UCPath Zoom Session: Hiring Student Workers
What prompted this topic?

We have noticed a large number of off-cycle payroll requests for student workers have been processed in UCPath.

The reasons for this are:

- Students couldn't log into EcoTime: Remember - students need to use their Employee AD and password (IT should be sharing additional information with departments on this topic)
- Approvers did not approve template transaction in a timely manner and student workers missed pay
- Initiators used the wrong template/Reason Code
- Auto-terminations in error
- Auto-terminations interrupting Intra-Location Transfer and Concurrent Hire processing
Today’s Topics

- Review & Resolve
- Choosing the Correct Template
- Timing Considerations & Completing the Template
Review & Resolve

- What to Review and Resolve *(Before Transacting!)*
What to Review Before Transacting

1. Person Organizational Summary

2. Search/Match
Review the Person Organizational Summary Page

Check Box indicates which job is the Primary Job. This status is determined by the system.

Indicates the Start Date of the assignment.

You can view job assignment information for all employee records across all locations. This page does not display historical or future-dated employment details.

Review FTE, FLSA Status, Pay Group, and Employee Type

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.
What To Look For in Person Org Summary

Look for Existing Active Jobs
If the student worker has an active record or active records in Person Org Summary, you will need to review:

**Appointment End Date**
Determine if there will be concurrent jobs; remember, the current department may still extend the student worker so you should communicate with them to confirm. Also, if you are going to process an Intralocation Transfer or a Concurrent Hire and the employee auto-terminates before your Intralocation or Concurrent Hire template is processed by UCPC, UCPC will deny the transaction. You may need to consider UCPC processing time and ask the current dept to extend the appointment until your transaction processes.

**FTE**
Student workers do not qualify for a FICA exemption, and will see a DCP-Safe Harbor deduction on their paycheck, if their total FTE exceeds 0.80; remember, jobs on SWB should have .01 or 0 FTE but those jobs may be returned and FTE increased so you should communicate with the current department to ensure you know the student worker’s full FTE during the dates they will be employed in your department.

- **Note:** SWB for casual/restricted student workers is only used for summer; students must be returned from SWB or terminated if they will not work fall quarter

**FLSA Status**
The FLSA Status on concurrent jobs must be the same; consult with the appropriate Central Office contact to determine which job should change FLSA Status

**Paygroup/Employee Type**
UCPath requires that compensation frequency is the same for concurrent jobs; consult with the appropriate Central Office contact to determine which job should change compensation frequency

Look for Existing Inactive Jobs
An existing inactive job means you may be able to use the Rehire template (we’ll talk more about this later 😊 - see section = Choosing the Correct Template)
Resolving FLSA Status involves compensation policy, so it is critical to work with the appropriate Central Office to resolve conflicts
- For resolution related to a Graduate Student Worker hire consult the Graduate Student Employment Office (grademployment@ucsd.edu)
- For resolution related to an Undergraduate Student Worker hires consult Kenric Yu with Central HR
- For resolution related to Medical Center jobs, Campus departments will need to work with HHR

Generally, the FLSA status of an Academic job overrides the FLSA status of the Staff job

The hiring department can make FLSA Status changes on the vacant position as a vacant position update

- **Paygroup & Employee Type** will tell you the employees Compensation Frequency – all jobs must be paid on the same frequency

- Ensure that Casual/Restricted student appointments are set up to match existing appointments, including graduate Academic titles

- **Paygroup is a derived value**: Job Code, Comp Rate Code, Pay Frequency impact it and certain Paygroups require a manual override (6MH, 6MS) (requested via Job Data Update form),

- Paygroup may derive the day after fields are changed and/or the Hire template transaction is processed

- Overrides to Comp Frequency can be entered on the hire template and a Paygroup override can be requested in the Comments – be sure to check UCPC processes correctly and know you may need to make updates after the hire is processed in some cases

- Comp Frequency and FLSA overrides that need to be corrected may delay the processing of hires; and if not responded to promptly may result in the cancellation of the hire

*Note: Grad Division is no longer using 6MS*
FYI: How to Read Paygroups in UCPath

1. **Paygroup Entity** (1st character)
   - **Campuses**
     - 0: UC Merced
     - 1: UC Berkeley
     - 2: UC San Francisco
     - 3: UC Davis
     - 4: UC Los Angeles
     - 5: UC Riverside
     - 6: UC San Diego
     - 7: UC Santa Cruz
     - 8: UC Santa Barbara
     - 9: UC Irvine
   - **Medical Centers**
     - F: San Francisco Med Ctr
     - D: Davis Med Ctr
     - L: Los Angeles Med Ctr
     - S: San Diego Med Ctr
     - I: Irvine Med Ctr

2. **Paygroup Frequency** (2nd character)
   - **Frequency**
     - B: Biweekly
     - M: Monthly

3. **Paygroup Identifier** (3rd character)
   - **Identifier**
     - 5: PD Fellows NRA IC 15
     - 7 (after B): 7/40 Non-exempt
     - 8 (after B): 8/80 Non-exempt
     - 7 (after M): NRA IC 17
     - 8 (after M): NRA IC 18
     - 9: NRA IC 19
     - E: Salary Exempt
     - H: Hourly Exempt
     - X: Exception Hourly Exempt
FYI: How to Read Paygroups in UCPath

Paygroup Combinations
This table identifies codes when the second and third characters are used as a combination.

<table>
<thead>
<tr>
<th>Character Combos</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>56</td>
<td>Firefighters Biweekly</td>
</tr>
<tr>
<td>AC</td>
<td>Academic Exempt Monthly</td>
</tr>
<tr>
<td>HS</td>
<td>AHSC Exempt Monthly</td>
</tr>
<tr>
<td>PD</td>
<td>Paid Direct Exempt Monthly</td>
</tr>
<tr>
<td>PF</td>
<td>PD Fellow Exempt Monthly</td>
</tr>
<tr>
<td>SP</td>
<td>Staff Physicians</td>
</tr>
<tr>
<td>ST</td>
<td>Students Biweekly</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>UC San Diego</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>656</td>
<td>UCSD Firefighters</td>
</tr>
<tr>
<td>6AC</td>
<td>UCSD Academic Exempt Monthly</td>
</tr>
<tr>
<td>6B7</td>
<td>UCSD 7/40 Non-Exempt Biweekly</td>
</tr>
<tr>
<td>6B8</td>
<td>UCSD 8/80 Non-Exempt Biweekly</td>
</tr>
<tr>
<td>6BE</td>
<td>UCSD Salary Exempt Biweekly</td>
</tr>
<tr>
<td>6BH</td>
<td>UCSD Hourly Exempt Biweekly</td>
</tr>
<tr>
<td>6BX</td>
<td>UCSD Exception Hourly Exempt BW</td>
</tr>
<tr>
<td>6HS</td>
<td>UCSD AHSC Exempt Monthly</td>
</tr>
<tr>
<td>6M5</td>
<td>UCSD PD Fellows NRA IC 15</td>
</tr>
<tr>
<td>6M7</td>
<td>UCSD NRA Income Code 17</td>
</tr>
<tr>
<td>6M8</td>
<td>UCSD NRA Income Code 18</td>
</tr>
<tr>
<td>6M9</td>
<td>UCSD NRA Income Code 19</td>
</tr>
<tr>
<td>6ME</td>
<td>UCSD Salary Exempt Monthly</td>
</tr>
<tr>
<td>6MH</td>
<td>UCSD Hourly Exempt Monthly</td>
</tr>
<tr>
<td>6MS</td>
<td>UCSD Monthly-Salaried Position</td>
</tr>
<tr>
<td>6PD</td>
<td>UCSD Paid Direct Exempt MO</td>
</tr>
<tr>
<td>6PF</td>
<td>UCSD PD Fellows Exempt Monthly</td>
</tr>
<tr>
<td>6SP</td>
<td>UCSD Staff Physicians</td>
</tr>
<tr>
<td>6ST</td>
<td>UCSD Students Biweekly</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>San Diego Medical Center</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>S56</td>
<td>UCSD MC Firefighters</td>
</tr>
<tr>
<td>SAC</td>
<td>UCSD MC Academic Exempt MO</td>
</tr>
<tr>
<td>SB7</td>
<td>UCSD MC 7/40 Non-Exempt BW</td>
</tr>
<tr>
<td>SB8</td>
<td>UCSD MC 8/80 Non-Exempt BW</td>
</tr>
<tr>
<td>SBE</td>
<td>UCSD MC Salary Exempt Biweekly</td>
</tr>
<tr>
<td>SBH</td>
<td>UCSD MC Hourly Exempt Biweekly</td>
</tr>
<tr>
<td>SBX</td>
<td>UCSD MC Exception Hourly Exempt BW</td>
</tr>
<tr>
<td>SHS</td>
<td>UCSD MC AHSC Exempt Monthly</td>
</tr>
<tr>
<td>SM5</td>
<td>UCSD MC PD Fellows NRA IC 15</td>
</tr>
<tr>
<td>SM7</td>
<td>UCSD MC NRA Income Code 17</td>
</tr>
<tr>
<td>SM8</td>
<td>UCSD MC NRA Income Code 18</td>
</tr>
<tr>
<td>SM9</td>
<td>UCSD MC NRA Income Code 19</td>
</tr>
<tr>
<td>SME</td>
<td>UCSD MC Salary Exempt Monthly</td>
</tr>
<tr>
<td>SMH</td>
<td>UCSD MC Hourly Exempt Monthly</td>
</tr>
<tr>
<td>SPD</td>
<td>UCSD MC Paid Direct Exempt MO</td>
</tr>
<tr>
<td>SPF</td>
<td>UCSD MC PD Fellows Exempt MO</td>
</tr>
<tr>
<td>SSP</td>
<td>UCSD MC Staff Physicians</td>
</tr>
<tr>
<td>SST</td>
<td>UCSD MC Students Biweekly</td>
</tr>
</tbody>
</table>
FYI: 6MS and 6MH Paygroups

6MS paygroup requires UCANNL Comp Rate Code; and it works by taking hours reported, dividing by working hours in the month to calculate a percentage that drives pay

- Update the position data in PayPath to change FLSA Status = Exempt
- Update the job data in PayPath as follows:
  - Comp Rate Code = UCANNL
  - Comp Rate = Annual Rate if person worked full time (system will derive the hourly amount, because the Paygroup I am about to tell you about is positive time reporting)
  - Comp Frequency should be M
- Submit a ticket to UCPC with a Job Data Update form to request a Paygroup Override to the 6MS paygroup; this paygroup allows an employee to be monthly, exempt, and positive time reporting

6MH: Requires UCHRLY Comp Rate Code; and it works by taking # of hours reported * hourly rate = pay

- Update the position data in PayPath to change FLSA Status = Exempt
- Update the job data in PayPath as follows:
  - Comp Rate Code = UCHRLY
  - Comp Rate = Hourly amount
  - Comp Frequency should be M
- Submit a ticket to UCPC with a Job Data Update form to request a Paygroup Override to the 6MH paygroup; this paygroup allows an employee to be monthly, exempt, and positive time reporting
FYI: Paygroup Resources

UC San Diego Job Aids and Quick References page:
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
Search/Match | Verify people

- Before initiating a **New Hire that will create a new EMPL ID** 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

Review the **Search for People Using Search/Match** UPK on the [UCPath Help Site for Transactional Users](https://ucpath.ucsd.edu/help/transactional-users).
Position Considerations

When you create your position (or make updates to it before processing your hire txn) you will be determining the following:

- Do I have an existing vacant position I can use with no/minimal updates?
- Can I clone an existing position?
- Will the default FLSA Status be appropriate? (e.g. check existing active jobs)
- Will this be a Work Study position?

Check Person Organization Summary before creating your position.

Review

How to Create a Position
How to Update a Vacant Position
How to Copy an Existing Position
How to Create a New Postdoc Position
How to Create and Manage Work Study Jobs

in the Position Management section of the UC San Diego Job Aids page
Monitor Template 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
**FYI: Three Ways to View Current Status**

**Smart HR Transactions Page**
- View list of templates you have submitted that are in progress
- Click name link to open and review your transaction, including local AWE status

**SS Smart HR Transactions Page**
- View status and comments for template transactions in local approval workflow
- Search and view any template submitted within your Business Unit

**Transaction Status Page**
- View status of templates locally approved or denied; see status of templates being processed by UCPC
- Search and view any template transactions submitted by any department(s) for which you have row-level security

**Requested**
Transaction completed local AWE and is waiting for UCPC to process.

**Completed**
Transaction was processed by UCPC and saved into UCPath.

**Hired/Added**
Hire or rehire transaction was processed by UCPC and saved into UCPath.

**Cancel**
Transaction was canceled by UCPC.

**Denied**
Transaction was denied during local AWE by a Location Approver.
Choosing the Correct Template

- Choosing the Correct Template
- Choosing the Correct Reason Code
How do I Choose the Correct Template?

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

1. Has the employee ever worked for the UC system?
   - No = Confirm with Search Match; if confirmed use Full Hire
   - Yes = Proceed to question 2

2. If the employee has worked for the UC system, can you find them in Person Org Summary?
   - No = Confirm with Search Match; if confirmed use a Full Hire with Rehire reason code
   - Yes = Proceed to question 3

3. Is this a transfer?
   - Answer is Yes if the employee is moving from one position to another with no break in service
   - Otherwise the answer is No

Either way proceed to 4.
How do I Choose the Correct Template?

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

When reviewing the Person Org Summary, consider the following:

- Active or inactive?
- Staff or academic? (type)
- For UC San Diego or another location?

These help you understand if you need a new Empl Record.

4. Do you need a new Empl Record?

**Answer is Yes if:**

- There is no Empl Record in UCPath (covered in steps 1 and 2)
- Current Empl Record(s) is not at UC San Diego
- Current Empl Record(s) is not of the same type you’re hiring them into (staff vs academic); this is because staff and academic records have different fields
- New job will be held concurrently with existing active job(s)
- Other circumstances require new Empl Record as a best practice: transfer between departments, Acad Student, etc.

Otherwise the answer is no.
<table>
<thead>
<tr>
<th>Worked at UC?</th>
<th>Record in POS?</th>
<th>Transfer?</th>
<th>Active Status</th>
<th>Same Type? (Staff vs Acad)</th>
<th>Location</th>
<th>New Empl Record?</th>
<th>Template</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>No – break in service</td>
<td>Inactive</td>
<td>Same or Different</td>
<td>Other</td>
<td>Yes – b/c current record is from another Location</td>
<td>Full Hire Reason = Rehire</td>
</tr>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>No – break in service</td>
<td>Inactive</td>
<td>Same</td>
<td>UCSD</td>
<td>No – b/c same type</td>
<td>Rehire</td>
</tr>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>No – break in service</td>
<td>Inactive</td>
<td>Different</td>
<td>UCSD</td>
<td>Yes – b/c different type</td>
<td>Full Hire Reason = Rehire</td>
</tr>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>No – new job is concurrent</td>
<td>Active</td>
<td>Same or Different</td>
<td>UCSD or Other</td>
<td>Yes – new job is concurrent</td>
<td>Concurrent Hire</td>
</tr>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Active</td>
<td>Same</td>
<td>UCSD</td>
<td>No</td>
<td>Intra-Location Transfer</td>
</tr>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Active</td>
<td>Same</td>
<td>UCSD</td>
<td>Yes – b/c of best practice</td>
<td>Concurrent Hire + Termination Reason = Intralocation Transfer</td>
</tr>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Active</td>
<td>Different</td>
<td>UCSD</td>
<td>Yes - b/c different type</td>
<td>Concurrent Hire + Termination Reason = Intralocation Transfer</td>
</tr>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Active</td>
<td>Same or Different</td>
<td>Other</td>
<td>Yes - b/c different Location</td>
<td>Concurrent Hire + Termination Reason = Inter BU Transfer</td>
</tr>
</tbody>
</table>
When the Best Practice = New EMPL Record

**STAFF**

Undergraduate student workers are Staff employees (Employee Class 5 – Student: Casual/Restricted)

- Use a **Concurrent Hire and a Termination** for an employee moving from one department to another in the same role so there is a new Empl Record

Not likely applicable to student workers:

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

**ACADEMIC**

Graduate student workers are Academic employees (Employee Class 11 – Academic: Academic Student)

- Use a **Concurrent Hire and a Termination** for an employee moving from one department to another in the same role so there is a new Empl Record. Example: TA 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) so that there is a new Empl Record

Not likely applicable to student workers:

- The **Intra-Location Transfer** template is not recommended for graduate academic titles unless it is used to indicate a permanent change in series. In those cases, the new job will replace the previous job on the same Employee Record.
The other/first job will continue unchanged until the department terminates it.
Example | Same Empl Record
Intra-Location Transfer in Workforce Job Summary & Person Org Summary

Person Org Summary:

Workforce Job Summary:
<table>
<thead>
<tr>
<th>SMART HR TEMPLATE</th>
<th>WHEN TO USE</th>
</tr>
</thead>
</table>
| **Full Hire**                     | ▪ 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**               | ▪ Hire an employee into an additional job, which they will hold concurrently with their existing job(s)                                                                                                    |

This template creates a new Employee Record

Full Hire
UC_FULL_HIRE
UC_FULL_HIRE_AC

Concurrent Hire
UC_CONC_HIRE
UC_CONC_HIRE_AC
## FYI: Summary of Templates that 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><strong>UC_REHIRE</strong></td>
<td><strong>Note:</strong> If there is no break in service, you must do a transfer.</td>
</tr>
<tr>
<td><strong>UC_REHIRE_AC</strong></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 UCPaht</td>
</tr>
<tr>
<td><strong>UC_REHIRE_REI</strong></td>
<td></td>
</tr>
<tr>
<td><strong>UC_REHIRE_REI_AC</strong></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><strong>UC_TRANSFER</strong></td>
<td>▪ Transfer an employee from one position to another within the same Business Unit (staff &gt; staff or acad &gt; acad)</td>
</tr>
<tr>
<td><strong>UC_TRANSFER_AC</strong></td>
<td>▪ Transfer an employee from one position to another in a related Business Unit* (staff &gt; staff or acad &gt; acad)</td>
</tr>
<tr>
<td><strong>This template uses an existing active record</strong></td>
<td><strong>Note:</strong> UC San Diego Campus and UC San Diego Medical Center are related Business Units; Location is the same</td>
</tr>
<tr>
<td>SMART HR TEMPLATE</td>
<td>WHEN TO USE</td>
</tr>
<tr>
<td>------------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Inter-Location Transfer</strong></td>
<td>- Transfer an employee from one Location to another Location without a break in service</td>
</tr>
<tr>
<td>UC_CONC_HIRE</td>
<td>Note: Inter-Location Transfer is a process that requires two templates: Concurrent Hire and Termination</td>
</tr>
<tr>
<td>UC_CONC_HIRE_AC</td>
<td></td>
</tr>
<tr>
<td>UC_VOL_TERM</td>
<td></td>
</tr>
<tr>
<td><strong>Transfer Between Staff and Academic Positions</strong></td>
<td>- Transfer an employee between staff and academic positions at UCSD Location without a break in service</td>
</tr>
<tr>
<td>UC_CONC_HIRE</td>
<td>- User Reason Code = Intralocation Transfer</td>
</tr>
<tr>
<td>UC_CONC_HIRE_AC</td>
<td>Note: This is a process that requires two templates: Concurrent Hire and Termination</td>
</tr>
<tr>
<td>UC_VOL_TERM</td>
<td></td>
</tr>
<tr>
<td><strong>This approach creates a new employee record</strong></td>
<td></td>
</tr>
</tbody>
</table>
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. **Always Review This!**

<table>
<thead>
<tr>
<th>Template / Description / Action</th>
<th>Action Reason</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACP - Academic Hire w/ Contract Pay</td>
<td>Use to hire an academic year employee with Contract Pay. This also can be used for a concurrent hire.</td>
<td></td>
</tr>
<tr>
<td>HIR - Hire - No Prior UC Affiliation</td>
<td>Use to hire a new employee. Employee has never been on pay status with UC.</td>
<td></td>
</tr>
<tr>
<td>AIL - Academic Inter BU Transfer</td>
<td>Use for an inter-business unit transfer of an academic employee. This is a transfer from a non-UCPath location to a UCPath location.</td>
<td></td>
</tr>
<tr>
<td>CN1 - Academic Concurrent Hire</td>
<td>Use to add a concurrent job (either Dual or Non-Dual employment).</td>
<td></td>
</tr>
<tr>
<td>RE2 - Rehire, &lt; 120 days break</td>
<td>Use for rehires from a different business unit. Use for a regular rehire to return to pay status following less than 120 days of break in service.</td>
<td></td>
</tr>
<tr>
<td>RE3 - Rehire, &gt;= 120 days break</td>
<td>Use for rehires from a different business unit. Use to hire a prior UC employee with a break in service. The employee does not already have a PeopleSoft record. The receiving campus must treat this as a rehire.</td>
<td></td>
</tr>
<tr>
<td>RL2 - Rehire, f Layoff-No Pref &lt;120</td>
<td>Use for rehires from a different business unit. Use to rehire following a layoff and not secured through the preferential rehire process within 120 days of separation.</td>
<td></td>
</tr>
<tr>
<td>RL0 - Rehire, f Layoff-No Pref &gt;=120</td>
<td>Use for rehires from a different business unit. Use to rehire following a layoff and not secured through the preferential rehire process within 120 days of separation.</td>
<td></td>
</tr>
<tr>
<td>PR2 - Rehire, from Layoff-Pref &lt;120</td>
<td>Use for rehires from a different business unit. Use to rehire following a layoff and secured through the preferential rehire process within 120 days of separation.</td>
<td></td>
</tr>
<tr>
<td>PRF - Rehire, from Layoff-Pref &gt;=120</td>
<td>Use for rehires from a different business unit. Use to rehire following a layoff and secured through the preferential rehire process where there is greater than or equal to 120 days of separation.</td>
<td></td>
</tr>
<tr>
<td>ACA - Rehire: Academic Recall</td>
<td>Use for rehires from a different business unit. Use for recall of retired academic. For Job Codes that are without salary (WOS), be sure to also enter the Comp Rate as UCWOS.</td>
<td></td>
</tr>
</tbody>
</table>
Timing Considerations & Completing the Template

- Timing Considerations: Hire Date
- Timing Considerations: Employee Data Change Deadline
- Completing the Template
Timing Considerations – Hire Date

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.), but if you can get them entered even earlier, that’s better.

- UCPC processing time is 1-4 business days but can be delayed during high transaction volume periods (Summer hiring saw 7-10 business day processing times).
- 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><strong>UCPC Process</strong></td>
<td><strong>Re-Submit Template</strong></td>
<td><strong>Local Approval</strong></td>
<td><strong>UCPC Process</strong></td>
<td><strong>UCPC Process</strong></td>
</tr>
<tr>
<td><strong>Other onboarding processes; entry of Template</strong></td>
<td></td>
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<td>6</td>
<td>7</td>
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<td>13</td>
<td>14</td>
<td>15</td>
<td>16</td>
<td>17</td>
</tr>
<tr>
<td><strong>Employee First Day</strong></td>
<td></td>
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<td></td>
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<tr>
<td>20</td>
<td>21</td>
<td>22</td>
<td>23</td>
<td>24</td>
</tr>
</tbody>
</table>
Timing Considerations – Employee Data Change Deadline

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 **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
Completing the Template

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. All other templates are a subset of the same tabs.
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 starting their first day
- 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
**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**

**EARNINGS DIST TAB**
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)

**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.
### 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 AND WHERE TO ENTER LATER

- **Person Phone Number Section**: Can be added later using Person Data Change template or 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 Citizenship Information

  Can’t do “later” data entry until Effective Date of Hire

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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
Academic Full Hire | Other Tabs

**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**

**EARNINGS DIST TAB**
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 starting their first day
Key Takeaways

- Review data and resolve key issues BEFORE submitting your Template Transaction
  - ALWAYS review Person Organizational Summary
  - If you are creating a new Employee ID, ALWAYS perform Search/Match
- Choose your template & Reason Code thoughtfully, referring to Job Aids and asking questions as needed
- Monitor Appointment End Dates to avoid unintended auto-terminations
- Begin working on new hires immediately
- Prioritize hires with Additional Pay or who have complexity in their records that may require resolution
- Whenever possible, provide all data in your Template transaction
- Ensure your Template Comments are complete and account for known reasons for cancellation (e.g., 0 comp, no SSN, etc.)
- Ensure hires are approved in a timely manner (ASAP)
- Make sure your student workers know how to log into Ecotime
You can leave Oath blank if needed, remember to add to Person Profile on their start date

Oath and Patent Sign Dates should be on or before the hire date

You can update the Oath in Person Profile; if a person starts working prior to signing the Oath that becomes a damage payment. You want to ensure Oath is signed before the start date.

Has anyone had an experience where certain transactions that are similar will process all but maybe one or two and those one or two will get denied, even though they are the same? I guess what I am asking is will transactions be processed differently depending on who is processing? (Shani to follow up with Stephanie B. on this)

Another thing I have come across, not sure if this has been talked about, is that we cannot add additional pay until on or after the hire date if you are processing a future hire.

Remember that Additional Pay now does Prorate, and the Prorate box defaults to checked. You may want to review and actively manage that box.

When a student transfers from one position in a department to another position in the same department, staff to staff position, would the Intra-Location Transfer template be the recommended template for this scenario? Or is concurrent hire + vol termination still the recommended practice? Intra-Location Transfer template sounds right to me 😊 (not Concurrent Hire and Termination)

When saying "meet" new hires, is that remote meet or in person meet at first day? Question for those who have hired already? Remote is my understanding