UCPath
HR Inquiry for Departments

UCPath Menus, Job Aids and Available Online Training
Trainer Introduction

Kathleen Cool
Title: Principal Trainer
Department: HR | UCPath
Years @ UC: 1 year
Previous Experience: 10+ years of experience in instructional design and training in higher education. Taught Information System Management at the undergraduate and graduate levels.
Housekeeping

- Cell Phones
- Breaks
- Restrooms
Intended Audience

This training is designed for Departmental Staff with HR and/or AP responsibilities.
Learning Topics (1 of 2)

- UCPath Inquiry Roles & Access
- Person Organizational Summary
- Additional Names
- Workforce Job Summary
- Job Data
- Person Profiles
- Add/Update Position Information
- Person Checklist
- Transaction Status
- Identification Data
- Create Additional Pay
Learning Topics (2 of 2)

- UC Employee Review
- Contract Payment Details
- Update Contract Pay NA
- Additional Courses
- Additional Training Resources
- Contact Us
- Training Evaluation
Access to UCPath is granted by your department SAA. To determine your UCPath access, do the following:

1. Go to [the Enterprise Access Control System](#)
2. Enter your Net ID into the User NetID field.
3. Click on the Condensed Accountability Report button to view your application access.

Note: You can view the full list of SAAs by clicking on the link at the bottom of the form (highlighted in yellow)
4. In the Application column, look for UCPATH.
5. Click on VIEW ROLES.
6. The list will display your roles in UCPATH.

Note: If you are missing a role, contact your SAA to request access.
Accessing UCPath

To access UCPath:
1. Go to R'Space
2. Click the Authorized Apps tab
3. Click on the UCPath Portal link
4. Select University of California, Riverside
5. Sign into UCPath using your credentials
Accessing the UCPath Help Site

The **UCPath Help for Locations** website is where you can find UCPath resources such as,

a. How-to-videos
b. Interactive simulations
c. Job aid
Use this page to view all current organizational relationships for a person: Employee, Contingent Worker (CWR) and/or Person of Interest (POI). This page does not display historical or future-dated employment details. For additional information, consult the View Person Organizational Summary Job Aid.
The UCPath Person Organizational Summary displays all current organizational relationships for an employee. It does not display historical or future dated employment details. To view the page,

1. Go to UCPath and navigate to the **Person Organizational Summary** menu
2. Search for the employee’s record and select the employee’s name
The Person Organizational Summary page displays the current organizational relationships for the selected employee. This example displays Employment Instances and Assignments for a Staff Employee.

Each Assignments header displays the employee’s HR Status and Payroll Status, their Last Hire date, and if applicable, Termination Date. If the employee has multiple assignments, one of the assignments is indicated as the Primary Job.

The Assignments section displays the employee’s job assignment details for each Empl Record. Data includes the 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, and Probation End Date.
Additional Names

Use this page to view the Additional Names page. For additional information, consult the View Additional Names Job Aid.
The UCPath Additional Names page contains additional names a given employee may go by. To view the page,

1. Go to UCPath and navigate to the **Additional Names** menu
2. Search for the employee’s record and select the employee’s name
After using the **Find an Existing Value** page to search for a specific employee record, all names associated with the selected employee appear in the **Current Names** section. To view Historical name data for the employee, click on the **View Name History** hyperlink within the **Current Names** record.
The Name History provides additional information, including the Type of Name, Effective Date, Status, Name, and Name Format. Clicking on the View Name hyperlink provides additional information on the English Name Format, including Prefix, First Name, Middle Name, Last Name, Suffix, Display Name, Formal Name, and Name.
Workforce Job Summary

Use this page to view a summary of an employee’s job information – including current, future and historical data. For additional information, consult the View Workforce Job Summary Job Aid.
Workforce Job Summary

PeopleSoft Menu > Workforce Administration > Job Information > Review Job Information > Workforce Job Summary

The UCPath Workforce Job Summary page contains employee job information. To view the page,

1. Go to UCPath and navigate to the Workforce Job Summary menu
2. Search for the employee’s record and select the employee’s name
The **General** tab displays the employee’s job change history.
The **Job Information** tab displays detailed information about the job change history.

<table>
<thead>
<tr>
<th>Organizational Relationship</th>
<th>Empl Record</th>
<th>Effective Date</th>
<th>Seq</th>
<th>Job Code</th>
<th>Description</th>
<th>Classified Ind</th>
<th>Empl Status</th>
<th>Full/Part Time</th>
<th>Standard Hours</th>
<th>FTE</th>
<th>FLSA Status</th>
<th>Expected Job End Date</th>
<th>Expected Return Date</th>
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<tbody>
<tr>
<td>EMP</td>
<td>0</td>
<td>01/17/2019</td>
<td>1</td>
<td>000148</td>
<td>INSTRUCTION</td>
<td>PSS</td>
<td>Active</td>
<td>Full Time</td>
<td>40.00</td>
<td>1.000000</td>
<td>Exempt</td>
<td>01/17/2019</td>
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<td>01/17/2019</td>
<td></td>
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<td>ORGANIZATIONAL CMBT 4</td>
<td>MSP</td>
<td>Active</td>
<td>Fixed</td>
<td>40.00</td>
<td>1.000000</td>
<td>Exempt</td>
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<td>Active</td>
<td>Fixed</td>
<td>40.00</td>
<td>1.000000</td>
<td>Exempt</td>
<td>01/02/2018</td>
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<td>12/01/2017</td>
<td>0</td>
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<td>1.000000</td>
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<td>Active</td>
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<tr>
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<td>CONVERSION JOB CODE</td>
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<td></td>
<td>0.01</td>
<td>No FLSA</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The **Work Location** tab provides basic location details.
Use this page to view an employee’s job data in UCPath. For additional information, consult the View Job Data Job Aid.
The UCPath Job Data page provides valuable information such as, employee details, type of appointment, organizational unit, salary, position number, etc. To view the Job Data page,

1. Go to UCPath and navigate to the **Job Data** menu
2. Search for the employee’s record and select the employee’s name
The **Work Location** tab contains employee position details such as,
- Payroll Status
- Position Number
- Department
- Location

![Work Location Tab](image)
The Job Information tab contains information about employee’s,

- Supervisor
- Employee Class
The **Job Labor** tab contains the employee’s **Union Code**.
The Payroll tab contains basic payroll information.
The **Salary Plan** tab displays the employee’s **Salary Grade**.
The Compensation tab displays the employee’s Payroll Status.
The UC Job Data tab displays basic job data. At the bottom of the page there are three important links,

- Employment Data
- Earnings Distribution
- Benefits Program Participation
The Employment Data page contains the employee’s Service Date and Seniority Dates.
The Earnings Distribution page displays basic earnings details.
The **Benefits Program Participation** page displays information related to benefits eligibility.
Person Profiles

Use this page to view person profile information in UCPath. For additional information, consult the View Person Profile Information Job Aid.
Person Profiles

PeopleSoft Menu > Workforce Development > Profile Management > Profiles > Person Profiles

The UCPATH Person Profiles page displays person profile information, including Qualifications, Education, Oath / Patent Signature Date, Multi-Location Appointments, and UC Student Status, Credit Card, and Employment Verification. To view the page,

1. Go to UCPATH and navigate to the Person Profiles menu
2. Search for the employee’s record and select the employee’s name
Qualifications

Use the Person Profile page to view information about an employee’s qualifications, education, oath and patent signature dates, multi-location agreements, and UC student status.

The Qualifications page provides information about honors and awards as well as licenses and certifications.
The **Education** page displays records of an employee’s degrees, any UC specialty codes they may qualify for and additional UC prior or future service codes.
The **Oath / Patent Signature Date** page displays the date an employee signed their oath and patent acknowledgement documents.

This information is mandatory and employees are not granted access to UC systems without updated information.
Multi-Location Appointments

The Multi-Location Appointments page identifies employees who have multiple and concurrent work assignments.

The host location is responsible for maintaining this information.
UC Student Status

The UC Student page identifies employees that are also UC students.
The Credit Card page lists if the employee has been assigned an UC Corporate Credit Card.
The Employee Verification page provides information on Student Opt-in and Non-Student Opt-Out choices on Employee Verification.
Use this page to view position information in UCPath. For additional information, consult the View Position Information Job Aid.
Add/Update Position Info

PeopleSoft Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

The UCPath Add/Update Position Info page displays position details. To view the page,
1. Go to UCPath and navigate to the Add/Update Position Info menu
2. Search for the employee’s record and select the employee’s name
The **Description** tab provides position details such as,

- **Position Number**
- **Job Code**
- **Department**
- **Location**
- **Reports To**
- **Salary Grade**
Budget and Incumbents Tab

The **Budget and Incumbents** tab provides,
- Current Incumbents
- Link to **Job Data** menu
Use this page to update an existing person checklist and add a new checklist. For additional information, consult the Update Person Checklist Job Aid.
Person Checklist

PeopleSoft Menu > Workforce Administration > Personal Information> Organizational Relationships > Person Checklist

The UCPath Person Checklist page displays an existing person checklist. To view the page,

1. Go to UCPath and navigate to the Person Checklist menu
2. Search for the employee’s record and select the employee’s name
The **Person Checklist** page displays the current checklist that is assigned to the employee. In most cases, this will be the **UC New Hire Checklist**.

The **New Hire Checklist** contains a list of tasks that should be completed when a new person is hired. The tasks are listed in the **Person Checklist Items** section.

Tasks on the list are entered in UCPath then marked as **Completed** on the checklist along with the date the task was completed. Some tasks are completed outside of UCPath and marked as **Completed** on the checklist.
Use this page to view the status of Smart HR Template transactions that have completed the approval workflow (AWE) and are being processed by UCPath Center WFA Production. You can view transactions, which you and others have submitted within the department(s) to which you have access. For additional information, consult the View Template Transaction Status – Transactions Status Page Job Aid.
The UCPath Transaction Status page the status of Smart HR Template transactions that have completed the approval workflow (AWE) and are being processed by UCPC WFA Production. To view the page,

1. Go to UCPath and navigate to the **Transaction Status** menu*

*The Transaction Status page may take a few minutes to download in its entirety. Please be patient.
Use the **Transaction Status** page to filter existing **Smart HR Template** transactions by status, type and date. You can select filter options or accept the default **All**. Enter **Start Date From** and **To** fields to refine your search result. When you are finished entering the appropriate search criteria, click the **Refresh** button to update the results.

The **Transaction Status** grid displays the transactions that match the search criteria you entered. The **Transaction Type** identifies the type of transaction that was initiated. The **Person ID** identifies the employee associated with the transaction. This column displays **NEW** for full hire transactions that are still pending. The **Action** displays the action code for the requested transactions. If necessary, scroll right to display additional columns.
Identification Data

Use this page to view employee citizenship/passport and visa/permit data. For additional information, consult the View Identification Data Job Aid.
Identification Data

PeopleSoft Menu > Workforce Administration > Personal Information > Citizenship > Identification Data

The UCPath Identification Date page displays employee citizenship/passport and visa/permit data. To view the page,

1. Go to UCPath and navigate to the Identification Data menu
2. Search for the employee’s record and select the employee’s name
Citizenship / Passport

Review the information on the Citizenship/Passport page.
Visa / Permit Data

Review the information on the Visa/Permit Data page.
Create Additional Pay

Use this page to view existing recurring additional compensation.
Create Additional Pay

PeopleSoft Menu > Payroll for North America > Employee Pay Data USA > Create Additional Pay

The UCPath Create Additional Pay page displays existing recurring additional compensation. To view the page,

1. Go to UCPath and navigate to the Create Additional Pay menu
2. Search for the employee’s record and select the employee’s name
Additional Pay

Review information pertaining to Additional Pay, including Administrative Stipends, STAR awards, Academic Additional Pay such as Summer Salary, etc.
UC Employee Review

Use this page to track employee ratings and next review date until TAM/ePerformance is deployed.
UC Employee Review

PeopleSoft Menu > Compensation > Base Compensation > Group Increases > UC Employee Review

The UCPath UC Employee Review page displays employee ratings and next review date until TAM/ePerformance is deployed. To view the page,

1. Go to UCPath and navigate to the UC Employee Review menu
2. Search for the employee’s record and select the employee’s name
The UC Employee Review tab displays employee Review Details including:

- Effective Date
- Review Type
- Rating Model
- Review Rating
The **Reviewers** tab displays the identity of the reviewer(s). Information includes the Evaluation Type and the ID of the person who conducted the review.
Contract Payment Details

Use this page to view contract pay (established for academics who start/end employment mid-quarter). No data is displayed if not applicable.
The UCPath Contract Payment Details displays contract pay for academics who start/end employment mid-quarter. To view the page,

1. Go to UCPath and navigate to the **Contract Payment Details** menu
2. Search for the employee’s record and select the employee’s name

If the employee selected is not eligible for contract pay, the system will return “No matching values were found.”
Update Contract Pay NA

Use this page to view contract pay updates (updated for academics who start/end employment mid-quarter. No data is displayed if not applicable.
Update Contract Pay NA

PeopleSoft Menu > Workforce Administration > Job Information > Contract Administration > Update Contract Pay NA

The UCPATH Update Contract Pay NA displays contract pay updated for academic who start/end employment mid-quarter. To view the page,

1. Go to UCPATH and navigate to the Update Contract Pay NA menu
2. Search for the employee’s record and select the employee’s name
The **Contract Pay** tab displays Contract Information, including:

- **Effective Date**
- **Payment Terms**
- **Monthly Frequency**
- **Pay Period Hours**
- **Assign Hours To**
- **Contract Begin/End Dates**
- **Payment Begin/End Dates**
- **Actual Start Date**
- **Termination Date**

If the employee selected is not eligible for contract pay, the system will return “No matching values were found.”
The **Contract Pay Options** tab displays **Annualization Options** and **Funding Options**.
Additional Courses

Click on the hyperlinks below to register for and take the corresponding online course in the LMS.

- PHCMNAV100: UCPath PeopleSoft Overview
- PHCMNAV105: UCPath Basics and Navigation
- PHCMNAV310: AWE Overview and Approvals
- PHCMWFA100: Employee Data Inquiry
- PHCMWFA110: WFA Overview
Training Resources

http://fomucpath.ucr.edu/training/resources.html
FOM|UCPath AP Team Email (for AP-specific questions)

APUCPathSupport@o365ucr.onmicrosoft.com
Your Feedback Please

https://tinyurl.com/ucrfomucpathfeedback
Thank You