Today’s Topics

- Refresher: Employee Lifecycle & System Steps
- Choosing the Correct Template
- Planning for Fall Hires
- Notes for Initiators & Approvers
- Q&A
Employee Lifecycle and System Steps

- Employee Lifecycle
- Template Transaction System Steps
- Timing Considerations
*If the position must be funded using the Salary Cap/MCOP Worksheet, you must wait until after the Hire has processed to enter the funding.
You can view job assignment information for all employee records across all locations. This page does not display historical or future-dated employment details.

- **Indicates the Start Date of the assignment.**
- **Check Box indicates which job is the Primary Job. This status is determined by the system.**
- **Indicates the Termination Date of the assignment, if applicable. This is Last Day Worked not the Effective Date of the Termination.**
- **Click the View All link to view all current information.**
Template Transaction System Steps

1. Choose your template, enter the **Effective Date**, and click **Create Transaction**

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

**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).
Template Transaction System Steps

2. Enter the transaction details, including **Employee ID**, **Reason Code**, and **Address Format**

Smart HR Transactions

**Enter Transaction Details**

The following transaction details are required.

- **Template**: Full Hire - Staff Only
- **Organizational Relationship**: Employee
- **Employee ID**: NEW
- **Effective Date**: 10/01/2018
- **Action**: Hire
- **Reason Code**: Hire - No Prior UC Affiliation
- **Address Format**: United States

*Address Format* field defaults to United States.
Complete the tabs, as needed, in your template to add/confirm Personal Data and set up Job Data. Remember: The Addl Pay tab is not functioning correctly. Additional Pay should be added via PayPath after a hire is processed.
Monitor your transaction status.

- **Smart HR Transactions**: Your saved templates and templates submitted for local approval but no local action taken yet
- **Transaction Status**: Template status after local action; Clone button and UCPC comments
- **SS Smart HR Transactions**: The only page where you can see local approver comments
- The “delete” functionality on these pages is real

### HOW TO USE THE TRANSACTION STATUS PAGE FOR TEMPLATE TRANSACTIONS

This job aid summarizes the functionality of the Transaction Status page. The Transaction Status page allows you to view the status for any template transactions submitted by department(s) for which you have security access and that have completed local AWE (approved or denied).

**System Steps**

1. Navigate to: PeopleSoft Menu > Workforce Administration > Smart HR Template > Transaction Status
2. Enter search criteria to narrow the results displayed
3. Click the Refresh button
4. Review the Transaction Status
   - **Requested**: Transaction completed local AWE and is awaiting UCPC
   - **Completed**: Transaction was processed by UCPC and committed to UCPath
   - **Hire/Added**: Hire/ehire transaction was processed by UCPC and committed to UCPath
   - **Cancel**: Transaction was canceled by the UCPC
   - **Denied**: Transaction was denied by local approver
5. If applicable, click the View Comments link to review UCPC comments for cancelled transactions
6. If applicable, click the Clone button to create a new Template Transaction with the information from a denied or canceled transaction pre-populated to edit and re-submit

**Important Considerations**

- If a transaction has a status of Requested, deleting it on this screen will remove it from the UCPath Center WFA Production queue. Deleted transactions cannot be retrieved and must be re-submitted if deleted in error.
- To view comments from your local approver, navigate to the SS Smart HR Transactions page: PeopleSoft Menu > UC Customizations > UC Extensions > SS Smart HR Transactions
- To view your own saved HR templates, or HR templates that you have submitted but that have not yet completed local AWE, navigate to the Smart HR Transactions page: PeopleSoft > Workforce Administration > Smart HR Template > Smart HR Transactions
Choosing the Correct Template

- Hire Templates
- Transfers
How do I Choose the Correct Template?

Answering the following three questions is critical to choosing the correct template.

1. What are the **circumstances** prompting initiation of the template transaction?

2. How do **UCPath system specifications** impact choice of template?
   - Location
   - Current Record
     - Academic/Staff
     - Active/Inactive

3. How does our **UCPath conversion date** impact choice of template?
### SMART HR TEMPLATE

<table>
<thead>
<tr>
<th>Full Hire</th>
<th>WHEN TO USE</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC_FULL_HIRE</td>
<td></td>
</tr>
<tr>
<td>UC_FULL_HIRE_AC</td>
<td></td>
</tr>
<tr>
<td><strong>This template creates a new Employee Record</strong></td>
<td></td>
</tr>
</tbody>
</table>
| | Hire a new employee who has never worked for UC  
| |  
| | No Prior Affiliation reason code  
| | Hire an employee who previously worked at a different UC Location  
| |  
| | Rehire reason code  
| | Rehire an employee who previously worked at our Location but for whom no data has been converted into UCPath  
| |  
| | Rehire reason code  
| | Rehire an employee who previously worked at our Location but who is being rehired into a different type of position (staff vs academic)  
| |  
| | Rehire reason code  
| | Hire an employee who was/is a CWR without a position  
| |  
| | With Prior Affiliation reason code  

<table>
<thead>
<tr>
<th>Concurrent Hire</th>
<th>WHEN TO USE</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC_CONC_HIRE</td>
<td></td>
</tr>
<tr>
<td>UC_CONC_HIRE_AC</td>
<td></td>
</tr>
<tr>
<td><strong>This template creates a new Employee Record</strong></td>
<td></td>
</tr>
</tbody>
</table>
| | Hire an employee into an additional job, which they will hold concurrently with their existing job(s)  

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Some Templates Create a New Employee Record

SMART HR TEMPLATE

- Full Hire
  - UC_FULL_HIRE
  - UC_FULL_HIRE_AC
  - **This template creates a new Employee Record**
    - Hire a new employee who has never worked for UC
      - No Prior Affiliation reason code
    - Hire an employee who previously worked at a different UC Location
      - Rehire reason code
    - Rehire an employee who previously worked at our Location but for whom no data has been converted into UCPath
      - Rehire reason code
    - Rehire an employee who previously worked at our Location but who is being rehired into a different type of position (staff vs academic)
      - Rehire reason code
    - Hire an employee who was/is a CWR without a position
      - With Prior Affiliation reason code

- Concurrent Hire
  - UC_CONC_HIRE
  - UC_CONC_HIRE_AC
  - **This template creates a new Employee Record**
    - Hire an employee into an additional job, which they will hold concurrently with their existing job(s)
Example | Concurrent Hire as Part of a Staff to Academic Transfer (Concurrent Hire + Term)

Person Org Summary:

Workforce Job Summary:

The other/first job will continue unchanged until the department terminates it.
## Other Templates Use an Existing Record

<table>
<thead>
<tr>
<th>SMART HR TEMPLATE</th>
<th>WHEN TO USE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Rehire</strong></td>
<td>- Rehire an existing terminated/retired employee at our same Location into the same type of position (staff vs academic) that they held previously with a break in service</td>
</tr>
<tr>
<td>UC_REHIRE</td>
<td>- <strong>Note</strong>: If there is no break in service, you must do a transfer.</td>
</tr>
<tr>
<td>UC_REHIRE_AC</td>
<td></td>
</tr>
<tr>
<td><strong>This template uses an existing inactive Employee Record</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Rehire Reinstate</strong></td>
<td>- Reinstate an employee at our Location who was automatically terminated in error in UCPath</td>
</tr>
<tr>
<td>UC_REHIRE_REI</td>
<td></td>
</tr>
<tr>
<td>UC_REHIRE_REI_AC</td>
<td></td>
</tr>
<tr>
<td><strong>This template uses an existing inactive Employee Record</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Intra-Location Transfer</strong></td>
<td>- Transfer an employee between positions at UC San Diego; must be from a staff position to a staff positions or an academic positions to an academic positions without a break in service</td>
</tr>
<tr>
<td>UC_TRANSFER</td>
<td>- <strong>Transfer an employee from one position to another within the same Business Unit (staff &gt; staff or acad &gt; acad)</strong></td>
</tr>
<tr>
<td>UC_TRANSFER_AC</td>
<td>- <em><em>Transfer an employee from one position to another in a related Business Unit</em> (staff &gt; staff or acad &gt; acad)</em>*</td>
</tr>
<tr>
<td><strong>This template uses an existing active record</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Note</strong>: UC San Diego Campus and UC San Diego Medical Center are related Business Units; Location is the same</td>
<td></td>
</tr>
</tbody>
</table>
Example | Intra-Location Transfer in Workforce Job Summary & Person Org Summary

Person Org Summary:

Workforce Job Summary:
How do I know which Reason Code to use?

There is no substitute for reviewing the Template Transactions – Action Reason Codes and Descriptions Job Aid on the Help Site for Transactional Users.
## SMART HR TEMPLATE

<table>
<thead>
<tr>
<th>SMART HR TEMPLATE</th>
<th>WHEN TO USE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Inter-Location Transfer</strong>&lt;br&gt;UC_CONC_HIRE&lt;br&gt;UC_CONC_HIRE_AC&lt;br&gt;UC_VOL_TERM</td>
<td>▪ Transfer an employee from one Location to another Location without a break in service&lt;br&gt;&lt;br&gt;Note: Inter-Location Transfer is a process that requires two templates: Concurrent Hire and Termination</td>
</tr>
<tr>
<td><strong>Transfer Between Staff and Academic Positions</strong>&lt;br&gt;UC_CONC_HIRE&lt;br&gt;UC_CONC_HIRE_AC&lt;br&gt;UC_VOL_TERM</td>
<td>▪ Transfer an employee between staff and academic positions at UCSD Location without a break in service&lt;br&gt;&lt;br&gt;Note: This is a process that requires two templates: Concurrent Hire and Termination</td>
</tr>
</tbody>
</table>
Key Scenarios for Staff and Academic Employees

**STAFF**

- Use the *Intra-Location Transfer template* for a promotion associated with an open recruitment (not PayPath)

- Use *PayPath* to process a reclassification upward

- Use a *Concurrent Hire and a Termination* for an employee moving from one department to another in the same role

**ACADEMIC**

- Use the *Intra-Location Transfer template* for academics is intended for permanent series changes. In those cases, the new job will replace the previous job on the same Employee Record. Example: LSOE to Professor

- Use a *Concurrent Hire and a Termination* for an employee moving from one department to another in the same role. Example: Lecturer moving from one department to another

- Use a *Concurrent Hire and Termination or SWB* for graduate students that move between jobs (E.g., GSR and TA)
Planning for Fall Hires

- Avoid Employee ID Issues
- Pre-Key Hires
Before initiating a **New Hire** you must use the **Search/Match** functionality to verify the new employee isn’t in UCPath

- This page allows you to search using various criteria
- For best results use multiple search criteria to limit the search results

Perform the search three times, in this order:

1. The employee’s Social Security number
2. The employee's first and/or last name and date of birth
3. The employee’s first and last name
UCPC recommends performing all 3 searches to verify new hire isn’t in system:
1. Enter **National ID (SSN)**, click Search
2. Enter **First and/or Last Name** with DOB, click Search
3. Enter **First and Last Name**, click Search

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Type</td>
<td>Person</td>
</tr>
<tr>
<td>Search Parameter</td>
<td>PERSON_SEARCH</td>
</tr>
<tr>
<td>National ID</td>
<td></td>
</tr>
<tr>
<td>First Name Search</td>
<td></td>
</tr>
<tr>
<td>Last Name Search</td>
<td></td>
</tr>
<tr>
<td>Date of Birth</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
</tr>
</tbody>
</table>

National ID = Social Security Number.
Search for People using Search/Match

1. Open the UCPath Help site.
2. Search the Search for People using Search/Match topic.
The best practice is to plan to have your transaction submitted and approved at least 7 business days before the **Effective Date** (e.g., hire date, transfer date, etc.)

- UCPC processing time is 1-4 business days but can be delayed during high transaction volume periods
- For a brand new employee, you won’t have the Employee ID until after the template is processed

That means hire processing outside of UCPath must start much earlier than was the case with PPS
Example: Onboarding Solution Workflow for New Hires

1. Receive offer approval email via HireOnline (Handshake for Students) and verbally extend offer. Upon offer acceptance, enter, review and submit the offer in ONBOARDING Solution.

2. New Hire signs offer letter and provides birthdate and SSN. Department is notified of completion and ONBOARDING Solution deploys Core Hire forms.

3. Initiator creates section 1 of Form I-9 in Tracker, completes UCPATH Smart HR Template and submits the entry for UCPATH Center (UCPC) approval. Meanwhile, the new hire completes core hire forms.

4. UCPC approves the new hire transaction and provides an employee ID number.

   *Please note approval can take approximately 5 business days.*

5. Enter the employee’s ID number into ONBOARDING Solution and submit to the Account Creator. The Account Creator will set up the new hire’s credentials (email and AD Username).

6. The Account Creator notifies the department of completion. Enter the new hire’s email and AD Username into Onboarding Solution.

7. The Welcome Letter sent to the new hire includes instructions on how to login and complete required Core Hire forms in the UCPATH employee Self-Service Portal.

8. On the employee’s first day of work, complete the signing ceremony in the ONBOARDING Solution and section 2 of the Form I-9 in Tracker.

PLEASE NOTE: Onboarding cycle time will increase due to approval workflows and UCPATH Center review - please allow 2-3 weeks.
When initiating a transaction plan for possible errors and UCPC processing time.

<table>
<thead>
<tr>
<th>MONDAY</th>
<th>TUESDAY</th>
<th>WEDNESDAY</th>
<th>THURSDAY</th>
<th>FRIDAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other onboarding processes; entry of Template</td>
<td>UCPC Process</td>
<td>Local Approval</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td>UCPC</td>
<td>Re-Submit Template</td>
<td>UCPC Process</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>14</td>
<td>15</td>
<td>16</td>
<td>17</td>
</tr>
<tr>
<td>UCPC</td>
<td>Complete AD/Email set up &amp; onboarding</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>21</td>
<td>22</td>
<td>23</td>
<td>24</td>
</tr>
<tr>
<td>★ Employee First Day</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
It is also important to consider the Payroll Processing Calendar and ensure your transaction is submitted and locally approved no later than the **Employee Data Change Deadline**

- Review the Payroll Processing Calendar from the UCPath Online Quicklinks menu to be sure you have the latest
- UCPC processes template transactions in 1-4 business days; guaranteed review and processing, if correct, if you meet the **Employee Data Change Deadline**
- Keep in mind, UCPC may Cancel your transaction and cause you to miss the **Employee Data Change Deadline**
- Remember, Additional Pay cannot be entered on a Template Transaction and must be entered and approved no later than the day before the **Employee Data Change Deadline**
- Remember, position funding should be added no later than the day before **Pay Confirm** of the first pay period in which the employee will receive pay
The Hire template has five tabs. You must navigate through all five tabs (click into each of them) before the Save and Submit button is available.
REQUIRED

- **First Name** and **Last Name**
- **Date of Birth** is required if the **Effective Date** of the template is prior to the current date. The **Date of Birth** is not required if the **Effective Date** of the template is on or after to the current date. Can be entered later via a Person Data Template Transaction
- **Person Address Section**
  - **Note:** This is where all Payroll and Benefits correspondence is mailed; actually ALL correspondence. Zip Code impacts benefits.

**Note:** Do not enter data in the three fields in the UC External System ID section, unless you are adding the PPS ID on a Rehire. (TBD)

REQUIRED OR EXPLAIN OMISSION IN COMMENTS

- **National ID Type** and **National ID:** Can be added by transactor via a Person Data Template Transaction
  - **Note:** employee cannot log into UCPath online until this is entered on their record
- **Person Email Address Section:** Can be entered later by the employee in UCPath Online or by transactor via a Person Data Template Transactions
  - **Note:** Person email is how a terminated employee is invited to the Former Employee Portal

NOT REQUIRED & WHERE TO ENTER LATER

- **Oath Signature Date:** Can be entered on **Person Profile** page and is required for access to UCPath Online (Entering later NOT RECOMMENDED)
- **Person Phone Number Section:** Can be added later using Person Data Change template or by the employee on UCPath Online
- **Patent Acknowledgement Sign Dt** field: Can be entered on **Person Profile** page or can be completed by the employee on UCPath Online
- **Tracker Profile ID** field: Can be entered on **Person Profile** page
  - **Note:** If Tracker ID is not entered, there will be no integration with I-9 Tracker to update status of employee or bring in changes for NRA, PR and Citizens information
  - **Note:** Can’t do “later” data entry until Effective Date of Hire

**Enter Comments for UCPC:** Include mention of missing Person Email Address and/or SSN, or the transaction will be canceled. Also add if the employee lives and works outside the US, then UCPC will add the **NRA Working Outside of the US** Citizenship Status to the **Identification Data** page
EMPLOYEE EXPERIENCE
For represented staff, use the fields on this page to enter data related to the employee’s prior work experience. Having this information is helpful in determining new compensation rates for the new hire. Information entered here is copied to the UC Employee Experience page after the template transaction is fully processed.

ADDL PAY
Do not enter data here, set up after in PayPath (this means you should enter hire transactions for employees with Additional Pay first).

EARNINGS DIST TAB
Only required for employees with MCOP or when changing Earn Code (e.g., Summer Salary)

JOB DATA TAB
Requires entry of most fields, follow UPK or UC San Diego Job Aid. If FTE = 0 and/or you are not entering compensation because the employee will receive flat dollar/Additional pay, add that to your Comments.
REQUIRED

- **First Name** and **Last Name**
- **Date of Birth** is required if the **Effective Date** of the template is prior to the current date. The **Date of Birth** is not required if the **Effective Date** of the template is on or after to the current date. Can be entered later via a Person Data Template Transaction
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**Enter Comments for UCPC:** Include mention of missing Person Email Address and/or SSN, or the transaction will be canceled. Also add if the employee lives and works outside the US, then UCPC will add the **NRA Working Outside of the US** Citizenship Status to the **Identification Data** page
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Only required for employees with MCOP or when changing Earn Code (e.g., Summer Salary).

ADDL PAY
Do not enter data here, set up after in PayPath (this means you should enter hire transactions for employees with Additional Pay first).
REQUIRED

- **JPM Degrees Section** may be required based on the **Job Code**; if required:
  - **Effective Date** = Date of the hire/rehire
  - **Year Acquired** = Year degree was acquired
  - **Degree Type**
  - This information is stored on the **Person Profile** page

NOT REQUIRED AND WHERE TO ENTER LATER

- **Oath Signature Date**: Can be entered on **Person Profile** page and is required for access to UCPath Online (Entering later NOT RECOMMENDED)
  - Note: Can’t do this data entry until Effective Date of Hire

- **Patent Acknowledgement Sign Dt** field: Can be entered on **Person Profile** page or can be completed by the employee on UCPath Online
Notes for Initiators and Approvers

- Initiator Notes
- Approver Notes
Other Important Things for Initiators to Remember

- The address you enter is where a paper paycheck will be mailed (and benefits correspondence, and ALL other correspondence)

- 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)
  - If you don’t want to risk UCPC missing your Case and processing, Delete the template from the Transaction Status page (no clone option)

- Future dated hires don’t have full access until the Start Date: For example, if an employee starts 8/1 but is fully in the system now, they will not have access to complete some of the onboarding items such as Direct deposit, tax forms, etc. They need to wait until their actual hire date. Peoplesoft is effective date driven.

- Future dated hire records also cannot be updated until the Start Date: For example, if you had not entered the Oath, you cannot add it on Person Profile until their start date
Critical Fields for Approvers to Review

- 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 (both fields)
  - 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.
- I have an oncampus employee transferring to our dept (promotion via open recruitment). She will be 90% in our dept and 10% in her old dept for 2 months at least.
  - Old dept does intralocation transfer to promoted position in their department, FTE = .1
  - Concurrent hire into new position in your dept that reflects new title, FTE = .9
  - Then after the 2 months, old dept does a termination and you increase FTE to 1.0

- Is the 10/1 hire eff date the actual date of the employee becoming active in payroll meaning that is the first date they will be able to receive a campus account for access to campus business systems, Canvas, etc? Yes, I think
  
  You should be able to setup an affiliates account to help them setup ahead of time through your DSA. I was told 30 days is max central IT is allowing us to setup an affiliate