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

- 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
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

<table>
<thead>
<tr>
<th>Template</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC_ADD_CWR</td>
<td>UC Add Contingent Worker - No Position Data</td>
</tr>
<tr>
<td>UC_ADD_CWR_POSN</td>
<td>UC Add Contingent Worker With Position</td>
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<td>UC Full Hire - Academic Use Only</td>
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<td>UC Involuntary Termination</td>
</tr>
<tr>
<td>UC_PERSON_DATA</td>
<td>UC Personal Data</td>
</tr>
<tr>
<td>UC_REHIRE</td>
<td>UC Rehire - Staff Only</td>
</tr>
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</tr>
<tr>
<td>UC_RENW_CWR</td>
<td>UC Renew Contingent Worker - Without Position</td>
</tr>
<tr>
<td>UC_RENW_CWR_POS</td>
<td>UC Renew CWR Instance - with Position</td>
</tr>
<tr>
<td>UC_RETIRED</td>
<td>UC Retirement</td>
</tr>
<tr>
<td>UC_TRANSFER</td>
<td>UC Intra-Business Unit Transfer - Staff Only</td>
</tr>
<tr>
<td>UC_TRANSFER_AC</td>
<td>UC Intra-Business Unit Transfer - Academic Only</td>
</tr>
<tr>
<td>UC_VOL_TERM</td>
<td>UC Voluntary Termination</td>
</tr>
</tbody>
</table>
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:

1. **Template Initiator**
   - Review Person Org Summary Page

2. **Template Initiator**
   - Enter and Submit Template Transaction

3. **Template Approver**
   - Review/Approve Template Transaction

4. **WFA Production**
   - Process Template Transaction

5. **All**
   - View Employee Data
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.
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.
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.
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](image-url)
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.
After you select the template, click the **Create Transaction** button.

**Smart HR Transactions**

Select a template and press Create Transaction.

**Transaction Template**

- **Transaction Type**: All
- **Select Template**: UC_FULL_HIRE

**Transactions in Progress**

<table>
<thead>
<tr>
<th>Select</th>
<th>Transaction Type</th>
<th>Effective Date</th>
<th>Name</th>
<th>Person ID</th>
<th>Action</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>JOB</td>
<td>07/16/2017</td>
<td>Jerry Chin</td>
<td>10000004</td>
<td>Terminatin</td>
<td>United States</td>
</tr>
<tr>
<td></td>
<td>PERSON</td>
<td>08/07/2017</td>
<td>Nubia Gonzales</td>
<td>10026789</td>
<td></td>
<td>United States</td>
</tr>
</tbody>
</table>

**Delete Selected Transactions**

**Go To** Transaction Status
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.
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

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

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

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.
This is your opportunity to practice this task on your own.

Open the UCPPath 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** values are: **Requested**, **Completed**, **Hired/Added**, **Denied** and **Cancel**.

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

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<table>
<thead>
<tr>
<th>Select</th>
<th>Transaction Type</th>
<th>Effective Date</th>
<th>Transaction Status</th>
<th>Person ID</th>
<th>Empl Record</th>
<th>Action</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Change Job Data</td>
<td>03/11/2017</td>
<td>Cancel</td>
<td>10002641</td>
<td>Data Chg</td>
<td>Clone</td>
<td>Eberhardt,Kasey Louis</td>
</tr>
<tr>
<td></td>
<td>Change Job Data</td>
<td>03/11/2017</td>
<td>Completed</td>
<td>10002641</td>
<td>Data Chg</td>
<td></td>
<td>Sullivan,Seung-Youn</td>
</tr>
<tr>
<td></td>
<td>Change Job Data</td>
<td>03/11/2017</td>
<td>Completed</td>
<td>10002641</td>
<td>Data Chg</td>
<td></td>
<td>Eberhardt,Kasey Louis</td>
</tr>
<tr>
<td></td>
<td>Change Job Data</td>
<td>03/11/2017</td>
<td>Requested</td>
<td>10000945</td>
<td>Terminntn</td>
<td></td>
<td>Holmes,Enc</td>
</tr>
<tr>
<td></td>
<td>Hire/Rehire and Profile Data</td>
<td>03/13/2017</td>
<td>Hired/Added</td>
<td>10003135</td>
<td>Hire</td>
<td>Clone</td>
<td>Fleck,Angelique G</td>
</tr>
<tr>
<td></td>
<td>Hire/Rehire and Profile Data</td>
<td>03/13/2017</td>
<td>Cancel</td>
<td>10003135</td>
<td>NEW</td>
<td>Hire</td>
<td>Jose Velez</td>
</tr>
<tr>
<td></td>
<td>Hire/Rehire and Profile Data</td>
<td>03/13/2017</td>
<td>Hired/Added</td>
<td>10003131</td>
<td>Hire</td>
<td>Clone</td>
<td>Linare,Shaun Nguyen</td>
</tr>
<tr>
<td></td>
<td>Hire/Rehire and Profile Data</td>
<td>03/13/2017</td>
<td>Hired/Added</td>
<td>10003130</td>
<td>Hire</td>
<td></td>
<td>St,Giuliano Ashley</td>
</tr>
<tr>
<td></td>
<td>Hire/Rehire and Profile Data</td>
<td>03/13/2017</td>
<td>Hired/Added</td>
<td>10003132</td>
<td>Hire</td>
<td></td>
<td>Myers,Meve</td>
</tr>
<tr>
<td></td>
<td>Hire/Rehire and Profile Data</td>
<td>03/13/2017</td>
<td>Hired/Added</td>
<td>10003134</td>
<td>Hire</td>
<td></td>
<td>Pollack,Joel</td>
</tr>
</tbody>
</table>

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**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
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

Ready to join?

Join at kahoot.it and enter the game PIN

88 Players

Kahoot!

Start
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.
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.
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

Select the hire (staff or academic) template.

Click Create Transaction to begin entry of the template transaction.
Enter the details for the full hire, beginning with the **Job Effective Date** (hire date) and the **Reason Code**.

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.

**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.

Click **Continue** to enter the remaining details of the template.
Enter the details for the hire on the **Personal Data**, **Job Data** and **Earnings 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.
After the Position Number is entered, many of the other fields default and are view-only.

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

You can clone transactions 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.
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.
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.
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.
Navigation: PeopleSoft Menu > Workforce Development > Profile Management > Profiles > Person Profiles
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.
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

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Kahoot!

Start

Enter

Game PIN

Enter

Game PIN

Enter

To complete a Kahoot go to Kahoot.com
Concurrent Hire

Module 3
The module learning objectives are:

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

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<td>Extend CWR (with Position) Appointment</td>
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<tr>
<td>UC_RETIREMENT</td>
<td>UC Retirement</td>
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<td>UC Intra-Business Unit Transfer - Academic Only</td>
</tr>
<tr>
<td>UC_VOL_TERM</td>
<td>UC Voluntary Termination</td>
</tr>
</tbody>
</table>
Concurrent Hire – System Process

1. Review Person Org Summary page
2. Navigate to the Smart HR Transactions page
3. Select the Concurrent Hire template
4. Enter concurrent hire details and attach supporting documentation as needed
5. 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.

<table>
<thead>
<tr>
<th>Host</th>
<th>Home</th>
<th>Receiving Location (Host)</th>
<th>Originating Location (Home)</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCPath</td>
<td>UCPath</td>
<td>Submit concurrent hire template with MLA.</td>
<td>Coordinate with receiving Location and make any applicable data changes.</td>
</tr>
<tr>
<td>PPS</td>
<td>UCPath</td>
<td>Complete MLA and send to originating Location. UCPath job is created for PPS host job.</td>
<td>Submit concurrent hire template with MLA.</td>
</tr>
<tr>
<td>UCPath</td>
<td>PPS</td>
<td>Submit full hire template with MLA.</td>
<td>Continue local process for data changes, if applicable.</td>
</tr>
</tbody>
</table>
Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions

Select the concurrent hire (staff or academic) template.

Click Create Transaction to begin entry of the template transaction.
Enter the details for the concurrent hire, beginning with the Job Effective Date and the Reason Code.

Enter Transaction Details Page

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 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.
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.
Having completed this module, you should be able to:

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

Ready to join?

Join at kahoot.it and enter the game PIN

88 Players

Kahoot!

Start
Rehire

Module 4
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

<table>
<thead>
<tr>
<th>Template</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC_ADD_CWR</td>
<td>UC Add Contingent Worker - No Position Data</td>
</tr>
<tr>
<td>UC_ADD_CWR_POSN</td>
<td>UC Add Contingent Worker With Position</td>
</tr>
<tr>
<td>UC_COM_CWR</td>
<td>UC Complete Contingent Worker Instance</td>
</tr>
<tr>
<td>UC_CONC_HIRE</td>
<td>UC Concurrent Hire - Staff Only</td>
</tr>
<tr>
<td>UC_CONC_HIRE_AC</td>
<td>UC Concurrent Hire - Academic</td>
</tr>
<tr>
<td>UC_EXT_CWR</td>
<td>Extend CWR Appointment</td>
</tr>
<tr>
<td>UC_EXT_CWR_POSN</td>
<td>Extend CWR (with Position) Appointment</td>
</tr>
<tr>
<td>UC_FULL_HIRE</td>
<td>UC Full Hire - Staff Only</td>
</tr>
<tr>
<td>UC_FULL_HIRE_AC</td>
<td>UC Full Hire - Academic Use Only</td>
</tr>
<tr>
<td>UC_INVOL_TERM</td>
<td>UC Involuntary Termination</td>
</tr>
<tr>
<td>UC_PERSON_DATA</td>
<td>UC Personal Data</td>
</tr>
<tr>
<td><strong>UC_REHIRE</strong></td>
<td>UC Rehire - Staff Only</td>
</tr>
<tr>
<td><strong>UC_REHIRE_AC</strong></td>
<td>UC Rehire - Academic</td>
</tr>
<tr>
<td>UC_RENW_CWR</td>
<td>UC Renew Contingent Worker - Without Position</td>
</tr>
<tr>
<td>UC_RENW_CWR_POS</td>
<td>UC Renew CWR Instance - with Position</td>
</tr>
<tr>
<td>UC_RETIREMENT</td>
<td>UC Retirement</td>
</tr>
<tr>
<td>UC_TRANSFER</td>
<td>UC Intra-Business Unit Transfer - Staff Only</td>
</tr>
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</tr>
<tr>
<td>UC_VOL_TERM</td>
<td>UC Voluntary Termination</td>
</tr>
</tbody>
</table>
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.
Rehire – System Process

1. Review Person Org Summary page
2. Navigate to the Smart HR Transactions page
3. Select the Rehire template
4. Enter rehire details and attach supporting documentation as needed
5. Save and Submit
Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions

Select the rehire (staff or academic) template.

Click Create Transaction to begin entry of the template transaction.
Enter the details for the rehire, beginning with the Employee ID, Job Effective Date and the Reason Code.

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.

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 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.
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.
Having completed this module, you should be able to:

- Describe the rehire system process.
- Initiate a rehire template transaction.
Check Your Understanding

Ready to join?

Join at kahoot.it and enter the game PIN

88 Players

Start

88

Players

Kahoot!

Game PIN

Enter

Kahoot!

Game PIN

Enter

Kahoot!

Game PIN

Enter
Personal Data

Module 5
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.
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.
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.
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.

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</tbody>
</table>
Personal Data – System Process

View Personal Information

Navigate to the Smart HR Transactions page

Select the Personal Data template

Enter personal data and attach supporting documentation as needed

Save and Submit
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.
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.
Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions

Select the personal data template.

Click Create Transaction to begin entry of the template transaction.
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.
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.
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.
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.
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.
Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > Biographical > Additional Names

In this example, you can see that Buffy Queen also goes by Elizabeth Queen.

Click + to add a name for the employee.
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

Click + to add new security clearance types.
Enter details about the security type selected.
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.
- Ask your instructor for assistance.
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.