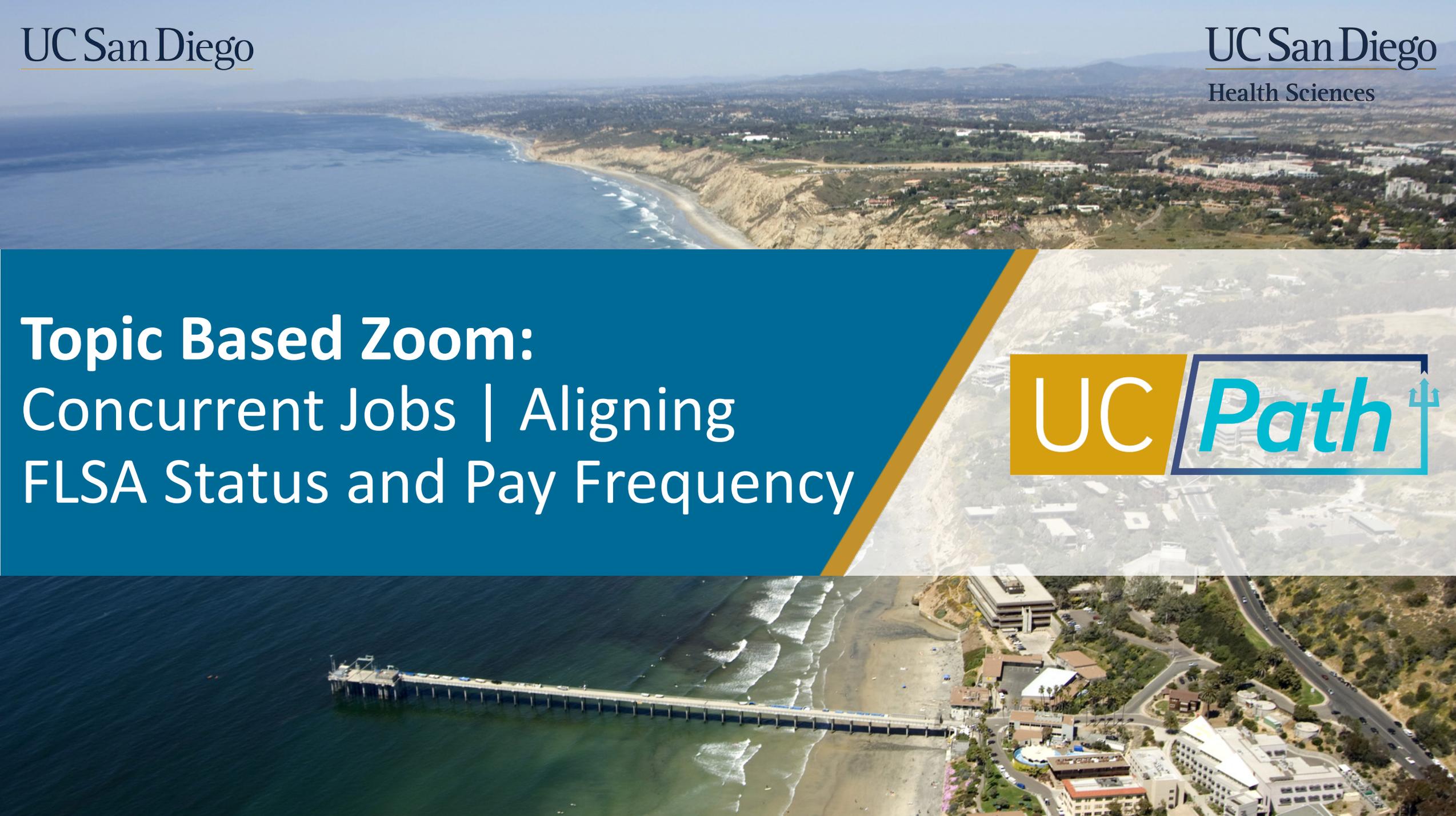


Topic Based Zoom:
Concurrent Jobs | Aligning
FLSA Status and Pay Frequency



Today's Topics



Key Terms & Concepts



Concurrent Hire Considerations



Best Practices & Review



Q&A





Position Data	The data elements or fields not tied to the incumbent, but establish departmental structure and organizational hierarchy. Position Data is maintained whether a position is filled or vacant.
Job Data	Specific details of an employee’s job including basic compensation. Established when the individual is hired, rehired, or transferred. Each individual’s job data is unique, but much of it is inherited from the position into which the employee was hired (e.g., employee’s department and job code default from position). Job data excludes other types of data, like personal data and information about benefits and deductions.
Effective Date	The date the personnel action should take effect; first day of the new status.
FTE	Distribution % is calculated as part of the Comp Rate
Action Code & Reason Code	Action Code = What type of action and Reason Code = Why action taking place (e.g. Action = TER for termination), (Reason = AAJ for accept another job).
Person Org Summary Page	Provides a summary and status of employee’s current organizational relationships across all UC locations, including HR and payroll status, primary job assignment and other details.
Expected Job End Date	For non-career staff indicates when a job will be auto-terminated and pay will stop (not used for career staff, field left blank). For academics field does NOT initiate any system actions unless End Job Automatically Check Box is also checked. While it does not automatically terminate the job, it does stop accruals when the end date is reached.



FLSA (Fair Labor Standards Act) Status	Designated in Position Data: Exempt, Non-Exempt, No FLSA Required or Non Exempt Alt Overtime.
Compensation Frequency	<p>Compensation Frequency fields (on the Compensation tab and on Smart HR Templates) determine the pay schedule/frequency and how the rate is entered into Job Data.</p> <p>Compensation Frequency defines what Compensation Rate Code will be accepted by UCPATH, e.g. UCANNL (A- Annual) or UCHRLY (H- Hourly).</p> <p>M – Monthly H – Hourly UC912 – UC9/12 AY UC_12 – UC 1/12th Rate C – Contract UC_10 – UC 1/10th Rate UC_9M – UC 1/9th Rate B – Biweekly UC_11 – UC 1/11th Rate UC_FY – UC 12/12 Rate</p>
Pay Group	<p>A logical grouping of employees based on shared characteristics that facilitate payroll processing. Pay Groups are set up as 3 alpha numeric characters which reflect the UC Location code (6=UC San Diego), Employee type (salary or hourly), FLSA Status (exempt or non-exempt), Pay Frequency (bi-weekly or monthly). Examples:</p> <p>6ME – UCSD Salary Exempt Monthly 6B7 – UCSD 7/40 Non-Exempt Biweekly 6MH – UCSD Hourly Exempt Monthly</p>

Reconciling Position and Job Data

It is critical to review Person Org Summary and correct any Position or Job Data in PayPath for existing appointments that will prevent processing of your Concurrent Hire Template by UCPC. Generally, staff appointments will need to be adjusted to the academic concurrent appointment, if applicable.

In Position and Job Data, check the following fields:

1. FLSA Status: Date Created

2. Compensation

- Frequency
- Pay Components Comp Rate
- Pay Components Rate Code
- Pay Components Frequency

3. Payroll

- Pay Group
- Employee Type

4. Job Information: FTE

Note: You should work with the Comp Policy Expert for guidance on these fields if it is your first time reconciling employee types.

Person Org Summary Page | Always Check Here First



Note the Expected Job End Date – an employee have active employment for a Concurrent Hire to be processed. If the FTE for a staff hire will be above 1.0, a Dual Appt Form is required to prevent cancellation

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

NAVIGATION

- PeopleSoft Menu
- Workforce Administration
- Personal Information
- **Person Organizational Summary**

Person Organizational Summary

Alex Rand Person ID 10002000

Find **View 1** First 1-2 of 2 Last

ORG Instance 0 HR Status Active Last Hire 01/01/2016
 Primary Job: Payroll Status Active Termination Date

Assignments Personalize | Find | 1 of 1 Last

Empl Record	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	Probation End Date
0	UCOP1	40001351	814000	IMM OFC INFO TECH SRVCS	004920	STDT 3	09/01/2016	0.250000	Student: Casual/Restricted	99	N	MB7	H	None	

ORG Instance 1 HR Status Active Last Hire 01/21/2015
 Primary Job: Payroll Status Active Termination Date

Assignments Personalize | Find | 1 of 1 Last

Empl Record	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	Probation End Date
1	UCOP1	40001456	814200	TECHNOLOGY SUPPORT SVS	004920	STDT 3	07/22/2016	0.240000	Student: Casual/Restricted	99	N	MB7	H	None	

The Effective Date of the Concurrent Hire template MUST be on a date that the employee had active employment, or the template will be cancelled.

All EmplRecords must have the same FLSA status and pay frequency. Concurrent Hires will not be processed by UCPC if any conflicts exist.

Click the **View All** link to view all current information.

Comp Policy Experts

Reach out to appropriate **Central HR Office** for approval/assistance in determining which FLSA status should be applied across all jobs and if changes required to Pay Group or compensation:

- Graduate Student Hires – Grad Student Employment Office (grademployment@ucsd.edu)
- Undergraduate Student Hires or Staff Hires – Kenric Yu, Central HR
 - Complete this form prior to reaching out to Central HR
<https://blink.ucsd.edu/HR/comp-class/compensation/index.html#Forms>
- Non-Student Academic Hires – Academic Personnel Office academicpersonnel@ucsd.edu
- Health Staff Hires – HHR 619-543-3200
- Health Academic, MD, and Faculty Hires – ARC https://ucsdhealth.service-now.com/arc_reques

Note: Refer to the [Resolving FLSA Conflicts](#) Quick Reference on the website

How to Plan for Processing Time

When initiating a transaction plan for possible errors and UCPC processing time.

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
		1 Approve Template	2 UCPC Process	3
6 UCPC Process	7 	8 Re-Submit Template	9 UCPC Process	10
13 UCPC Process	14 	15 Send EMPL ID to IT	16 IT Set Up	17
★ 20 Employee First Day	21	22	23	24

Reconciling Concurrent Hires

- Position Data Change
- Reconcile Existing Job
- Initiate Concurrent Hire

How do I reconcile my Concurrent Hire?

Based on your circumstance, follow the below processes for reconciliation.

1

The new concurrent hire Position Data must be reconciled to the existing jobs, **changes to the new position** must be made before processing.

2

The existing job's Position or Job Data must be reconciled to the new concurrent hire, **before** the concurrent hire is processed

3

No Position/Job Data changes to existing job(s) and no Position Data update needed for the new position or after completing process #1 and/or process #2 Process the Concurrent Hire

1 | Position Data Change

- Updating the new Concurrent Hire position

Update FLSA status on the vacant or new position to reconcile to the existing positions before processing the hire. Use the Concurrent Hire template comments section if Job Data needs to be adjusted as well.

NAVIGATION

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

Position Administrators have data entry access on the **Add Update Info** page.

Description	Specific Information	UC Position Data	Budget and Incumbents	Supporting Documents
Position Information				
Position Number	40052367			
Headcount Status	Filled	Current Head Count	1 out of 1	
Effective Date	06/01/2017	Status	Active	
Reason	JRU	Job Reclassification - Upward	Action Date	06/28/2017
Position Status	Approved	Status Date	04/17/2017	<input type="checkbox"/> Key Position
Job Information				
Business Unit	MECMP	UC Merced Campus		
Job Code	004523	CURRICULUM PLNR 3		
Reg/Temp	Not Applicable	Full/Part Time	Variable	
Regular Shift	Not Applicable	Union Code	99	Non-Represented
Title	CURRICULUM PLNR 3	Short Title	CURRICULUM	Detailed Position Description
Work Location				
Reg Region	USA	United States		
Department	E30000	Schl Soc Science/Humaniti/Arts	Company	UCS University of California
Location	00011	Campus		

2 | Reconcile Existing Jobs

- Updating existing Job(s) Position and Job Data

NAVIGATION

- Main Menu
- UC Customizations
- UC Extensions
- PayPath Actions

The screenshot shows the Oracle PayPath search interface. At the top, there are navigation tabs: Favorites, Main Menu, UC Customizations, UC Extensions, and PayPath Actions. The Oracle logo is visible in the top left. Below the logo, the page title is "PayPath Actions". A green callout box points to the search criteria input fields with the text "Enter Search Criteria such as EMPL ID or Last Name". The search criteria section includes fields for Empl ID, Empl Record, Name, Last Name, Business Unit, Position Number, Department, Job Code, Employee Classification, and Employee Status. A "Search" button is highlighted with a green callout box that says "Click Search". Below the search criteria, there is a "Search Results" section with a "View All" link. A table of search results is displayed, with a green callout box pointing to the first row and the text "After Search results display, select correct Employee".

Enter Search Criteria such as EMPL ID or Last Name

Search in PayPath by Employee ID, Name, Job Code, etc..

Employees with multiple jobs (Employee Records) require each job to be updated separately.

Click Search

After Search results display, select correct Employee

Empl ID	Empl Record	Name	Last Name	Business Unit	Position Number	Department	Department Description	Job Code	Job Code Description	Employee Classification	
10000077	0	Allen,Chen	Allen	UCOP1	40000157	805600	UNDERGRADUATE ADMISSIONS	005883	PROJECT POLICY ANL 4 GF	2	Staff: C
10000607	0	Allen,Todd Kathleen	Allen	UCOP1	40000492	822000	CHIEF INV OFFICER IMM OFFICE	000230	FIXED INCOME INV DIR	2	Staff: C
10000888	0	Allen,Kimberly Tinsley	Allen	UCOP1	40001270	815800	RETIREMENT ADMIN SV CTR (RASC)	004737	RET CUSTOMER SVC REPR 2	2	Staff: C
10001410	0	Allen,Yon Dohn M.	Allen	UCOP1	40002109	813400	RISK SERVICES	007205	ENTERPRISE RISK MGT ANL 4 2	2	Staff: C
10001679	0	Allen Daniel	Allen	UCOP1	40000002	809000	VICE PROV ACAD PERS IMMED OFC	000261	LABOR REL REPR 5	2	Staff: C

Use the **Position Data** page to enter changes to position data.

The **Position Data** page provides two areas: **New Values to update** and **Existing Values**.

This allows you to view the existing Position Data while entering the updated Position Data. The most current effective-dated row on Position Data can also be reviewed here.

Reconcile the current position(s) FLSA status to match the new concurrent hire position's designation.

Position Data | Job Data | Additional Pay Data

Chen Allen Employee Empl ID 10000077 Empl Record 0 [Position Data](#)

Position Data

Position Number: 40000157 PROJECT POLICY ANL 4 GF Action: POS Position Change
Effective Date: 07/31/2017 Position Change Reason:

New Values to update	Existing Values
Business Unit: UCOP1 UC Office of President	Current Effective Date: 10/17/2016 Business Unit: UCOP1 UC Office of President
Department ID: 805600 UNDERGRADUATE ADMISSIONS	Department: 805600 UNDERGRADUATE ADMISSIONS
Location: FRANKLIN UCOP - Franklin Building	Location: FRANKLIN UCOP - Franklin Building
Job Code: 005883 PROJECT POLICY ANL 4 GF	Job Code: 005883 PROJECT POLICY ANL 4 GF
Union Code: 99 Non-Represented	Union Code: 99 Non-Represented
FLSA Status: Exempt	FLSA Status: Exempt
Reports To Position: 40000093 ADMISSIONS RECRMT MGR 3	Reports To Position: 40000093 ADMISSIONS RECRMT MGR 3
Sal Admin Plan: CTOP	Sal Admin Plan: CTOP
Salary Grade: 23	Salary Grade: 23
Standard Hours: 40.00	Standard Hours: 40.00
FTE: 1.000000	FTE: 1.000000

Mail Drop: 712348 Adds to FTE Actual Count:
Position Pool: Include FTE:
Employee Relations Code: All Others, Not Confidential Representation Code: Covered
Classified Indicator: Management & Sr Professional

[Return to Search](#)

Position Data | Job Data | Additional Pay Data

Position Data | **Job Data** | Additional Pay Data

Chen Allen Employee Empl ID: 10000077 Empl Record: 0
Staff: Career HR Status: Active Payroll Status: Active [Work Force Job Summary](#)
[Person Org Summary](#)

Job Data Find | View All First 1 of 1 Last

Effective Date: 07/31/2017 Action: Action Reason:

Effective Sequence: 0

Current Effective Date: 10/17/2016 Current Action: POS Position Change
Current Eff Sequence: 0 Current Action Reason: RTC Reports To Change

Position Number: 40000157 PROJECT POLICY ANL 4 GF
Business Unit: UCOP1 UC Office of President
Department: 805600 UNDERGRADUATE ADMISSIONS
Location Code: FRANKLIN UCOP - Franklin Building
Job Code: 005883 PROJECT POLICY ANL 4 GF
Union Code: 99 Non-Represented

Reports To Position Number: 40000093 ADMISSIONS RECRMT MGR 3 10001557 Annette Gil
FLSA Status: Exempt
Salary Administration Plan: CTOP Establishment ID: UCOP UC Office of the President
Step: Salary Grade: 23 Employee Class: 2 Staff: Career
FTE: 1.000000 Appointment End Date:

Earnings Distribution Type: None Comp Rate: 7,846.917500 Standard Hours: 40.00 Pay Frequency: Monthly

Pay Components			
Rate Code	Comp Rate	Compensation Frequency	
1 UCANNL	94,163.010000	Annual	

Earnings Distribution			
Earnings Code	Comp Rate	Distribution %	
1			

UC Job Data

ERIT/Phased Retirement End Dt: Probation Code: None Location Use End Date: Location Use Type:
Trial Employment End Date: PY Career Duration: Probation End Date:

Job Data Comments:

Return to Search

Position Data | Job Data | Additional Pay Data

Click + to add multiple job data changes in the same transaction. Multiple changes can be entered for the same Effective Date. **Must be manually entered in the order you want the updates to occur.**

Transactions with different Effective Dates must be entered as separate transactions

Pay Frequency must match across appointments, adjust this value as needed.

Ensure your Pay Components accurately reflect the intended pay group reassignment of your position. Refer to your Comp Policy Expert for guidance if unsure

Changing Pay Frequency | Effective Date Considerations

The Pay Frequency field is modified in PayPath, on the Job Data tab. If possible, choose the *Pay Group Change* **Effective Date** as follows:

- After the current position Pay Group Pay Confirm Date
- Before the Employee Data Change deadline, of the new position's pay cycle
- EXCEPTION: If Concurrent Hire Effective Date must drive effective date of pay group change, then change Pay Frequency on existing appointments before the concurrent hire date
- NOTE: UCPC highly discourages frequency changes (bi-weekly to monthly or monthly to bi-weekly) for an employee changing positions mid pay cycle. When an employee is changing frequency, it is best to make the effective date at the start of the next pay period vs mid cycle
- The Payroll office receives error reports for payroll issues & benefits adjustments needed as a result of frequency changes and will notify the HR Dept Contact if errors identified; but the primary responsibility for confirming accurate pay and benefits remains with the dept and the HR Transactors.

Changing Pay Frequency | Using the Review Paycheck Page

After the Pay Confirm Date has passed for the new Pay Group, go to Review Paycheck Page to confirm accuracy of employee's pay:

Earn Code Errors

Earn codes for previous pay group, in T&A file, can error out because not valid for new pay group

- Pay will error out if the position number and/or empl rec are shared with the previous pay frequency

Missing Pay

If effective date did not meet new pay cycles' **Inbound File Due** deadline employee may have missing pay

- The effective date does drive what UCPath will pay, but depending on when Ecotime receives data employee could miss both BW & MO pay

Off-Cycle Pay Request

If pay reflected shows hours are incorrect and/or did not make deadline for Inbound T&A file, generate an Off-Cycle Pay Request for missing pay

- The I-181 will be rejected

For Template Transactions to impact payroll, they must be approved by the **Employee Data Change** deadline. UCPC will review, and if accepted, process the transaction in time for the payroll run. Also make note of the Inbound File and Pay Confirm dates and deadlines.

Pay Cycle	Check Date	Pay Period Dates		Run ID Schedule	Location							UCPath Center						
		Begin	End		Campus			Med Center Only				Pay Confirm	DDODS Burst (4:30 AM)	Accrual Post Confirm	GL Post Confirm (Complete Summary Level Data)	GL Post Confirm (Complete Detail Labor Ledger Data)	Pay Statements on UCPath (8:00 AM)	Leave Accrual Available on UCPath (After 5:00 PM)
					* Employee Data Change *** (3:00 PM) After 3:00 PM changes will not be processed for current pay cycle	Stop Processing PayPath & Position Mngt (5:00 PM)	Resume Processing (6:00 AM)	* Inbound Files Due **** (2:30 PM) * Msg Error Log Distribution (11:00 PM)	* Location Corrections To Msg Error Log (2:00 PM) * E-703 Funding Upload	* Inbound Files Due **** (5:00 PM) * Msg Error Log Distribution (11:00 PM)	* Location Corrections To Msg Error Log (2:00 PM)							
MO	Mon 01-04-21	12-01-20	12-31-20	201231M0X	Mon 12-21-20 *	Tue 12-22-20	Wed 12-30-20	Tue 12-22-20 *	Wed 12-23-20 *	Tue 12-22-20 *	Wed 12-23-20 *	Tue 12-29-20	Wed 12-30-20	Mon 01-04-21	Mon 01-04-21	Tue 01-05-21	Sat 01-02-21	Mon 01-04-21
B1	Wed 01-06-21	12-13-20	12-26-20	201226B1X	Tue 12-22-20 *	Fri 12-25-20	Fri 12-31-21	Mon 12-28-20 *	Tue 12-29-20 *	Mon 12-28-20 ▲▲	Tue 12-29-20 *	Wed 12-30-20	Fri 12-31-21	Wed 01-06-21	Tue 01-05-21	Wed 01-06-21	Mon 01-04-21	
B2	Wed 01-20-21	12-27-20	01-09-21	210109B2X	Thu 01-07-21	Tue 01-12-21	Fri 01-15-21	Tue 01-12-21	Wed 01-13-21	Tue 01-12-21	Wed 01-13-21	Thu 01-14-21	Fri 01-15-21	Tue 01-19-21	Tue 01-19-21	Wed 01-20-21	Fri 01-15-21	Tue 01-19-21

↑
Employee Data Change Deadline

↑
Inbound File Deadline

↑
Pay Confirm Date

Pay Frequency Changes | Timekeeping Impacts



- The Pay Frequency change will not be reflected until the pay period ends.
- If the employee is going from a BW to MO, the MO timesheet will not show until after the BW PPE. A SNOW ticket should be submitted if you do not see a change in timesheet pay frequency
- If employee is going from a BW nonexempt to MO exempt and they have comp time balance, payout needs to be initiated before switching pay frequencies.

UNIVERSITY OF CALIFORNIA UPath Center **JOB DATA UPDATE FORM**
Clear Form Validate Undo Highlight
FR.107

The purpose of the Job Data Update Form is to submit job data related corrections to the UCPath Center and update the job data in UCPath. Click [here](#) to access form instructions.

SECTION 1. KEY INFORMATION *Indicates Required Fields

Employee ID #* (8 Digits)	Last Name*	First Name*		
Type of Update*	Empl Record #*	Job Indicator*	Effective Date* (m/d/yyyy)	Effective Sequence*
Action*	Reason*			
Submitter Name*	Submitter Email*	Date Submitted* (m/d/yyyy)		

SECTION 2. JOB DATA

Business Unit*	Department #	Position #	Reports To Position #
Employee Pay Type <input type="radio"/> Hourly <input type="radio"/> Salary	Job Code	Union Code	
Empl Class # / Code	Standard Hrs	FTE	
Expected Job End Date (m/d/yyyy)	End Job Automatically <input type="radio"/> Yes <input type="radio"/> No	Classified Indicator	FLSA Status
Probation End Date	Probation Code	PY Career Duration	Academic Duration of Appt
Comp Frequency	Salary Step	Trial Employment End Date	ERIT Phased Retirement End Date
Eligibility Group Override <input type="radio"/> Yes <input type="radio"/> No	Pay Group Override <input type="radio"/> Yes <input type="radio"/> No	Salary Admin Plan	Salary Grade
Job Earnings Distribution			
Earnings Distribution Type	Earnings Code	Compensation Rate	Percent of Distribution
Compensation			
1) Reason	Rate Code		
Seq	Comp Rate	Frequency	Apply to Future Rows <input type="radio"/> Yes <input type="radio"/> No

SECTION 3. SHORT WORK BREAK / RETURN FROM SHORT WORK BREAK

Expected Return Date (m/d/yyyy)	Date Returned to Work (m/d/yyyy)
---------------------------------	----------------------------------

SECTION 4. TERMINATION / RETIREMENT

Last Date Worked (m/d/yyyy)	Date of Death (m/d/yyyy) (if applicable)	Survivor Information (if applicable)
-----------------------------	--	--------------------------------------

SECTION 5. INITIATOR COMMENTS
Type Comments Below

SECTION 6. BUSINESS UNIT APPROVAL

Approval #1 Type/Print Name*	Approval #1 Signature*	Date Approved* (m/d/yyyy)
Approval #2 Type/Print Name	Approval #2 Signature	Date Approved (m/d/yyyy)
Approval #3 Type/Print Name	Approval #3 Signature	Date Approved (m/d/yyyy)

- The Job Data Update Form is required if the update needs a Pay Group change in Job Data:
 - If not assigned through the nightly process after Position/Job Data changes are completed
 - If need assigned to one of the pay groups that do not auto-derive (ie. 6MH, 6MS)
- The **Job Update Form** is accessed through the **Forms Library** on UCPath Online and submitted via Case to UCPC. Indicate this change in the comments section of the form after identifying the existing or new row of data for updating.

3 | Concurrent Hire

- Initiate a Concurrent Hire Template Transaction

When to use the Concurrent Hire Templates

Use the **UC_CONC_HIRE** template to:

- To create a new EmplRecord for the employee
- Hire an employee into **an additional job**, which they will hold concurrently with their existing job(s). Can be processed at any time they would have held the new position concurrently

For this template, the employee will **already have data** in UCPATH. Note that there is a Staff and an Academic version of this template.

To Prevent UCPC Cancellation:

- Align FLSA Status and Pay Frequency of all positions before hiring
- Attach the Dual Appointment or Multi-Location Agreement, if applicable

Available Templates

Template	Description
UC_ADD_CWR	Add Contingent Worker - No Position Data
UC_ADD_CWR_POSN	Add Contingent Worker With Position
UC_COM_CWR	Complete Contingent Worker Instance
UC_CONC_HIRE	Staff Concurrent Hire/Inter Location Transfer
UC_CONC_HIRE_AC	Academic Concurrent Hire/Inter Location Transfer
UC_EXT_CWR	Extend CWR Appointment
UC_EXT_CWR_POSN	Extend CWR (with Position) Appointment
UC_FULL_HIRE	Full Hire - Staff Only
UC_FULL_HIRE_AC	Full Hire - Academic Use Only
UC_INVOL_TERM	Involuntary Termination
UC_PERSON_DATA	UC Personal Data
UC_REHIRE	UC Rehire - Staff Only
UC_REHIRE_AC	Rehire - Academic
UC_REHIRE_REI	Rehire Reinstatement - For Staff Appointments
UC_REHIRE_REI_AC	Rehire Reinstatement - For Academic Appointments
UC_RENW_CWR	Renew Contingent Worker - Without Position
UC_RENW_CWR_POS	Renew CWR Instance - with Position
UC_RETIREMENT	Retirement
UC_TRANSFER	Intra-Business Unit Transfer - Staff Only
UC_TRANSFER_AC	Intra-Business Unit Transfer - Academic Only
UC_VOL_TERM	Voluntary Termination

Staff Concurrent Hire | Reason Codes

Concurrent – Dual Emp

Two or more jobs that exceed a total of 100% FTE.

Concurrent – Non Dual Emp

Two or more jobs with FTE less than or equal to 100%.

The screenshot shows a software interface for hiring. At the top, it says "Action Hire". Below that, there are two fields: "*Reason Code" and "*Address Format". The "*Reason Code" field has a dropdown menu open, showing the following options: "Concurrent Hire - Dual Emp", "Concurrent Hire - Non Dual Emp", "Transfer - Intra Location", "Transfer-Inter BU, Demotion", "Transfer-Inter BU, Lateral", "Transfer-Inter BU, Promotion", and "Transfer-Inter BU, Undefined". Below the fields are two buttons: "Continue" and "Cancel".

If applicable, Dual Appointment Form and Multi-Location Appt. form must be submitted to avoid cancellation by UCPC.

Before entering your Concurrent Hire Template Transaction:



- Determine if you need to reconcile **FLSA statuses and pay frequencies** between the employee's new and existing jobs, UCPC will not pay employees with conflicting FLSA statuses and pay frequencies



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

- Position number
- EMPL ID
- Start date/Effective date
- **Dual Appointment Form**
- **Multi-Location Agreement (MLA) if concurrent hire is for an employee currently working at a different UC Location**



- Determine the new total percent FTE for the employee
- 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

Enter details for the **Concurrent Hire** on the template tabs.

- 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

Note: Be sure to check that UCPC processes correctly and know you may need to make updates after the hire is processed in some cases

Smart HR Transactions

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_CONC_HIRE Name: Action/Action Reason: HIR/TIL (Transfer - Intra Location)
Effective Date: 10/01/2020 Employee Record:
Employee ID:

Personal Data Job Data Earns Dist

Employee Information

Primary Name - English

*First Name Middle Name
*Last Name Name Suffix

Birthday Information

Date of Birth

Person Education Level

Highest Education Level

Person National ID United States

National ID Type PR National ID 566968023

Person Address 01 - United States

*Address Type Home Address Line 1
Address Line 2 City
State CA Postal Code
County

Person Phone Number Personalize | Find | View All | First 1 of 1 Last

Phone Type Telephone Preferred

1

Person Email Address Personalize | Find | View All | First 1 of 1 Last

Email Type Email Address

1

Comments

Comments

[Return to Enter Transaction Details Page](#)

 [Supporting documents](#)

Transaction ID: NEW

Initiator Comments:

Job Aid

Template Transactions Action Reason Codes and Descriptions



Review it

1. Open the [UCPath Help site](#).
2. Search the **Template Transactions – Action Reason Codes and Descriptions** topic.

Transaction Status and Cloning

- Transaction Status Pages
- Cloning a Template

Template Transactions | 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.



Clone a template when you need to correct a transaction that has been canceled or denied:

- UCPC may cancel a Template Transaction and will provide a comment explaining why and what needs to be corrected (View the comments on the Transaction Status Page)
- A Campus Approver may deny a Template Transaction and will provide comments about what needs to be corrected (View the comments on the SS Smart HR Transaction Page)
- Transactor cannot change the type of transaction by cloning if that was the reason for declination/cancellation

NOTE: The Template Initiator is notified by email of a canceled or denied transaction.

NAVIGATION

- Main Menu
- Workforce Administration
- Job Information
- Job Data

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation | UC Job Data

Tyler Redden Empl ID 10365848
Employee Empl Record 0

Work Location ? Find First 1 of 2 Last
Go To Row

Effective Date	05/01/2020	Action	Position Change
Effective Sequence	1	Reason	Reports To Change
HR Status	Active	Job Indicator	Primary Job
Payroll Status	Active		Current
Position Number	40658036	PROJECT POLICY ANL 3	
	Override Position Data		
Position Entry Date	07/01/2019		
	<input checked="" type="checkbox"/> Position Management Record		
Regulatory Region	USA	United States	
Company	UCS	University of California	
Business Unit	SDCMP	UC San Diego Campus	
Department	000001	BUSINESS AND FINANCIAL SERV.	
Department Entry Date	07/01/2019		
Location	VCCFO	VC-CHIEF FINANCIAL OFFICER	
Establishment ID	UCSD	UC San Diego	Date Created 05/03/2020
Last Start Date	07/01/2019		

The Date Created field indicates when the change impacted the system. Check if it meets the applicable Payroll Processing Calendar deadline.

View Transaction Status Reminders

- Local approvers **deny** template transactions; UCPC **cancel**s template transactions
- Use the **Smart HR Transactions page** to review or **delete** template transactions you have initiated that are in progress
- Use the **SS Smart HR Transactions page** to review **local AWE status and approver comments** for template transactions in your Business Unit
- Use the **Transaction Status** page to (1) view the **status** of transactions that have already been approved/denied locally and (2) **clone** transactions that have been denied or canceled
- Use the **Job Data page** to check when specific updates were committed to UCPath



Always Review Person Org Summary before Transacting

- Ensure you have a complete understanding of the employee's active and inactive Positions
- Identify departments for transaction collaboration



Use the Comments sections

- Use the hire template for Job Data updates to your new concurrent hire, like Pay Freq and Pay Group
- Confirm UCPC processed the updates mentioned in the comments after template processing



Plan for Approval and Processing Times

- The payroll calendar deadline for template transactions is the Employee Data Change at 3pm
- For Pay Freq changes, note the deadlines for Inbound Files, Pay Confirm, & Employee Data Change



Coordinate with other departments as needed

- Reconciling Position and Job Data requires active coordination to ensure the employee's new appt is entered on time
- Contact your Comp Policy Expert as needed



Review key resources as often as you need to

- [Templates Action and Reason Codes](#) Job Aid
- Payroll Processing Calendar
- [Resolving FLSA Conflicts](#) Quick Reference



The Payroll office receives error reports for payroll issues & benefits adjustments needed as a result of frequency changes and will notify the HR Dept Contact if errors identified; but the primary responsibility for confirming accurate pay and benefits remains with the dept and the HR Transactors.

Key Takeaways

- Concurrent Hires will not be processed if Pay Frequency and FLSA Status don't align to existing appointments
- The Effective Date of the Pay Frequency Job Data update should be the day after the Pay Confirm Date, and before the Employee Data Change deadline of the new frequency's pay cycle
- Contact your local Comp Policy Expert to reconcile Position and Job Data fields between existing and new appointments before submitting your transaction
- Multi-Location Appointment and Dual Appointment Forms (Staff only) must be attached to the concurrent hire, if applicable, to avoid cancellation
- If a template is cancelled, clone the transaction after reconciliation of Position and Job Data is complete
- Refer to the *Resolving FLSA Status Quick Reference* on the UC San Diego UCPATH website under Job Aids, access other resources as needed
- If missing pay is owed to the employee, submit an Off-Cycle Pay Request or contact the Campus Ecotime team via SNOW for assistance

UC San Diego Job Aids and Quick References

<https://ucpath.ucsd.edu/training/job-aids.html>

UCPath / Training / Job Aids

UC San Diego Job Aids and Quick References

- **Job Aids:** Provide succinct step-by-step instructions for key transactions with appropriate business process context
- **Quick References:** Provide summarized information on concepts and data that span multiple UCPath transactions and modules

We are creating Job Aids especially for our UC San Diego transactors. If the Job Aid below does not have a hotlink, it is still in progress, but coming soon.

- ▶ Global References
- ▶ Accruals Management
- ▶ Extended Leave of Absence
- ▶ Funding
- ▶ PayPath Transactions
- ▶ Payroll Requests
- ▶ Position Management
- ▶ Template Transactions

UCPath Help Site for Transactional Users

<https://sp.ucop.edu/sites/ucpathhelp/LocationUsers/LOCplayer/data/toc.html>

UNIVERSITY OF CALIFORNIA UCPath

search

- ▶ Basics and Navigation
- ▶ Absence Management
- ▶ Benefits
- ▶ ePerformance
- ▶ General Ledger
- ▶ Payroll
- ▶ System Administration
- ▶ Talent Acquisition Management
- ▶ Workforce Administration



- Will we be covering changes in pay frequency for faculty (like 9/9, 9/12, 11/12)? **Kelly Maheu in APO requested these type of changes request guidance through APO since it is situation specific.**
- Academics can have concurrent appointments with different pay frequency, e.g., UC_FY for postdocs and UC_9M for lecturers. **As long as the different pay frequencies derive the same Employee Type (ie. Monthly or BW designation) across all appointments**
- So we may be able to avoid the job data update form to change pay group and pay frequency by adding comments in the concurrent hire transaction? **Correct, ask in the comments since the existing positions should not be reconciled. If UCPC processes it incorrectly, updates to Posn and Job Data will be needed after UCPC processing in PayPath (or form for Pay Group).**
- If employee move from 83% staff appointment to 100% academic, and Concurrent hire template used for hiring her to new position and terminate the staff position, do we still have to update the data or it will be automatically correct the data? **No reconciliation needed if it's a transfer!**
- Are you saying we could payout comp time through ECOtime? We don't have to go thru UC Path? **Payout while they are in that comp eligible position via EcoTime – use the units to payout to avoid overpayment.**
- I have not done a “clone” in awhile, but I vaguely remember having a problem in some cases. Some fields in the clone process cannot be edited, if I recall correctly. If that particular un-editable data was wrong and needs to be updated, you won't be able to do it via a clone. I had to start over from scratch. Sorry, I don't recall more details than that. But are you familiar with such situations and can you explain when it might be better to start over from scratch rather than clone a transaction? **If the type of transaction is wrong (Full Hire vs Concurrent) then a new transaction is required.**

- I recently submitted a Job Data Update Form to UCPC requesting them to update a student employee's pay group. This employee switched from MO to BW and the pay group didn't auto derive when I switched the pay frequency. UCPC said "We are unable to change pay group for you and change must be completed at location level. I would suggest you reach out to your HR Director for assistance." **Escalate via SNOW to UCPATH Project to escalate to QCU. Provide the case# and keep the case open.**
- Can someone explain all the different types of aids? What's the functional difference between a "Job Aid," "Quick Reference," "UPK," and "KBA"? **Functionally, they are all mostly the same (except a UPK is a simulation). They each live in different areas though (Job Aids are on UCSD UCPATH site and Help Site).**
- The FLSA mismatch process has resulted in delays in pay for several ASE (academic student hires) as it can be lengthy. ASE hires are almost always hired as Exempt. Are there any suggestions on how resolve the FLSA status concerns more quickly to avoid missed pay? And/or is the FLSA mismatch form required if the ASE positions are known to be exempt? **Requiring form at this time due to some issues. May adjust in future as situation evolves.**
- Can you remind us where we can view the recordings of these sessions? **Training on the UCPATH.ucsd.edu website, under Review and Reinforcement**
- I submitted a concurrent hire transaction which UCPC has approved. The employee decided not to begin employment. A Job data Update is the appropriate action to delete the empl record ?with a job data update form? **Submit a termination template with the Reason of NSE (never started employment). Use the hire date as the termination date.**

- Regarding my “clone” issue above, I recall one of the errors that I couldn’t update in the clone. I wanted to delete an erroneously entered “Oath Signature Date.” The employee was not a US citizen and did not sign the Oath. I had accidentally entered an oath date in the orig. template. I asked my local reviewer to deny the template so that I could delete that Oath Sig Date. But when I cloned the transaction, it wasn’t possible to delete the Oath Sig Date.

The logo features the letters 'UC' in white on a gold square background. To the right, the word 'Path' is written in a blue, italicized sans-serif font. This text is enclosed in a blue rectangular frame that has a slight 3D effect. At the top right corner of the frame, there is a blue trident symbol with three upward-pointing arrows.

UC Path

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