Workforce Administration

PHCMWFAL260:
Template Transactions – Part II
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: Termination
2: Retirement
3: Transfers
4: Employee Checklists
By the end of this course, you should be able to:

- Describe the template transaction system process for voluntary termination, involuntary termination, retirement, intralocation transfer and interlocation transfer.
- Initiate voluntary termination, involuntary termination, retirement, intralocation transfer and interlocation transfer template transactions.
- Update employee checklists.
The module learning objectives are:

- Describe the termination system process.
- Initiate a voluntary termination template transaction.
- Initiate an involuntary termination template transaction.
There are two templates available for terminations: **Voluntary** and **Involuntary**.

Initiate a voluntary termination template when:
- An employee decides to resign his or her UC employment.

Initiate an involuntary termination template when:
- A Location decides to terminate an employee, lay off an employee or learns of the death of an employee.

### Available Templates

<table>
<thead>
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</tr>
<tr>
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<tr>
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<tr>
<td>UC_VOL_TERM</td>
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</tbody>
</table>
Termination – System Process

1. Review Person Org Summary page
2. Navigate to the Smart HR Transactions page
3. Select the Termination template
4. Enter termination details and attach supporting documents as needed
5. Save and Submit
6. Initiate final pay
Smart HR Transactions Page

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

**Smart HR Transactions**
Select a template and press Create Transaction.

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

- **Transactions in Progress**

Select the termination template (voluntary or involuntary).

Click **Create Transaction** to begin entry of the template transaction.
Enter the details for the termination.

**Important**
- Ensure 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.

**Select the correct Employment Record Number** for the job to terminate. If the employee has multiple assignments, submit a termination template for all jobs, as necessary. If the termination reason is **Death**, only one termination template needs to be initiated; UCPC WFA Production will terminate all other UC jobs for the employee.

**Click Continue** to enter the remaining details of the template.
Enter Transactions Information

- The Last Date Worked automatically populates with a date that is one day prior to the Job Effective Date.
  - If the Job Effective Date is a Monday, the Last Date Worked defaults to the previous workday (Friday).
  - The Last Date Worked field can be changed, if needed; however, the Last Date Worked must be prior to the Job Effective Date.
- When complete, click the Save and Submit button.

Update the Last Date Worked if needed and enter a Comment.
Final Pay is required when an employee is separated from the University.

For voluntary and involuntary terminations:

- After you click the **Save and Submit** button, the **Submit Confirmation** page appears.
- Click the **Add Payroll Request** link to initiate the final pay process.
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.
Initiate Voluntary Termination Template Transaction

- Watch as your instructor demonstrates how to initiate a voluntary termination template transaction in UCPath.
- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *Initiate Voluntary Termination 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

Initiate Voluntary Termination Template Transaction

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

- Watch as your instructor demonstrates how to initiate an involuntary termination template transaction in UCPath.
- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *Initiate Involuntary Termination 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

Initiate Involuntary Termination Template Transaction

- This is your opportunity to practice this task on your own.
  - Open the UCPath Help site and refer to the *Initiate Involuntary Termination Template Transaction* 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 termination system process.
- Initiate a voluntary termination template transaction.
- Initiate an involuntary termination template transaction.
Check Your Understanding

Ready to join?

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Start

Kahoot!
Retirement

Module 2
The module learning objectives are:

- Describe the retirement system process.
- Initiate a retirement template transaction.
Retirement – Overview

- Initiate a retirement template when an employee decides to retire.
- There is one retirement template that is used for both academic and staff employees.

Available Templates

<table>
<thead>
<tr>
<th>Template</th>
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<tr>
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</tbody>
</table>
Retirement – System Process

1. Review Person Org Summary page
2. Navigate to the Smart HR Transactions page
3. Select the Retirement template
4. Enter retirement details and attach supporting documents as needed
5. Save and Submit
6. Initiate final pay
Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions

Click Create Transaction to begin entry of the template transaction. Select the retirement template.
Enter Transactions Details Page

Enter the details for the retirement.

Important
- Ensure you select the correct Job Effective Date.
- This field is an important entry point for the employee’s record and has many downstream effects.

There is only one Reason Code for the retirement template.

Select the correct Employment Record Number for the job to retire. If an employee retires from UC, only one retirement template needs to be initiated; UCPC WFA Production will retire all other jobs for the employee, as needed.

Click Continue to enter the remaining details of the template.
Enter Transactions Information

- The Last Date Worked automatically populates with a date that is one day prior to the Job Effective Date.
  - If the Job Effective Date is a Monday, the Last Date Worked defaults to the previous workday (Friday).
  - The Last Date Worked field can be changed, if needed; however, the Last Date Worked must be prior to the Job Effective Date.
- When complete, click the Save and Submit button.

Update the Last Date Worked if needed and enter a Comment.
After you click the **Save and Submit** button, the **Submit Confirmation** page appears.

Click the **Add Payroll Request** link to initiate the final pay process.
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 Retirement Template Transaction

- Watch as your instructor demonstrates how to initiate a retirement template transaction in UCPath.

- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *Initiate Retirement 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

Initiate Retirement Template Transaction

- This is your opportunity to practice this task on your own.
  - Open the UCPath Help site and refer to the *Initiate Retirement Template Transaction* 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 retirement system process.
- Initiate a retirement template transaction.
Check Your Understanding

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Start
The module learning objectives are:

- Describe the intralocation transfer system process.
- Initiate an intralocation transfer template transaction.
- Describe the interlocation transfer system process.
- Initiate an interlocation transfer (concurrent hire) template transaction.
- Initiate an interlocation transfer (terminate) template transaction.
Intralocation transfers are initiated when an employee transfers within the same business unit (campus) or to a related business unit (medical center).

- Transfers also are initiated when an employee transfers from one position to another within the same business unit.

- A separate transfer template is available for academic and staff.

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</table>
Intralocation Transfer – System Process

- Review Person Org Summary page
- Navigate to the Smart HR Transactions page
- Select the Transfer template
- Enter transfer details and attach supporting documents as needed
- Save and Submit
Smart HR Transactions Page

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

Smart HR Transactions
Select a template and press Create Transaction.

Select the transfer template (staff or academic).

Click Create Transaction to begin entry of the template transaction.
Enter the details for the intralocation transfer.

**Important**
- Ensure 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.

Select the correct Employment Record Number for the job to transfer.

Click Continue to enter the remaining details of the template.
Enter Transactions Information

- Enter the details for the intralocation transfer on the Job Data and Job Earnings Dist tabs, as needed.
- When complete, click the Save and Submit button to submit the template for review and approval.
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 Intralocation Transfer Template Transaction

- Watch as your instructor demonstrates how to initiate an intralocation transfer template transaction in UCPath.
- Follow along using the UCPath Help topic.
  - **Staff**: Open the UCPath Help site and refer to the *Initiate Intralocation Transfer Template Transaction (Staff)* topic.
  - **Academic**: Open the UCPath Help site and refer to the *Initiate Intralocation Transfer 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 Intralocation Transfer Template Transaction

- This is your opportunity to practice this task on your own.
  - **Staff:** Open the UCPath Help site and refer to the *Initiate Intralocation Transfer Template Transaction (Staff)* topic.
  - **Academic:** Open the UCPath Help site and refer to the *Initiate Intralocation Transfer Template Transaction (Acad)* topic.
- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.
Interlocation transfers are initiated when an employee transfers from one business unit to another business unit without a break in service.

For interlocation transfers two separate templates must be initiated:

ุม Concurrent Hire
- Initiated by the business unit to which the employee is transferring.

♦ Voluntary Termination
- Initiated by the business unit from which the employee is transferring.

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</tr>
<tr>
<td>UC_RETIRED</td>
<td>UC Retirement</td>
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<td>UC_VOL_TERM</td>
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</tbody>
</table>
## When both Locations are on UCPath

- For interlocation transfers, a concurrent hire template is initiated by the Location to which the employee is transferring, and a voluntary termination template is initiated by the Location from which the employee is transferring.

- There should be no break in service.
  - The **Job Effective Date** of the termination should be the **same Job Effective Date** as the concurrent hire.

- This process should be coordinated between the two Locations.
  - Before processing the templates, WFA Production validates there is both a concurrent hire (interlocation transfer) template and a termination (interlocation transfer) template for the employee. They process the concurrent hire template prior to the termination template to ensure there is no break in service.
Transferring PPS \(\rightarrow\) UCPath

- A hire template transaction is initiated in UCPath when an employee transfers from PPS to a UCPath Location (and who have never had a UCPath Empl ID).

- The UCPath Location initiates a Full Hire template and the appropriate **Reason Code** related to their new position:
  - Transfer-Inter BU, Promotion
  - Transfer-Inter BU, Demotion
  - Transfer-Inter BU, Lateral
  - Transfer-Inter BU, Undefined

- When an employee transfers from a PPS Location, it is the PPS Location’s responsibility to provide the employee’s benefit and payroll information by submitting the UFIN301 forms.
A termination template is initiated in UCPath when an employee transfers from a UCPath Location to PPS.

- A termination template is initiated with a **Reason Code** of:
  - Transfer from UCPath PS
  - Locations should enter a comment to inform UCPC WFA Production that the termination is due to a Transfer

- When an employee transfers from a UCPath Location to a PPS Location, it is UCPC WFA Production’s responsibility to initiate the UFIN301 forms.
Instructor Demo – Part 1

Initiate Interlocation Transfer (Concurrent Hire) Template Transaction

- Watch as your instructor demonstrates how to initiate an interlocation transfer template transaction in UCPath. This demonstration is for a transfer from a UCPath Location to another UCPath Location.

- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *Initiate Interlocation Transfer (Concurrent Hire) 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.
Watch as your instructor demonstrates how to initiate an interlocation transfer (terminate) template transaction in UCPath. This demonstration is for a transfer from a UCPath Location to another UCPath Location.

Follow along using the UCPath Help topic.

- Open the UCPath Help site and refer to the *Initiate Interlocation Transfer (Terminate) 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 – Part 1

Initiate Interlocation Transfer (Concurrent Hire) Template Transaction

- This is your opportunity to practice this task on your own.
  - Open the UCPath Help site and refer to the *Initiate Interlocation Transfer (Concurrent Hire) Template Transaction* topic.

- Launch the **Try It** version of the topic.

- Ask your instructor for assistance.
Exercise – Part 2

Initiate Interlocation Transfer (Terminate) Template Transaction

- This is your opportunity to practice this task on your own.
  - Open the UCPath Help site and refer to the *Initiate Interlocation Transfer (Terminate) Template Transaction* 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 intralocation transfer system process.
- Initiate an intralocation transfer template transaction.
- Describe the interlocation transfer system process.
- Initiate an interlocation transfer (concurrent hire) template transaction.
- Initiate an interlocation transfer (terminate) template transaction.
Check Your Understanding

Ready to join?

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Kahoot!

Start
Employee Checklists

Module 4
The module learning objectives are:
- Describe when employee checklists are used.
- Update employee checklist.
Checklists track specific tasks that need to happen for an event.

For example, a newly hired employee is automatically assigned with a **New Hire Checklist**. This checklist provides a list of hire tasks that need to be completed.

Additional checklists can be used as defined by a Location’s business process.
**Person Checklist Page**

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

The **Checklist** displays the description of the checklist.

If the employee has multiple checklists, the **View All** link is active.

The tasks for the displayed checklist are listed.
You can add new checklists to an employee, update the tasks on an existing checklists and enter task completion information.

### Person Checklist

#### Person Checklist Items

<table>
<thead>
<tr>
<th>Sequence</th>
<th>Item Code</th>
<th>Description</th>
<th>Status</th>
<th>Status Date</th>
<th>Link ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>UCH001</td>
<td>State Oath of Allegiance</td>
<td>Initiated</td>
<td></td>
<td>State Oath of Allegiance</td>
</tr>
<tr>
<td>250</td>
<td>UCH031</td>
<td>I-9, EE Signature Date (Sec</td>
<td>Completed</td>
<td>06/24/2013</td>
<td>I-9, EE Signature Date</td>
</tr>
<tr>
<td>275</td>
<td>UCH043</td>
<td>I-9, Employer Verif (Sec 2)</td>
<td>Initiated</td>
<td></td>
<td>I-9, Employer Verif</td>
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<tr>
<td>300</td>
<td>UCH005</td>
<td>Visa/Permit &amp; Citizenship</td>
<td>Initiated</td>
<td></td>
<td>Visa/Permit &amp; Citizenship</td>
</tr>
<tr>
<td>400</td>
<td>UCH003</td>
<td>Designated Official - Form 700</td>
<td>Initiated</td>
<td></td>
<td>Designated Official - Form 700</td>
</tr>
</tbody>
</table>

#### Checklist History

- **Checklist Date:** 06/24/2013
- **Checklist:** UCHIR1
- **Comment:**

- **Status**:
  - Initiated
  - Completed

- **Status Date**:
  - 06/24/2013

Click + to add a row and enter a new checklist for the employee. The pre-defined tasks automatically display when a checklist is selected.

Update the **Status** and **Status Date** when tasks are completed.

Click a link to enter details for the task in a separate UCPath page.
Instructor Demo

Update Person Checklist

- Watch as your instructor demonstrates how to update an employee checklist in UCPath.

- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *Update Person Checklist* 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 Checklist

- This is your opportunity to practice this task on your own.
  - Open the UCPath Help site and refer to the Update Person Checklist topic.
- Launch the Try It version of the topic.
- Ask your instructor for assistance.
Having completed this module, you should be able to:

- Describe when employee checklists are used.
- Update employee checklist.
Check Your Understanding

Ready to join?

Join at kahoot.it and enter the game PIN

88 Players

Start

Kahoot!

Game PIN

Enter

Kahoot!

Game PIN

Enter

Kahoot!

Game PIN

Enter

Kahoot!

Game PIN

Enter
Course Agenda

1: Termination
2: Retirement
3: Transfers
4: Employee Checklists
You must initiate the final pay process for termination and retirement template transactions if an employee is separated from the University (all jobs are terminated or retired).

Intralocation transfers are initiated when an employee transfers within the same business unit (campus) or to a related business unit (medical center).

Interlocation transfers are initiated when an employee transfers from one business unit to another business unit without a break in service.

For interlocation transfers between two UCPath Locations, two separate templates must be initiated:

- **Concurrent Hire** and **Voluntary Termination**

Refer to the *Template Transactions – Action Reason Codes and Descriptions* job aid for a list of all the templates, associated **Reason Codes** and a description.
Having completed this course, you should be able to:

- Describe the template transaction system process for voluntary termination, involuntary termination, retirement, intralocation transfer and interlocation transfer.
- Initiate voluntary termination, involuntary termination, retirement, intralocation transfer and interlocation transfer template transactions.
- Update employee checklists.
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.