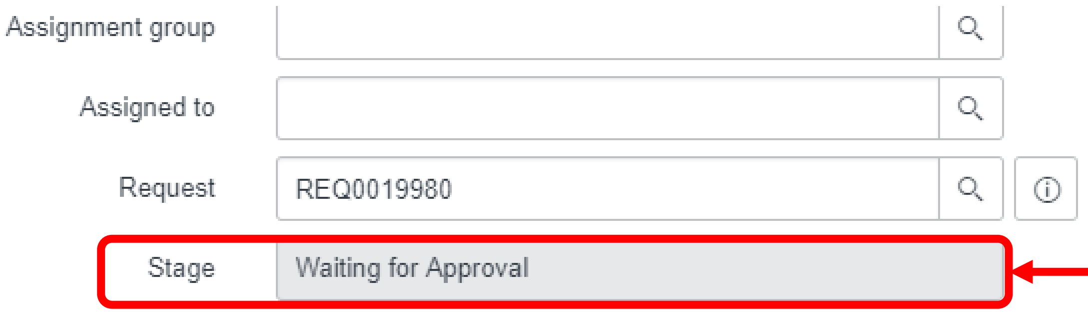
- "An employee required to develop or present management positions for collective bargaining, and/or an employee whose duties normally require access to information which contributes significantly to the development of such management positions."

Refer to http://hr.ucr.edu/erelcodechart.html for additional policy-related information.

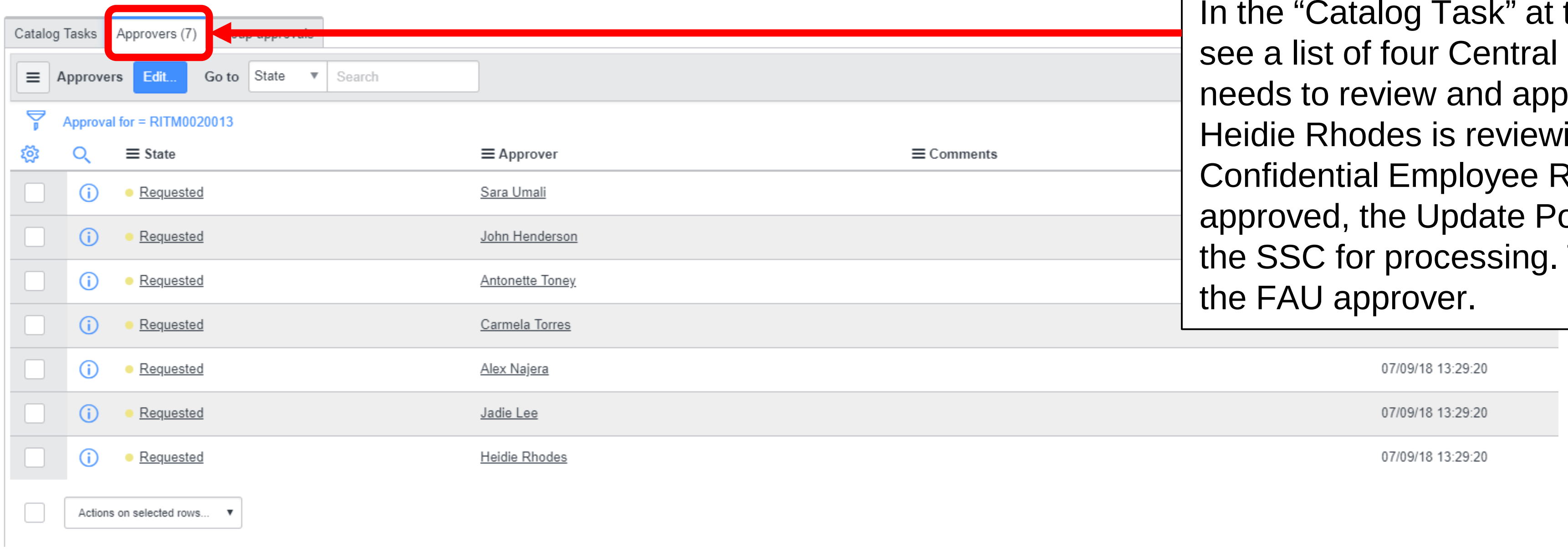


When selecting a Confidential Employee Relations Code, attachments become a required field. You will need to provide supporting documentation explaining the circumstances.

Employee Relations Code (continued)



When a Confidential Employee Relations Code is chosen, an extra level of approval becomes required. This additional level of approval is represented by the "Waiting for Approval" Stage in the ServiceLink Initiator View.



In the "Catalog Task" at the bottom of the RITM, you will see a list of four Central HR approvers. Only one of these needs to review and approve the request. Currently, Heidie Rhodes is reviewing and approving ALL Confidential Employee Relations Code requests. Once approved, the Update Position request will then be sent to the SSC for processing. The request will NOT be sent to the FAU approver.

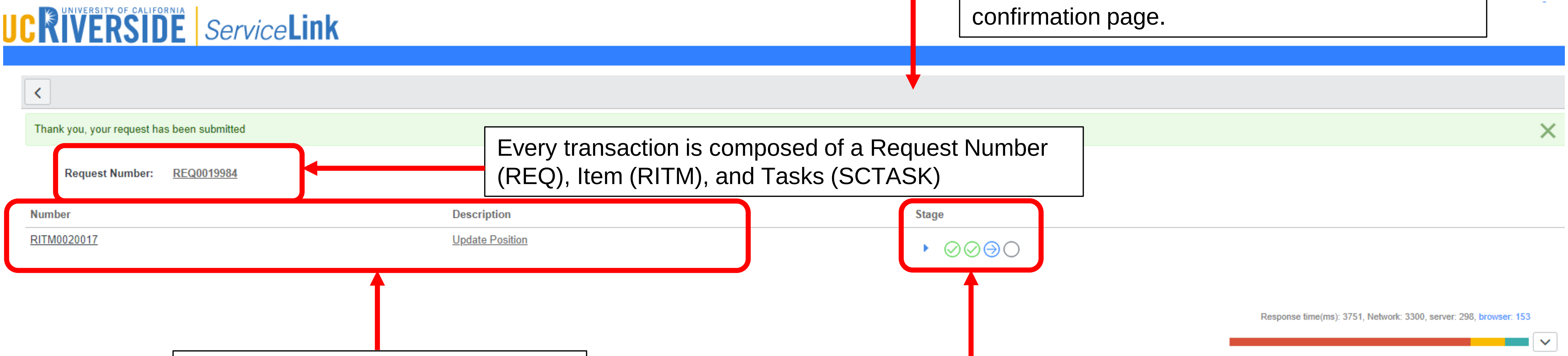
Comments & Add Attachment

Comments are always required for an Update Position request. In addition to including information not captured on other parts of the form, enter the correct FAU information if requesting a change in FAU

Attachments are not required for Position Updates. If additional supporting documentation exists, it should be attached to the request. For example, if the Employee Relations Code on the position is changed to Confidential, documentation supporting the reason(s) for the change should be included in the request.

ServiceLink Initiator

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

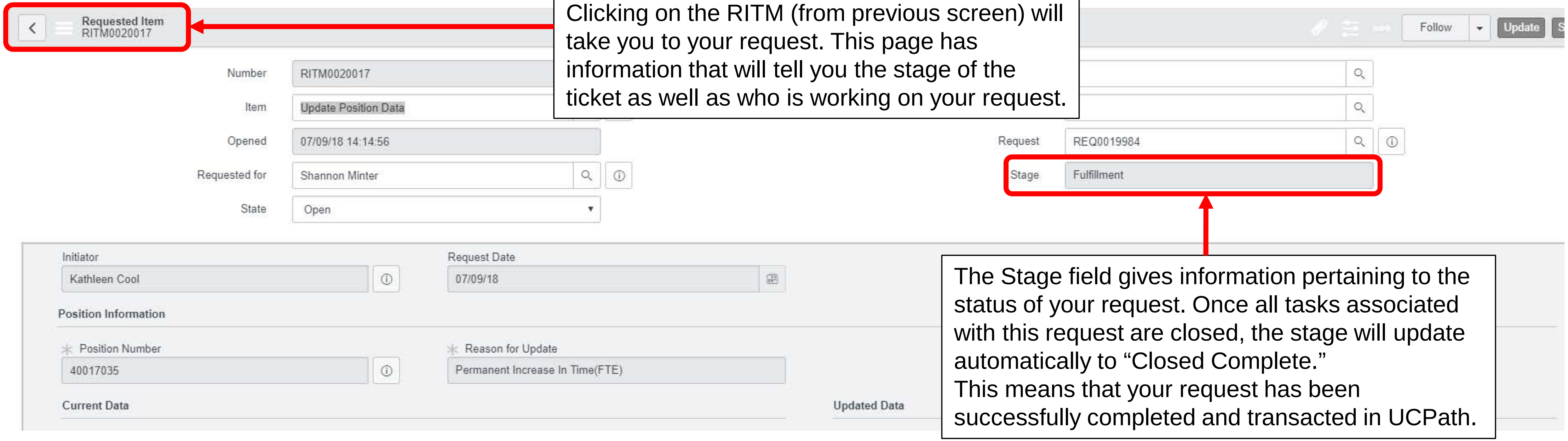


Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

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.

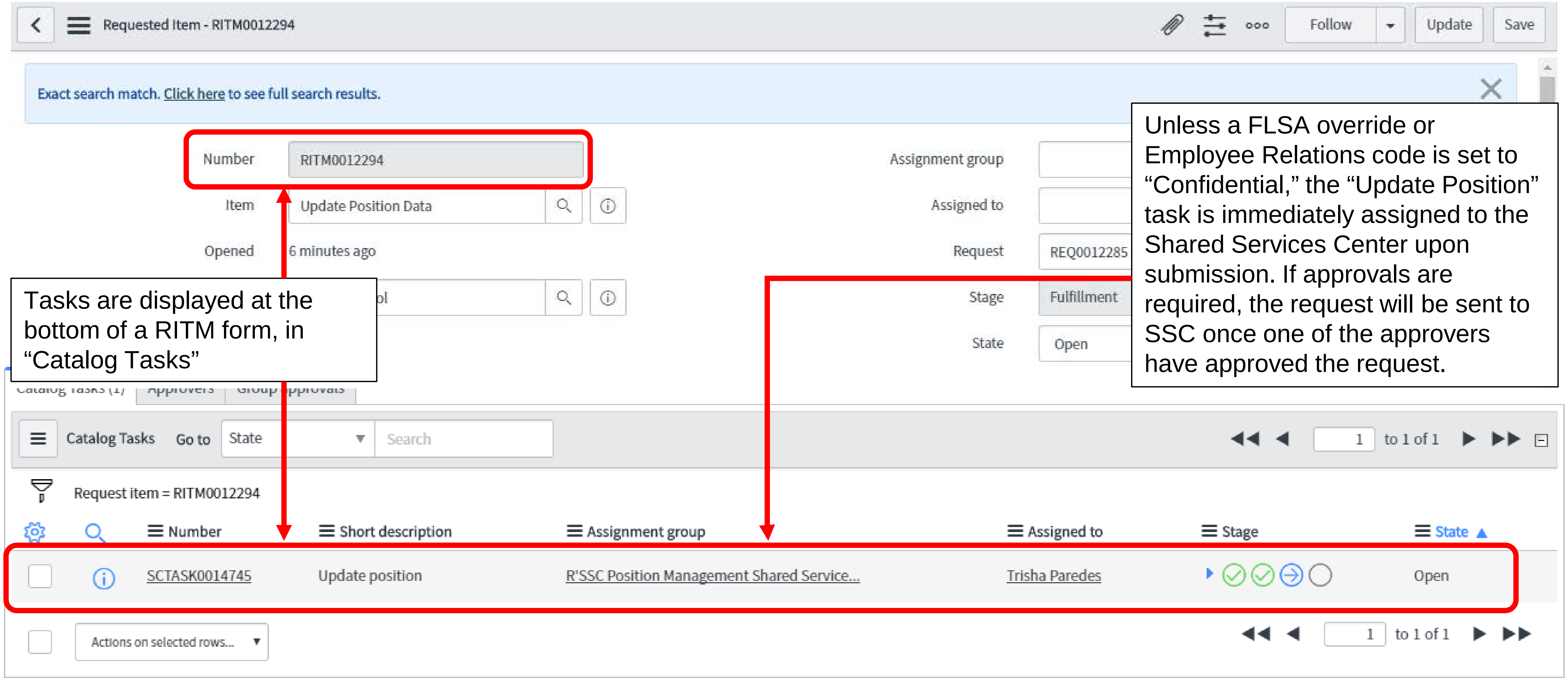
ServiceLink Initiator



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.

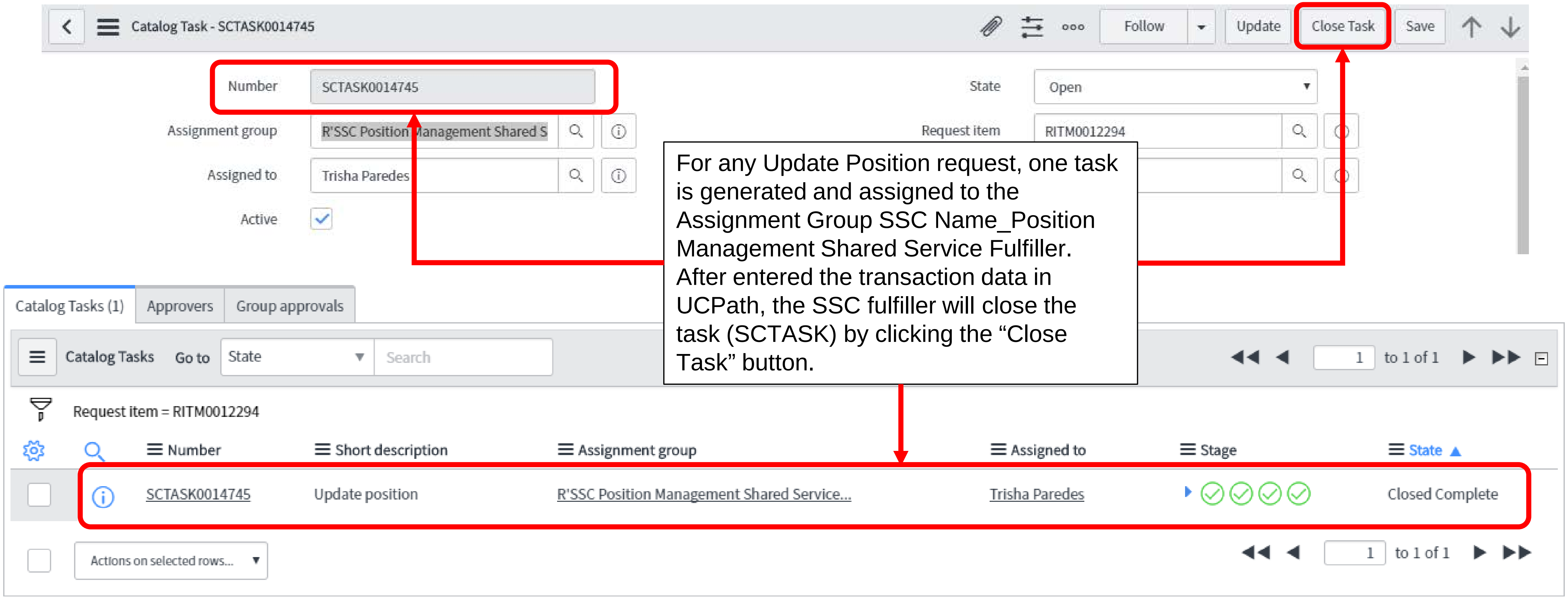
SSC Fulfiller



Tasks are displayed at the bottom of a RITM form, in "Catalog Tasks"

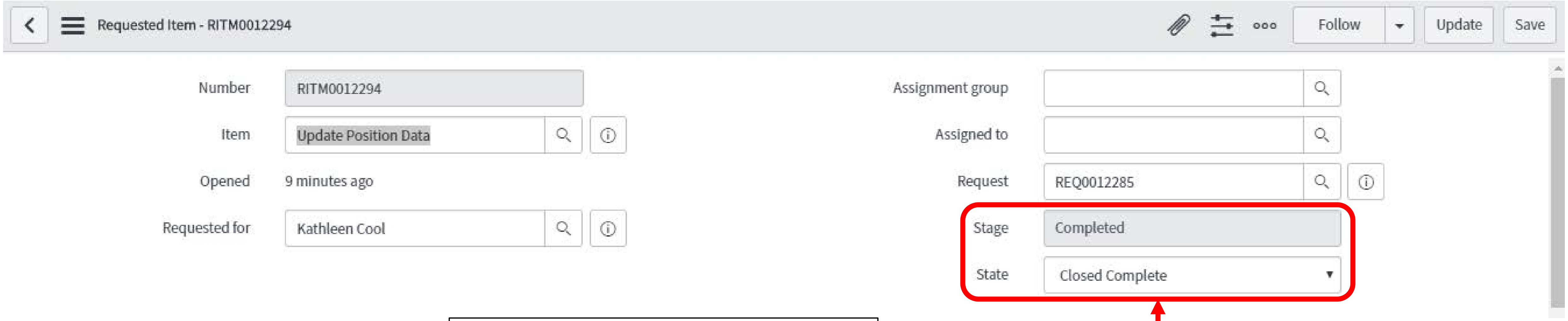
Unless a FLSA override or Employee Relations code is set to "Confidential," the "Update Position" task is immediately assigned to the Shared Services Center upon submission. If approvals are required, the request will be sent to SSC once one of the approvers have approved the request.

SSC Fulfiller



For any Update Position request, one task is generated and assigned to the Assignment Group SSC Name_Position Management Shared Service Fulfiller. After entered the transaction data in UCPath, the SSC fulfiller will close the task (SCTASK) by clicking the "Close Task" button.

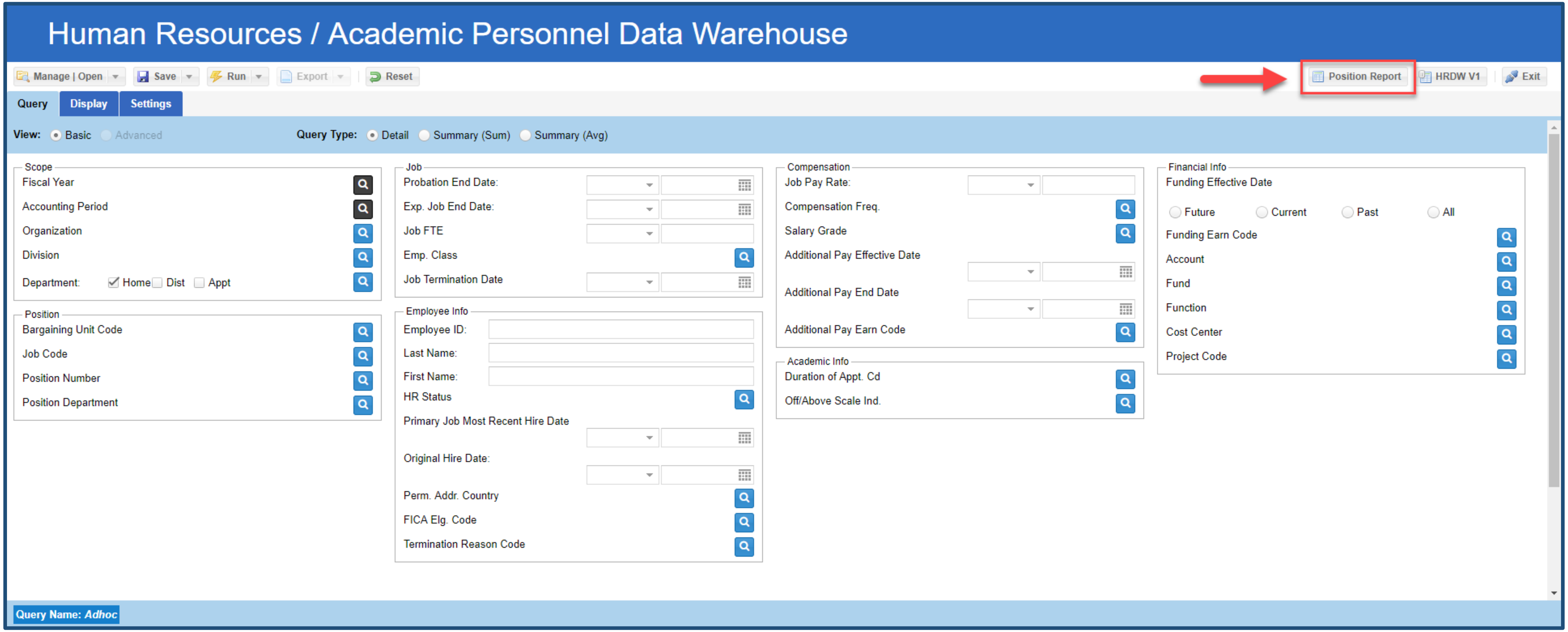
SSC Fulfiller



Since only one task is generated for Update Position requests, the RITM will close automatically. The Initiator will receive an email notifying them that the request has been completed and is now closed.

HRDW Reporting

HRDW Position Report



HRDW Position Report (continued)

Department Position Report

D01000 - Graduate School of Education

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

UCPath Inquiry

HR Inquiry

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

HR Inquiry (continued)

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

HR Inquiry (continued)

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

HR Inquiry (continued)

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

FAU / SCT Inquiry

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


Q
A

Additional Courses

- UCRONB200: Advanced FOM ServiceLink Onboarding
- UCRJDC200: Advanced FOM ServiceLink Job Data Changes

FOM|UCPath Training Team Email

FOMUCPathtraining@ucr.edu

Training Resources

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

Your Feedback Please

https://tinyurl.com/ucrfomucpathfeedback

Thank You