Today’s training session includes:

- The concepts of Template Transactions
- The who, what, why, when, where, & how of the various transactions processed with HR Smart Templates
- Learning about all the resources available to you, including Job Aids, people, and UCPath itself
Introductions & Classroom Logistics

Instructor
- Name
- UC role
- UCPath role
- Years at UC
- Functional experience

Attendees
- Name
- University role
- Years at UC
- Expectations for this training

- Safety and Housekeeping
  - Emergency evacuation procedures
  - Restrooms
  - Course duration: 4 hours
  - Breaks
- Classroom Etiquette
  - Please turn off cell phones
  - No email or web surfing
  - Return from breaks on time
  - Please use trash receptacles in the room

Workforce Administration
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UCSB UCPath
Human Resources & Academic Personnel
Questions

• We encourage burning questions*. More than likely someone else in the room has the same burning questions.

• Please stop us and ask. Feel free.

• There is a lot of terminology. We use terms you will not understand.

• Let the instructors provide the answers.

Parking Lot

✓ Questions we can't answer right away
✓ Questions requiring a lengthy response
✓ Questions beyond the scope of this training
We know who YOU Are

A Variety of **Experiences**

- Work mostly with Staff
- Work mostly with Academics
- Work with both Staff & Academics
- Long-time employee
- New employee
The UCPath System
Many UCSB staff members have multiple roles in the UCPath System. Examples of these roles include:

- Initiator and Approver
- Initiator, Approver, and Inquiry Only
- Approver and Inquiry Only

If you have questions about your assigned role please consult your Business Officer or Supervisor.
Types of UCPath Transactions

- **Position Requests** - Use the Position Request Control Form for:
  - Requesting a new position
  - Updating a vacant position
  - Requesting / updating a multi-head count position

- **Smart HR Templates** are for employee onboarding and offboarding: - Use Smart HR Templates for:
  - Hiring
  - Rehiring
  - Intra-Business Unit Transfers (within campus)
  - Inter-Business Unit Transfers (between campuses)
  - Termination
  - Retirement

- **PayPath** is for employee maintenance – Use PayPath for:
  - Position Updates (filled positions only)
  - Job Data Updates
  - Additional Pay (Stipends, etc.)
Workforce Administration

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Who Processes UCPath Transactions

<table>
<thead>
<tr>
<th>INITIATOR</th>
<th>APPROVER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept</td>
<td>Dept</td>
</tr>
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<td>Dept</td>
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</tbody>
</table>

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Who Processes UCPath Transactions

Non-student Academics

<table>
<thead>
<tr>
<th>INITIATOR</th>
<th>APPROVER 1</th>
<th>APPROVER 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Hire</td>
<td>Dept</td>
<td>Dept</td>
</tr>
<tr>
<td>Re-Hire</td>
<td>Dept</td>
<td>Dept</td>
</tr>
<tr>
<td>Voluntary Terminations &amp; Retirement</td>
<td>Dept</td>
<td>Dept</td>
</tr>
<tr>
<td>Involuntary Terminations</td>
<td>Dept</td>
<td>Dept</td>
</tr>
<tr>
<td>Personal Data Changes</td>
<td>Dept</td>
<td>Dept</td>
</tr>
<tr>
<td>Add/Renew Contingent Worker</td>
<td>Dept</td>
<td>Dept</td>
</tr>
</tbody>
</table>

Then fulfilled by UCPC

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UCSB UCPath

Human Resources & Academic Personnel
Who has answers on the (UC)Path?
Staff transactions

1. FTE Approval
   - Budget Approval

2. Compensation
   - Job Description Approval

3. Workforce Administration (WFA)
   - Position Control Request Approval

4. BFS
   - Position Funding Questions

5. Employment
   - Receiving Hiring Requisition
   - Receiving Hiring Proposal

6. UCPath Center
   - Fulfilling Hiring Template

7. BFS
   - I-9 Process

8. Department: With New Employee
   - Onboarding

UCSB UCPath
Human Resources & Academic Personnel

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UCSB UCPath

Human Resources & Academic Personnel

UC SANTA BARBARA 12
Initiating Transactions…

1: Template Transactions Overview
2: Full Hire
3: Concurrent Hire
4: Rehire
5: Transfers
6: Termination
7: Retirement

More…
You’ve Processed your transaction ... Now what?

8. The Person
9. Transaction Status
10: Cloning a Transaction
11: Course Review
Template Transactions
Overview
Module 1
Transactions Processed Using Templates

**Overview**

- Workforce Administration
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**Transactions Processed Using Templates**

- **Full Hire**
  - Intralocation Transfer
- **Rehire**
  - Interlocation Transfer
- **Concurrent Hire**
  - Personal Data Change
- **Termination**
- **Retirement**
- **Contingent Worker (CWR)**

Revised 10/29/2019
1. Access to templates is determined by the Initiator's security level.

2. Access to specific records is determined by:
   A. Template selected
   B. Employee ID and Record Number entered

---

**Available Records & Templates**

**All Initiators**

- Access UC System wide Records
  - Full Hire
  - Concurrent Hire
  - Add Contingent Worker w/Position
  - Add Contingent Worker w/out Position

**All UCSB Initiators**

- Access UCSB Campus Records
  - Rehire
  - Intra-location Transfer
  - Renew Contingent Worker

**Dept-Specific Initiators**

- Access Department Records
  - Voluntary Termination
  - Involuntary Termination
  - Retirement
  - Personal Data
Approval Workflow Engine (AWE)

AWE is the UCPaPath functionality that routes transactions for review and approval.

The AWE Process varies based on if the template is submitted for a Staff or Academic employee.

1st Approver review

☐ Approve
☐ Deny

2nd Fulfillment

Then on to UCPC to be fulfilled
Template transactions are initiated through the UCPath component "Smart HR Transactions" and provide the fields necessary to complete the transaction all in one place.
Selecting a Template

• In many cases, there is a template specific to academic and another specific to staff. For example:
  - Full Hire - Staff Only
  - Full Hire - Academic Use Only

• Use the Select Template lookup to choose the template for the transaction you need to initiate.

Use the Transactions in Progress section to review the template transactions you have submitted or saved for later. You can also select and delete your transactions.
Creating a Smart HR Transaction

After you populate **Select Template** and **Effective Date**, click the **Create Transaction** button.

Select a template and press Create Transaction.

![Smart HR Transactions interface](image)

1. **Select Template**
2. **Effective Date**
3. **Create Transaction**

You do not have any transactions in progress.

Go To: **Transaction Status**

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Revised 10/29/2019

Human Resources & Academic Personnel
Full Hire

Module 2
Walk the (UC)Path
Staff transactions

1. Department secures FTE Approval
2. Department secures Budget Approval
3. Department submits Job Description in OACIS
4. A. Department approves JD and/or ...
4. B. Compensation approves JD
5. Department submits Position Control Request to WFA
6. WFA approves and assigns position number
7. Department adds Position funding. BFS provides support if needed
8. Department submits Hiring Requisition to Employment (OACIS)
9. Department submits Hiring Proposal to Employment (OACIS)
10. Dept initiates/Approves Hiring Template (UCPath)
11. UCPath Center fulfills Hiring Template
12. BFS completes I-9 Process
13. Department on-boards new employee
Walk the (UC)Path
Academic Transactions

1. Department Secures FTE Approval
2. Department Secures Budget Approval
3. Academic Personnel (AP) Approves/Audits Appointment
4. AP creates positions for Non-Student Academics
5. Department Adds Funding to Position
6. Department Initiates/Approves Hiring Template
7. UCPath Center Fulfills the Hire transaction
8. BFS Completes the I-9 Process
9. Department On-boards new employee

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UCSB UCPath
Human Resources & Academic Personnel
The full hire template transaction creates a record for an employee receiving compensation through UCPath Payroll processing.

* Separate hire templates are available for academic and for staff full hires.

### AVAILABLE TEMPLATES*

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

* Revised 10/29/2019
Situations Using Full Hire Template

New Hire
- First time hiring a former staff employee as an academic
- First time hiring someone from another UC campus or medical center

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**Full Hire Key System Steps**

**COMMUNICATE with other department if necessary**

- **Department Initiator**: Review Person Org Summary
- **Department Initiator**: Navigate to Smart HR Templates
- **Department Initiator**: Select Appropriate Hire Template
- **Department Initiator**: Enter Full Hire Details and Attach Supporting Docs if Needed
- **Department Initiator**: Save and Submit

---

**Revised 10/29/2019**
Template Transactions Academic Process

COMMUNICATE with other department if necessary

Department Initiator
Review Person Org Summary

Department Initiator
Enter and Submit Template Transaction

Department Approver
Review/Approve Template Transaction

Academic Personnel
Review/Approve Template Transaction

WFA UCPath Production
Process Template Transaction

Department Initiator
View Employee Data

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UCSB UCPath

Human Resources & Academic Personnel
Template Transactions Staff Process

COMMUNICATE with other department if necessary

- Department Initiator: Review Person Org Summary
- Department Initiator: Enter and Submit Template Transaction
- Department Approver: Review/Approve Template Transaction
- UCPath WFA Production: Process Template Transaction
- Department Initiator: View Employee Data

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Revised 10/29/2019
The first step to processing a hire template is to review the Person Org Summary to confirm an employee’s current relationship to the UC including:

- HR status
- Payroll status
- Primary job assignment
- Other current job assignment details

* Quick Tip
Keep an eye out for duplicate names
Person Organizational Summary

- Person Org Summary allows you to view job assignment information for all employee records across all UC campuses.

- Person Org Summary displays current employee information for all organizational relationships.
  - **Employee**
  - **Contingent Worker (CWR)**
  - **Person of Interest (POI)**

- An employee may have more than one organizational relationship concurrently.
  - **Example**: An employee at UCSB who is also a CWR at UCLA.
  - **Example**: A staff student employee who is also a TA

CWRs do not have an employer/employee relationship with the University and are paid by a 3rd party. Staff Example: Apple One temp.

Historical or future-dated employment details are available in other components … more on that later!
The header, above each **Assignments** section:
- Displays employee's status in Payroll and in HR.
- Indicates which job is the **Primary Job** and if applicable, the **Termination Date** of the assignment.

**Be mindful of FTE so students don’t exceed 1.0 FTE.**

If there is more than one row of data, click the **View All** link to all current information.
Smart HR Transaction Page Navigation

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions

Smart HR Transactions
Select a template and press Create Transaction.

1. Select Template: UC_FULL_HIRE
2. Effective Date: 12/01/2018
3. Create Transaction

Navigation:
PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions

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Human Resources & Academic Personnel
Effective Date

The **effective date** of transactions drives the entire system.

- Please be aware of the effective date you are using.
- Once the effective date is entered it is the effective date for the action.

Oops! Need to make a change?

- You can cancel prior to saving.
- If your transaction was fulfilled already, please submit a **job data update form** to the UCPath Center and request they make the update.
Use the **Enter Transaction Details** page to identify the appropriate **Reason Code**. Each template has its own set of Reason codes, which are further distinguished based on staff or academic. *More on this later.*

**Selecting a Reason Code** has important downstream effects. Ask via HR ServiceNow or AP-Path@ucsb.edu if you are uncertain which Reason Code to use.
Full Hire Transaction Details

Enter the details for the full hire, beginning with the **Job Effective Date** (hire date) and the **Reason Code**.

**Important**
- Ensure that you select the correct **Job Effective Date** (hire date) and **Reason Code**.
- These fields are important entry points for the employee's record and have many downstream effects.
- In the **Address Format** field, accept the default of **United States** or change to **Global**, if applicable.
- Fields marked with * are required fields and must contain a value before continuing to the next page.

For new hires, accept the default of **NEW** to allow the system to automatically assign the employee ID when the transaction is processed by WFA Production.
NOTE: “With Prior UC Affiliation” refers to former Contract, BYA, or CWR only. It does not refer to those who previously worked as a UCSB employee.
Entering Transaction Information

- Enter the details for the hire on each tab.
- You must navigate through all the tabs before the **Save and Submit** button is available.

**Staff does not enter data on Earns Dist, Addl Pay (unless applicable) and Employee Experience**

- When complete, click the **Save and Submit** button to submit the template for review and approval.
As you progress through the template transaction, on the bottom of the personal data tab you will see the *Tracker Profile ID* field.

1. Email type should be "HOME"
2. Leave Tracker Profile ID = BLANK. This field auto-populates once tracker is done
3. Leave Remote I-9 Section 2 = UNCHECKED (notify BFS through BFS ServiceNow if remote I9 needed, because employee will not be working on campus)
4. COMMENTS field is where you communicate with UCPath. Notes are available for audit
5. Initiator comments field is where initiators communicate with Approvers regarding the transaction. These notes also stay with the record and are available for audit
After the **Position Number** is entered, many of the other fields default and are view-only.

- For staff, the **Employee Classification** field does not default and must be manually entered.
- For academic personnel, the **Employee Classification** field defaults and is view-only.
If any auto-populated fields are incorrect, please stop and submit a **Position Control Request** to make the change on the Position.

You cannot proceed and correct later.
Job Codes and BYA

Job Codes are entered on the Job Data Tab

The Job Code determines the Salary Admin Plan and Salary Grade on the Job Data Tab

FYI: Job Codes that do not have an established Salary Plan and Grade are commonly By Agreement (BYA). Tab through the compensation field so it is left blank.
Steps and Compensation

✔ If the Job Codes has Steps, verify the compensation field auto-populated correctly. Typically represented or academic positions.

✔ If the Job code does not have steps enter the compensation fields manually.

✔ Salary Plan = Open Range? No steps.
Staff Compensation Fields

- **Comp Rate Codes** are used to define each component of the employee's base salary.
- **Compensation Rate** is the amount paid at the compensation frequency.

In the **Job Compensation - Pay Components** section, the **Compensation Frequency** field defines how the quoted compensation amount is presented:
  - **M** = Monthly Pay Schedule
  - **H** = Hourly Pay Schedule

In the **Job Compensation - Payroll Currency and Frequency** section, the **Compensation Frequency** field defines how the total compensation is actually paid out to the employee per paycheck:
  - For example, Monthly or Hourly.
  - This field defaults from the job code.
Some employees do not receive compensation from UC. In some cases these Academic employees should have a comp rate of **UCWOS** (without salary). This places them in a pay group that ensures payroll is not processed for them.

**Things to keep in mind … Keep your ducks in a row!**

- WOS comp rate code prohibits **ALL** pay
- Applies to all hiring templates: **full/rehire/concurrent**
Upon selecting **COMP RATE CODE**, the Compensation Frequency fields auto-populate.

- **Exempt employees** = UCANNL
  - First Comp Frequency field under Pay Components will be ‘A’
  - Second comp frequency field under Payroll Currency and Frequency will default from the job code.

- **Nonexempt employees** = UCHRLY
  (both Comp Frequency fields will be H)

- Off Scale academic employees = UCOFF1
- Hourly Off Scale Academic employees = UCOFFHRLY
- NOTE: Most academic appointments have an off-scale amount. This amount is manually entered.

Exempt employees

- UCANNL
- UC912
- UC_10
- UC_11
- UC_12
- UC_9M
- UC_FY

Nonexempt employees

- UCHRLY
- UC 9/12 - AY
- UC 1/10th Rate
- UC 1/11th Rate
- UC 1/12th Rate
- UC 1/15th Rate

**NOTE:** Most academic appointments have an off-scale amount. This amount is manually entered.
Expected Job End Date Staff

- Enter the date the job ends in the Expected Job End Date field for Contract (1), Limited (4), Casual/Restricted (5), CWR (13), and Rehired Retiree (15) staff employees.

- Non-Academic employees in class 1, 4, 5, 13, and 15 are automatically terminated in UCPath on the expected job end date.

- Failing to enter an end date for employee class 1, 4, 5, 13 or 15 may result in the employee continuing to be paid after the expected job end date, and possibly becoming eligible for benefits, including vacation and sick, which is charged to the department.

- Departments monitor expected job end dates and, if needed, update/extend the expected job end date (in PayPath Actions) to ensure termination occurs only as intended.
Expected Job End Date

Academic

For Academic templates, the **End Job Automatically** check box appears next to the **Expected Job End Date** field.

- Select the check box to automatically terminate the employee on the **Expected Job End Date**.
- If the check box is not selected, the employee is not automatically terminated; pay continues other UC-related access may be affected (parking, benefits, systems, etc.)
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Who has answers?
Staff transactions

Department: Internal Divisional Process
FTE Approval  Budget Approval

Compensation
Job Description Approval

Workforce Administration (WFA)
Position Control Request Approval

BFS
Position Funding Questions

Employment
Receiving Hiring Requisition  Receiving Hiring Proposal

UCPath Center
Fulfilling Hiring Template

BFS
I-9 Process

Department: With New Employee
Onboarding
Help and Resources

- Ask Staff WFA Questions
- UCSB HR Staff-specific Guidelines and Processes
- Video Demos from UCOP (UPK)
- HR ServiceNow – for Staff
  https://ucsb.service-now.com/hr
- HR Website – for Staff
  https://www.hr.ucsb.edu/ucpath
- UCPATH Portal
  Dashboard Menu > Help/FAQ > Self Service or Location Users
- Academic Personel UCPATH Team
  AP-Path@UCSB.edu
- UCSB UCPATH Site
  https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources
- Ask UCPATH
  Ask UCPATH Center
- E-mail questions re: Faculty and ASE
- Find Job Aids, Handouts, Support Documents
- Submit an Inquiry to UCPC or Search UCPATH Help Library

Human Resources & Academic Personnel
https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources
Full Hire Scenario

I am hiring a new Student Assistant, Jane Doe.

1. Where do I check if Jane has a UCPath Employee ID?
   PERSON ORG SUMMARY

2. Which Template do I use for new hire?
   FULL HIRE TEMPLATE

3. Who can I contact with questions?
   SERVICE NOW (HRHELP.UCSB.EDU) staff
   or AP-PATH@UCSB.EDU if academic

Go to the Job Aid
Concurrent Hire

Module 3
Workforce Administration

Position Control
- Introductions & Logistics
- UCPath System
- Overview
- New Positions
- Update Positions
- Course Review

Template Transactions
- Introductions & Logistics
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- Full Hire
- Concurrent Hire
- Rehire
- Transfers
- Termination
- Retirement
- The Person
- Transaction Status
- Cloning a Transaction
- Course Review

PayPath Transactions
- Introductions & Logistics
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- Course Review

Walk the (UC)Path
Staff transactions
Workforce Administration

Position Control
- Introductions & Logistics
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Template Transactions
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  - Concurrent Hire
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PayPath Transactions
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- Job Data Changes
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- Course Review

Walk the (UC)Path Academic Transactions

1. Department Secures FTE Approval
2. Department Secures Budget Approval
3. Academic Personnel (AP) Approves/Audits Appointment
4. Position is created:
   - Department Submits Position Control Request for ASE, OR
   - AP creates positions for Non-Student Academics
5. Department Adds Funding to Position
6. Department Initiates/Approves Hiring Template (non-student appts only)
7. UCPath Center Fulfills the Hire transaction
8. BFS Completes the I-9 Process
9. Department On-boards new employee

Revised 10/29/2019
Concurrent Hire: A staff or academic employee adds an additional job, which is concurrent to his or her existing job with UC.

- A separate concurrent hire template is available for academic and for staff.
- Concurrent hire templates are also used for interlocation transfers (between campuses).

Interlocation transfers are discussed later in this presentation.
Situations Using Concurrent Hire Template

Adding an additional job (staff-staff)

Inter-location Transfer (between campuses)

Adding an additional job (academic-academic)

Intra-location Transfer (between depts)

** Academics only **

UCSB UCPath

Human Resources & Academic Personnel

Revised 10/29/2019
Communicate with other department regarding effective date, FLSA, and Pay Group.

**Concurrent Hire Key System Steps**

1. Department Initiator
   - Review Person Org Summary
2. Department Initiator
   - Navigate to Smart HR Templates
3. Department Initiator
   - Select Appropriate Concurrent Hire Template
4. Department Initiator
   - Concurrent Hire Details and Attach Supporting Docs if Needed
5. Department Initiator
   - Save and Submit

**Position Control**
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**PayPath Transactions**
- Introductions & Logistics
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Revised 10/29/2019
COMMUNICATE with other department if necessary

- Department Initiator
  - Review Person Org Summary
- Department Initiator
  - Enter and Submit Template Transaction
- Department Approver
  - Review/Approve Template Transaction
- Academic Personnel
  - Review/Approve Template Transaction
- WFA UCPath Production
  - Process Template Transaction
- Department Initiator
  - View Employee Data

Revised 10/29/2019

UCSB UCPath

Human Resources & Academic Personnel
Use the **Transaction Template** section to select the concurrent hire template.
Enter the details for the concurrent hire, beginning with the **Reason Code**.

**Important**
- Ensure that you select the correct **Job Effective Date** and **Reason Code**.
- These fields are important entry points for the employee's record and have many downstream effects.

Enter the employee's current **Employee ID**.

Click **Continue** to enter the remaining details of the template.
STAFF-ONLY Reason Codes

STAFF Full Hire Reason Codes

- Concurrent Hire - Dual Empl
- Concurrent Hire - Non Dual Emp

STAFF Concurrent Hire Reason Codes

- Concurrent Hire - Dual Empl
- Concurrent Hire - Non Dual Emp

Dual Employment: Combined FTE greater than 100%

Non-Dual Employment: Combined FTE less than 100%

Workforce Administration
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Revised 10/29/2019
**Position Control**
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**ACADEMIC Full Hire Reason Codes**

- Academic Concurrent Hire
- Academic Hire w/ Contract Pay
- Academic Inter BU Transfer
- Hire - No Prior UC Affiliation
- Rehire, < 120 days break
- Rehire, >= 120 Days Break
- Rehire, fr Layoff-No Pref <120
- Rehire, fr Layoff-NoPref >=120
- Rehire, from Layoff-Pref < 120
- Rehire, from Layoff-Pref >=120
- Rehire: Academic Recall
- Rehire: Emeritus Faculty
- Rehire: Rehired Retiree
- Rehire: Reinstatement
- Rehire: Retirement Suspended
- Transfer-Inter BU, Demotion
- Transfer-Inter BU, Lateral
- Transfer-Inter BU, Promotion
- Transfer-Inter BU, Undefined

**ACADEMIC Concurrent Hire Reason Codes**

- Academic Concurrent Hire
- Academic Inter BU Transfer

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Revised 10/29/2019
Some existing employee info is automatically displayed.

Enter the remaining details on the template tabs.

You must navigate through all the tabs before the **Save and Submit** button is available.

When complete, click the **Save and Submit** button to submit the template for review and approval.
New info regarding **Personal Information**

- **Employees enter / maintain the following fields via “guided onboarding” pages in UCPath self-service**
  - Gender
  - Military Status
  - Ethnic Group

- **UCPath populates (hidden) Gender field in Modify a Person page with “Unknown” during hiring activities. This value remains until employees updates in self service.**
When processing a concurrent hire that “crosses the aisle” between STAFF and ACADEMIC, the template varies depending on if the employee has an existing record in the opposite UCPath table.

**Full Hire Template**
- reason code: concurrent hire non-dual employment
  - Academic
    - first staff job
  - Staff
    - first academic job

**Concurrent Hire Template**
- non-dual employment
  - Academic
    - with prior staff job
  - Staff
    - with prior academic job
Who has answers?
Staff transactions

Department: Internal Divisional Process
FTE Approval → Budget Approval

Compensation
Job Description Approval

Workforce Administration (WFA)
Position Control Request Approval

Full Hire
Concurrent Hire
Rehire
Transfers
Termination
Retirement

Transaction Status
The Person
Cloning a Transaction
Course Review

Payment Administration
Position Funding Questions

Employment
Receiving Hiring Requisition → Receiving Hiring Proposal

UCPath Center
Fulfilling Hiring Template

BFS
I-9 Process

Department: With New Employee
Onboarding
Help and Resources

- **Ask Staff WFA Questions**
- **UCSB HR Staff-specific Guidelines and Processes**
- **Video Demos from UCOP (UPK)**
- **HR ServiceNow – for Staff**
  - [https://ucsb.service-now.com/hr](https://ucsb.service-now.com/hr)
- **Academic Personnel UCPath Team**
  - AP-Path@UCSB.edu
- **E-mail questions re: Faculty and ASE**
- **Find Job Aids, Handouts, Support Documents**
- **HR Website – for Staff**
  - [https://www.hr.ucsb.edu/ucpath](https://www.hr.ucsb.edu/ucpath)
- **UCSB UCPath Site**
  - [https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources](https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources)
- **Submit an Inquiry to UCPC or Search UCPath Help Library**
- **UCPath Portal**
  - Dashboard Menu > Help/FAQ > Self Service or Location Users
- **Ask UCPath**
  - [Ask UCPath Center](#)
https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources
I think my new employee might already have a job on campus... *hmmm?*

1. In which component can I see an employee’s current relationship with UC?
   PERSON ORG SUMMARY

2. Which template do I use to hire an employee who already works on campus?
   CONCURRENT HIRE

3. Don’t I need to communicate with someone else….? Who was that?
   HINT: YES, the other department!
Rehire

Module 4
Walk the (UC)Path
Academic Transactions

1. Department Secures FTE Approval
2. Department Secures Budget Approval
3. Academic Personnel (AP) approves or audits appointment
4. Position is created:
   - Department submits position control request for ASE, OR
4. AP creates positions for Non-Student Academics
5. Department adds funding to position
6. Department initiates/approves hiring template (non-student appointments only)
6. AP audits and approves hiring template (non-student appointments only)
7. UCPath Center fulfills the hire transaction
8. BFS completes the I-9 process
9. Department on-boards new employee

Position Control
   - Introductions & Logistics
   - UCPath System
   - Overview
   - New Positions
   - Update Positions
   - Course Review

Template Transactions
   - Introductions & Logistics
   - UCPath System
   - Overview
   - Full Hire
   - Concurrent Hire
   - Rehire
   - Transfers
   - Termination
   - Retirement
   - Transaction Status
   - The Person
   - Cloning a Transaction
   - Course Review

PayPath Transactions
   - Introductions & Logistics
   - Overview
   - Position Data Changes
   - Job Data Changes
   - Additional pay
   - Course Review

Revised 10/29/2019
Use the UC **Rehire** template to rehire a previous UCSB employee, only when there is an existing UCSB UCPath employee record.

**Available Templates**

<table>
<thead>
<tr>
<th>Template</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC_ADD_CWR</td>
<td>Add Contingent Worker - No Position Data</td>
</tr>
<tr>
<td>UC_ADD_CWR_POSN</td>
<td>Add Contingent Worker With Position</td>
</tr>
<tr>
<td>UC_COM_CWR</td>
<td>Complete Contingent Worker Instance</td>
</tr>
<tr>
<td>UC_CONC_HIRE</td>
<td>Staff Concurrent Hire/Inter Location Transfer</td>
</tr>
<tr>
<td>UC_CONC_HIRE_AC</td>
<td>Academic Concurrent Hire/Inter Location Transfer</td>
</tr>
<tr>
<td>UC_EXT_CVR</td>
<td>Extend CWR Appointment</td>
</tr>
<tr>
<td>UC_EXT_CVR_POSN</td>
<td>Extend CWR (with Position) Appointment</td>
</tr>
<tr>
<td>UC_FULL_HIRE</td>
<td>Full Hire - Staff Only</td>
</tr>
<tr>
<td>UC_FULL_HIRE_AC</td>
<td>Full Hire - Academic Use Only</td>
</tr>
<tr>
<td>UC_ININV_TERM</td>
<td>Involuntary Termination</td>
</tr>
<tr>
<td>UC_PERS_DATA</td>
<td>UC Personal Data</td>
</tr>
<tr>
<td>UC_REHIRE</td>
<td>UC Rehire - Staff Only</td>
</tr>
<tr>
<td>UC_REHIRE_AC</td>
<td>Rehire - Academic</td>
</tr>
<tr>
<td>UC_REHIRE_REI</td>
<td>Rehire Reinstatement - For Staff Appointments</td>
</tr>
<tr>
<td>UC_REHIRE_REI_AC</td>
<td>Rehire Reinstatement - For Academic Appointments</td>
</tr>
<tr>
<td>UC_REINV_CWR</td>
<td>Renew Contingent Worker - Without Position</td>
</tr>
<tr>
<td>UC_REINV_CWR_POSN</td>
<td>Renew CWR Instance with Position</td>
</tr>
<tr>
<td>UC_REIRE</td>
<td>Retirement</td>
</tr>
<tr>
<td>UC_TRANSFER</td>
<td>Intra-Business Unit Transfer - Staff Only</td>
</tr>
<tr>
<td>UC_TRANSFER_AC</td>
<td>Intra-Business Unit Transfer - Academic Only</td>
</tr>
<tr>
<td>UC_VOL_TERM</td>
<td>Voluntary Termination</td>
</tr>
</tbody>
</table>

**NOTE:**

Use the **Full Hire** Template to process a rehire if the employee has...

- Their only termination record at a different UC
- A UCPath ID, but never worked in UCPath or
- Worked at UCSB, but does not have a UCPath ID
COMMUNICATE with other department if necessary.

Rehire Key System Steps

1. Department Initiator
   - Review Person Org Summary

2. Department Initiator
   - Navigate to Smart HR Templates

3. Department Initiator
   - Select Appropriate Rehire Template

4. Department Initiator
   - Enter Rehire Details and Attach Supporting Docs if Needed

5. Department Initiator
   - Save and Submit

Revised 10/29/2019
Smart HR Transactions Navigation

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions

Smart HR Transactions
Select a template and press Create Transaction.

1. Transaction Template
2. Effective Date
3. Create Transaction

Transactions in Progress
You do not have any transactions in progress.

Go To Transaction Status
Entering Transaction Details

Enter the details for the rehire, beginning with the **Employee ID**, **Job Effective Date** and the **Reason Code**.

**Important**
- Ensure that you select the correct **Job Effective Date**, **Action** and **Reason Code**.
- These fields are important entry points for the employee’s record and have many downstream effects.

Click the **Employee ID** search button to locate the employee. If the rehired employee does not exist in UCPath, they must be processed as a full hire.

Click **Continue** to enter the remaining details of the rehire.
STAFF-ONLY Reason Codes

STAFF Full Hire Reason Codes (for Rehire)

- Concurrent Hire - Dual Empl
- Concurrent Hire - Non Dual Emp
- Hire - No Prior UC Affiliation

- Rehire < 120 days break
- Rehire, >= 120 Days Break
- Rehire, fr Layoff-No Pref < 120
- Rehire, fr Layoff-NoPref >= 120
- Rehire, from Layoff-Pref < 120
- Rehire, from Layoff-Pref >= 120
- Rehire: Rehired Retiree
- Rehire: Reinstatement
- Rehire: Retirement Suspended
- Rehire: Staff Recall < 120
- Rehire: Staff Recall >= 120

- Transfer-Inter BU, Demotion
- Transfer-Inter BU, Lateral
- Transfer-Inter BU, Promotion
- Transfer-Inter BU, Undefined
- With Prior UC Affiliation

STAFF Rehire Reason Codes

- Concurrent Dual Employment
- Concurrent Non Dual Employment
- Rehire - Retirement Suspended
- Rehire fr Layoff-No Pref, < 120
- Rehire fr Layoff-No Pref, >= 120
- Rehire fr Layoff-Pref, < 120
- Rehire fr Layoff-Pref, >= 120
- Rehire, < 120 days break
- Rehire, > or = 120 days break
- Rehired Retiree
- Staff Recall, <120
- Staff Recall, >=120
- Transfer - Inter BU, Demotion
- Transfer - Inter BU, Lateral
- Transfer - Inter BU, Promotion
- Transfer - Inter BU, Undefined
Workforce Administration

Position Control
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- Cloning a Transaction
- Course Review

PayPath Transactions
- Introductions & Logistics
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- Job Data Changes
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- Course Review

ACADEMIC Full Hire Reason Codes

ACADEMIC Rehire Reason Codes
Entering Transaction Information

- Some of the employee’s existing personal information is automatically populated.
- Enter remaining details for the rehire on the template tabs.
- You must navigate through all the tabs before the **Save and Submit** button is available.
- When complete, click the **Save and Submit** button to submit the template for review and approval.
Workforce Administration

Position Control
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PayPath Transactions
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Who has answers?

Staff Transactions

Department: Internal Divisional Process
- FTE Approval
- Budget Approval

Compensation
- Job Description Approval

Workforce Administration (WFA)
- Position Control Request Approval

BFS
- Position Funding Questions

Employment
- Receiving Hiring Requisition
- Receiving Hiring Proposal

UCPath Center
- Fulfilling Hiring Template

BFS
- I-9 Process

Department: With New Employee Onboarding

Revised 10/29/2019
Help and Resources

- **Ask Staff**
  - WFA Questions

- **UCSB HR**
  - Staff-specific Guidelines and Processes

- **HR ServiceNow**
  - for Staff
    - [https://ucsb.service-now.com/hr](https://ucsb.service-now.com/hr)

- **HR Website**
  - for Staff
    - [https://www.hr.ucsb.edu/ucpath](https://www.hr.ucsb.edu/ucpath)

- **学术人员 UCPATH 团队**
  - UCPATH 团队
    - AP-Path@UCSB.edu

- **UCSB UCPATH 网站**
  - [https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources](https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources)

- **UCPATH 门户**
  - Dashboard Menu > Help/FAQ > Self Service or Location Users

- **UCPATH 门户**
  - [Ask UCPATH Center](#)

- **E-mail questions re:**
  - Faculty and ASE

- **Find Job Aids, Handouts, Support Documents**

- **Submit an Inquiry to UCPC or Search UCPath Help Library**
https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources
The Re-Hire Process

1. How can I find out if my new employee already has an Employee ID?
   PERSON ORG SUMMARY

2. They DO have an EMPL ID, and they are inactive (as expected), which template should I use?
   REHIRE TEMPLATE

3. Uh Oh! My staff employee auto-terminated. Which template should I use to Rehire?
   REHIRE/REINSTATEMENT TEMPLATE
Transfers

Module 5
Types of Transfers

Regardless of Staff or Academic, there are 3 types of transfers:

1. Intra-Campus Transfer - same department
   An employee transfers from one position to another at UCSB, within the same department.

2. Intra-Campus Transfer - different department
   An employee transfers from one position to another at UCSB, between different departments.

3. Inter-Campus Transfer – different CAMPUS
   An employee transfers from one position to another at a different CAMPUS.
Workforce Administration

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Department secures FTE Approval
2 Department secures Budget Approval
3 Department submits Job Description in OACIS
4 A. Department approves JD and/or ...
5 Department submits Position Control Request to WFA
6 WFA approves and assigns position number
7 Department adds Position funding, BFS provides support if needed
8 Department submits Hiring Proposal to Employment (OACIS)
9 Department submits Hiring Proposal to Employment (OACIS)
10 Dept Initiates/Approves Hiring Template (UCPath)
11 UCPath Center fulfills Hiring Template
12 BFS completes I-9 Process
13 Department on-boards new employee

Revised 10/29/2019
Walk the (UC)Path
Academic Transactions

1. Department Secures FTE Approval
2. Department Secures Budget Approval
3. Academic Personnel (AP) Approves/Audits Appointment
4. Position is created:
   - Department Submits Position Control Request for ASE, OR
4. AP creates positions for Non-Student Academics
5. Department Adds Funding to Position
6. Department Initiates/Approves Hiring Template
6. AP Audits and Approves Hiring Template (non-student appts only)
7. UCPath Center Fulfills the Hire transaction
8. BFS Completes the I-9 Process
9. Department On-boards new employee

Workforce Administration
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Revised 10/29/2019
An employee transfers from one position to another within the SAME department on campus.
1. Intra-Campus Transfer Same Department

- Intra-campus transfers within the same department use the Intra-Business Unit Transfer Template.

- A separate transfer template is available for academic and staff.

Available Templates

<table>
<thead>
<tr>
<th>Template</th>
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<td>Full Hire - Staff Only</td>
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<td>UC Personal Data</td>
</tr>
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<tr>
<td>UC_REHIRE_REI</td>
<td>Rehire Reinstatement - For Staff Appointments</td>
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<td>Rehire Reinstatement - For Academic Appointments</td>
</tr>
<tr>
<td>UC_RNEW_CWR</td>
<td>Renew Contingent Worker - Without Position</td>
</tr>
<tr>
<td>UC_RNEW_CWR_POSN</td>
<td>Renew CWR Instance - with Position</td>
</tr>
<tr>
<td>UC_RETIREEMENT</td>
<td>Retirement</td>
</tr>
<tr>
<td>UC_TRANSFER</td>
<td>Intra-Business Unit Transfer - Staff Only</td>
</tr>
<tr>
<td>UC_TRANSFER_AC</td>
<td>Intra-Business Unit Transfer - Academic Only</td>
</tr>
<tr>
<td>UC_VOL_TERM</td>
<td>Voluntary Termination</td>
</tr>
</tbody>
</table>
1. Intra-Campus Transfer Key System Steps

- **Department Initiator**: Review Person Org Summary
- **Department Initiator**: Navigate to Smart HR Templates
- **Department Initiator**: Select Appropriate Transfer Template
- **Department Initiator**: Enter Transfer Details and Attach Supporting Docs if Needed
- **Department Initiator**: Save and Submit

**System Steps**

1. Intra-Campus Transfer
2. Key
3. System
4. Steps

**Template Transactions**
- Introductions & Logistics
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**Revised 10/29/2019**
Smart HR Transactions Navigation

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions

Smart HR Transactions
Select a template and press Create Transaction.

Transaction Template
Transaction Type: All

Effective Date

Create Transaction

Transactions in Progress
You do not have any transactions in progress.

Go To Transaction Status
1. Enter Transaction Details

Enter details for the staff intra-campus transfer.

**Important**
- Ensure you select the correct Job Effective Date and Reason Code.
- These fields are important entry points for the employee's record and have many downstream effects.

Select the correct Employment Record Number for the job to transfer.
1. Intra-Campus Transfer STAFF Reason Codes within SAME department

- Academic Intra-Campus Transfer
- Involuntary Demotion
- Lateral Transfer
- Per Diem to Career
- Promotion
- Temp Out of Class Assignment
- Transfer - Dual Employment
- Voluntary Demotion
1. Enter Transaction Information

- Enter the details for the staff intralocation transfer on the **Job Data** and **Job Earnings Dist** tabs, as needed.

- When complete, click the **Save and Submit** button to submit the template for review and approval.
An employee transfers from one position at UCSB to another at UCSB, in a DIFFERENT department.
Since go-live we have learned there are two options to process an intra-campus transfer.

1. **ACADEMIC ONLY**: Process a Concurrent Hire/Termination template

2. **STAFF ONLY**: Process an Intra-campus transfer template
2A. **ACADEMIC** Intra-Campus Transfer Different Department

**First Concurrent Hire**

1. **Initiator New Dept.** Enter and Submit Concurrent Hire
2. **UCPath WFA Production** UCPC Fulfills Template Transaction
3. **Initiator New Dept.** Watch for Fulfillment of Concurrent Hire
4. **Initiator New Dept.** Confirm Job Data Updated Correctly
5. **Department Initiator** Contact Former Dept to Submit Termination Template

**Communicate with other department regarding effective date.**

**Second Termination Template**

Revised 10/29/2019
Smart HR Transactions Navigation

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions

Smart HR Transactions

Select a template and press Create Transaction.

1. Select Template
2. Effective Date
3. Create Transaction

Transaction Template
- Transaction Type: All
- Select Template

Transaction Type
- All

Transactions in Progress
- You do not have any transactions in progress.

Go To
- Transaction Status
Concurrent Hire: Step 1: to transfer an academic employee from an academic job in one department to another department at UCSB.

Available Templates

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<td>Extend CWR Appointment</td>
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<td>Renew Contingent Worker - Without Position</td>
</tr>
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<td>UC_VOL_TERM</td>
<td>Voluntary Termination</td>
</tr>
</tbody>
</table>
2A. ACADEMIC Intra-Campus Transfer Reason Codes

Concurrent Hire Reason Codes

Voluntary Termination Reason Codes
Concurrent Hire

- Some of the employee’s existing personal information is automatically displayed.
- Enter the remaining details for the concurrent hire on the template tabs.
- You must navigate through all the tabs before the **Save and Submit** button is available.
- When complete, click the **Save and Submit** button to submit the template for review and approval.
2A. ACADEMIC Intra-Campus transfer: Concurrent Hire **STEP 2**

**Navigation:** PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions

Initiate a voluntary termination template as the second part of a Campus to Campus or Dept. to Dept. transfer.
2A. Enter Termination Transaction Details

![Termination Transaction Details]

The following transaction details are required:

- **Template**
- **Voluntary Termination**

**Organizational Relationship** Employee

- **Employee ID**
- **Employment Record Number**
- **Effective Date** 07/15/2019
- **Reason Code**
  - Career to Per Diem
  - Interlocation (BU) Transfer
  - Release fr Temp Employment Vol
  - Resign - Accept Another Job
  - Resign - Attend School
  - Resign - Dissatisfied w/ Job
  - Resign - Job Abandonment
  - Resign - Look For Another Job
  - Resign - Military Service
  - Resign - Moved out of Area
  - Resign - No Reason Given
  - Resign - Personal Reasons
  - Resign - Quit Without Notice
  - Resign - Self Employment
  - Resign -Failed to Ret fr Leave
  - Transfer from UCPath PS

**Action**
- Termination

**Transaction Status**
- Cloning a Transaction

**The Person**
2A. Enter Transaction Information

The Last Date Worked automatically populates with a date that is **one business day prior** to the Job Termination Effective Date.

- If the Job Termination Effective Date is a Monday, the Last Date Worked defaults to the previous workday (Friday).

- The Last Date Worked field can be changed, if needed; however, the Last Date Worked must be prior to the Job Termination Effective Date. (Not the same date)

When complete, click the **Save and Submit** button.
2B. **STAFF** Intra-Campus Transfer Template

**Intra-Campus Transfer (STAFF):** The preferred template to transfer a staff employee between departments at UCSB.

✔️ The new department initiates the **intra**location transfer template.

**Always maintain communication between departments throughout this process.**

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</tbody>
</table>
2B. **STAFF** Intra-Campus Transfer

**Key System Steps**

- Communicate with other department regarding effective date.

---

**Department Initiator**
- Review Person Org Summary

**Department Initiator**
- Navigate to Smart HR Templates

**Department Initiator**
- Select Appropriate Transfer Template

**Department Initiator**
- Enter Transfer Details and Attach Supporting Docs if Needed

**Department Initiator**
- Save and Submit
2B. Smart HR Transactions

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions

Smart HR Transactions

Select a template and press Create Transaction.

1. Select Template

2. Effective Date

3. Create Transaction

Transaction Template

Transaction Type

Select Template

Effective Date

Create Transaction

Transaction Status

Transactions in Progress

You do not have any transactions in progress.

Go To Transaction Status
Enter the details for the rehire, beginning with the **Employee ID**, **Job Effective Date** and the **Reason Code**.

**Important**
- Ensure that you select the correct **Job Effective Date**, **Action** and **Reason Code**.
- These fields are important entry points for the employee’s record and have many downstream effects.

Click the **Employee ID** search button to locate the employee. If the rehired employee does not exist in UCPath, they must be processed as a full hire.
2B. STAFF Intra-Campus Transfer Reason Codes

Click Continue to enter the remaining details of the rehire.
2B. STAFF Intra-Campus Transfer
Entering Transaction Information

☑ Enter the details for the staff intralocation transfer on the **Job Data** and **Job Earnings Dist** tabs, as needed.

☑ When complete, click the **Save and Submit** button to submit the template for review and approval.
An employee transfers from one position to another at a **DIFFERENT CAMPUS**.
3. Inter-Campus Transfer Overview

Initiate an **inter-campus transfer** when an employee transfers from one UCPath campus to another UCPath campus without a break in service. For example, an employee transfers from UCLA to UCSB.

1st New Campus Submits and **confirms** Concurrent Hire Template

2nd Former Campus Submits Termination Template
3A. Transferring UCPath → UCPath

This process must be coordinated between the two campuses.

- A **concurrent hire** template is initiated by the **New Campus** to which the employee is transferring,

- A **voluntary termination** template is initiated by the **Former Campus** from which the employee is transferring.

- There should be no break in service.

  The **Job Termination Effective Date** should be the **same** as the **Job Effective Date** for the concurrent hire.
3B. Transferring Non-UCPath \(\rightarrow\) UCPath

A **Full Hire** template transaction is initiated in UCPath when an employee transfers from a non-UCPath Campus (PPS) to a UCPath Campus (and has never had a UCPath Empl ID).

### STAFF Full Hire Reason Codes

- **Concurrent Hire - Dual Empl**
- **Concurrent Hire - Non Dual Emp**
- **Hire - No Prior UC Affiliation**
- **Rehire, < 120 days break**
- **Rehire, >= 120 Days Break**
- **Rehire, fr Layoff-No Pref <120**
- **Rehire, fr Layoff-NoPref >=120**
- **Rehire, from Layoff-Pref <120**
- **Rehire, from Layoff-Pref >=120**
- **Rehire: Rehired Retiree**
- **Rehire: Reinstatement**
- **Rehire: Retirement Suspended**
- **Rehire: Staff Recall < 120**
- **Rehire: Staff Recall >= 120**
- **Transfer-Inter BU, Demotion**
- **Transfer-Inter BU, Lateral**
- **Transfer-Inter BU, Promotion**
- **Transfer-Inter BU, Undefined**

### ACADEMIC Full Hire Reason Codes

- **Academic Concurrent Hire**
- **Academic Hire w/ Contract Pay**
- **Academic Inter BU Transfer**
- **Hire - No Prior UC Affiliation**
- **Rehire, < 120 days break**
- **Rehire, >= 120 Days Break**
- **Rehire, fr Layoff-No Pref <120**
- **Rehire, fr Layoff-NoPref >=120**
- **Rehire, from Layoff-Pref <120**
- **Rehire, from Layoff-Pref >=120**
- **Rehire: Academic Recall**
- **Rehire: Emeritus Faculty**
- **Rehire: Rehired Retiree**
- **Rehire: Reinstatement**
- **Rehire: Retirement Suspended**

**NOTE:** When an employee transfers from a non-UCPath Campus, it is the non-UCPath Campus' responsibility to provide the employee’s benefit and payroll information by submitting the UFIN301 forms.
3C. Transferring UCPath → Non-UCPath

- **A Voluntary Termination template** is initiated in UCPath when an employee transfers from a UCPath Campus to a non-UCPath Campus.

- **Transfer from UCPath PS** is the Reason Code.

- **Enter a comment** in the termination template to inform UCPC WFA Production that the termination is due to a transfer. Also include the campus to which the employee is transferring.

**NOTE**
When an employee transfers from a UCPath Campus to a non-UCPath Campus, it is UCPC WFA Production’s responsibility to initiate the UFIN301 forms.

- **Transfer from UCPath PS** is the Reason Code.

- **Enter a comment** in the termination template to inform UCPC WFA Production that the termination is due to a transfer. Also include the campus to which the employee is transferring.
Help and Resources

- **Ask Staff WFA Questions**
- **UCSB HR Staff-specific Guidelines and Processes**
- **Video Demos from UCOP (UPK)**
- **HR ServiceNow – for Staff**
  - [https://ucsb.service-now.com/hr](https://ucsb.service-now.com/hr)
- **HR Website – for Staff**
  - [https://www.hr.ucsb.edu/ucpath](https://www.hr.ucsb.edu/ucpath)
- **UCSB UCPATH Site**
  - [https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources](https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources)
- **UCPath Portal**
  - Dashboard Menu > Help/FAQ > Self Service or Location Users
- **Academic Personnel UCPATH Team**
  - AP-Path@UCSB.edu
- **E-mail questions re: Faculty and ASE**
- **Find Job Aids, Handouts, Support Documents**
- **Submit an Inquiry to UCPC or Search UCPATH Help Library**

Human Resources & Academic Personnel
Transfer Pop Quiz!

1. I am hiring a lab assistant away from Chemistry and in to Physics… Which templates could I use?
   **STAFF: INTRA-CAMPUS TRANSFER TEMPLATE OR ACADEMIC: CONCURRENT HIRE + TERMINATION TEMPLATE**

2. I don’t have to pick up the phone …do I?
   Yes you do! … Who are YOU gonna call?
   (It’s not ghost busters!)
   **IT’S THE OTHER DEPARTMENT**

3. Our department analyst was just promoted to be our department business officer…. Which template do I use?
   **INTRA-CAMPUS TRANSFER**

I need to transfer an employee between departments on the UCSB campus …
Termination

Module 6
Initiate a **voluntary** termination template when:

- An employee resigns their UC employment.
- As one part of an Inter-Campus or Inter-Department transfer.

Initiate an **involuntary** termination template when:

- It is necessary to terminate an employee, lay off an employee, or you learn of the death of an employee.
Using the Termination Template

The termination template is used for both academic and staff terminations.

- Initiators submit templates only for employees within departments for which they have security access. If needed, you must coordinate with other departments for terminating other UC jobs.
- If the termination reason is **Death**, only one termination template is initiated (Involuntary Termination); UCPC WFA Production terminates all other jobs for the employee.
**Termination Key System Steps**

COMMUNICATE with other department regarding **effective date**.

1. **Department Initiator**: Review Person Org Summary
2. **Department Initiator**: Navigate to Smart HR Templates
3. **Department Initiator**: Select Appropriate Termination Template
4. **Department Initiator**: Enter Termination Details and Attach Supporting Docs if Needed
5. **Department Initiator**: Save and Submit

**Initiate Final Pay if Needed (BFS)**
Enter Transaction Details

**Enter Transaction Details**

The following transaction details are required:

- **Template**: UC Voluntary Termination

  **Organizational Relationship**: Employee

  **Employee ID**: [Input field]

  **Job Effective Date**: 12/15/2017

  **Action**: Termination

  **Reason Code**: Resign - Moved out of Area

**Important**

- Ensure you select the correct **Job Effective Date** and **Reason Code**.
- These fields are important entry points for the employee’s record and have many downstream effects.

**Select the correct Employment Record Number**
If the **Job Termination Effective Date** is a Monday, the **Last Date Worked** defaults to the previous workday (Friday).

The **Last Date Worked** field can be changed, if needed; however, the **Last Date Worked** must be prior to the **Job Termination Effective Date**.

When complete, click the **Save and Submit** button.
Final pay is **required** when all jobs are terminated or retired.

- While the termination and retirement templates provide a link for initiating final pay after entering the template, **UCSB does not use this component.**

- Request final pay through BFS ServiceNow portal: [https://ucsb.service-now.com/payroll](https://ucsb.service-now.com/payroll)

- For additional information on final pay, refer to the **Payroll** course: *PHCMPAYL200: Additional Compensation and Pay Adjustments Requests.*
The Termination Process

1. Is a termination processed in PayPath?
   NO

2. Which component do I use to process a Termination?
   SMART HR TRANSACTIONS

3. Do I manually enter the last day worked or is it auto-populated based on the termination date?
   NO, IT AUTO-POPULATES

4. Is a Termination Template used as part of an inter-campus transfer?
   YES
Retirement

Module 7
Initiate a retirement template when an employee decides to retire.

- One retirement template is used for both academic and staff employees.
- When UCPC WFA Production receives a retirement transaction, they retire the employee from all UC jobs.
**Initiate Final Pay if Needed (BFS)**

**Retirement Key System Steps**

1. **Department Initiator**
   - Review Person Org Summary

2. **Department Initiator**
   - Navigate to Smart HR Transaction

3. **Department Initiator**
   - Select Retirement Template

4. **Department Initiator**
   - Enter Retirement Details and Attach Supporting Docs if Needed

5. **Department Initiator**
   - Save and Submit

**COMMUNICATE with other department regarding effective date.**
Smart HR Transactions Navigation

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions

Smart HR Transactions

Select a template and press Create Transaction.

Transaction Template

Transaction Type All

Select Template

Effective Date

Create Transaction

Transactions in Progress

You do not have any transactions in progress.

Go To Transaction Status

Revised 10/29/2019

UCSB UCPath

Human Resources & Academic Personnel
When an employee retires from UC, only one retirement template needs to be initiated; UCPC WFA Production will retire all other jobs for the employee, as needed.

There is only one Reason Code for the retirement template.

Click Continue to enter the remaining details of the template.
Entering Transaction Information

“Last Date Worked” automatically populates with a date that is one business day prior to “Job Retirement Effective Date.”

- If the Job Retirement Effective Date is a Monday, the Last Date Worked defaults to the previous workday (Friday).

- The Last Date Worked field can be changed if needed; however, the Last Date Worked must be prior to the Job Retirement Effective Date.

When complete, click the Save and Submit button.

NOTE: End of FY retirements have specific requirements for termination date, last day work, and effective date.
Final pay is required when an employee retires.

- Request final pay via BFS ServiceNow [https://ucsb.service-now.com/payroll](https://ucsb.service-now.com/payroll).

- For additional information on final pay, refer to the Payroll course: Additional Compensation and Pay Adjustments Requests.
The Retirement Process

1. How many Retirement Templates are there to choose from, whether staff or academic?
   **ONE**

2. How many Reason Codes are there to choose from on a Retirement Template?
   **ONE**

3. My retiring employee has 2 jobs, how many Retirement templates do I need to submit?
   **ONE**
The Person

Module 8
Personal Data Changes Overview

1. **UCPath Portal**
   - In most cases, employees enter their own personal data changes using the UCPath portal. Updates that can be made from the Portal include:
     - name,
     - personal email,
     - emergency contacts,
     - home and mailing address,
     - employee disclosures,
     - phone number,
     - ethnic groups,
     - military status and
     - disability status.

2. **UCPath Template Transaction**
   - Use this method to update the personal data mentioned above, but **must** be used to update:
     - Date of birth or Social Security Number.
     - Require Social Security Number Verification (SSNVS) before processing into UCPath.

Three methods to update personal data in UCPath.
3. **Case Management**

- Use this method for transactions that require document verification.
- UCPC WFA Production performs the verification.
- Department initiates a case and WFA Production enters the update directly in UCPath.

*For example, for a name change, the employee must submit a copy of a government issued ID, which indicates gender, to substantiate the request.*
Initiate the UC Personal Data template to update an employee’s personal information.

- Initiate the UC Personal Data template for staff or academic employees.
- If the employee has jobs on multiple campuses, the employee’s primary-job campus updates the personal data.

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Personal Data Key System Steps

1. View Personal Information
   - Department Initiator

2. Navigate to Smart HR Transaction
   - Department Initiator

3. Select Personal Data Template
   - Department Initiator

4. Enter Personal Data and Attach Supporting Docs if Needed
   - Department Initiator

5. Save and Submit
   - Department Initiator

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Workforce Administration

Position Control
- Introductions & Logistics
- UCPath System
- Overview
- New Positions
- Update Positions
- Course Review

Template Transactions
- Introductions & Logistics
- UCPath System
- Overview
- Full Hire
- Concurrent Hire
- Rehire
- Transfers
- Termination
- Retirement
- The Person
  - Transaction Status
  - Cloning a Transaction
  - Course Review

PayPath Transactions
- Introductions & Logistics
- Overview
- Position Data Changes
- Job Data Changes
- Additional pay
- Course Review

Revised 10/29/2019

UCSB UCPath

Human Resources & Academic Personnel
The Person Profile component contains several tabs that store a variety of information about an employee.

Person Profile Information Examples

- Honors and Awards
- License and Certificates
- Degrees
- UC Specialty Codes
- UC Prior Service Code
- UC Separation Destination Code
- Oath Signature Date
- Patent Amendment Date
- Patent Acknowledgment
- UC Student Status
- Credit Card

Template Initiators can view and update information in the Person Profile component for employees for which they have security access.
The Oath Signature Date, Patent Amendment Date and Patent Acknowledgment fields are completed on the hire/rehire templates and automatically transfer to the Oath/Patent Signature Date tab after the template is processed.
Use the following pages to view the status of template transactions.

**SS Smart HR Transaction Page**

Use to view Smart HR template transactions requiring on-campus approval, and their status in the AWE (on campus)

**Transaction Status Page**

Use to view the status of template transactions that completed the AWE on campus and are being fulfilled by UCPath Center WFA Production
Use SS Smart HR Transaction Page to:

- View the template transaction details and where the transaction is within the AWE process on campus.
- View transactions you submitted along with all transactions submitted based on your departmental access level.
- Review approvers at each level.
Workforce Administration

Position Control
- Introductions & Logistics
- UCPath System
- Overview
- New Positions
- Update Positions
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Transaction Status
- Cloning a Transaction
- Course Review

PayPath Transactions
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- Overview
- Position Data Changes
- Job Data Changes
- Additional pay
- Course Review

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > SS Smart HR Transactions

To view the template transaction details, click the Name link.

The status appears at the top of the page and also at the bottom of the page.

This section displays the Campus approvers to whom the transaction is routed. To display the specific Campus approver name(s), click the Multiple Approvers link.
Use Transaction Status Page to:

- View the status of the template as it goes through the fulfillment queue at UCPC (WFA Production).
- Track the status of templates after Campus approval.
  - View the **Employee ID** created for new hire transactions.
  - View all transactions for which you have departmental security access.

Revised 10/29/2019
Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > Transaction Status

Adjust the selection criteria as needed to filter the displayed transactions. Start Date From and To = effective date of the transaction.

If a transaction is cancelled, you can View Comments to see why it was cancelled, then Clone the existing template information into a new template, correct and resubmit.

Transaction Status values are: Requested, Completed, Hired/Added, and Cancel.

Do not use the Delete Selected Transactions functionality.
1. Which component do I access to see if my Template Transaction has been approved by my supervisor?

**SS SMART TRANSACTION**

2. My Template Transaction has been approved by my supervisor. Now, I want to see if the UCPath Center has fulfilled it yet. Which component should I use?

**TRANSACTION STATUS**
Cloning Transactions

Module 10
Cloning a Template

In some cases, the UCPath Center (UCPC) Workforce Administration (WFA) Production may cancel a template transaction.

- WFA Production adds a comment explaining the cancellation and sends an email notification to the Template Initiator.

- Access the Transaction Status page to view the status of transactions, review comments, and clone a cancelled template.
After reviewing the comments regarding the cancelled transaction, click on the ‘clone’ button.

Once that is done, return to the Smart HR Transaction menu.

The cloned transaction is in the Transaction Progress list. Click on the transaction and make the appropriate updates and resubmit.
**Clone a Template**

**Transaction Status Navigation**

**Navigation:** PeopleSoft Menu > Workforce Administration > Smart HR Template > Transaction Status

You can clone transactions that display a Transaction Status of Cancel. You can View Comments to see why it was cancelled, then Clone the existing template information into a new template, correct and resubmit.
Topics Covered…

1: Template Transactions Overview

2: Full Hire

3: Concurrent Hire

4: Rehire

5: Transfers

6: Termination

7: Retirement

More…
More topics covered...

8. The Person
9. Transaction Status
10: Cloning a Transaction
11: Course Review
Putting It All Together

- Refer to the Template Transactions – Action Reason Codes and Descriptions job aid for a list of all the templates, associated Reason Codes and a description.
- Intra-location transfers are initiated when an employee transfers within the same department (changing jobs) or from one department to another on the same campus.
- Inter-location transfers are initiated when an employee transfers from one campus to another without a break in service.
- For transfers between two UCPath Campuses or between UCSB Departments, departments work together to submit two separate templates with coordinated effective dates and comments on each template:
  - Concurrent Hire
  - Voluntary Termination
- Initiate the final pay process for termination and retirement template transactions if an employee is separated from the University (and all other jobs are terminated or retired).
Who has answers?
Staff Transactions

Department: Internal Divisional Process
- FTE Approval
- Budget Approval

Compensation
- Job Description Approval

Workforce Administration (WFA)
- Position Control Request Approval

BFS
- Position Funding Questions

Employment
- Receiving Hiring Requisition
- Receiving Hiring Proposal

UCPath Center
- Fulfilling Hiring Template

BFS
- I-9 Process

Department: With New Employee
Onboarding

Human Resources & Academic Personnel
Help and Resources

Ask Staff WFA Questions

HR ServiceNow – for Staff
https://ucsb.service-now.com/hr

Academic Personnel UCPath Team
AP-Path@UCSB.edu

E-mail questions re: Faculty and ASE

UCSB HR Staff-specific Guidelines and Processes

HR Website – for Staff
https://www.hr.ucsb.edu/ucpath

Find Job Aids, Handouts, Support Documents

Video Demos from UCOP (UPK)

UCSB UCPath Site
https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources

Submit an Inquiry to UCPC or Search UCPath Help Library

UCPath Portal
Dashboard Menu > Help/FAQ > Self Service or Location Users

Ask UCPath
Ask UCPath Center

Human Resources & Academic Personnel
Parking Lot

- Review parking lot
  - Have all questions been answered during our class?
  - Are there any new questions to add to the list?
Academic Personnel:
AP-Path@ucsb.edu
- Tamara Berton
- Danica Acosta
- Monique Chaidez

Staff:
www.hrhelp.ucsb.edu
- Amy Arnold
- Sarah Soto

Template Transaction Training
https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources