Zoom-A-Day: Navigation, Create a Position, Initiate a Hire
Today’s Topics

- UCPath System Navigation
- How to Create a Position
- How to Initiate a Full Hire
- How to Approve Template Transactions
Where can I get help?

- UC San Diego Job Aids and Quick References: [https://ucpath.ucsd.edu/training/job-aids.html](https://ucpath.ucsd.edu/training/job-aids.html)
- UCPath Help Site for Transactional Users: [https://sp.ucop.edu/sites/ucpathhelp/LocationUsers/LOCplayer/data/toc.html](https://sp.ucop.edu/sites/ucpathhelp/LocationUsers/LOCplayer/data/toc.html)
UCPath System Navigation

- Bookmarks vs Favorites
- Submitting a Case to UCPC
- Important Reference Pages
- Resources
Bookmarks vs Favorites

- You will navigate to: https://ucpath.universityofcalifornia.edu and log into UCPath Online
- You will use the menus on the left side of the page to navigate to transaction pages in UCPath
- You can open a new window from UCPath transaction page, and have multiple tabs or pages open at the same time
- When you open a new window from a UCPath transaction page, you are no longer in the UCPath Online “wrap,” you are in the native PeopleSoft pages
- You can use your Favorites in both views
Submitting a Case to UCPC

There are many reasons you will need to submit a Case to UCPC.
<table>
<thead>
<tr>
<th>PAGE AND DESCRIPTION</th>
<th>NAVIGATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacant Budgeted Positions</td>
<td>PeopleSoft Menu &gt; Organizational Development &gt; Position Management &gt; Review Position/Budget Info &gt; <strong>Vacant Budgeted Positions</strong></td>
</tr>
<tr>
<td>View a summary of a department’s currently vacant positions</td>
<td></td>
</tr>
<tr>
<td>Position Summary</td>
<td>PeopleSoft Menu &gt; Organizational Development &gt; Position Management &gt; Review Position/Budget Info &gt; <strong>Position Summary</strong></td>
</tr>
<tr>
<td>View a summary of edits to position data</td>
<td></td>
</tr>
<tr>
<td>Person Organizational Summary</td>
<td>PeopleSoft Menu &gt; Workforce Administration &gt; Personal Information &gt; <strong>Personal Organizational Summary</strong></td>
</tr>
<tr>
<td>View a summary of an employee’s current organizational relationships and primary job assignment</td>
<td></td>
</tr>
<tr>
<td>Job Data</td>
<td>PeopleSoft Menu &gt; Workforce Administration &gt; Job Information &gt; <strong>Job Data</strong></td>
</tr>
<tr>
<td>View a summary of job data and job data changes</td>
<td></td>
</tr>
<tr>
<td>Workforce Job Summary</td>
<td>PeopleSoft Menu &gt; Workforce Administration &gt; Job Information &gt; Review Job Information &gt; <strong>Workforce Job Summary</strong></td>
</tr>
<tr>
<td>View summary of employee’s current, future, and historical data</td>
<td></td>
</tr>
<tr>
<td>Review Absence Balance</td>
<td>PeopleSoft Menu &gt; UC Customizations &gt; UC Extensions &gt; <strong>Admin – Review Absence Balance</strong></td>
</tr>
<tr>
<td>View leave balances</td>
<td></td>
</tr>
<tr>
<td>Funding Entry Inquiry</td>
<td>PeopleSoft Menu &gt; Set Up HCM &gt; Product Related &gt; Commitment Accounting &gt; UC Customizations &gt; <strong>Funding Entry Inquiry</strong></td>
</tr>
<tr>
<td>View position funding</td>
<td></td>
</tr>
</tbody>
</table>
The Person Org Summary page shows key Job Data for all of an individual’s job records across all UC Locations.
The Workforce Job Summary page shows all job data updates for a particular employee record.

REMEMBER: Many Job Data fields are cascaded directly from Position Data. You’ll see Position Data on Job Data pages.
Navigate to the Job Information tab for more detailed information than you viewed on the General tab.
Resource Review

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How to Create a Position

- Review System Steps
- Important Things to Remember
- Resources
Going forward we are changing our best practice to **one month prior to hire date**, rather than one year prior to hire date.

**Considerations**
- The effective date of your position must be **after** the most recent range-based salary scale change (those with minimums and maxes) for the type of employee position you are creating, if applicable
- If you expect the hire date to fall on the effective date of a salary scale change, use the hire date as the position effective date
On the **Add/Update Position Info** page, click the **Add a New Value** tab to display the screen below. Click **Add** to begin the steps for adding a new position.

> Always accept the value of all zeros in the Position Number field. When you save a new position, UCPath automatically assigns the next available position number.
Add/Update Position Info Components

Start with the Description tab to enter Position, Job, Work Location and Salary Plan Info.

- Gather all needed info before you start. Position Management does not have a Save for Later option.

- The Effective Date field defaults to today’s date. Remember, a best practice is to back-date this 1 month to ensure access if changes are required prior to a hire.

- After you enter applicable information on the remaining tabs you click Save. The position is created and UCPaPath automatically assigns the next available Position Number to the new position.
After you enter Job Code the following fields are usually auto-filled: Union Code, Title, and Short Title.

Enter Department and Reports To. Location will auto-fill after Department selected.

Accept:
- Status default = Active
- Reason default = NEW
- Position status = Approved

Business Unit will default to UC San Diego Campus.

Choose appropriate Full/Part Time Status.

Accept defaults for Reg Region and Company.

Fields with a blue line through them are not used by UC, do not enter data in these fields.

REMEMBER: Change the effective date as it will default to today’s date.
Description Tab (cont) | Salary Plan Information

Enter **Salary Admin Plan** and **Grade**.

DO NOT enter anything in the **STEP** field, not used at Position level.

Fields with a blue line through them are not used by UC, do not enter data in these fields.

The **Standard Hours**, **Work Period** and **FLSA** fields are derived by **Job Code**, **DO NOT CHANGE**.
Specific Information Tab

- Fields with a blue line through them are not used by UC, do not enter data in these fields.

- Pre-Encumbrance Indicator, Encumber Salary Option, and Classified Indicator are derived from Job Code, DO NOT CHANGE.

- Position Pool is only used for Work Study positions.

- Accept default of “1” for Max Head Count.

- Make sure the Budgeted Positions box is checked if you want to view this position on the Vacant Budgeted Position page.

- Enter FTE. An employee with an FTE of zero will NOT get paid, even if hours submitted via Time & Attendance.

- Check the Adds to FTE Actual Count box.
Select the HR Worksite ID to take advantage of I-9 Tracker integration.

Select the appropriate Employee Relations Code – this is a required field.

HR Worksite ID drives the automatic UCPath & I-9 Tracker integration functionality.

UC San Diego is not currently using Special Training Code or Secondary Org Department sections on this page.
• The **Effective Date** defaults to today’s date and you should update it to be one month prior to the anticipated hire date.

• Consider any recent changes to range-based salary scales.

• **Do not** enter **Step** on the Position – **Step** is Job Data.

• **FTE** should not be zero unless the employee hired into this position will only be paid using Additional Pay.

• Automatic Tracker Integration currently not working, but you should still enter the **HR Worksite ID**.

• The **Position Number** is generated when you click **Save**; Position Management has no approval workflow.

• You can find the vacant positions in your department on the **Vacant Budgeted Positions** page.

• You can’t override values that default from the **Job Code** (like **FLSA Status**) when you are creating a position; you must make those changes in a separate position update transaction with the appropriate **Reason Code**.
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How to Hire

- Hire system steps
- Important Things to Remember
- Hire demo
- Hire resources
When To Use the Full Hire Templates

The UC_FULL_HIRE template creates a new record for an employee at the hiring Location. Use this template to:

- Hire a new employee with no prior UC affiliation
- Rehire an employee who previously worked at a different UC Location
- Rehire an employee who previously worked at our Location but for whom no data has been converted into UCPath

Note: There is a Staff and an Academic version of the Full Hire template.

If hiring an individual with prior UC affiliation and no break in service, perform a transfer transaction.
Full Hire Pre-Process & Considerations

Before entering your Full Hire Template Transaction:

Have the information you need to complete the template handy, including:

- Personal data (from Onboarding or another tool)
- Position number
- EMPL ID (if new hire has one from employment at another Business Unit)
- Start date/Effective date

- Review **Person Org Summary** and perform the **Search Match** searches (if applicable)
- Review the **Template Transactions – Action Reason Codes and Descriptions** job aid to ensure you utilize the correct template and reason code
- Review the **Payroll Processing Calendar** to ensure you submit your transaction in time for approval before deadline
- Remember that you will receive a new employee’s EMPL ID only after UCPC accepts and processes your template transaction
Smart HR Transactions Page

This page is the starting point to initiate all template transactions.

**NAVIGATION**
- PeopleSoft Menu
- Workforce Administration
- Smart HR Template
- Smart HR Transactions

**IMPORTANT**
Effective Dates are critical. The effective date on a template is the first day of the new status (e.g. hired, terminated, retired, transferred).

Use the **Select Template** look up to choose the correct template for the transaction you need to initiate.

Do not use the **Transaction Type** dropdown menu. UC does not use this field.

Click **Create Transaction** after selecting Template and entering Effective Date.
Verify the Effective Date for the Full Hire and select the appropriate Reason Code.

The Employee ID field defaults to NEW.

Accept the default if the individual has never had a UCPath Employee ID.

Enter the individual’s Employee ID if one exists. It’s critical to avoid creating two ID’s for a single person.

When UCPC processes the template transaction the new Employee ID is generated.

Address Format field defaults to United States.
The Hire template has five tabs.

- The **Personal Data** and **Job Data** tabs must be completed
- The **Earns Dist, Addl Pay** and **Employee Experience** tabs are completed as applicable

**REMEMBER**
You must navigate through all five tabs (click into each of them) before the Save and Submit button is available.
Full Hire Template | Personal Data Tab

Required Personal Data fields:
- First and Last Name
- National ID (SSN)
- Address
- Personal Email Address

UCPC will cancel template transactions without a Social Security Number except when:
- New hire is a Non-Resident Alien (NRA)
- Submitting a future-dated hire

UCPC will cancel template transactions without a Personal Email except when:
- Submitting a future-dated hire

NOTE: When your transaction does not include a SSN or Personal Email you MUST include an explanation in the Comments Box or UCPC will cancel the transaction.
Enter the Position Number, press the Tab Key. Job Data fields are populated from the Position and are view-only.

For Staff: Employee Classification field must be entered.

For Academics: Employee Classification field defaults and is view-only.

IMPORTANT

If you can’t locate a position, it’s possible the Effective Date of the Position is later than the Effective Date of the Hire.
- **Comp Rate Codes** define each component of the employee's base salary
  - UCANNL and UCHRLY will be the most commonly used Comp Rate Codes for staff employees
- **Compensation Rate** is the amount paid at the compensation frequency

**Job Compensation - Pay Components**

- Compensation Frequency here defines how the quoted compensation amount is presented:
  - A = Annual amount
  - H = Hourly amount

**Job Compensation - Payroll Currency and Frequency**

- Compensation Frequency here defines how total compensation is paid out to the employee.

For example, Monthly, Hourly, 9/12, 1/10.
- This field driven by **Job Code**.
- This field can be overridden in a separate transaction if there is a need to sync up pay cycles between two or more jobs.
Enter the job end date in the **Expected Job End Date** field, for a short term or temporary hire.

- **Staff** employees are automatically terminated in UCPath on this date (do not put end date for career staff)
- **Academic** template has a checkbox that must be checked to automatically terminate on **Expected Job End Date**

Only Academic Template will have the **End Job Automatically** checkbox.
The need for MCOP comes from an off-scale or negotiated/incentive component of pay. MCOP are managed in the Job Earnings Distribution (JED) component of Job Data.

- **Staff employees**: Rarely have MCOP, outside of Staff Physicians

- **Academic employees**: MCOP required for Health Sciences Comp Plan (HSCP) and General Campus Comp Plan (GCCP)

   NOTE: UCOP refers to GCCP as the Negotiated Salary Trial Program (NSTP)

   HSCP & GCCP will always be distributed **By Amount**.
Additional Pay is used for one time and recurring payments.

Additional Pay is also used at UC San Diego for an employee being paid using a flat dollar amount.

- Examples are UNEX instructors, Rec instructors, and Summer Session instructors; FTE=0.0 and compensation fields in Job Data will be left blank.
Hire: Important Things to Remember

- Review Person Org Summary
- Make sure you are using the correct template (e.g., Hire, Rehire, Intra-Location Transfer, Concurrent Hire)
- Perform Search Match searches before using the Full Hire template to ensure you are not creating a second Employee ID for the individual you are hiring
- If you realize you’ve made a mistake after you have submitted your template:
  - Delete the template from your Smart HR Templates page (no clone option)
  - Ask your approver to deny (you can clone from Transaction Status page)
  - If they have already approved, submit a Case to UCPC and ask them to cancel the transaction (you can clone from Transaction Status page)
- The Additional Pay tab is not currently working in Template Transactions; set up Additional Pay in PayPath after the hire is processed by UCPC
- New Employee ID is not available until after UCPC processes the Full Hire template
- UCPC processing for Template Transactions is 1-4 business days
- Initiate a Full Hire Template Transaction
- UC San Diego Job Aids and Quick References: [https://ucpath.ucsd.edu/training/job-aids.html](https://ucpath.ucsd.edu/training/job-aids.html)
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How to Approve Transactions

- Worklist
- Critical Fields for Hire Templates
- Demos
- Resources
Only those provisioned as Approvers have a Worklist on UCPath Online
The Worklist shows transactions that require approval
Tasks disappear once any Approver has approved or denied the transaction
Approvers also receive an email notification for each transaction that requires an approval
The link in the Worklist and the notification email take you directly to the Approval page for the transaction.

Example of an email notification with direct link to Approval page.

Mark as Worked removes the item from your Worklist; does not Approve or remove it from others’ Worklists.

Priority is for your own workflow; it does not impact others’ Worklists.
Critical Fields

- Always check the **Effective Date**
- Hire transactions require the following but can be submitted without; be sure these are in the transaction or the Comments explain why they aren’t otherwise UCPC will cancel the transaction:
  - **Person email**
  - **SSN**
  - **Zero Compensation**
- Closely review all compensation-related fields: **FTE, Salary Admin Plan, Grade, Step, Pay Components**, etc.
- **FTE** should not be zero unless the employee will only receive pay via Additional Pay

**Remember:** Denied Template Transactions can be cloned; the initiator does not need to start from scratch.
Demo

- Approve a Template Transaction (See It)
Resource Review

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