UNIVERSITY OF CALIFORNIA UCPath

Workforce Administration

PHCMWFAL250:
Template Transactions – Part I

Introductions

Instructor

- Name
- UC role
- UCPath role
- Years at UC
- Functional experience

Attendees

- Name
- University role
- Years at UC
- Expectations for this training

Training Logistics

Safety and Housekeeping

- Emergency evacuation procedures
- Restrooms
- Course duration: 4 hours
- Breaks

Classroom Etiquette

- Please turn off cell phones
- No email or web surfing
- Return from breaks on time
- Please use trash receptacles in the room

Parking Lot

- Parking Lot
  - Capture any questions or concerns that cannot be addressed during class
  - Provide follow up to all attendees of this class

Course Agenda

1: Template Transactions Overview

2: Full Hire

3: Concurrent Hire

4: Rehire

5: Personal Data

Course Objectives

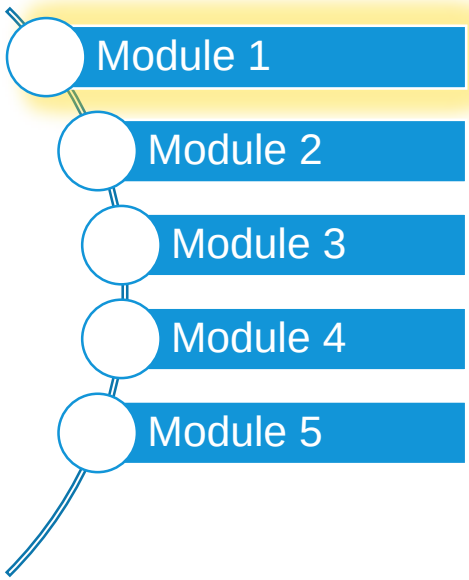
By the end of this course, you should be able to:

- Identify the actions that are processed using templates.
- Identify the pages used to initiate template transactions.
- View template transaction status.
- Describe the template transaction system process for full hire, concurrent hire, rehire and personal data changes.
- Initiate full hire, concurrent hire, rehire and personal data change template transactions.
- Update personal information.

Template Transactions Overview

Module 1

Module Objectives



The module learning objectives are:

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

Template Transactions – Introduction

- Template transactions are initiated through a UCPath template-based page called **Smart HR Templates**.
- Custom templates provide the fields necessary to complete the transaction.
- In many cases, there is a template specific to academic and another specific to staff. For example:
  - UC Full Hire - Staff Only
  - UC Full Hire - Academic Use Only

Available Templates

Template	Description
UC_ADD_CWR	UC Add Contingent Worker - No Position Data
UC_ADD_CWR_POSN	UC Add Contingent Worker With Position
UC_COM_CWR	UC Complete Contingent Worker Instance
UC_CONC_HIRE	UC Concurrent Hire - Staff Only
UC_CONC_HIRE_AC	UC Concurrent Hire - Academic
UC_EXT_CWR	Extend CWR Appointment
UC_EXT_CWR_POSN	Extend CWR (with Position) Appointment
UC_FULL_HIRE	UC Full Hire - Staff Only
UC_FULL_HIRE_AC	UC Full Hire - Academic Use Only
UC_INVOL_TERM	UC Involuntary Termination
UC_PERSON_DATA	UC Personal Data
UC_REHIRE	UC Rehire - Staff Only
UC_REHIRE_AC	UC Rehire - Academic
UC_RENW_CWR	UC Renew Contingent Worker - Without Position
UC_RENW_CWR_POS	UC Renew CWR Instance - with Position
UC_RETIREMENT	UC Retirement
UC_TRANSFER	UC Intra-Business Unit Transfer - Staff Only
UC_TRANSFER_AC	UC Intra-Business Unit Transfer - Academic Only
UC_VOL_TERM	UC Voluntary Termination

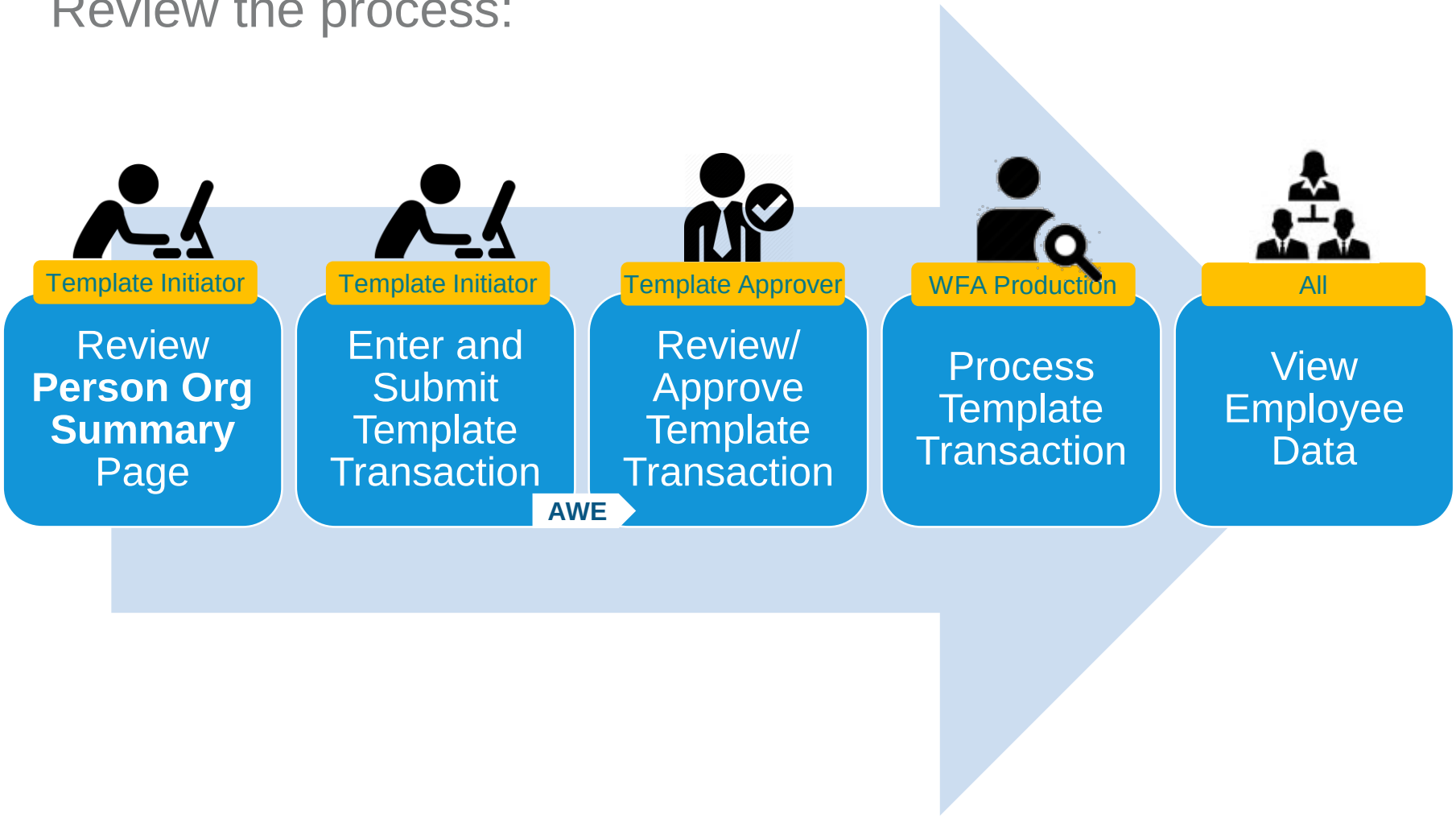
Transactions Processed Using Templates

The actions that are processed using templates include:

Full Hires	**Contingent Workers (CWR)**	**Concurrent Hires**
Rehires	**Personal Data Changes**	**Retirement**
Intralocation Transfers	**Interlocation Transfers**	**Terminations**

Template Transactions – System Process

Review the process:



Person Organizational Summary Overview

- Use the **Person Org Summary** page to view a summary of an employee's current organizational relationship, including HR and payroll status and all current job assignment details.
- The **Person Org Summary** page displays current employee information for all organizational relationships:
  - Employee
  - Contingent Worker (CWR)
  - Person of Interest (POI)
- This page does not display historical or future-dated employment details.
- You can view job assignment information for any UC employee, it is not restricted by business unit.

Person Organizational Summary Page

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > **Person Organizational Summary**

- If there is more than one row of data, click the **View All** link to all current information.

The header, above each **Assignments** section, displays the employee's statuses, indicates which job is the **Primary Job** and, if applicable, the **Termination Date** of the assignment.

Person Organizational Summary

Alex Rand Person ID 10002000

Employment Instances Find | View 1 First 1-2 of 2 Last

ORG Instance 0 HR Status Active Last Hire 01/01/2016
Primary Job: ☑ Payroll Status Active Termination Date

Assignments Personalize | Find | First 1 of 1 Last

Empl Record	Business Unit	Position Number	Dept ID	Department Description	Job Code	Description	Expected Job End Date	FTE	Employee Class	Union Code	FLSA Status	Pay Group	Employee Type	Probation Code	Probation End Date
0	UCOP1	40001351	814000	IMM OFC INFO TECH SRVCS	004920	STDT 3	09/01/2016	0.250000	Student: Casual/Restricted	99	N	MB7	H	None	

ORG Instance 1 HR Status Active Last Hire 01/21/2015
Primary Job: ☐ Payroll Status Active Termination Date

Assignments Personalize | Find | First 1 of 1 Last

Empl Record	Business Unit	Position Number	Dept ID	Department Description	Job Code	Description	Expected Job End Date	FTE	Employee Class	Union Code	FLSA Status	Pay Group	Employee Type	Probation Code	Probation End Date
1	UCOP1	40001456	814200	TECHNOLOGY SUPPORT SVS	004920	STDT 3	07/22/2016	0.240000	Student: Casual/Restricted	99	N	MB7	H	None	

Instructor Demo

View Person Organizational Summary

- Watch as your instructor demonstrates how to review employee information using the **Person Org Summary** page.
- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *View Person Organizational Summary* topic.
  - Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.

Exercise

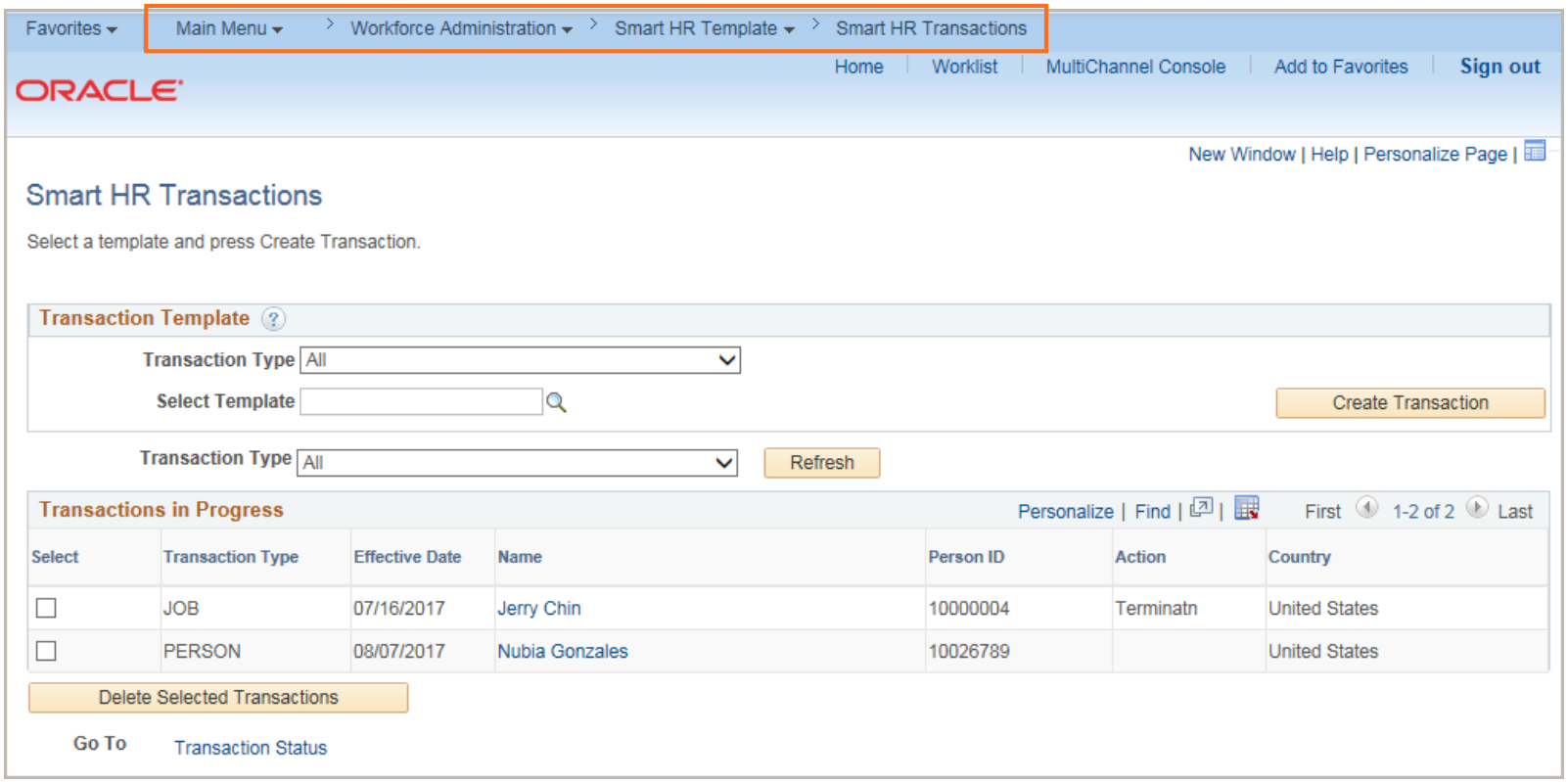
View Person Organizational Summary

- This is your opportunity to practice this task on your own.
- Open the UCPath Help site and refer to the *View Person Organizational Summary* topic.
- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.

Smart HR Transactions – Navigation

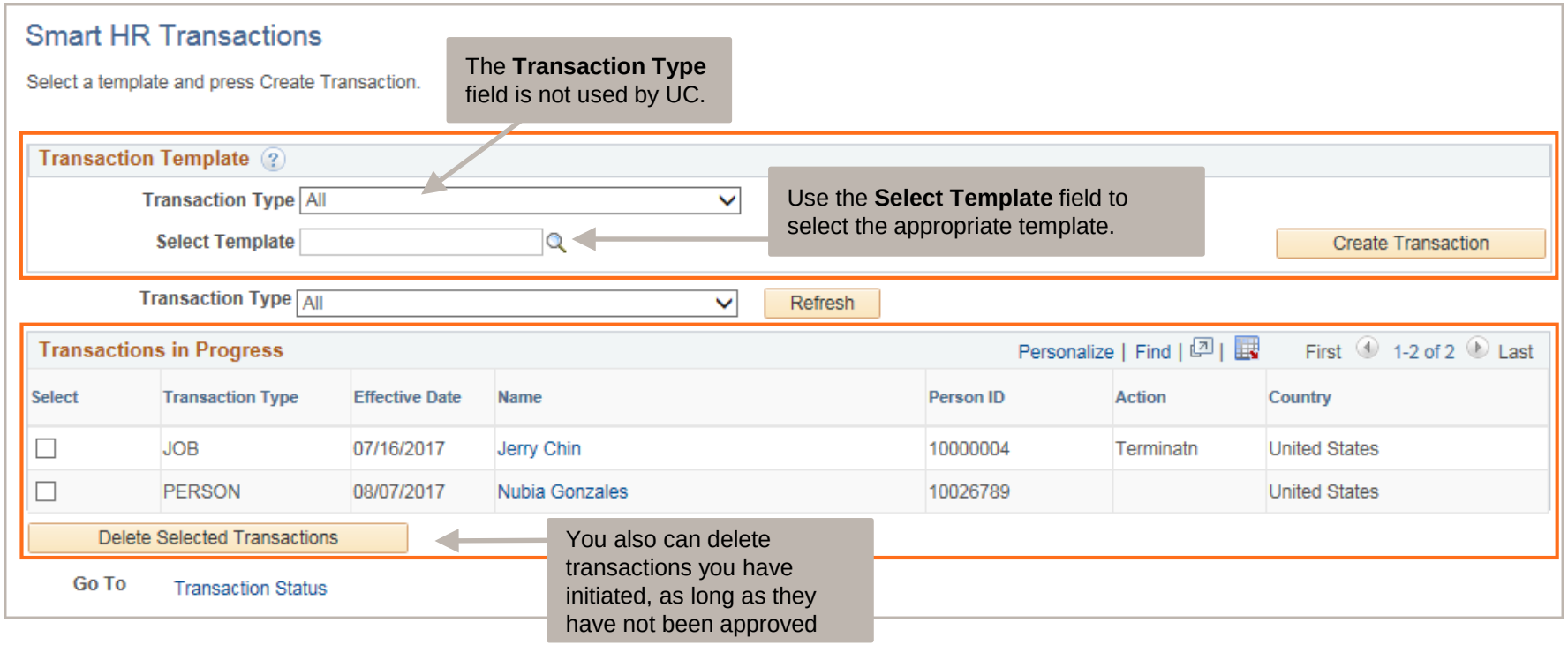
Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

- The **Smart HR Transactions** page is the starting point to initiate a template transaction.



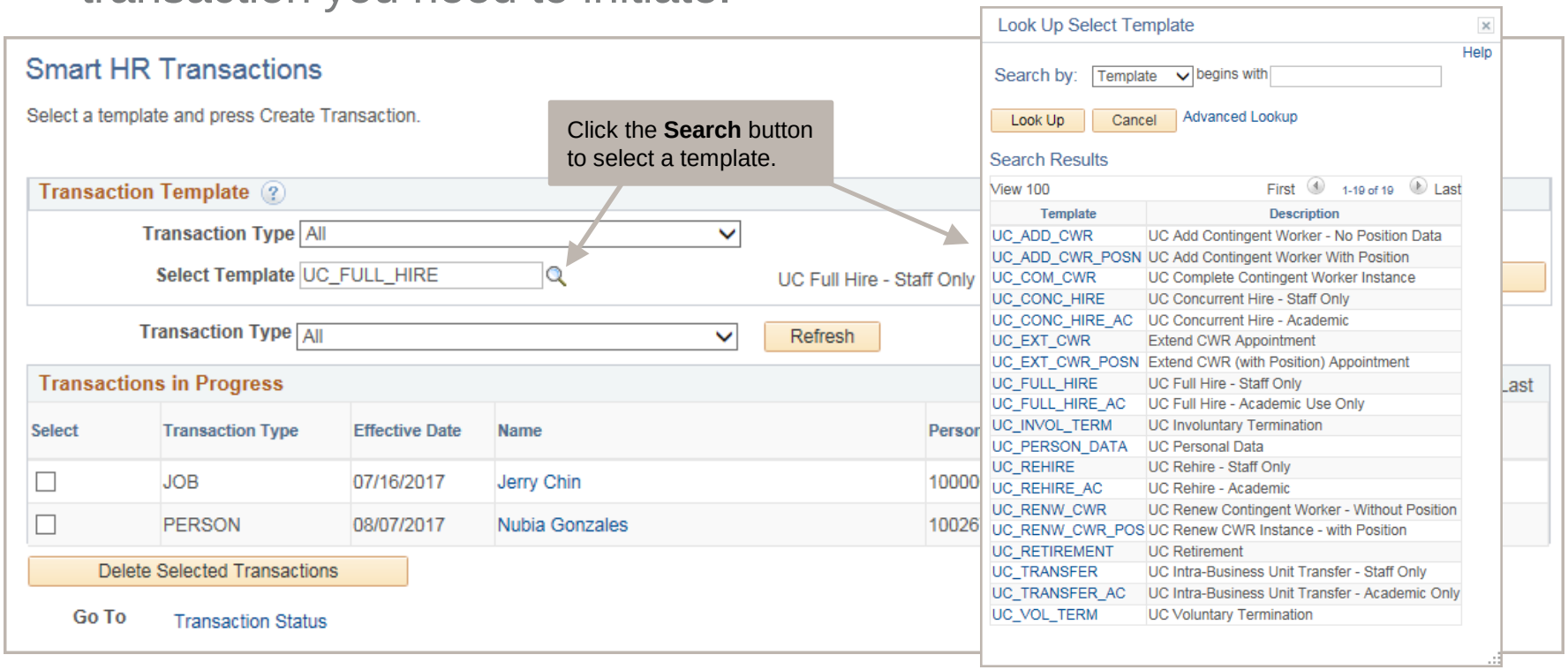
Smart HR Transactions – Page

- Use the **Transaction Template** section to select the type of template appropriate for the request.
- Use the **Transactions in Progress** section to review the template transactions you have already initiated or to delete transactions.



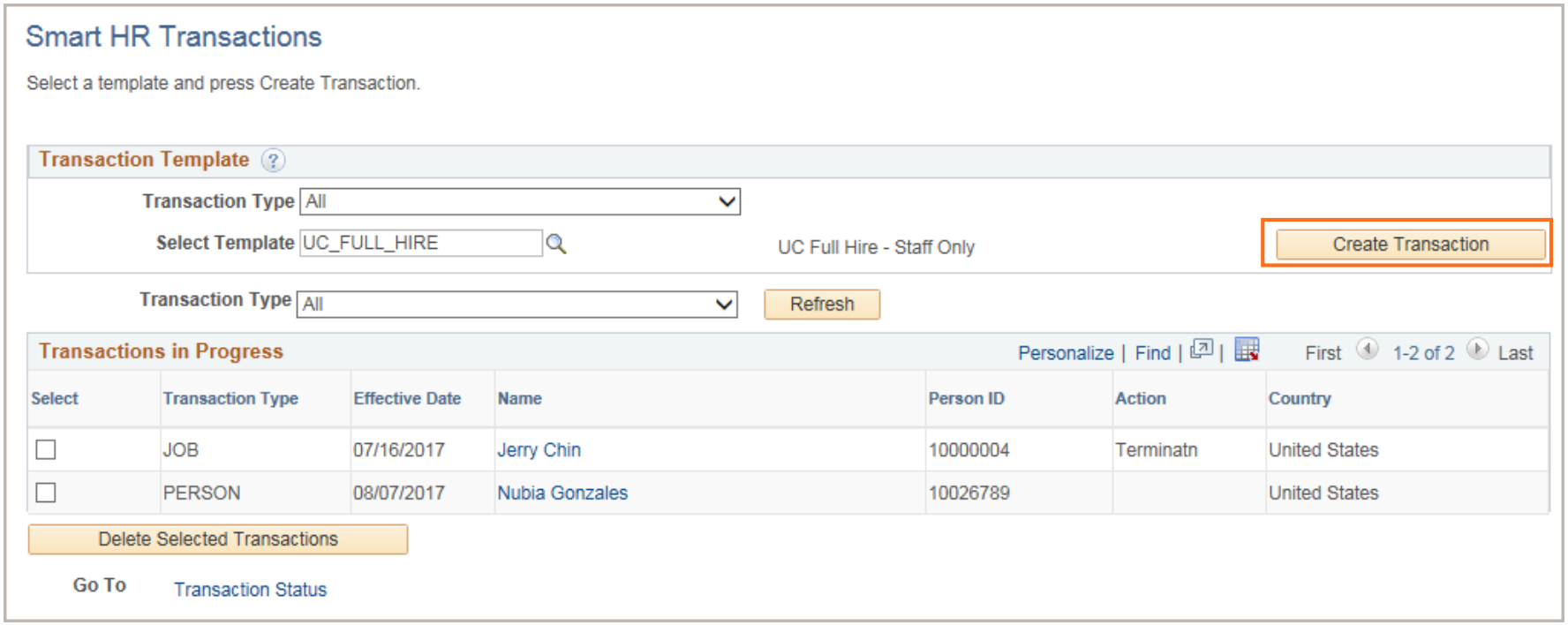
Smart HR Transactions – Templates

- The templates are configured to support the update of the appropriate UCPath component tables. Components updated can include **Job Data**, **Personal Data** and **Person Profile**.
- Use the **Select Template** look up to select the template for the transaction you need to initiate.



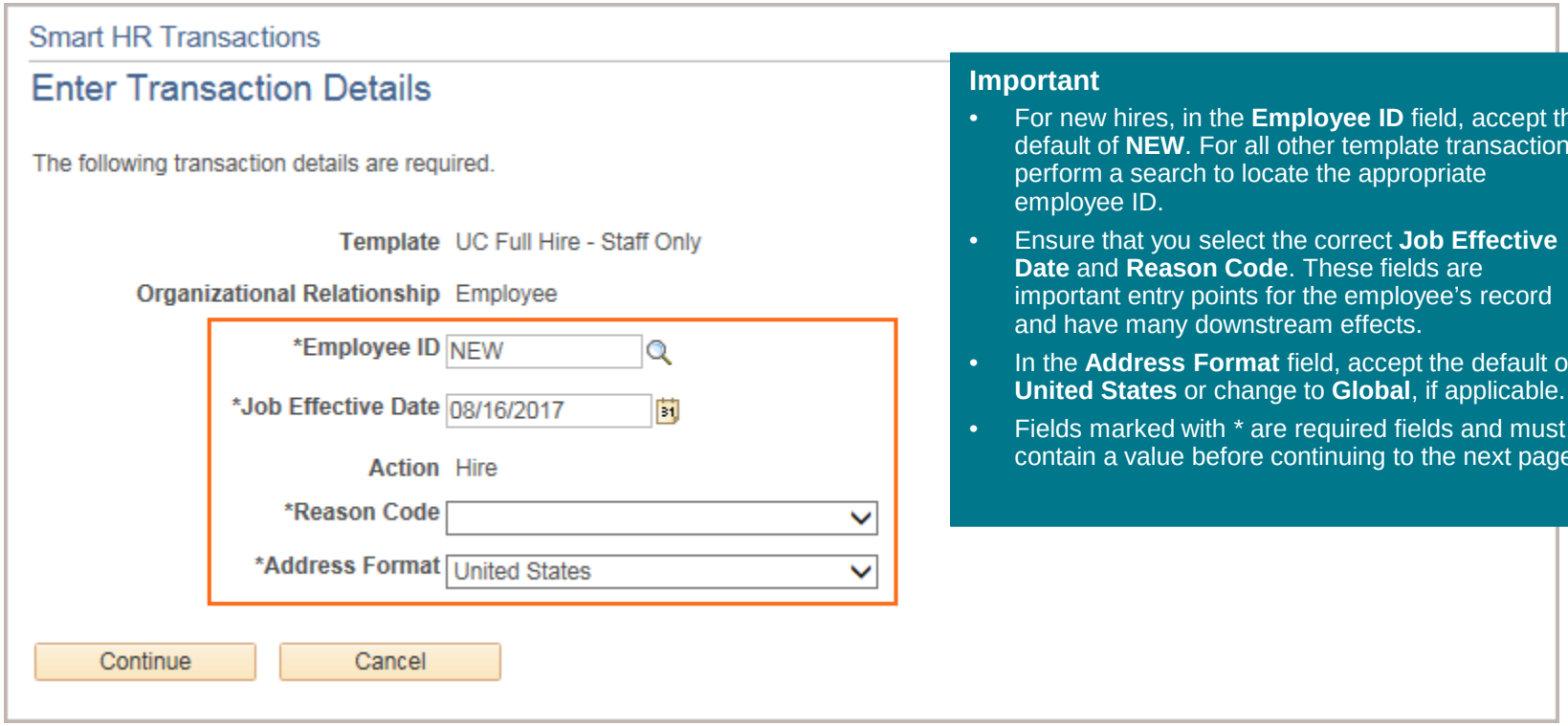
Smart HR Transactions – Create

After you select the template, click the **Create Transaction** button.



Smart HR Transactions – Action/Reason

Use the **Enter Transaction Details** page to enter the **Job Effective Date** and identify the **Reason Code**. Each template has a unique list of **Reason** codes.



Important

- For new hires, in the **Employee ID** field, accept the default of **NEW**. For all other template transactions, perform a search to locate the appropriate employee ID.
- Ensure that you select the correct **Job Effective Date** and **Reason Code**. These fields are important entry points for the employee's record and have many downstream effects.
- In the **Address Format** field, accept the default of **United States** or change to **Global**, if applicable.
- Fields marked with * are required fields and must contain a value before continuing to the next page.

Job Aid

Template Transactions – Action Reason Codes and Descriptions

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

Transaction Status

Use the following pages to view the status of template transactions.

SS Smart HR Transaction Page

Use to view the status of template transactions that are still in the approval workflow (AWE).

Transaction Status Page

Use to view the status of template transactions that have completed the approval workflow (AWE) and are being processed by UCPath Center WFA Production.

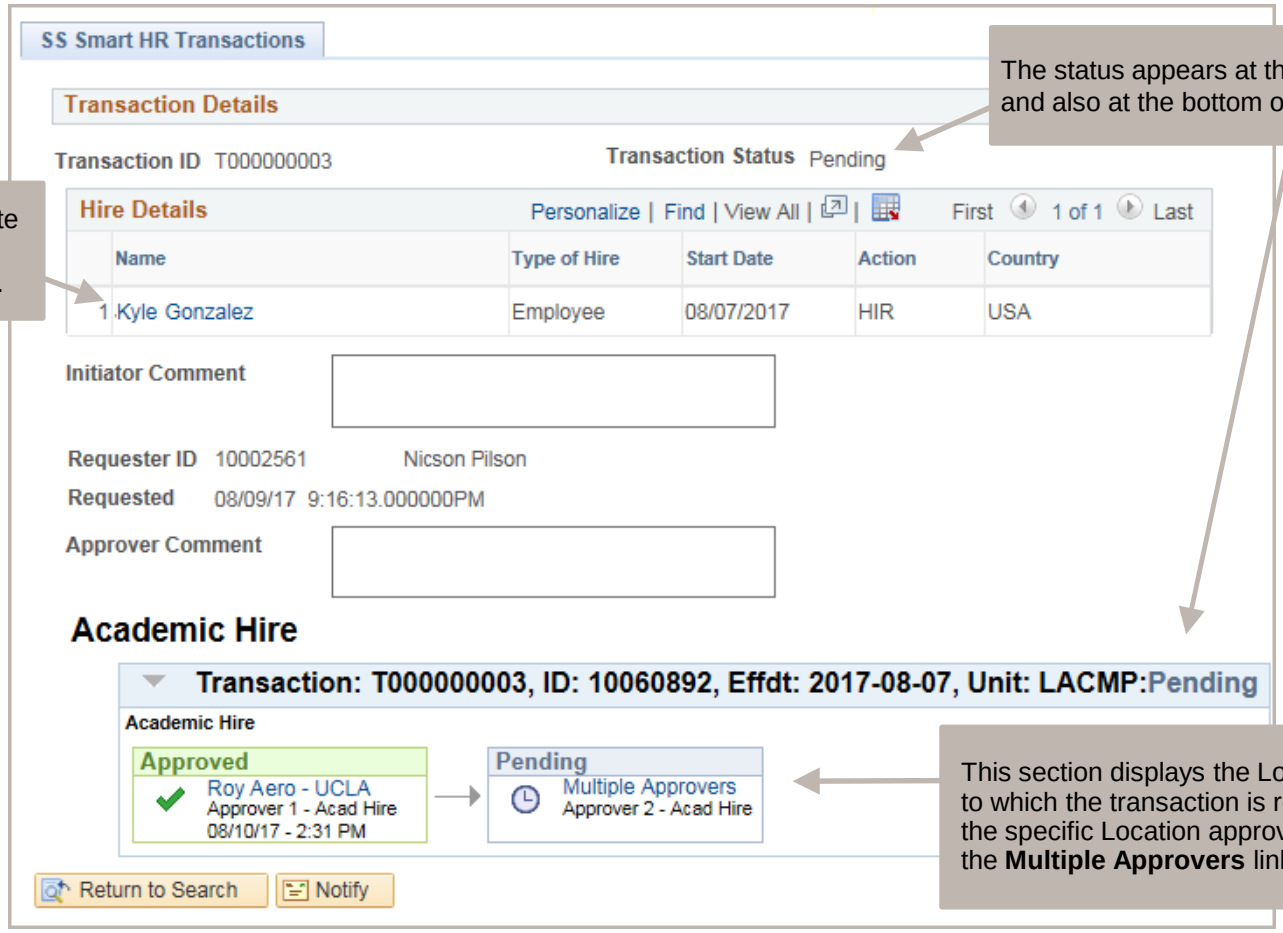
SS Smart HR Transactions

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

- View the status of a template transaction and where it is within the approval workflow (AWE).
- View transactions you have submitted along with all transactions submitted within your business unit.
- Review who the Approvers are at each level.
- Review the template entry details (the fields are view-only).

SS Smart HR Transactions Page

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **SS Smart HR Transactions**



The status appears at the top of the page and also at the bottom of the page

To view the template transaction details, click the **Name** link.

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

Instructor Demo

View Template Transaction Status – SS Smart HR Transactions Page

- Watch as your instructor demonstrates how to review the status of template transaction within approval workflow.
- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *View Template Transaction Status – SS Smart HR Transactions Page* topic.
  - Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.

Exercise

View Template Transaction Status – SS Smart HR Transactions Page

- This is your opportunity to practice this task on your own.
- Open the UCPath Help site and refer to the *View Template Transaction Status – SS Smart HR Transactions Page* topic.
- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.

Transaction Status

- Use the **Transaction Status** page to view the status of templates after they have completed AWE.
  - This page tracks the status of templates after they have been routed and approved at the Locations.
- View transactions you have submitted along with all transactions for departments for which you have security access.
- This page is also used to clone a transaction that was cancelled or denied.

Transaction Status Page

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

Transaction Status

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

HR Review Status: All
Transaction Type: All
Transaction Status: All
Start Date From: 03/11/2017 To: 03/13/2017

Refresh | Clear

Adjust the selection criteria as needed to filter the displayed transactions.

Transaction Status values are: **Requested**, **Completed**, **Hired/Added**, **Denied** and **Cancel**.

If a transaction is cancelled or denied, you can **View Comments** to see why it was cancelled/denied, then **Clone** the existing template information into a new template, correct and resubmit.

Transaction Status

Personalize | Find | First 1-12 of 12 Last

Select	Transaction Type	Effective Date	Transaction Status	Person ID	Empl Record	Action		Name	
☐	Change Job Data	03/11/2017	Cancel	10002641		Data Chg	Clone	Eberhardt,Kasey Louis	View Comments
☐	Change Job Data	03/11/2017	Completed	10003093		Data Chg		Sullivan,Seung-Youn	
☐	Change Job Data	03/11/2017	Completed	10002641		Data Chg		Eberhardt,Kasey Louis	
☐	Change Job Data	03/11/2017	Requested	10000945		Terminatn		Holmes,Eric	
☐	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003135		Hire		Fleck,Angelique G	
☐	Hire/Rehire and Profile Data	03/13/2017	Cancel	NEW		Hire	Clone	Jose Velez	View Comments
☐	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003131		Hire		Linares,Shaun Nguyen	
☐	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003130		Hire		Sit,Giuliano Ashley	
☐	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003132		Hire		Myers,Maeve	
☐	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003134		Hire		Pollack,Joel	

Select All Deselect All

Delete Selected Transactions

Instructor Demo

View Template Transaction Status – Transaction Status Page

- Watch as your instructor demonstrates how to review Smart HR template transaction statuses in UCPath.
- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *View Template Transaction Status – Transaction Status Page* topic.
  - Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.

Exercise

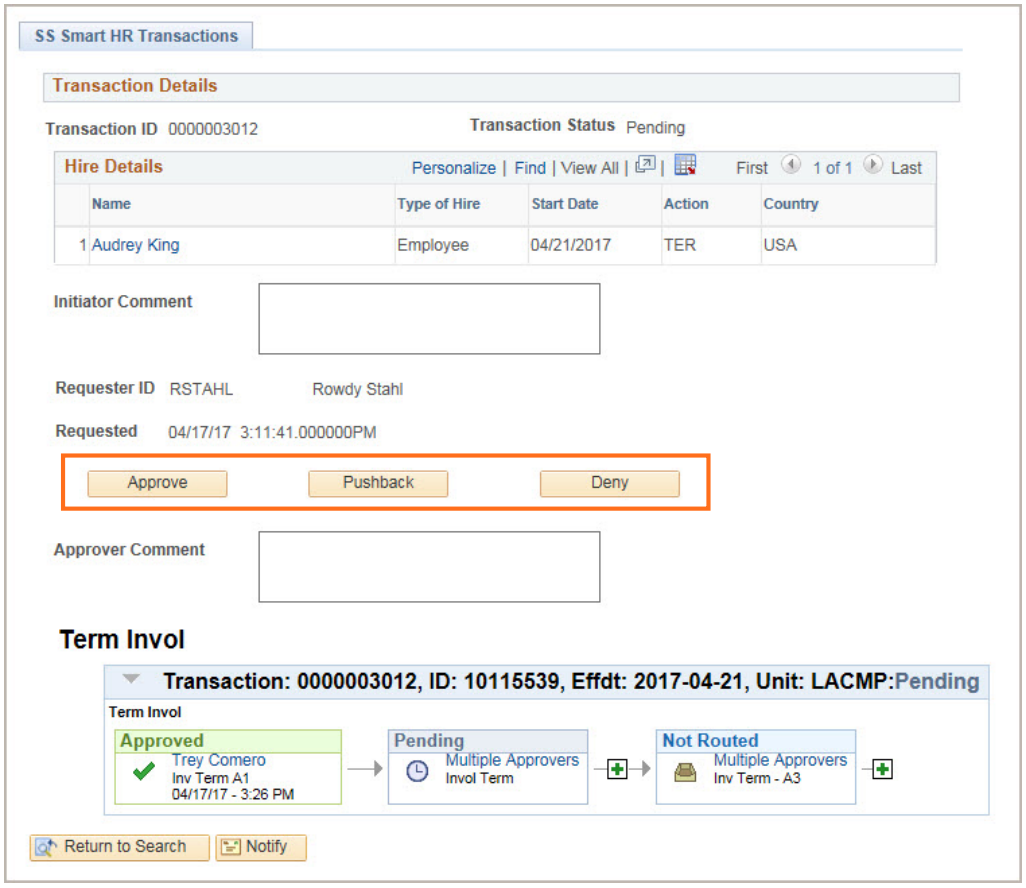
View Template Transaction Status – Transaction Status Page

- This is your opportunity to practice this task on your own.
- Open the UCPath Help site and refer to the *View Template Transaction Status – Transaction Status Page* topic.
- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.

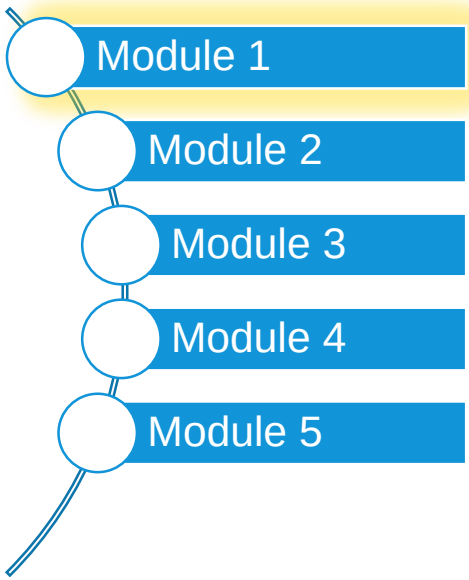
AWE and Transactions

AWE is the UCPath functionality that routes transactions for review and approval. Location Approver options include:

- Approve
- Pushback
  - If more than one Approver
- Deny



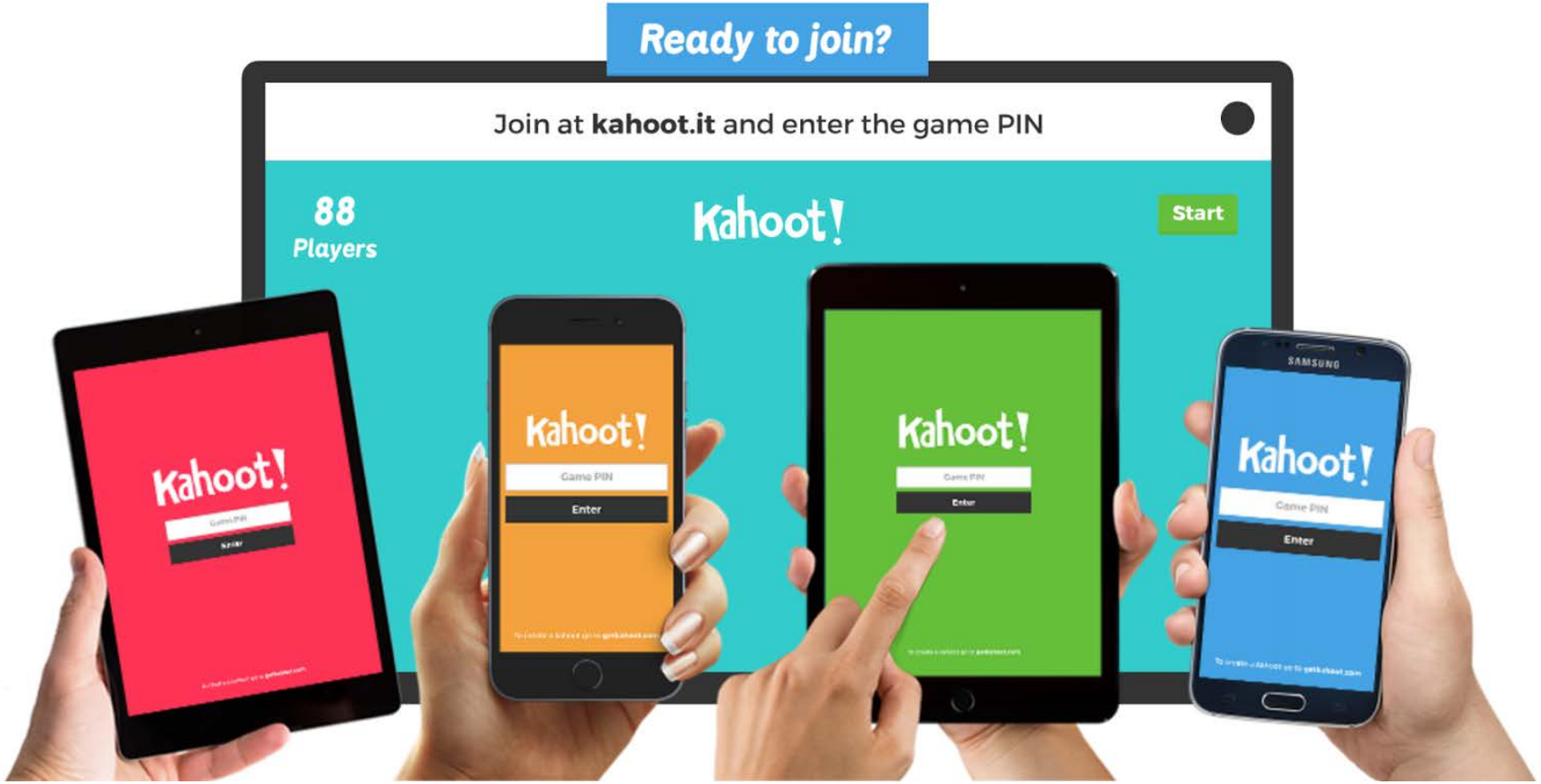
Module Objectives Review



Having completed this module, you should be able to:

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

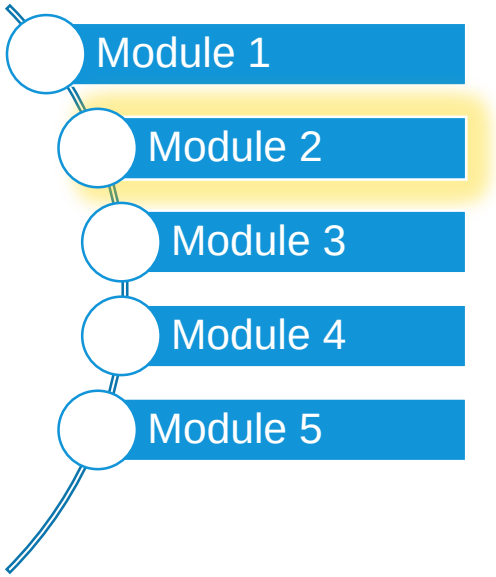
Check Your Understanding



Full Hire

Module 2

Module Objectives



The module learning objectives are:

- Describe the full hire system process.
- Initiate a full hire template transaction.
- Clone a template transaction.
- Update **Person Profile** information.

Full Hire – Overview

- The full hire template transactions create a new record for an employee who receives compensation through UCPath Payroll processing.
- The full hire templates are used to hire an employee who does not already have a UCPath employee ID.
- A separate hire template is available for academic and for staff full hires.

Available Templates

Template	Description
UC_ADD_CWR	UC Add Contingent Worker - No Position Data
UC_ADD_CWR_POSN	UC Add Contingent Worker With Position
UC_COM_CWR	UC Complete Contingent Worker Instance
UC_CONC_HIRE	UC Concurrent Hire - Staff Only
UC_CONC_HIRE_AC	UC Concurrent Hire - Academic
UC_EXT_CWR	Extend CWR Appointment
UC_EXT_CWR_POSN	Extend CWR (with Position) Appointment
UC_FULL_HIRE	UC Full Hire - Staff Only
UC_FULL_HIRE_AC	UC Full Hire - Academic Use Only
UC_INVOL_TERM	UC Involuntary Termination
UC_PERSON_DATA	UC Personal Data
UC_REHIRE	UC Rehire - Staff Only
UC_REHIRE_AC	UC Rehire - Academic
UC_RENW_CWR	UC Renew Contingent Worker - Without Position
UC_RENW_CWR_POS	UC Renew CWR Instance - with Position
UC_RETIREMENT	UC Retirement
UC_TRANSFER	UC Intra-Business Unit Transfer - Staff Only
UC_TRANSFER_AC	UC Intra-Business Unit Transfer - Academic Only
UC_VOL_TERM	UC Voluntary Termination

Full Hire – System Process

Review **Person Org Summary** page

Navigate to the **Smart HR Transactions** page

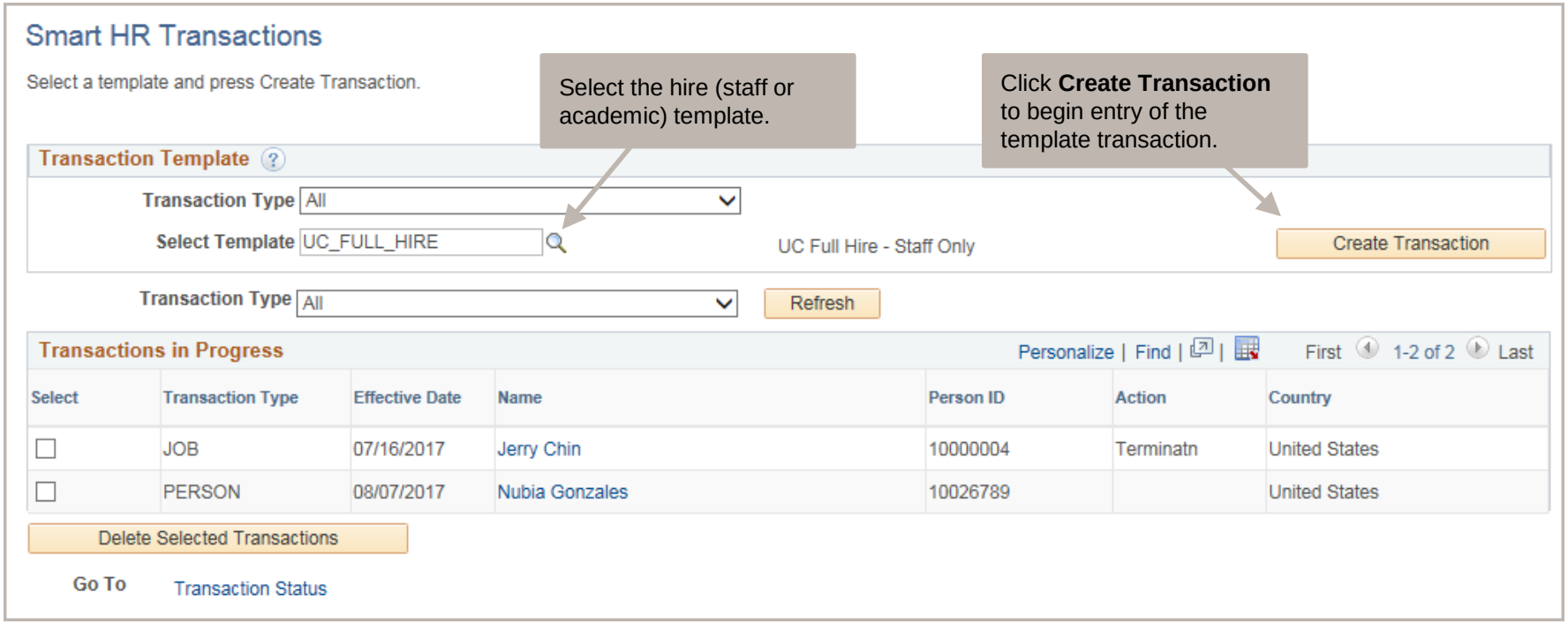
Select the **Full Hire** template

Enter full hire details and attach supporting documentation as needed

Save and Submit

Smart HR Transactions Page

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

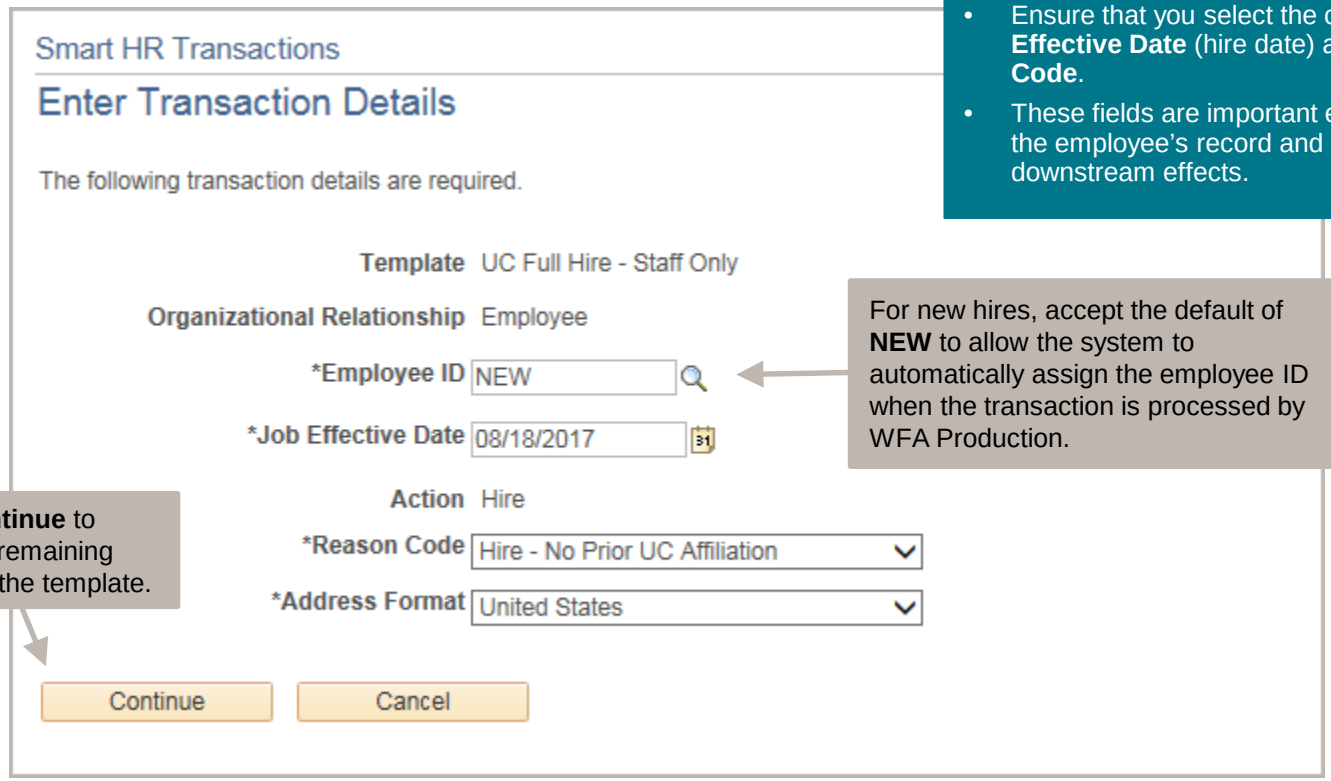


Enter Transaction Details Page

Enter the details for the full hire, beginning with the **Job Effective Date** (hire date) and the **Reason Code**.

Important

- Ensure that you select the correct **Job Effective Date** (hire date) and **Reason Code**.
- These fields are important entry points for the employee's record and have many downstream effects.

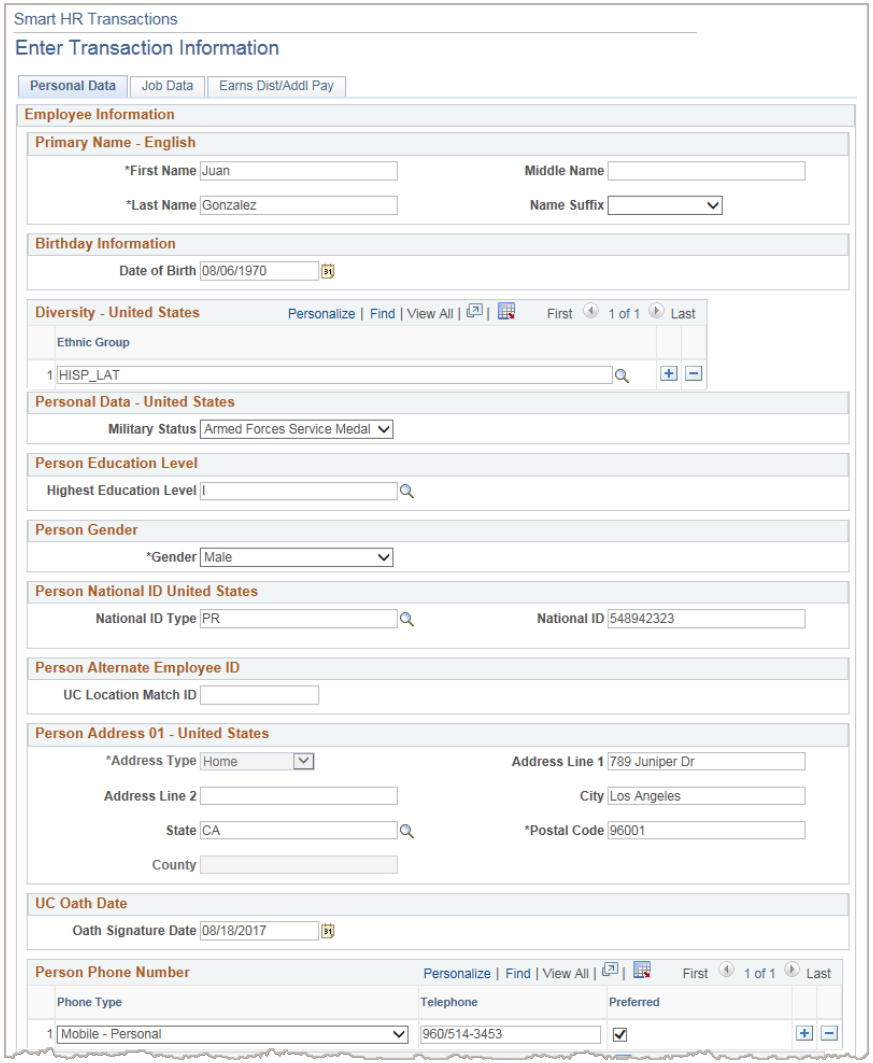


For new hires, accept the default of **NEW** to allow the system to automatically assign the employee ID when the transaction is processed by WFA Production.

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

Enter Transaction Information Page

- Enter the details for the hire on the **Personal Data**, **Job Data** and **Earns Dist/Addl Pay** tabs.
- When complete, click the **Save and Submit** button to submit the template for review and approval.
- You must navigate through all the tabs before the **Save and Submit** button is available.



Full Hire Template Defaults

Many fields automatically populate or default when entering certain fields.

- Several fields default after the **Position** is entered. Some examples include:
  - Job Code
  - Employee Classification (for Academic employees)
  - Standard Hours, FTE
  - Salary Admin Plan, Salary Grade
    - The Job Code determines the Salary Admin Plan and Salary Grade
- Form many **Job Codes** a **Step** must be entered to default the compensation fields.
  - Stepped positions are largely Represented Staff & Ladder Rank Faculty.
  - If the salary plan is open range – there are no steps available to select.
  - If steps are not applicable for the **Job Code**, the compensation fields must be manually entered.

Full Hire Template – Job Data Page

Smart HR Transactions

Enter Transaction Information

Personal Data | Job Data | Earns Dist/Addl Pay

After the **Position Number** is entered, many of the other fields default and are view-only.

Employee Information

Work Location - Position Data

*Position Number 40159338

Work Location - Job Fields

Business Unit LACMP

Department 352500

Location Code 141648

Establishment ID UCLA

Job Information - Job Code

Job Code 004723

Job Information - United States

FLSA Status Nonexempt

Job Labor - Union Code

Union Code CX

Job Information - Reporting Information

Reports To Position Number 40081270

The **Employee Classification** field defaults for academic employee and is view-only.
You must enter the correct classification for staff employees.

Job Information - Employee Classification

*Employee Classification 2

Classified/Unclassified Ind Professional & Support Staff

Job Information - Standard Hours

Standard Hours 40.000000

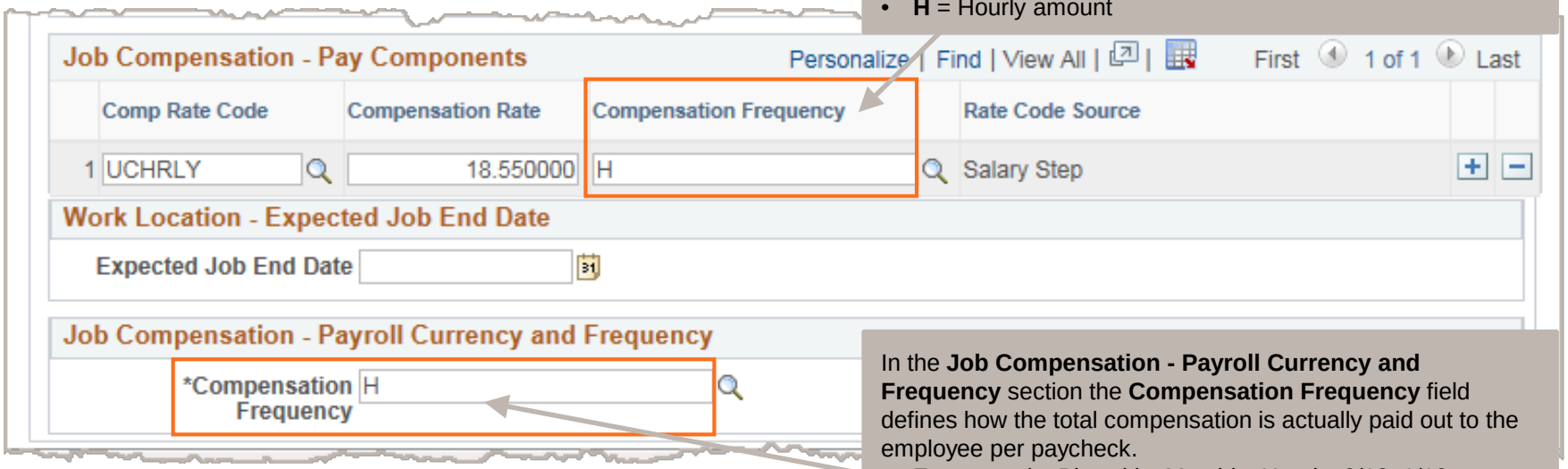
FTE 1.000000

Compensation Fields

- **Comp Rate Codes** are used to define each component of the employee's base salary.
- **Compensation Rate** is the amount paid at the compensation frequency.

In the **Job Compensation - Pay Components** section the **Compensation Frequency** field defines how the quoted compensation amount is presented:

- **A** = Annual amount
- **H** = Hourly amount



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

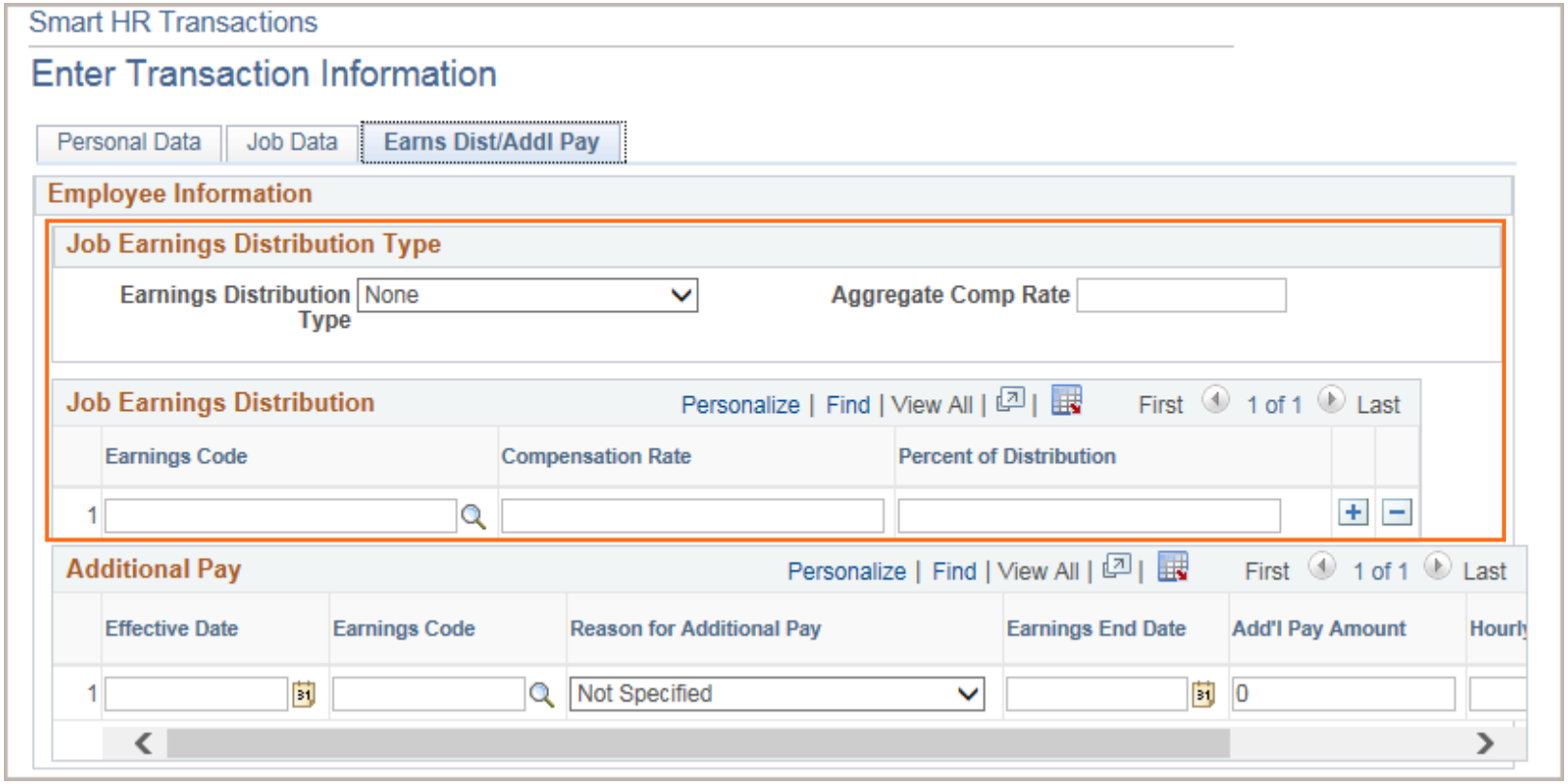
- For example, Biweekly, Monthly, Hourly, 9/12, 1/10.
- This field defaults from the job code.
- This field can be overridden if there is a need to sync up pay cycles between two or ore jobs.

Multiple Components of Pay

- Certain employees have Multiple Components of Pay (MCOP) because they have either an off-scale or negotiated/incentive component.
  - Staff employees - there is very little need for MCOP (outside of Staff Physicians)
  - Academic employees - this is more frequent especially if the employee is in the Health Sciences Comp Plan (HSCP)

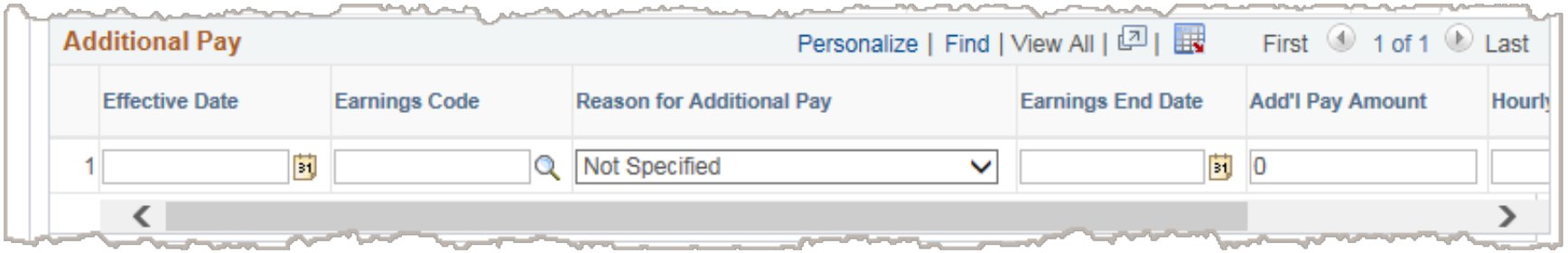
Job Earnings Distribution

Job Earnings Distribution (JED) is mostly automated and populates distributions **By Amount** in the **Job Earnings Distribution** section. The Earn Codes are pulled in based on the **Comp Rate Codes** in the **Pay Components** section.



Additional Pay

- There are many cases where an employee's base salary is paid through **Additional Pay** using a flat dollar amount.
  - Most commonly for UNEX instructors.
  - No Compensation in Job Data.
- **Additional Pay** should be used primarily for recurring payments.
  - Recurring payments are paid over multiple, consecutive pay periods.
  - Recurring additional pay can be submitted on the hire templates (Full Hire, Rehire, Concurrent Hire).



Job Aid

Template Transactions – Action Reason Codes and Descriptions

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

Instructor Demo

Initiate Full Hire Template Transaction

- Watch as your instructor demonstrates how to initiate a full hire template transaction in UCPath.
- Follow along using the UCPath Help topic.
  - **Staff:** Open the UCPath Help site and refer to the *Initiate Full Hire Template Transaction (Staff)* topic.
  - **Academic:** Open the UCPath Help site and refer to the *Initiate Full Hire Template Transaction (Acad)* topic.
  - Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.

Exercise

Initiate Full Hire Template Transaction

- This is your opportunity to practice this task on your own.
  - **Staff:** Open the UCPath Help site and refer to the *Initiate Full Hire Template Transaction (Staff)* topic.
  - **Academic:** Open the UCPath Help site and refer to the *Initiate Full Hire Template Transaction (Acad)* topic.
- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.

Clone a Template

- In some cases, UCPC WFA Production may need to cancel or deny a template transaction. WFA Production adds a comment explaining the cancellation/denial.
- You can review the comments, clone the template transaction, update necessary information and submit the new template transaction.
- Access the **Transaction Status** page to view the status of transactions, review comments and clone the template that is cancelled/denied.

Clone a Template – Transaction Status Page

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

Transaction Status

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

HR Review Status: All

Transaction Type: All

Transaction Status: All

Start Date From: 03/11/2017 To: 03/13/2017

Refresh | Clear

You can clone transaction that display a **Transaction Status** of **Cancel** or **Denied**.

You can **View Comments** to see why it was cancelled or denied, then **Clone** the existing template information into a new template, correct and resubmit.

Transaction Status — Personalize | Find | First 1-12 of 12 Last

Select	Transaction Type	Effective Date	Transaction Status	Person ID	Empl Record	Action		Name	
☐	Change Job Data	03/11/2017	Cancel	10002641		Data Chg	Clone	Eberhardt,Kasey Louis	View Comments
☐	Change Job Data	03/11/2017	Completed	10003093		Data Chg		Sullivan,Seung-Youn	
☐	Change Job Data	03/11/2017	Completed	10002641		Data Chg		Eberhardt,Kasey Louis	
☐	Change Job Data	03/11/2017	Requested	10000945		Terminatn		Holmes,Eric	
☐	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003135		Hire		Fleck,Angelique G	
☐	Hire/Rehire and Profile Data	03/13/2017	Cancel	NEW		Hire	Clone	Jose Velez	View Comments
☐	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003131		Hire		Linares,Shaun Nguyen	
☐	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003130		Hire		Sit,Giuliano Ashley	
☐	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003132		Hire		Myers,Maeve	
☐	Hire/Rehire and Profile Data	03/13/2017	Hired/Added	10003134		Hire		Pollack,Joel	

Select All Deselect All

Delete Selected Transactions

Instructor Demo

Clone Template Transaction

- Watch as your instructor demonstrates how to clone a cancelled or denied template transaction in UCPath.
- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *Clone Template Transaction* topic.
  - Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.

Exercise

Clone Template Transaction

- This is your opportunity to practice this task on your own.
- Open the UCPath Help site and refer to the *Clone Template Transaction* topic.
- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.

Person Profile – Overview

The **Person Profile** page contains several tabs that store a variety of information about an employee.

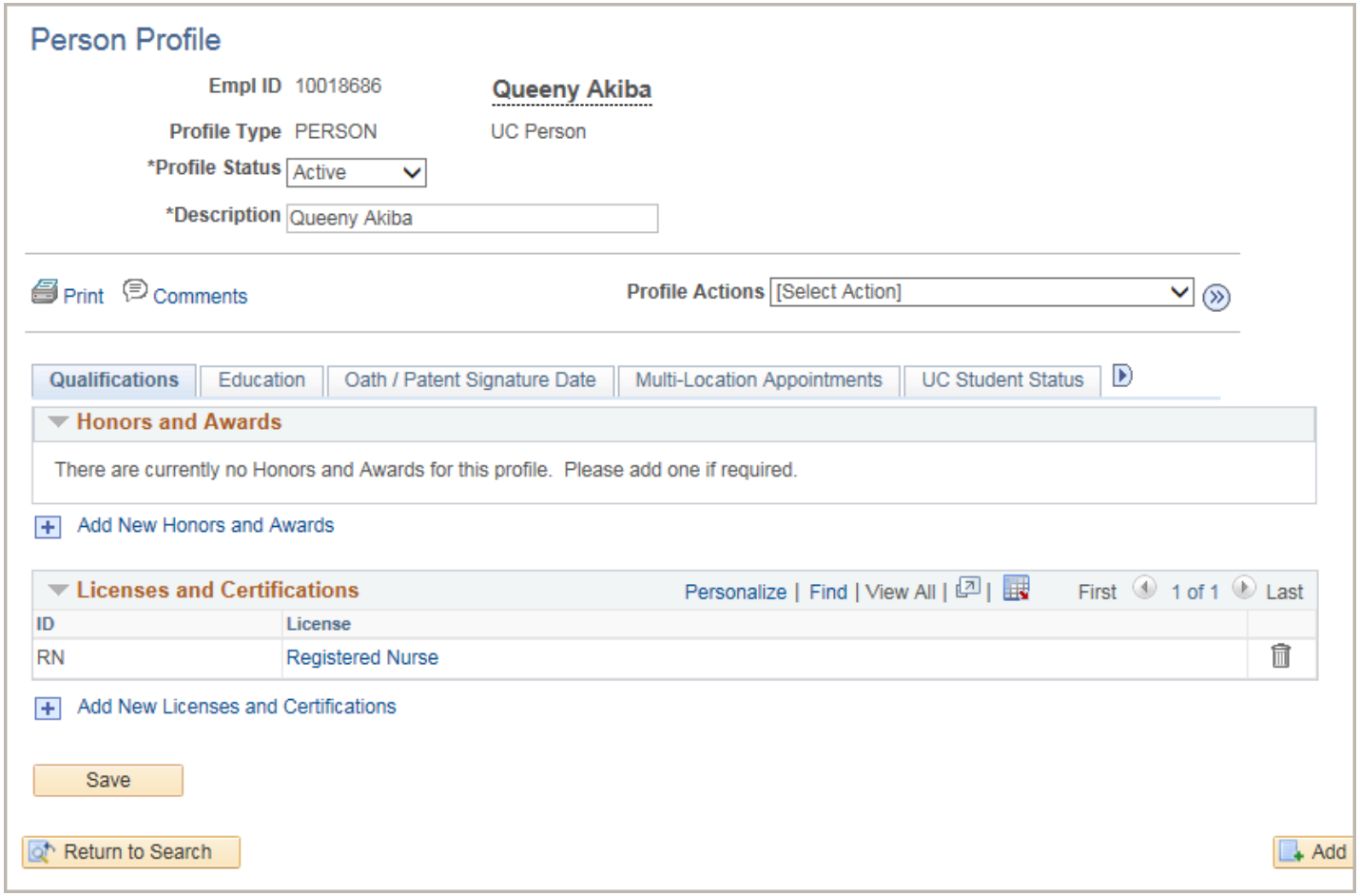
Person Profile Information Examples

- Honors and Awards
- License and Certificates
- Degrees
- UC Specialty Codes
- UC Prior Service Code
- UC Separation Destination Code
- Oath Signature Date
- Patent Amendment Date
- Patent Acknowledgment
- UC Student Status
- Credit Card

- Location Template Initiators have access to view and update all information in the **Person Profile** page for employees.
- The Oath Signature Date , Patent Amendment Date and Patent Acknowledgment fields are completed on the hire/rehire templates and automatically transferred to the **Person Profile** page after the template is processed.

Person Profile Page

Navigation: PeopleSoft Menu > Workforce Development > Profile Management > Profiles > **Person Profiles**



Instructor Demo

Update Person Profile Information

- Watch as your instructor demonstrates how to update an employee's person profile information in UCPath.
- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *Update Person Profile Information* topic.
  - Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.

Exercise

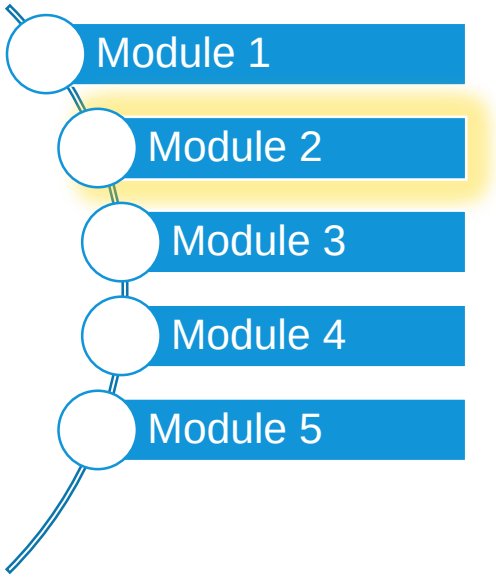
Update Person Profile Information

- This is your opportunity to practice this task on your own.
- Open the UCPath Help site and refer to the *Update Person Profile Information* topic.
- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.

I-9 Process

- The vendor for the I-9 / E-Verify process is Tracker.
- There are no integrations with UCPath (Inbound or Outbound) at the time of hire.
- It is the location's responsibility to update I-9 information in the **Security Clearance** page.
  - This is also listed as a task on the Hire Checklist where there is a link to the Security Clearance page.

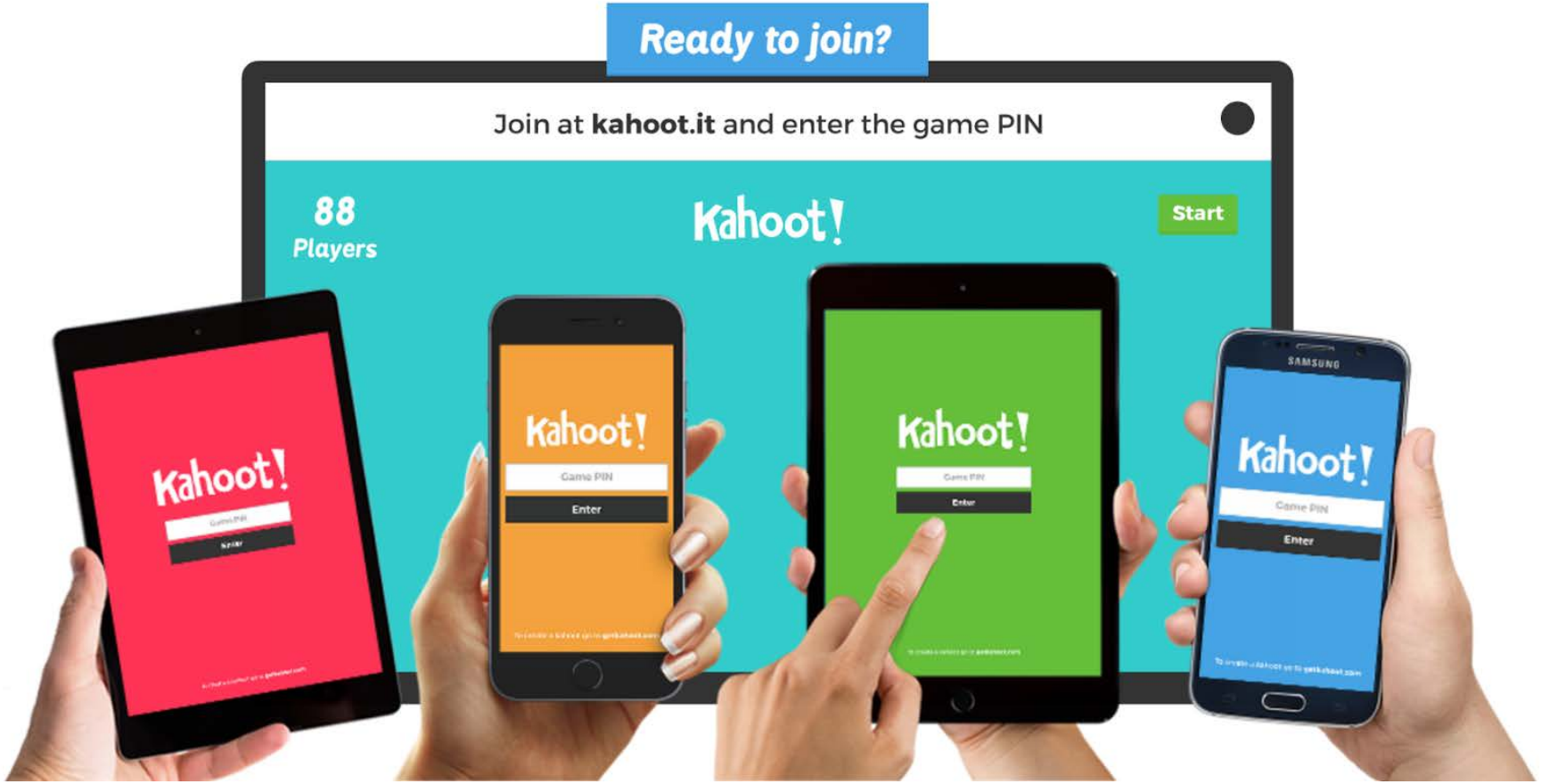
Module Objectives Review



Having completed this module, you should be able to:

- Describe the full hire system process.
- Initiate a full hire template transaction.
- Clone a template transaction.
- Update **Person Profile** information.

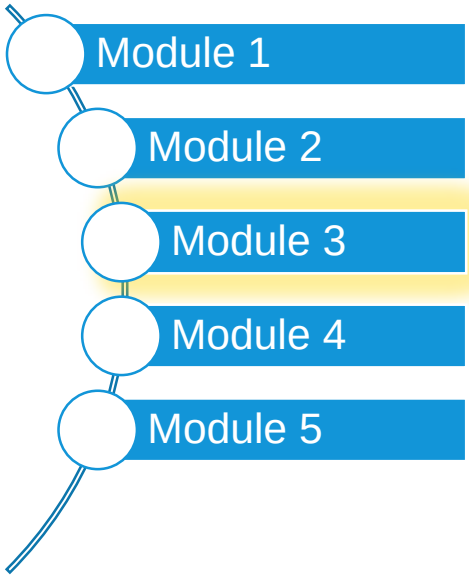
Check Your Understanding



Concurrent Hire

Module 3

Module Objectives



The module learning objectives are:

- Describe the concurrent hire system process.
- Initiate a concurrent hire template transaction.

Concurrent Hire – Overview

Concurrent Hire:

- A staff or academic employee adds an additional job, which is concurrent to his or her existing job with UC.
  - Non-Dual: Two or more jobs that do not exceed a total percent time of 100%.
  - Dual: Two or more jobs that exceed a total percent time of 100%.
- A separate concurrent hire template is available for academic and for staff.

Available Templates

Template	Description
UC_ADD_CWR	UC Add Contingent Worker - No Position Data
UC_ADD_CWR_POSN	UC Add Contingent Worker With Position
UC_COM_CWR	UC Complete Contingent Worker Instance
UC_CONC_HIRE	UC Concurrent Hire - Staff Only
UC_CONC_HIRE_AC	UC Concurrent Hire - Academic
UC_EXT_CWR	Extend CWR Appointment
UC_EXT_CWR_POSN	Extend CWR (with Position) Appointment
UC_FULL_HIRE	UC Full Hire - Staff Only
UC_FULL_HIRE_AC	UC Full Hire - Academic Use Only
UC_INVOL_TERM	UC Involuntary Termination
UC_PERSON_DATA	UC Personal Data
UC_REHIRE	UC Rehire - Staff Only
UC_REHIRE_AC	UC Rehire - Academic
UC_RENW_CWR	UC Renew Contingent Worker - Without Position
UC_RENW_CWR_POS	UC Renew CWR Instance - with Position
UC_RETIREMENT	UC Retirement
UC_TRANSFER	UC Intra-Business Unit Transfer - Staff Only
UC_TRANSFER_AC	UC Intra-Business Unit Transfer - Academic Only
UC_VOL_TERM	UC Voluntary Termination

Concurrent Hire – System Process

Review **Person Org Summary** page

Navigate to the **Smart HR Transactions** page

Select the **Concurrent Hire** template

Enter concurrent hire details and attach supporting documentation as needed

Save and Submit

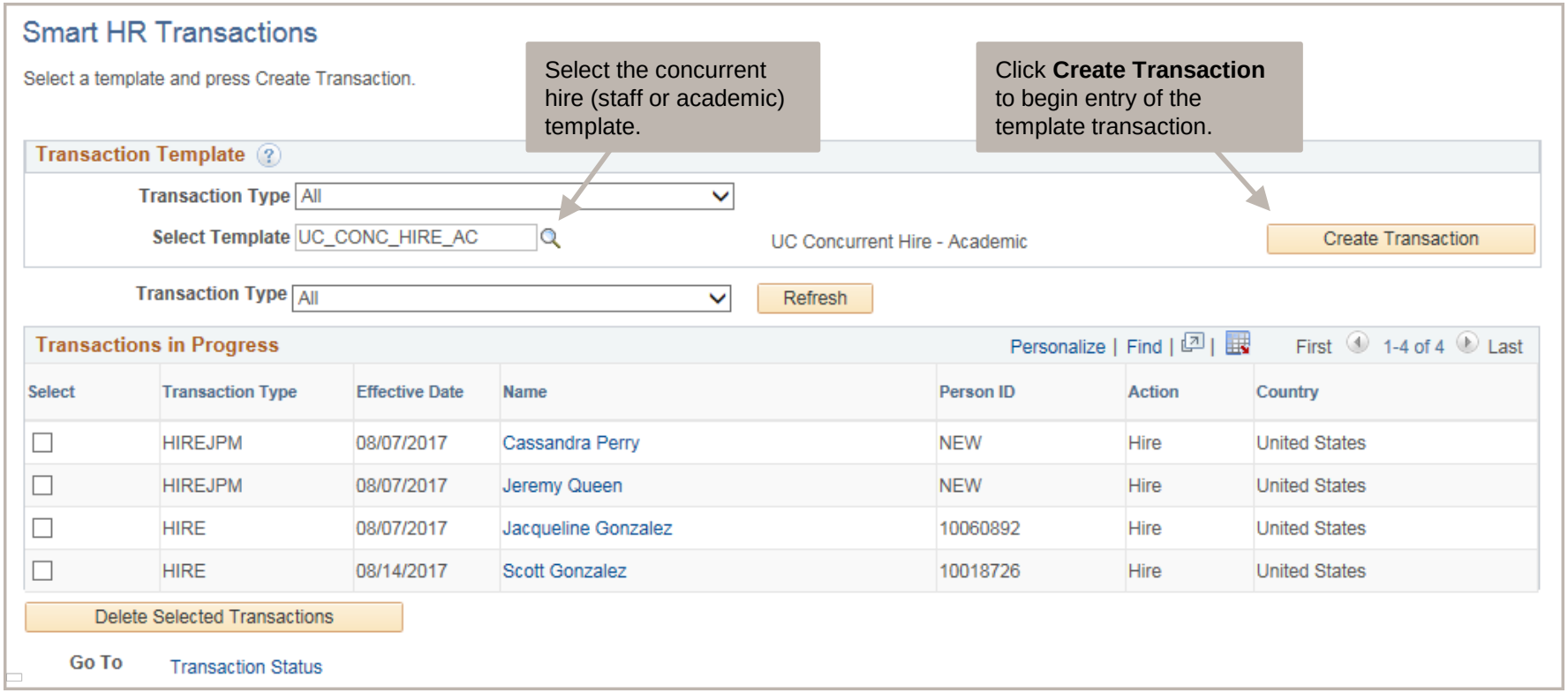
Concurrent Jobs – MLA

- If a concurrent job is between multiple Locations (interlocation), the Location must complete a Multi-Location Agreement (MLA) form and attach it to the hire template transaction.
- Until all Locations are live on UCPath, use the following guidelines for new concurrent jobs between Locations.

Host	Home	Receiving Location (Host)	Originating Location (Home)
UCPath	UCPath	Submit concurrent hire template with MLA.	Coordinate with receiving Location and make any applicable data changes.
PPS	UCPath	Complete MLA and send to originating Location. UCPath job is created for PPS host job.	Submit concurrent hire template with MLA.
UCPath	PPS	Submit full hire template with MLA.	Continue local process for data changes, if applicable.

Smart HR Transactions Page

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

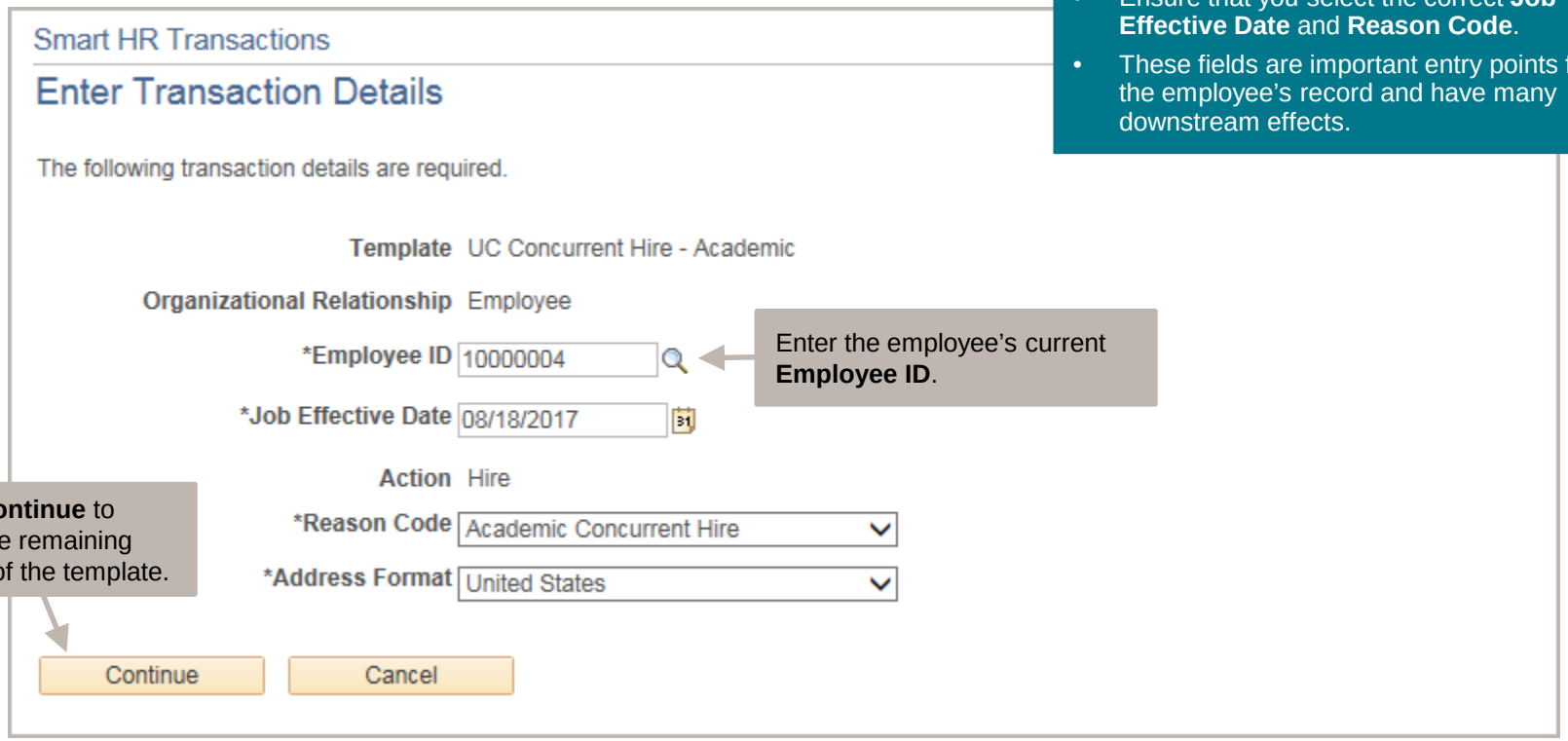


Enter Transaction Details Page

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

Important

- Ensure that you select the correct **Job Effective Date** and **Reason Code**.
- These fields are important entry points for the employee's record and have many downstream effects.

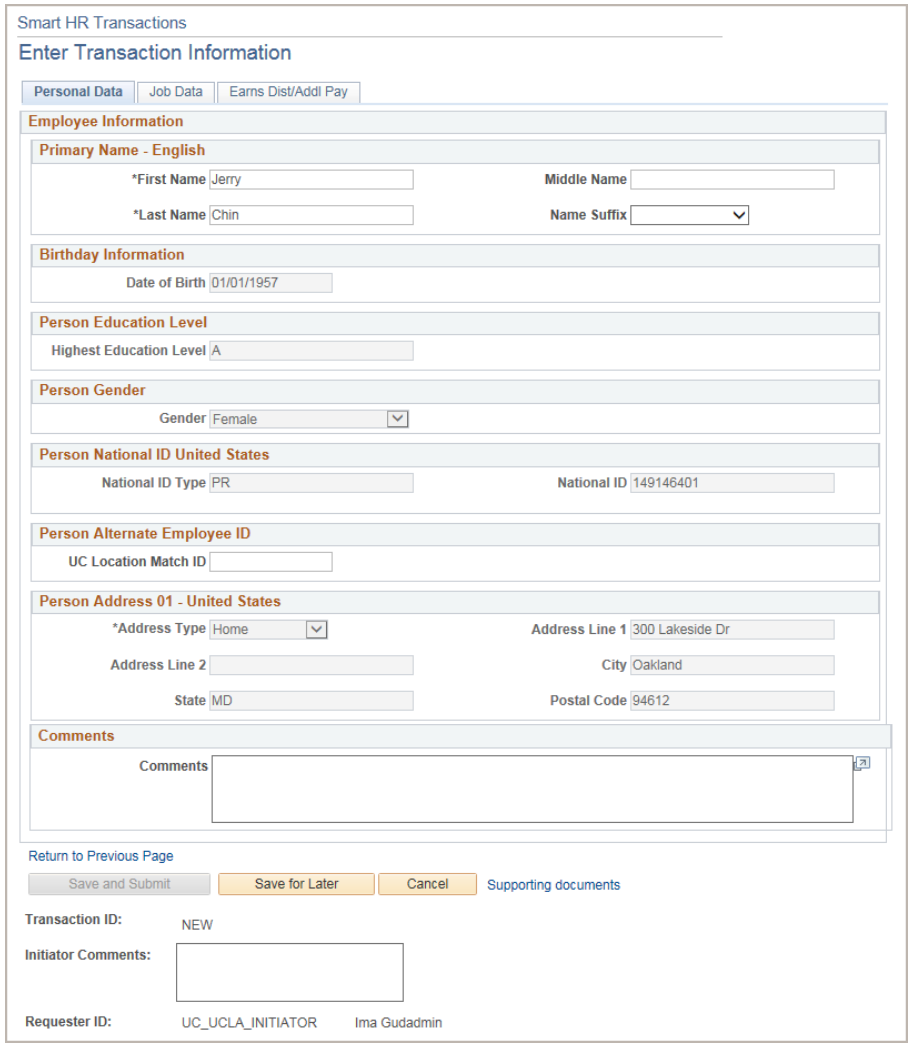


Enter the employee's current **Employee ID**.

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

Enter Transaction Information Page

- Enter the details for the concurrent hire on the **Personal Data**, **Job Data** and **Earns Dist/Addl Pay** tabs.
- Some of the employee's existing personal information is automatically displayed.
- When complete, click the **Save and Submit** button to submit the template for review and approval.
- You must navigate through all the tabs before the **Save and Submit** button is available.



Job Aid

Template Transactions – Action Reason Codes and Descriptions

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

Instructor Demo

Initiate Concurrent Hire Template Transaction

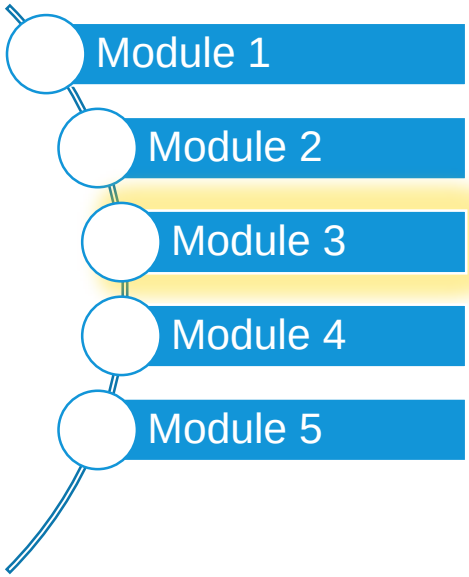
- Watch as your instructor demonstrates how to initiate a concurrent hire template transaction in UCPath.
- Follow along using the UCPath Help topic.
  - **Staff:** Open the UCPath Help site and refer to the *Initiate Concurrent Hire Template Transaction (Staff)* topic.
  - **Academic:** Open the UCPath Help site and refer to the *Initiate Concurrent Hire Template Transaction (Acad)* topic.
  - Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.

Exercise

Initiate Concurrent Hire Template Transaction

- This is your opportunity to practice this task on your own.
  - **Staff:** Open the UCPath Help site and refer to the *Initiate Concurrent Hire Template Transaction (Staff)* topic.
  - **Academic:** Open the UCPath Help site and refer to the *Initiate Concurrent Hire Template Transaction (Acad)* topic.
- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.

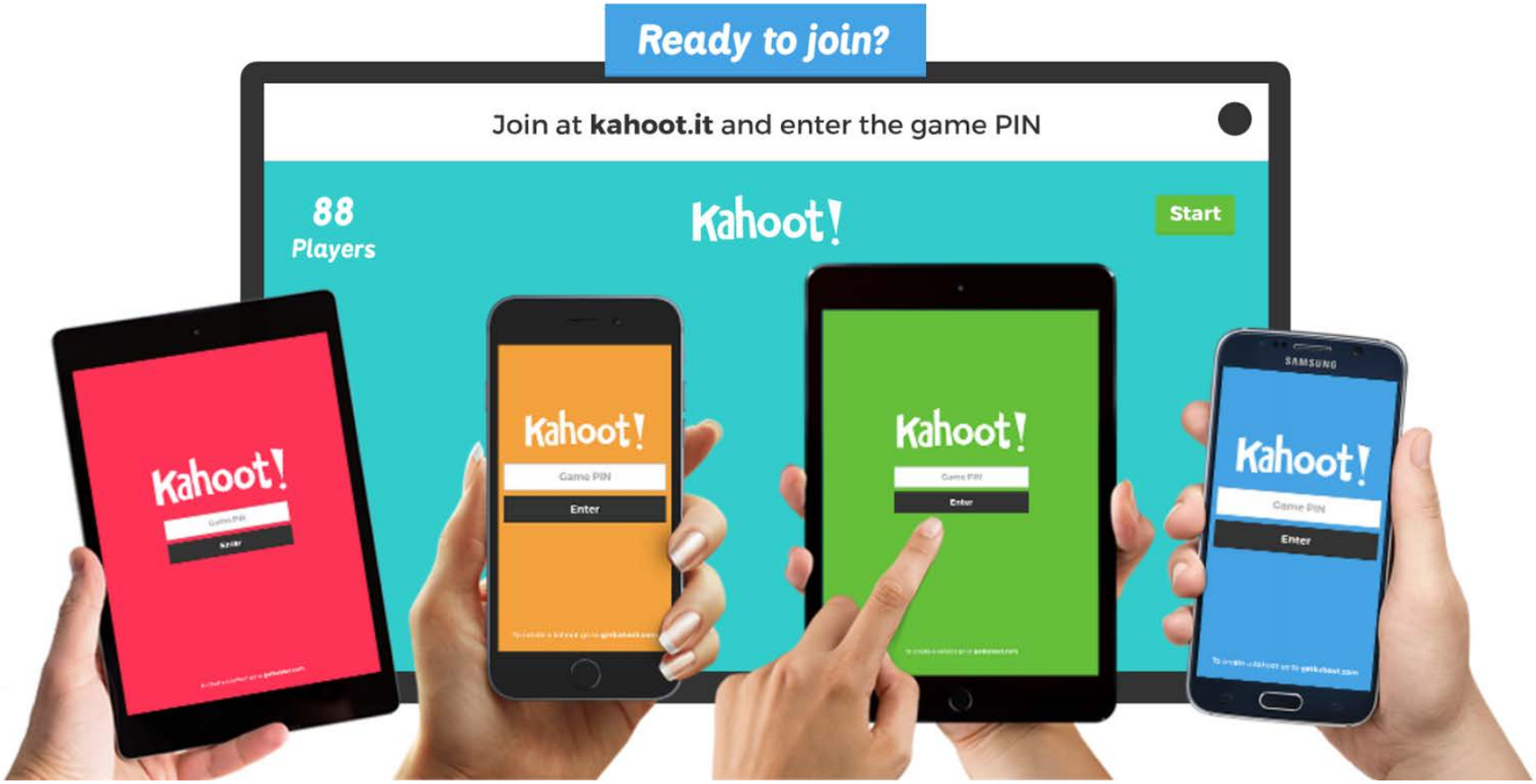
Module Objectives Review



Having completed this module, you should be able to:

- Describe the concurrent hire system process.
- Initiate a concurrent hire template transaction.

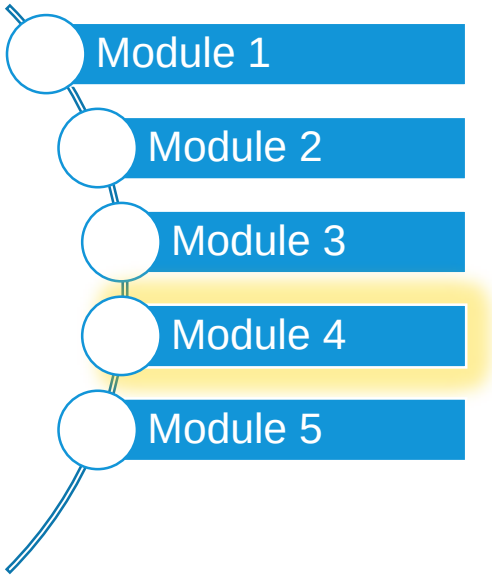
Check Your Understanding



Rehire

Module 4

Module Objectives



The module learning objectives are:

- Describe the rehire system process.
- Initiate a rehire template transaction.

Rehire – Overview

- Use the **UC Rehire** template to rehire a previous UC employee who has an existing UCPath employee ID.
- Use the **UC Full Hire** template to initiate a rehire for a previous UC employee who does not have an employee ID in UCPath (with **Reason Code** of **Rehire – Break in Service**).

Available Templates

Template	Description
UC_ADD_CWR	UC Add Contingent Worker - No Position Data
UC_ADD_CWR_POSN	UC Add Contingent Worker With Position
UC_COM_CWR	UC Complete Contingent Worker Instance
UC_CONC_HIRE	UC Concurrent Hire - Staff Only
UC_CONC_HIRE_AC	UC Concurrent Hire - Academic
UC_EXT_CWR	Extend CWR Appointment
UC_EXT_CWR_POSN	Extend CWR (with Position) Appointment
UC_FULL_HIRE	UC Full Hire - Staff Only
UC_FULL_HIRE_AC	UC Full Hire - Academic Use Only
UC_INVOL_TERM	UC Involuntary Termination
UC_PERSON_DATA	UC Personal Data
UC_REHIRE	UC Rehire - Staff Only
UC_REHIRE_AC	UC Rehire - Academic
UC_RENW_CWR	UC Renew Contingent Worker - Without Position
UC_RENW_CWR_POS	UC Renew CWR Instance - with Position
UC_RETIREMENT	UC Retirement
UC_TRANSFER	UC Intra-Business Unit Transfer - Staff Only
UC_TRANSFER_AC	UC Intra-Business Unit Transfer - Academic Only
UC_VOL_TERM	UC Voluntary Termination

Rehire – Overview

- The **Rehire** template can be used only when there is an existing employee record at your Location or Business Unit (BU).
- If the employee's only terminated employee record is at a different BU, you must use the **Concurrent Hire** template with **Reason Code** of **Rehire**.

Available Templates

Template	Description
UC_ADD_CWR	UC Add Contingent Worker - No Position Data
UC_ADD_CWR_POSN	UC Add Contingent Worker With Position
UC_COM_CWR	UC Complete Contingent Worker Instance
UC_CONC_HIRE	UC Concurrent Hire - Staff Only
UC_CONC_HIRE_AC	UC Concurrent Hire - Academic
UC_EXT_CWR	Extend CWR Appointment
UC_EXT_CWR_POSN	Extend CWR (with Position) Appointment
UC_FULL_HIRE	UC Full Hire - Staff Only
UC_FULL_HIRE_AC	UC Full Hire - Academic Use Only
UC_INVOL_TERM	UC Involuntary Termination
UC_PERSON_DATA	UC Personal Data
UC_REHIRE	UC Rehire - Staff Only
UC_REHIRE_AC	UC Rehire - Academic
UC_RENW_CWR	UC Renew Contingent Worker - Without Position
UC_RENW_CWR_POS	UC Renew CWR Instance - with Position
UC_RETIREMENT	UC Retirement
UC_TRANSFER	UC Intra-Business Unit Transfer - Staff Only
UC_TRANSFER_AC	UC Intra-Business Unit Transfer - Academic Only
UC_VOL_TERM	UC Voluntary Termination

Rehire – System Process

Review **Person Org Summary** page

Navigate to the **Smart HR Transactions** page

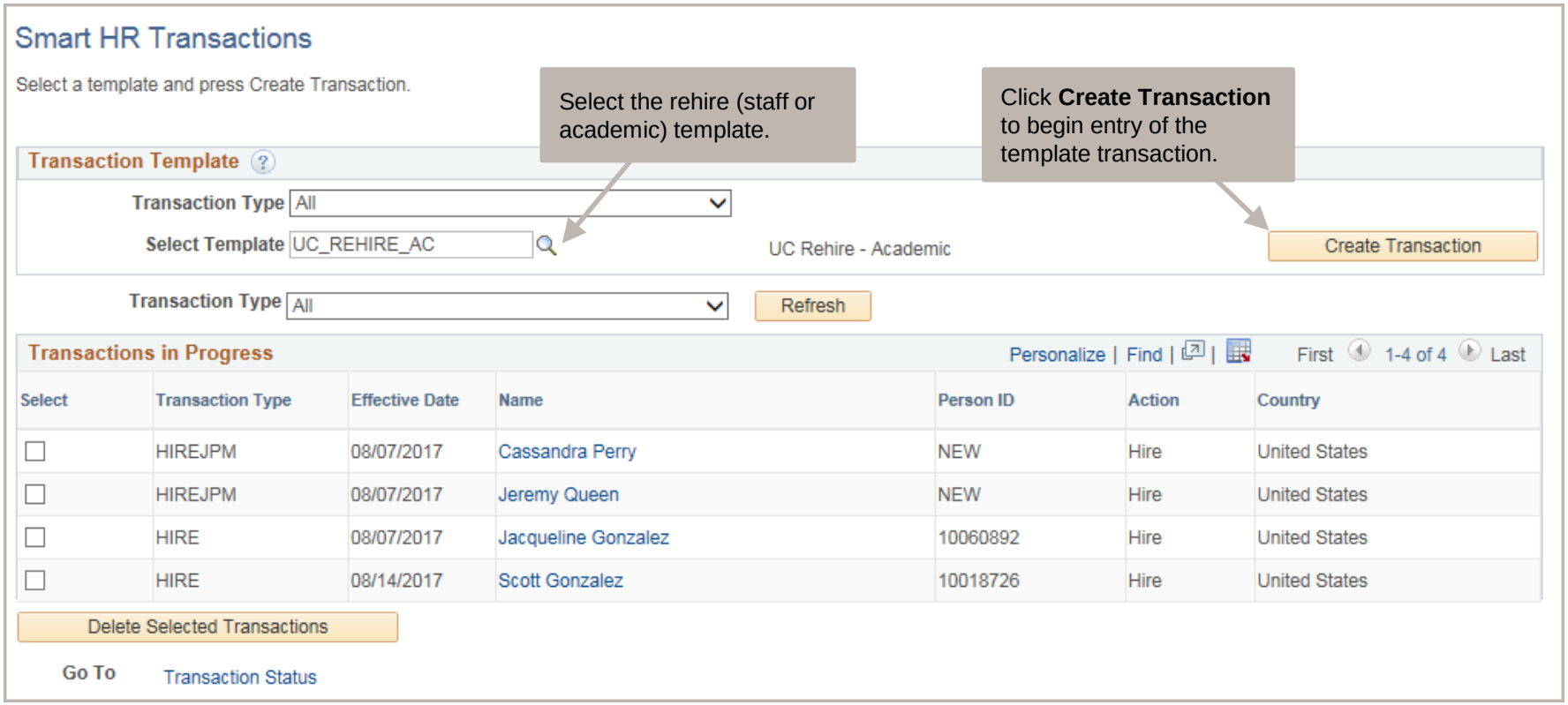
Select the **Rehire** template

Enter rehire details and attach supporting documentation as needed

Save and Submit

Smart HR Transactions Page

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

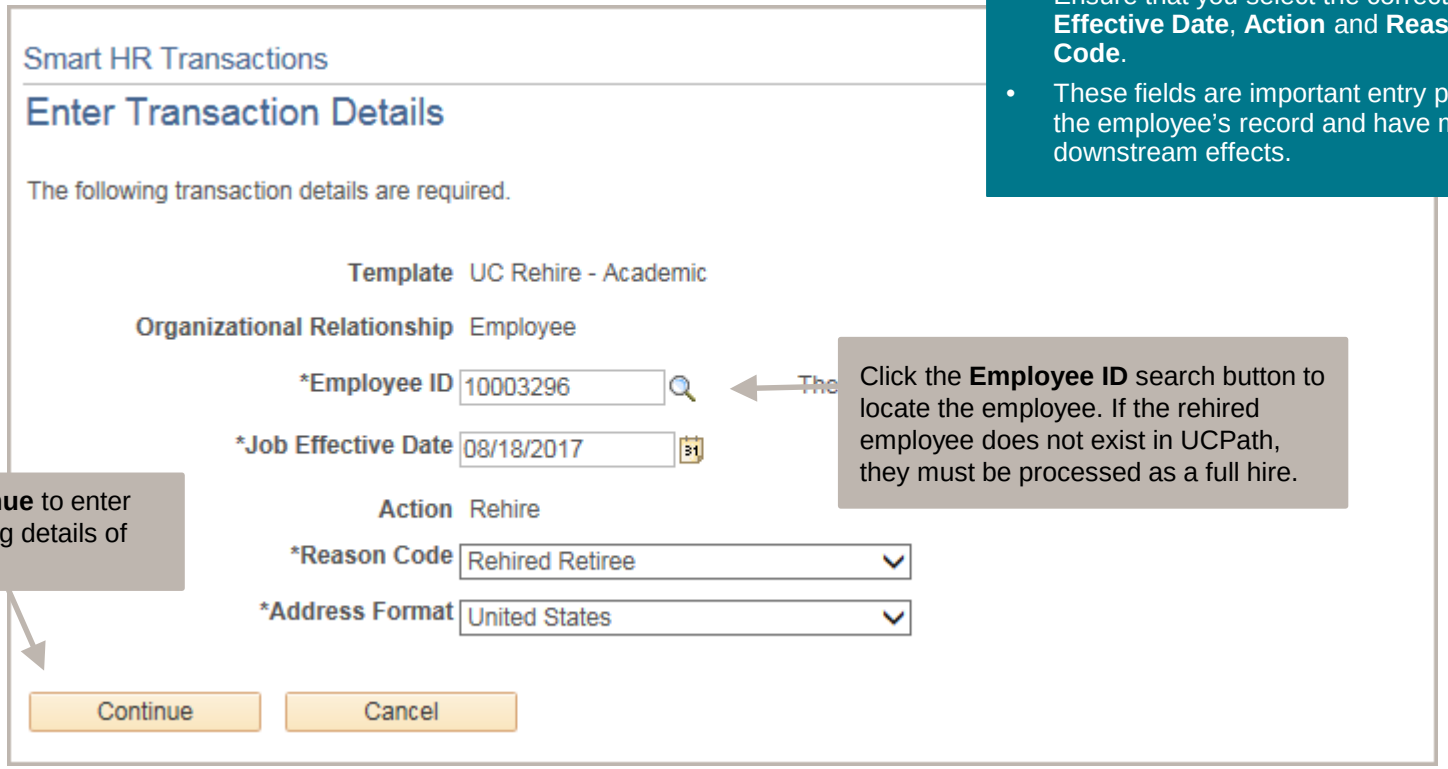


Enter Transaction Details Page

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

Important

- Ensure that you select the correct **Job Effective Date**, **Action** and **Reason Code**.
- These fields are important entry points for the employee's record and have many downstream effects.

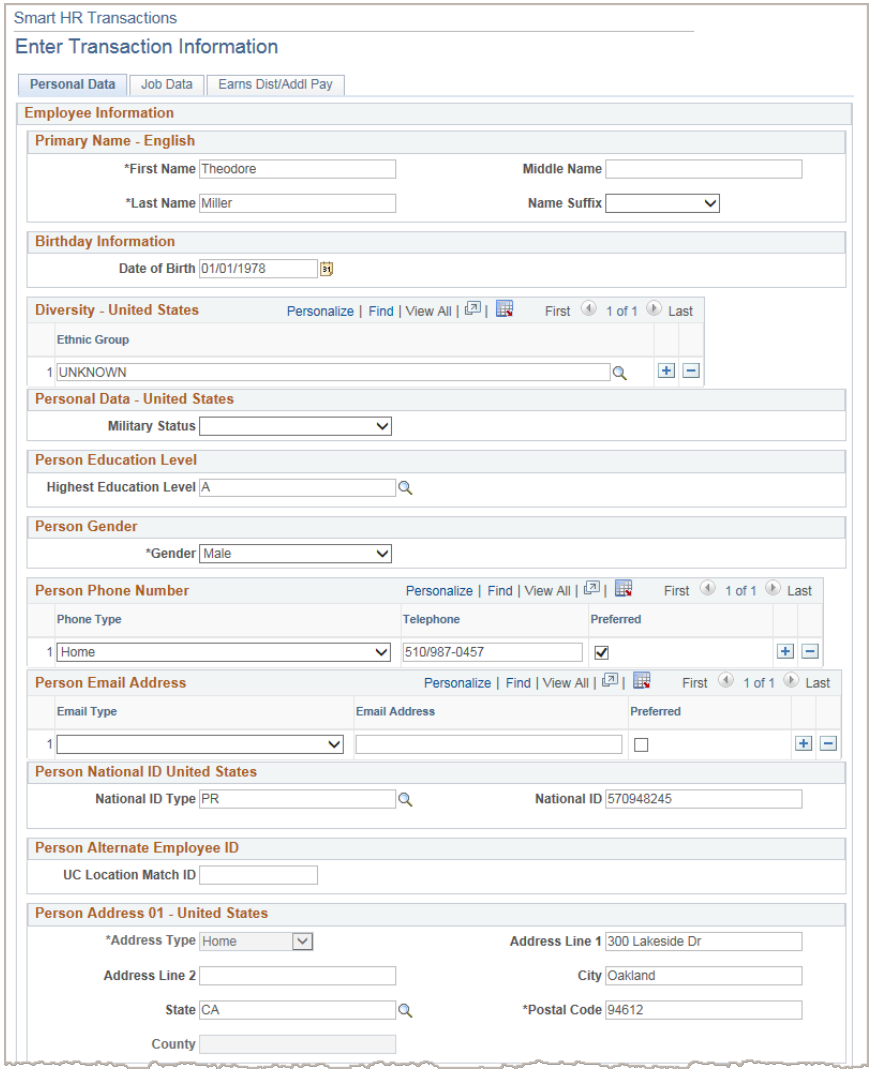


Click the **Employee ID** search button to locate the employee. If the rehired employee does not exist in UCPath, they must be processed as a full hire.

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

Enter Transaction Information Page

- Enter the details for the rehire on the **Personal Data**, **Job Data** and **Earns Dist/Addl Pay** tabs.
- Some of the employee's existing personal information is automatically displayed.
- When complete, click the **Save and Submit** button to submit the template for review and approval.
- You must navigate through all the tabs before the **Save and Submit** button is available.



Job Aid

Template Transactions – Action Reason Codes and Descriptions

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

Instructor Demo

Initiate Rehire Template Transaction

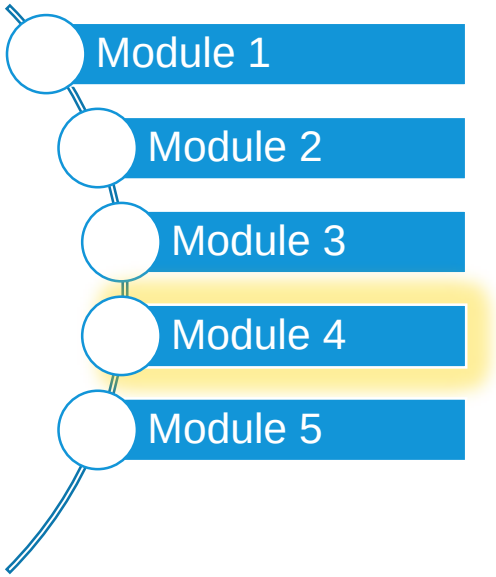
- Watch as your instructor demonstrates how to initiate a rehire template transaction in UCPath.
- Follow along using the UCPath Help topic.
  - **Staff:** Open the UCPath Help site and refer to the *Initiate Rehire Template Transaction (Staff)* topic.
  - **Academic:** Open the UCPath Help site and refer to the *Initiate Rehire Template Transaction (Acad)* topic.
  - Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.

Exercise

Initiate Rehire Template Transaction

- This is your opportunity to practice this task on your own.
  - **Staff:** Open the UCPath Help site and refer to the *Initiate Rehire Template Transaction (Staff)* topic.
  - **Academic:** Open the UCPath Help site and refer to the *Initiate Rehire Template Transaction (Acad)* topic.
- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.

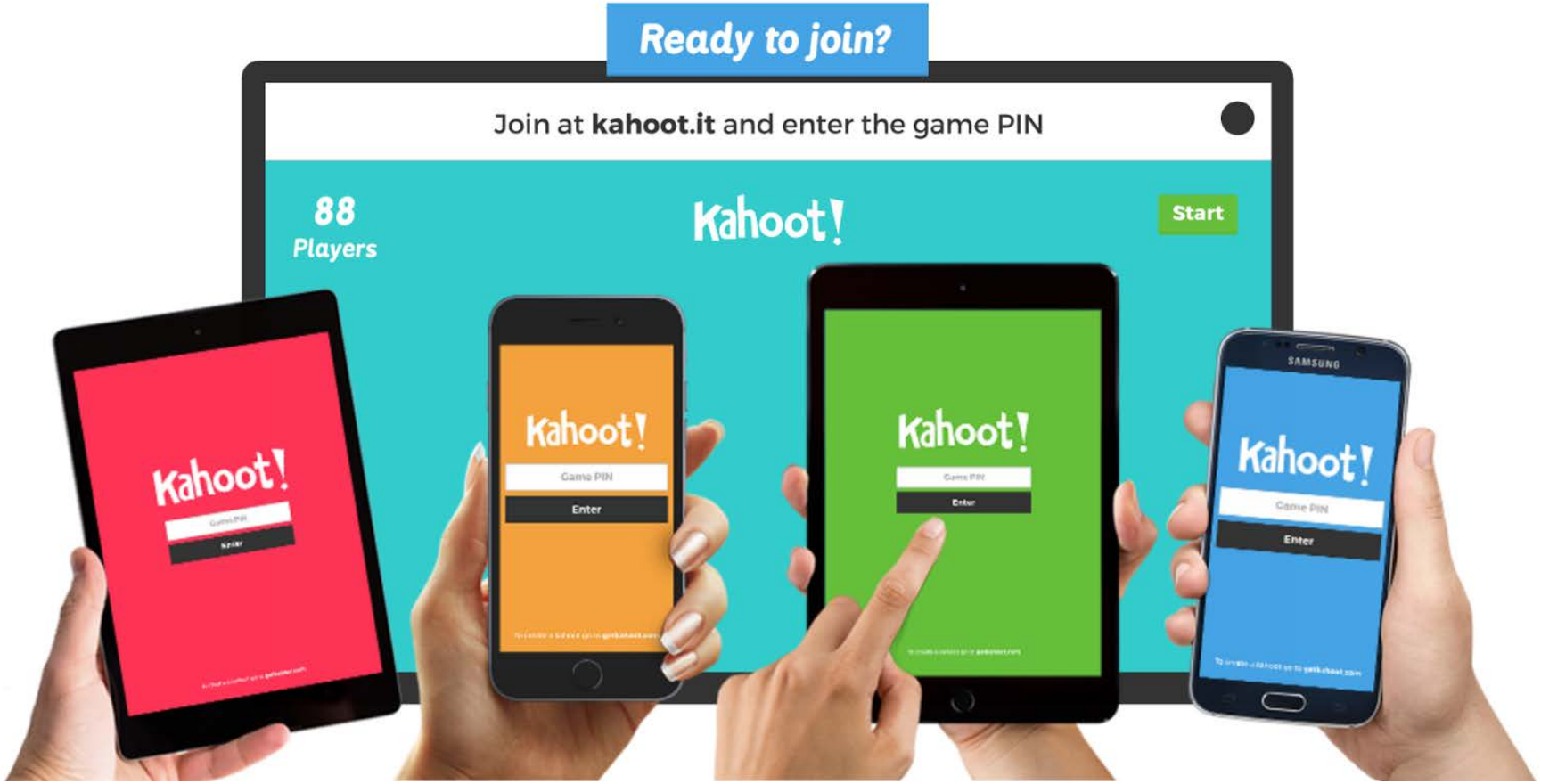
Module Objectives Review



Having completed this module, you should be able to:

- Describe the rehire system process.
- Initiate a rehire template transaction.

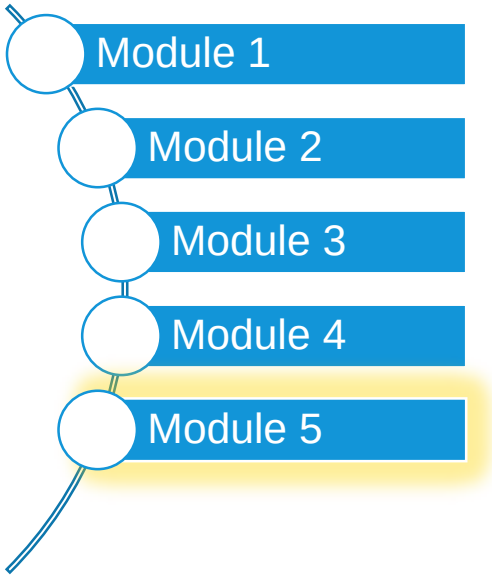
Check Your Understanding



Personal Data

Module 5

Module Objectives



The module learning objectives are:

- Describe the personal data change system process.
- View personal information.
- Initiate a personal data change template transaction.
- Update personal information.

Personal Data Changes – Overview

There are four methods to update personal data in UCPath.

1. **UCPath Portal**
   - In most cases, employees enter their own personal data changes using the UCPath portal. Updates that can be made from the Portal include: personal email, emergency contacts, home and mailing address, employee disclosures, phone number, ethnic groups, military status and disability status.
2. **UCPath Template Transaction**
   - This method can be used to update the personal data mentioned above, but must be used to update: legal name, date of birth or Social Security Number.
     - These types of updates require Social Security Number Verification (SSNVS) before processing into UCPath.

Personal Data Changes – Overview (cont'd)

3. **Case Management**
   - This method is used for transactions that require document verification. The verification is performed by Location or by UCPC WFA Production. Location initiates a case and WFA Production enters the update directly in UCPath. For example, for a gender change, the employee must submit a copy of a government issued ID, which indicates gender, to substantiate the request.
4. **Direct Update in UCPath**
   - This method is used when the Template Initiator must update certain personal information pages on behalf of an employee. Examples include Security Clearance (I-9), Emergency Contacts and Additional Names.

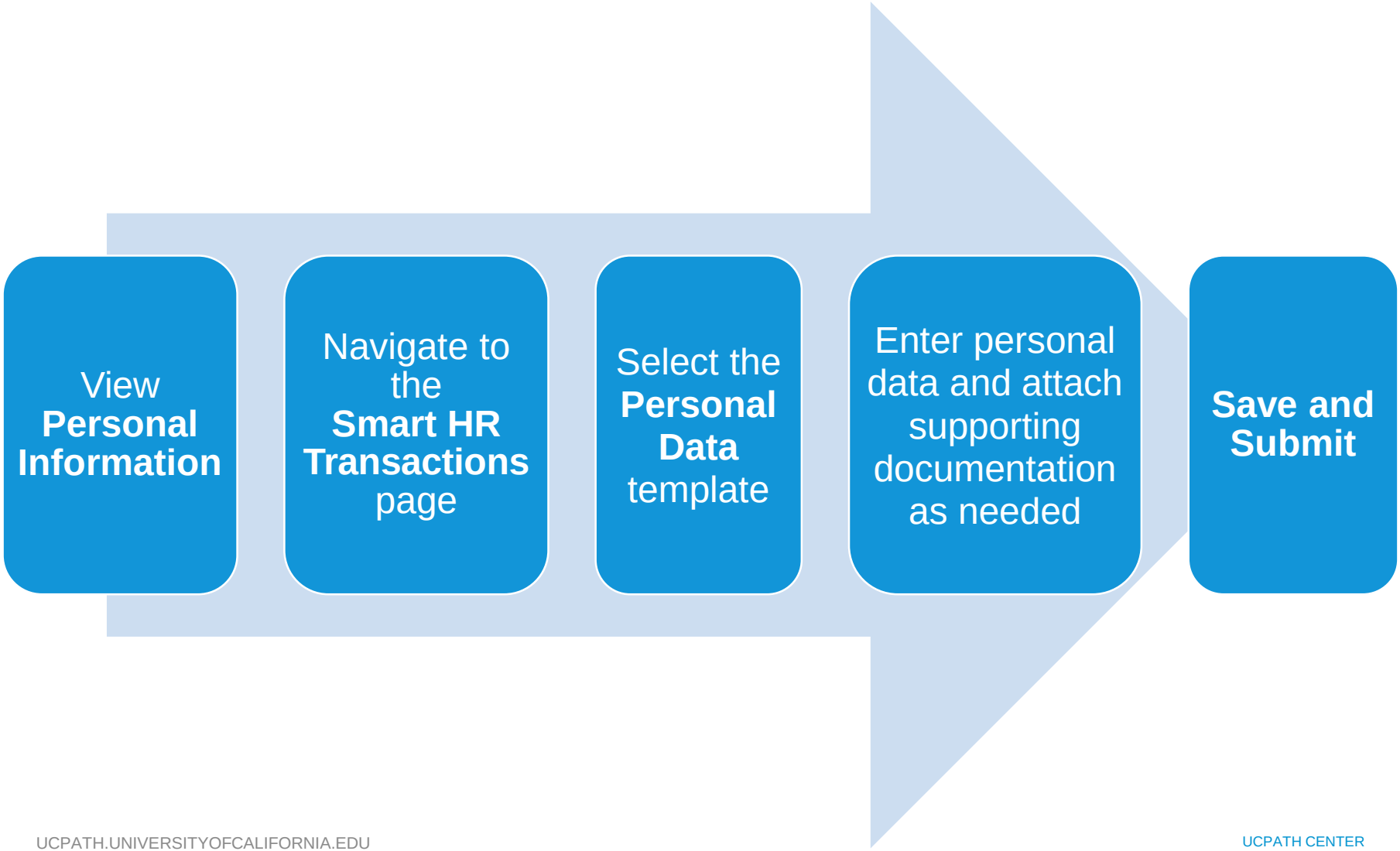
Personal Data – Template Transaction

- Use the **UC Personal Data** template to update an employee's personal information.
- The **UC Personal Data** template can be used for staff or academic employees.

Available Templates

Template	Description
UC_ADD_CWR	UC Add Contingent Worker - No Position Data
UC_ADD_CWR_POSN	UC Add Contingent Worker With Position
UC_COM_CWR	UC Complete Contingent Worker Instance
UC_CONC_HIRE	UC Concurrent Hire - Staff Only
UC_CONC_HIRE_AC	UC Concurrent Hire - Academic
UC_EXT_CWR	Extend CWR Appointment
UC_EXT_CWR_POSN	Extend CWR (with Position) Appointment
UC_FULL_HIRE	UC Full Hire - Staff Only
UC_FULL_HIRE_AC	UC Full Hire - Academic Use Only
UC_INVOL_TERM	UC Involuntary Termination
UC_PERSON_DATA	UC Personal Data
UC_REHIRE	UC Rehire - Staff Only
UC_REHIRE_AC	UC Rehire - Academic
UC_RENW_CWR	UC Renew Contingent Worker - Without Position
UC_RENW_CWR_POS	UC Renew CWR Instance - with Position
UC_RETIREMENT	UC Retirement
UC_TRANSFER	UC Intra-Business Unit Transfer - Staff Only
UC_TRANSFER_AC	UC Intra-Business Unit Transfer - Academic Only
UC_VOL_TERM	UC Voluntary Termination

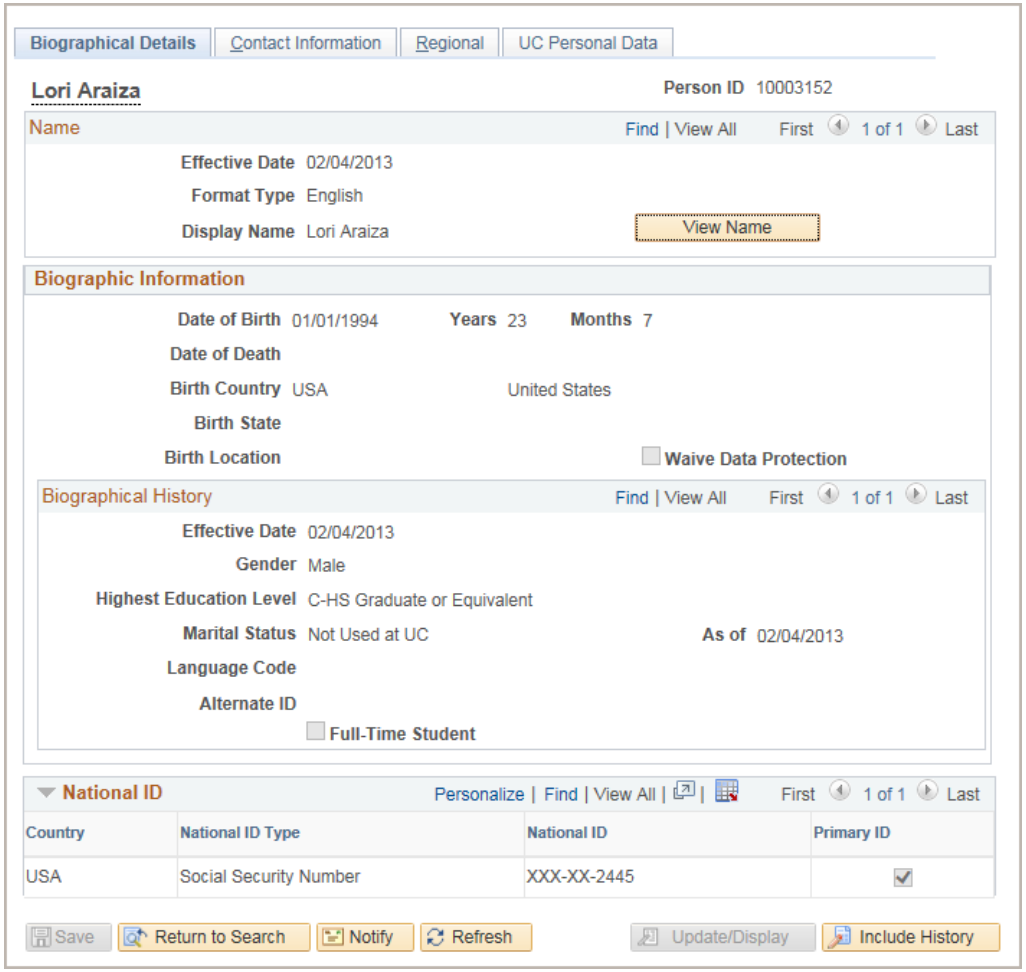
Personal Data – System Process



View Personal Information

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > **Modify a Person**

- Review an employee's personal information using the **Modify a Person** component.



Instructor Demo

View Personal Information

- Watch as your instructor demonstrates how to view an employee's personal information using the **Modify a Person** component.
- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *View Personal Information* topic.
  - Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.

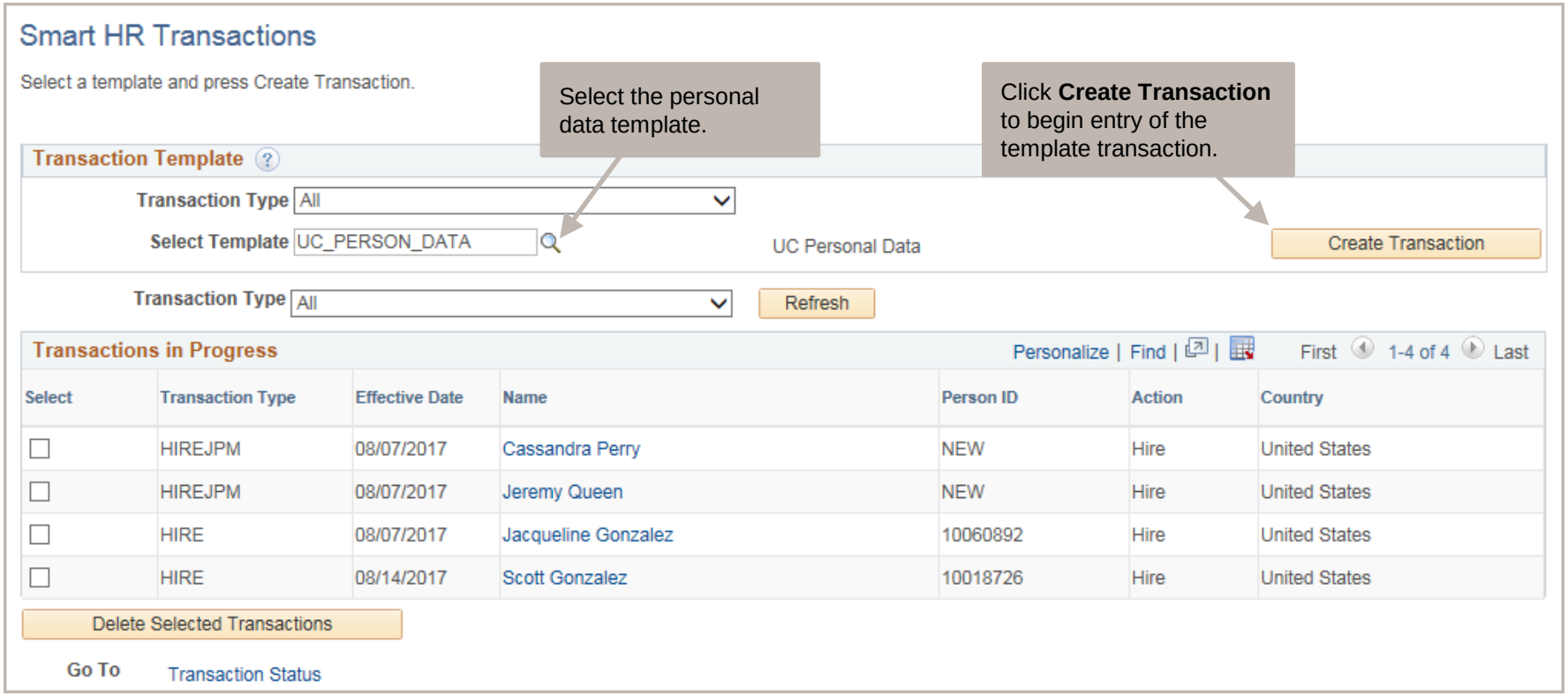
Exercise

View Personal Information

- This is your opportunity to practice this task on your own.
- Open the UCPath Help site and refer to the *View Personal Information* topic.
- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.

Smart HR Transactions Page

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**



Enter Transaction Details Page

The **Personal Data Changes** template does not have any **Reason Codes**.

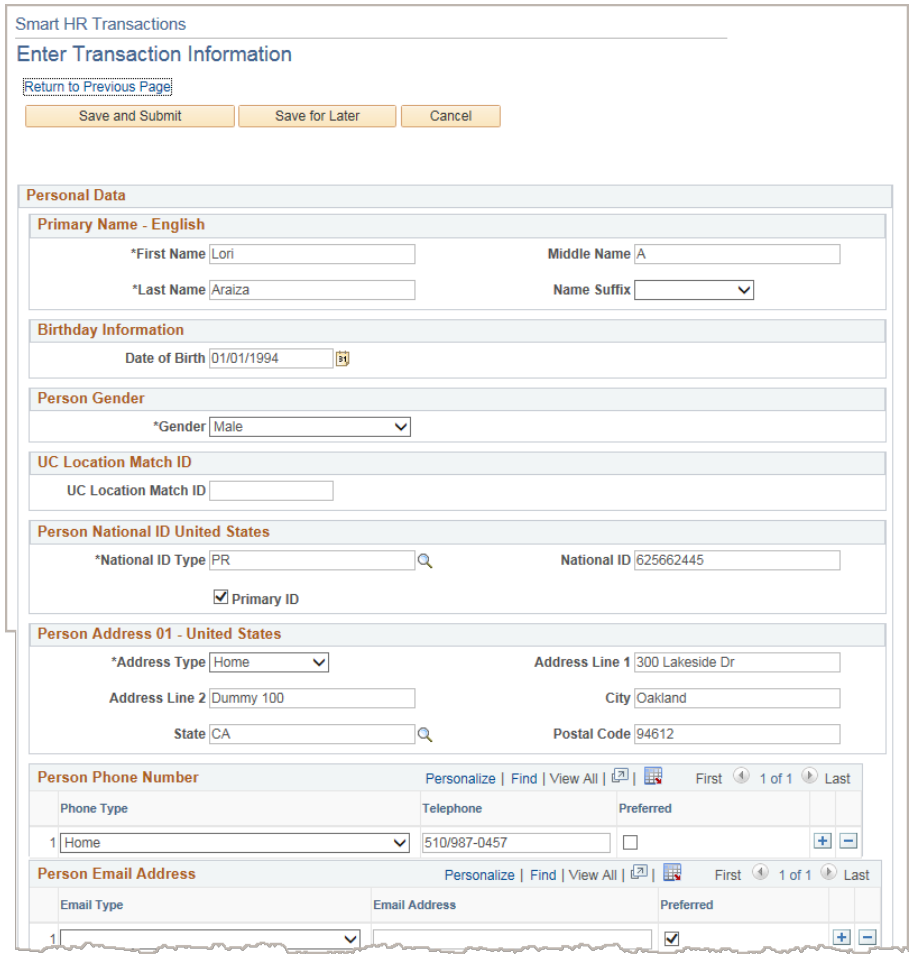
- Enter the **Employee ID** and the **Job Effective Date**.

Click **Continue** to enter the remaining details of the personal data change.

Click the **Employee ID** search button to locate the employee.

Enter Transaction Information Page

- The employee's existing personal information is automatically displayed.
- Update the employee's personal data.
- Enter a comment to inform UCPC WFA Production specifically what field was updated.
- When complete, click the **Save and Submit** button to submit the template for review and approval.



Instructor Demo

Initiate Personal Data Change Template Transaction

- Watch as your instructor demonstrates how to initiate a rehire template transaction in UCPath.
- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *Initiate Personal Data Change Template Transaction (Staff/Acad)* topic.
  - Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.

Exercise

Initiate Personal Data Change Template Transaction

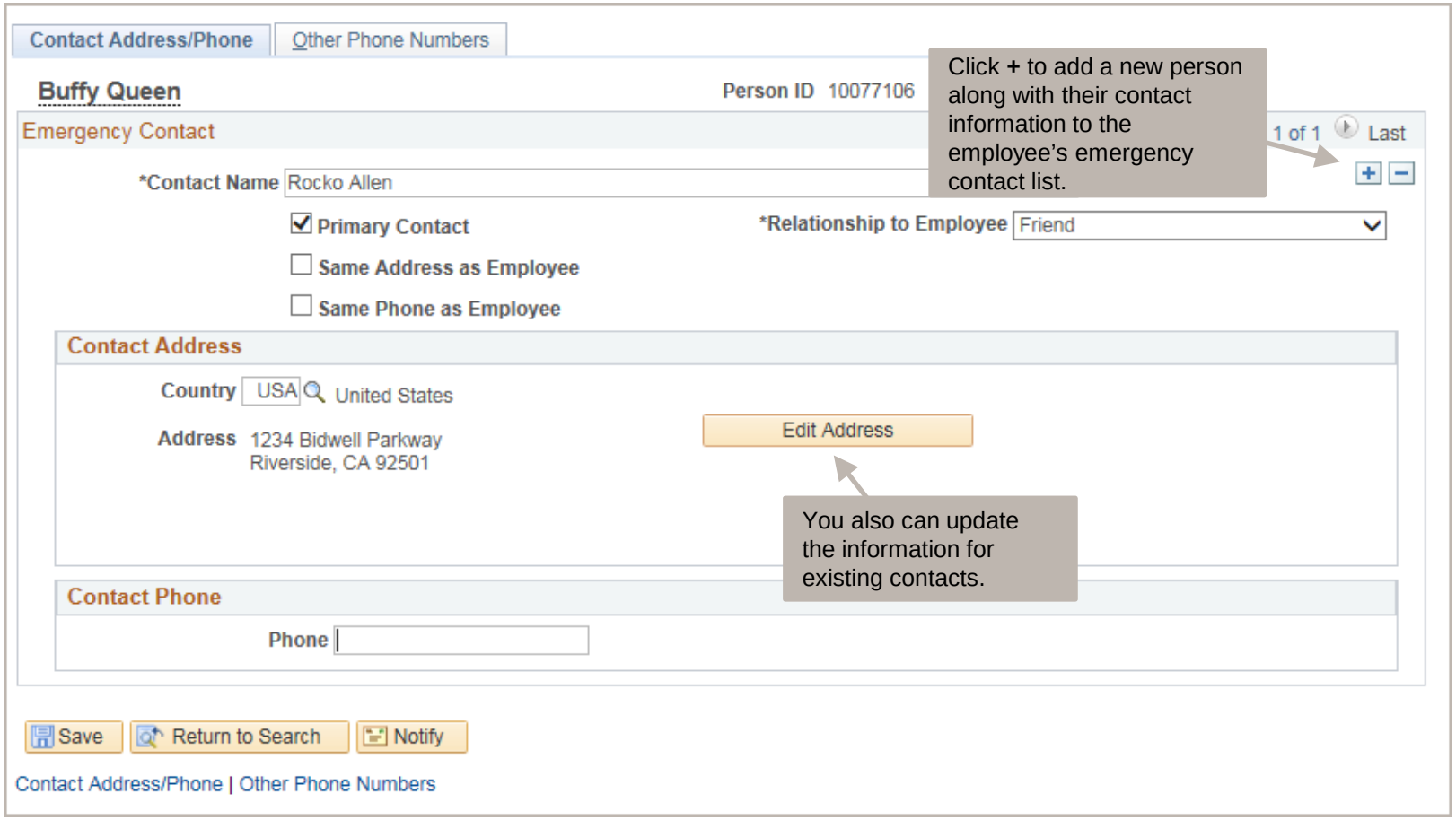
- This is your opportunity to practice this task on your own.
  - Open the UCPath Help site and refer to the *Initiate Personal Data Change Template Transaction (Staff/Acad)* topic. Launch the **Try It** version of the topic.
- Ask your instructor for assistance.

Direct Updates to Employee Information

- You have the security to update the following types of personal information directly in UCPath (on behalf of an employee):
  - Emergency Contacts
  - Additional Names
  - Security Clearance

Personal Information – Emergency Contacts

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > Personal Relationships > **Emergency Contact**



Click + to add a new person along with their contact information to the employee's emergency contact list.

You also can update the information for existing contacts.

Instructor Demo

Update Personal Information – Emergency Contacts

- Watch as your instructor demonstrates how to update an employee's emergency contacts in UCPath.
- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *Update Personal Information – Emergency Contacts* topic.
  - Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.

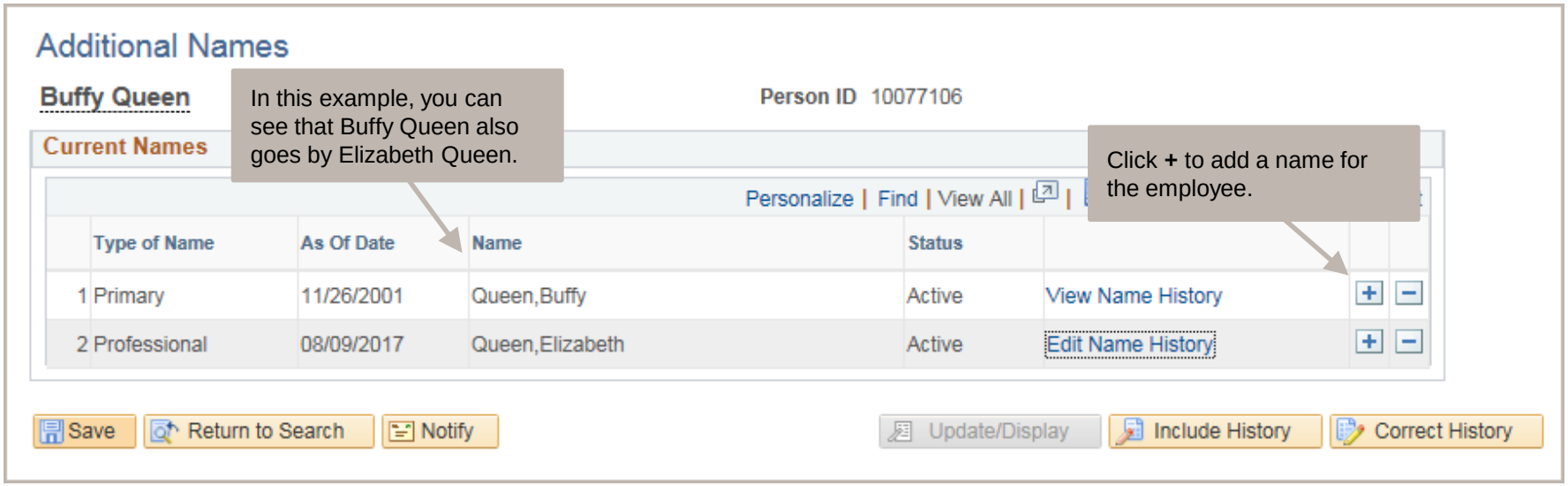
Exercise

Update Personal Information – Emergency Contacts

- This is your opportunity to practice this task on your own.
  - Open the UCPath Help site and refer to the *Update Personal Information – Emergency Contacts* topic.
  - Launch the **Try It** version of the topic.
- Ask your instructor for assistance.

Personal Information – Additional Names

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > Biographical > **Additional Names**

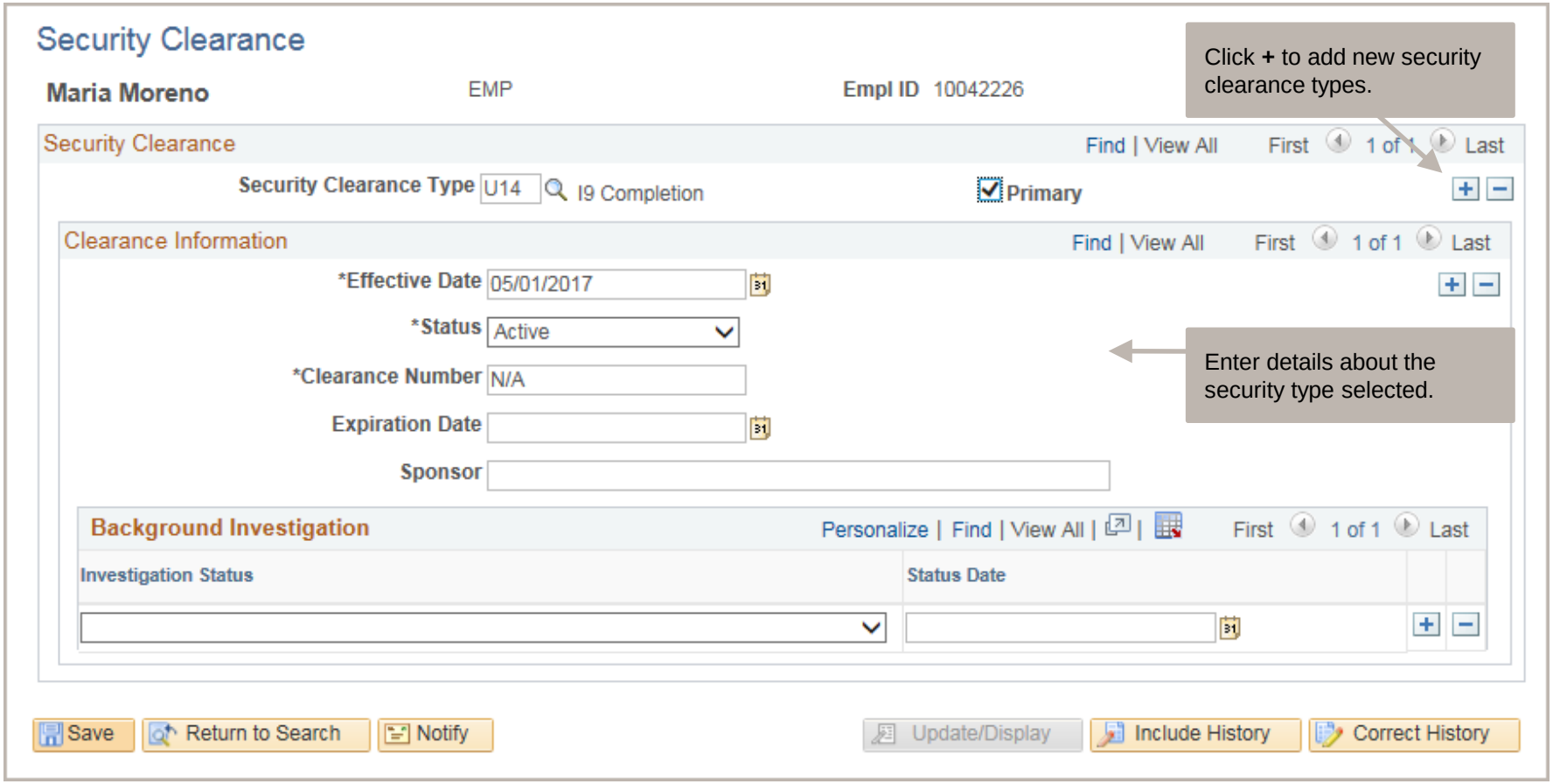


I-9 Process / E-Verify

- The vendor for the I-9 / E-Verify process is Tracker.
- There are no integrations with UCPath (inbound or outbound) at the time of hire.
- It is the location's responsibility to update I-9 information using the **Security Clearance** page.

Personal Information – Security Clearance

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > **Security Clearance**



Instructor Demo

Update Personal Information – Security Clearance

- Watch as your instructor demonstrates how to update an employee's security clearance in UCPath.
- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *Update Personal Information – Security Clearance* topic.
  - Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.

Exercise

Update Personal Information – Security Clearance

- This is your opportunity to practice this task on your own.
  - Open the UCPath Help site and refer to the *Update Personal Information – Security Clearance* topic.
  - Launch the **Try It** version of the topic.
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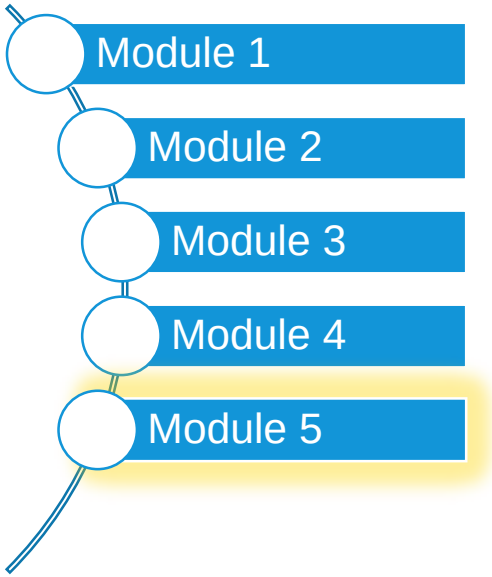
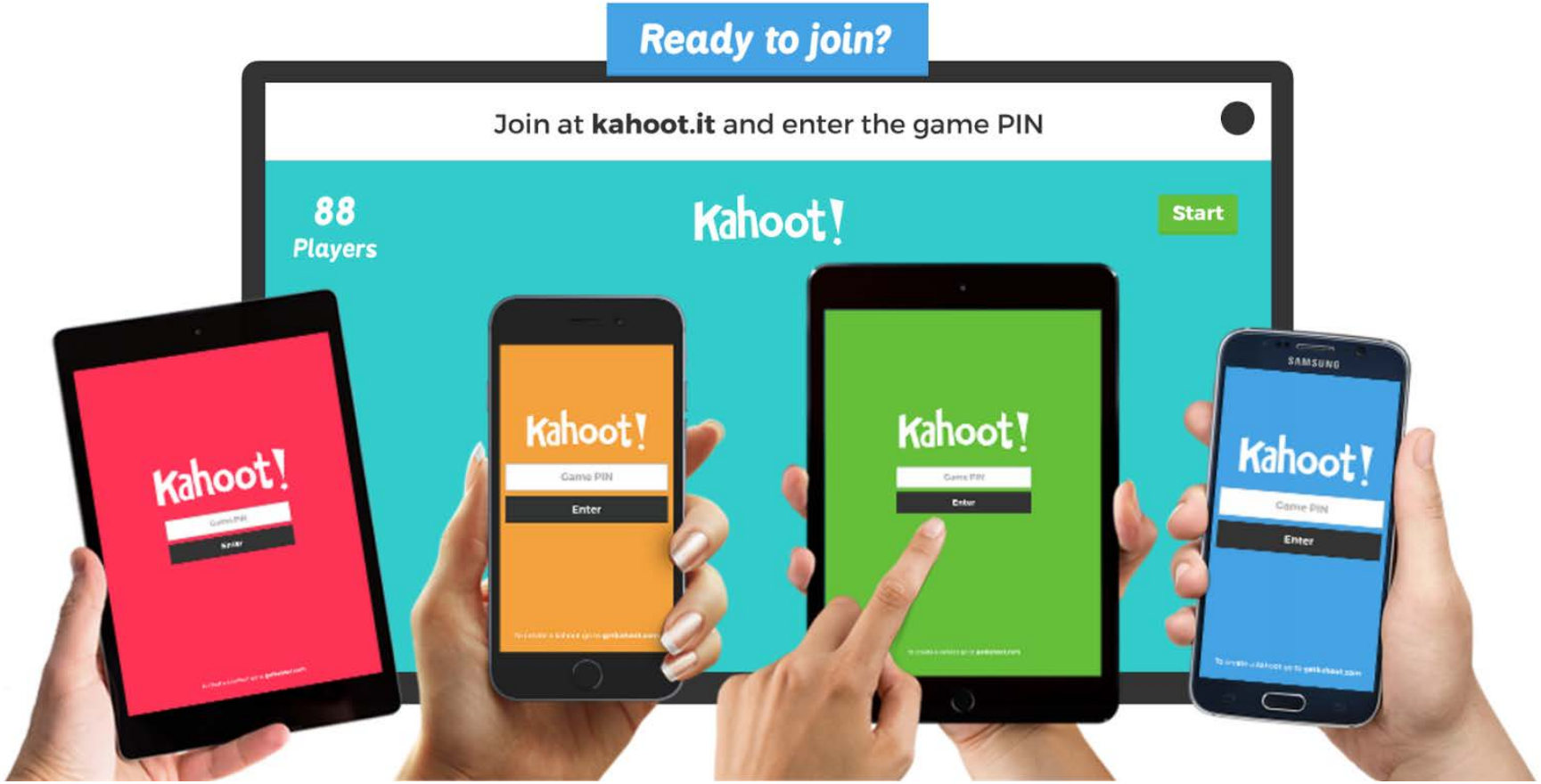
Module Objectives Review



Having completed this module, you should be able to:

- Describe the personal data change system process.
- View personal information.
- Initiate a personal data change template transaction.
- Update personal information.

Check Your Understanding



Course Review

Course Agenda

1: Template Transactions Overview

2: Full Hire

3: Concurrent Hire

4: Rehire

5: Personal Data

Putting It All Together

- The **Smart HR Transactions** page is the starting point to initiate any type of template transaction.
- Refer to the **Template Transactions – Action Reason Codes and Descriptions** job aid for a list of all the templates, the associated **Reason Codes** and a description.
- Remember to enter **Comments** on the template to further describe what is needed with the template transaction.
- Attach supporting documentation whenever needed.

Course Objectives Review

Having completed this course, you should be able to:

- Identify the actions that are processed using templates.
- Identify the pages used to initiate template transactions.
- View template transaction status.
- Describe the template transaction system process for full hire, concurrent hire, rehire and personal data changes.
- Initiate full hire, concurrent hire, rehire and personal data change template transactions.
- Update personal information.

Parking Lot

- Review parking lot
  - Have all questions been answered during our class?
  - Are there any new questions to add to the list?

Where to Get Help

- The **UCPath Help** site is your first level of support. Search for conceptual content, job aids or step-by-step instructions for UCPath tasks.
  - From the UCPath portal homepage, expand the **Help / FAQ** section on the left side of the page and then click the appropriate link to open the site. An Adobe PDF version is available for users with screen readers.
  - From any UCPath page or component, click the **Help** link in the upper right corner of the page to find help topics specific to the page/component.

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