

UCPath Training Refresher

LTSC



HR – WFA Refresher Topics

HR Workforce Administration Issues

- WFA Overview
- Pay Groups
- Template Transactions
- Avoiding Cancellations
- Job Data Update Forms
- Position Update Forms
- Hiring Process
- SWB
- Resources

<https://ucsb.service-now.com/hr>

Introduction to:

- Payroll Processing Schedule
- When to call AP / BFS / UCPC
- When to call ETS

Please refer to AP or BFS regarding:

Academic Personnel Issues

- Academic rehire (Empl Rec #)
- 4 month plan for TA's
- TA childcare reimbursement
- Questions regarding Academic Personnel

AP-Path@ucsb.edu

BFS Issues

- Funding Errors
- Overpayments
- Reconciliation of Payroll Ledger
- Sick/Vacation Accrual
- Salary Cost Transfers / Direct Retro
- TA childcare reimbursement

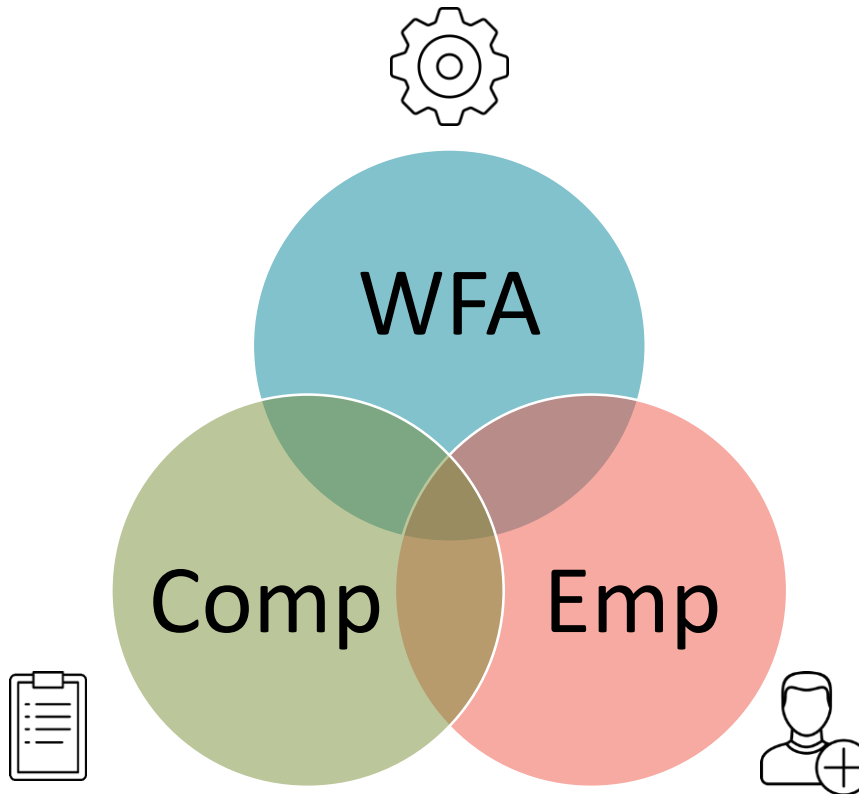
<https://ucsb.service-now.com/payroll>



Working with UCPath

Workforce Administration from a central HR perspective

Multiple HR Units Work Together in UCPath



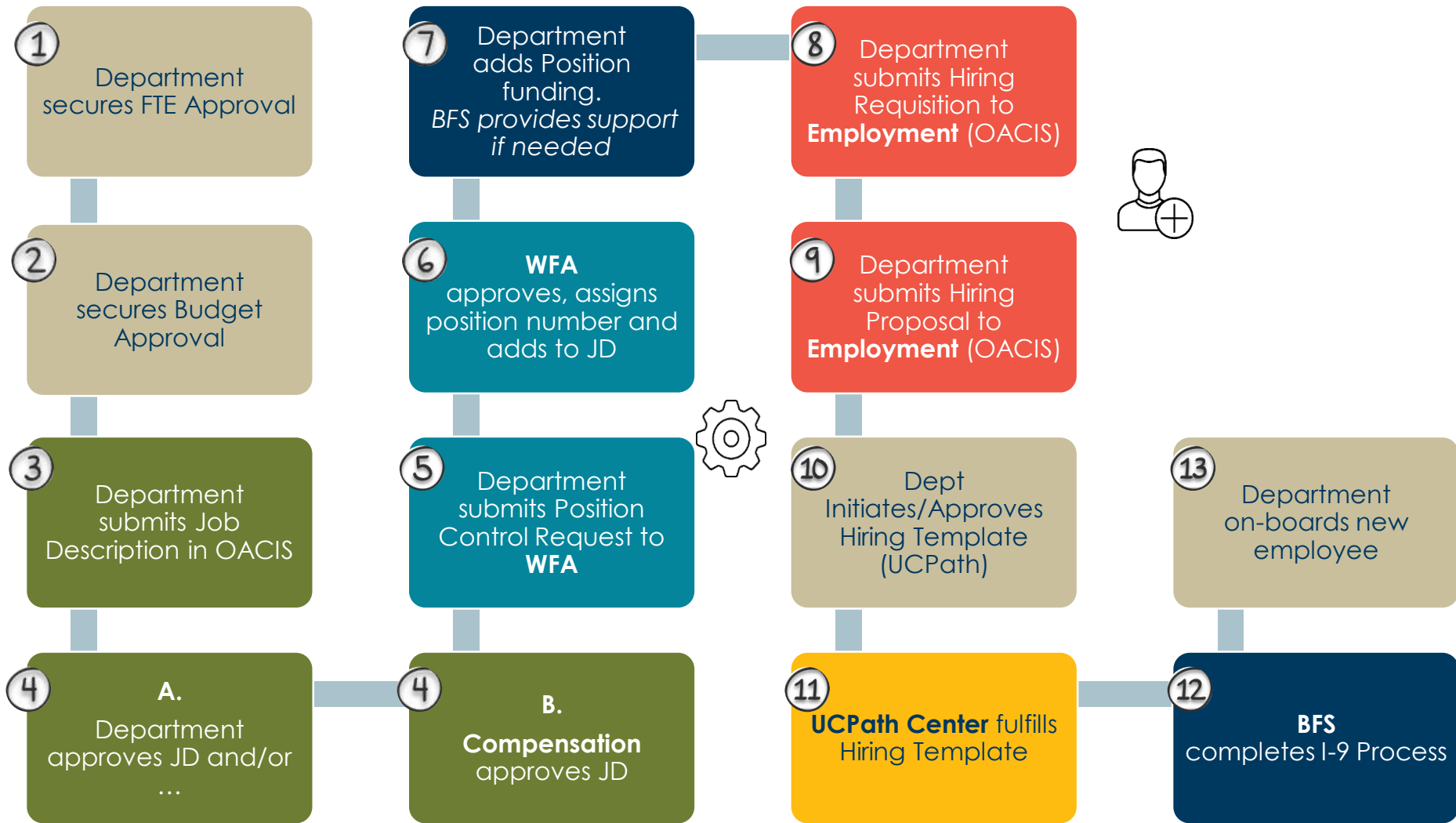
HR Units +
the UCPath System Manage

- **Compensation**
- **Position Administration**
- **Recruitment**
- **Problem Solving**
- **Functional User Training**

After fulfillment of the hiring template,
UCPath maintenance continues through:

- Payroll (BFS)
- WFA
- UCPC

Walk step-by-step on the (UC)Path



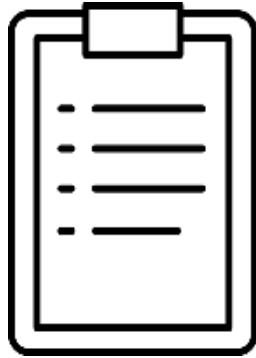


Job Description and Position Data

Understanding how data from the Job Description intersects with the Position

Step 1 - Job Description

All Career and Limited employees have a job description in OACIS

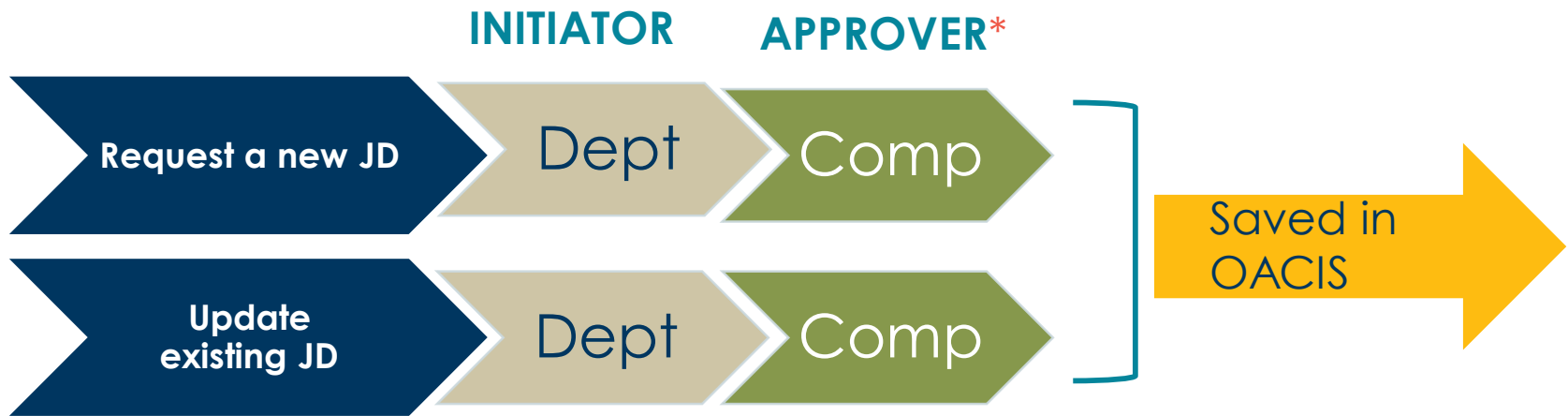


Job Description must be:

- Current
- Approved
- In OACIS

Job Description Approval Workflow – STAFF

Job Description must be current, approved and in OACIS



Compensation & Classification Team

- Kathy Moore
- Linda Broen
- John Ibach
- Andrea Dittman
- Anna Fudge

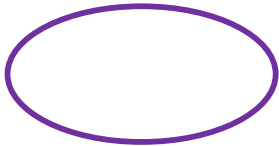
<https://www.hr.ucsb.edu/compensation/contacts>

** Specific criteria allow certain limited positions to be approved at the department level, but they must be in OACIS.*

Job Descriptions determine some Position and Job Data fields



= Position Data



= Job Data

UNIVERSITY OF CALIFORNIA, SANTA BARBARA JOB DESCRIPTION					
PROV #: 40072965 REQUISITION:					Decision Date: 09-27-2019
EMPLOYEE NAME:		EMPLOYEE ID:	NEW HIRE START DATE: 11/06/2019		
APPROVED PAYROLL TITLE: BLANK AST 3	TITLE CODE: 4722	WORKING TITLE: Performing Arts Coordinator		RECLASSIFICATION EFFECTIVE DATE: 04/27/2014	
JOB FAMILY:	JOB FUNCTION:	JOB LEVEL:	JOB LEVEL CODE :		
PERCENT OF TIME: 100.00	CBU: CX - Clerical Unit (Teamsters)	ERC: E	GRADE TYPE: Other	GRADE: None	FLSA STATUS: Non-Exempt
APPT TYPE: Career	DEPARTMENT/DIVISION: ALEC-Arts And Lectures Office		WORK LOCATION: Arts & Lectures Building 402		
NAME OF SUPERVISOR: Sarah Jane Bennett	SUPERVISOR'S PAYROLL TITLE: Events Specialist 4		NAME OF DEPARTMENT HEAD: Celesta Billeci		
EMPLOYEE'S FORMER PAYROLL TITLE: BLANK AST 3			NAME OF PREVIOUS INCUMBENT: Vacant (repl Lyndsay Cooke)		
HR APPROVED ACTION: Update	TEMP BEGIN DATE:	TEMP END DATE:	LTD APPT BEGIN DATE:	LTD APPT END DATE:	END DATE (OTHER):
TYPE OF SUPERVISION RECEIVED: General supervision					
Other: Frequency of Other Activity: No Response					
SPECIAL CONDITIONS OF EMPLOYMENT: The below licenses, certificates, credentials, bondability, altered work schedules, furloughs, travel, etc are required for this position: Maintain a valid CA driver's license, a clean DMV record and enrollment in the DMV Employee Pull-Notice Program Satisfactory criminal history background check -Some evening and occasional weekend hours required (subject to overtime pay in accordance with University/CBU agreement). -Ability to lift/move up to 50 lbs.					
Employee's Signature		Supervisor's Signature		Department Head's Signature	

Align Position Data with Job Description



- Working title, job class, name / Detailed Position Description
- FLSA
- ERC
- Percent of time / FTE
- Name of supervisor / Reports To Position No.
- Special Conditions of Employment / Security Clearance Type
- Position Number

Most Employees

1 Position

1 Corresponding Approved Job Description

THE POSITION

Job Codes auto populate some fields in the job Information section as well as the FLSA

Initiators populate the remaining fields

NOTE:



= available options to populate a field

Description | Specific Information | UC Position Data | Supporting Documents

Position Information Find | View All First 1 of 1 Last

Position Number NEW Transaction ID 111111111
Headcount Status Open Current Head Count 0 out of 1
*Effective Date 11/19/2019 Approval Status Initial *Status Active Initialize
*Reason NEW New Position
*Position Status Approved Status Date 11/19/2019 Key Position

Job Information

*Business Unit SBCMP UC Santa Barbara Campus
Job Code 009617 SRA 2 NEX
Reg/Temp Not Applicable
Shift Not Applicable
Title SRA 2 NEX

Manager Level All Other Positions
Full/Part Time System Default - Selec
Union Code RX Research Support Professionals
Short Title SRA 2 NEX Detailed Position Description

Work Location

Reg Region USA United States
Department
Location
Reports To

Company
Dot-Line

Supervisor Lvl

Salary Plan Information

Salary Admin Plan Salary Grade Step
Standard Hours 0.00 Work Period W Weekly

Salary Ranges

	Minimum	Midpoint	Maximum

USA

FLSA Status Nonexempt Bargaining Unit 8888

If Department has an Existing Position Number

Job Description and Position 1:1



1. Department searches for existing Position Number in OACIS

If a JD with the Position Number is FOUND

- Confirm that the information on the position matches the information on the JD
- Update position / JD as needed
- If the Title Code on the Job Description does not match the Job Code on the Position ... Consult with your department's Compensation Analyst.

If JD with Position Number NOT FOUND

- Add Position Number to the existing JD or
- If no JD found, create a new Job Description

2. Department begins Hiring Requisition process

Note:

WFA is not involved if there is no update to the position.

Contact WFA with questions



The Position

Required fields, updating positions, and the subtleties of single vs multi- headcount

THE POSITION

Step 2 - Create a New Position or Update an Existing Position

Use the Job Description as a reference

Position Information

Position Number: NEW
Headcount Status: Open
*Effective Date: 11/05/2019
*Reason: NEW
*Position Status: Approved
Transaction ID: 111111111
Current Head Count: 0 out of 1
Approval Status: Initial
*Status: Active
Status Date: 11/05/2019
Key Position:

Job Information

*Business Unit: SBCMP UC Santa Barbara Campus
Job Code:
Reg/Temp:
Shift: Not Applicable
Title:
Manager Level:
Full/Part Time: System Default - Sele
Union Code:
Short Title:
[Detailed Position Description](#)

Work Location

Reg Region: USA United States
Department:
Location:
Reports To:
Company:
Dot-Line:
Supervisor Lvl:

Salary Plan Information

Salary Admin Plan:
Salary Grade:
Step:
Standard Hours: 0.00
Work Period: W Weekly

Salary Ranges

Minimum	Midpoint	Maximum

FLSA Status: Nonexempt
Bargaining Unit: 8888

Add comments to position administrator here.

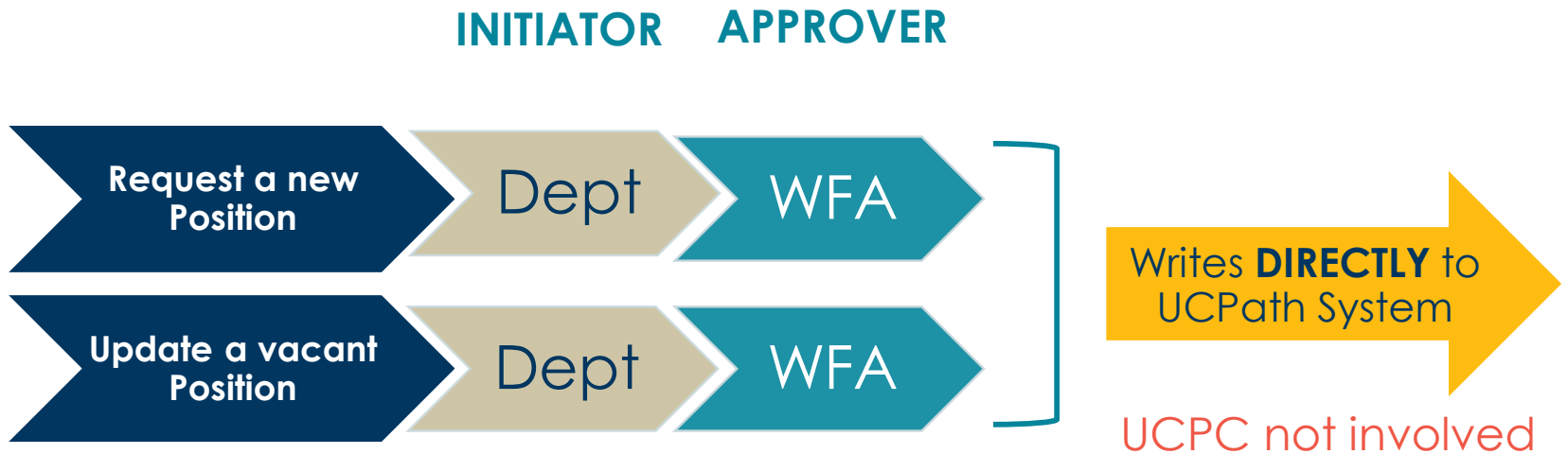
Required Data on the POSITION

Required Fields on Position by Tab			
DESCRIPTION	SPECIFIC INFORMATION	UC POSITION DATA	SUPPORTING DOCUMENTS
Job Code	Max Head Count <i>Multi-headcount positions are only for student job codes</i>	HR Worksite <i>Always 91-BFS</i>	N/A
Full/Part Time	FTE	Special Training Code	Can upload documents, but not required.
Union Code	Budgeted Position <i>If the position is not budgeted, you can uncheck this box.</i>	Employee Relations Code	
Department		Security Clearance	
Reports To			
Salary Admin Plan			
Salary Grade			
FLSA Status			

Position Administrator denies Position Control Request if **any** of these fields are blank

These fields align with the job description

Position Control Approval Workflow – STAFF



* WFA = Workforce Administration
(Central HR on the UCSB Campus)

UCSB WFA Team

- Amy Arnold
- Sarah Soto
- Edna Arellano
- Karen Reynolds-Moreno

Remember: No department approver for Position requests

Single Headcount Positions

Most positions are single-headcount

1 Position : 1 Incumbent



Multi-Headcount Positions

A department can group **staff student** or **academic student** jobs in one multi-headcount position *if all Position attributes are the same.*



Managing Attributes on Multi-Headcount Positions

POSITION DATA changes apply to **ALL** incumbents.*



- Only Central HR Position Administrators have access to make changes to Multi-Headcount position data.
- Submit multi-headcount Position Data update requests through **HR ServiceNow**

<https://ucsb.service-now.com/hr>

JOB DATA changes apply only to **the selected incumbent**



- Use **PayPath** to search for Employee ID
- Navigate to Job Data Tab

Submit Job Data Updates for department approval via PayPath

Creating & Updating Positions

Filled Single-headcount Positions



❑ Create Using:

❑ Update Position Data:

❑ Update Job Data:

Position Control Request

★ PayPath

PayPath

Filled (or partially filled) Multi-headcount Positions



❑ Create Using:

❑ Update Position Data:

❑ Update Job Data:

Position Control Request

★ HR ServiceNow ticket

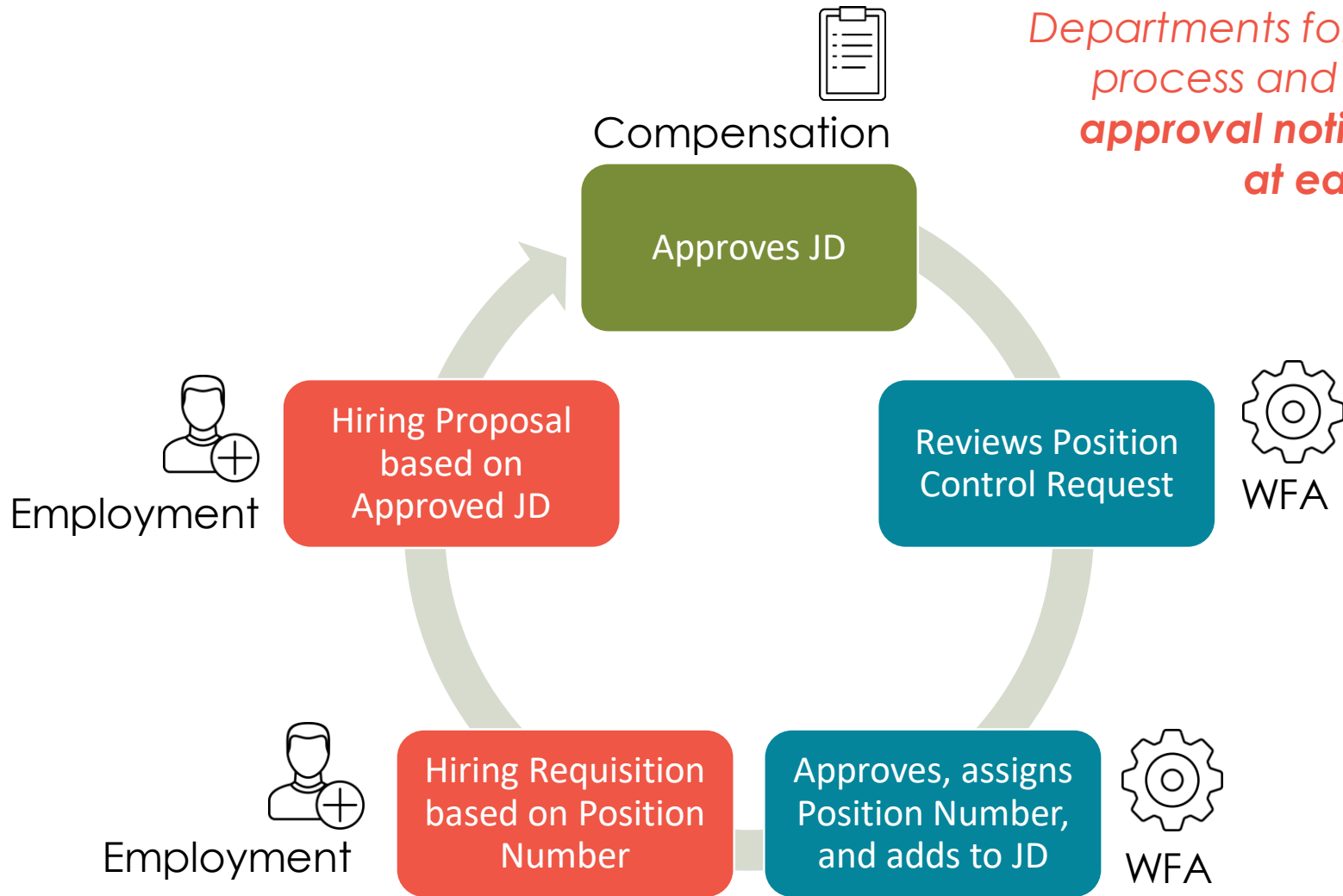
PayPath



Ready for Recruitment

HR Employment Unit and the hiring process

Relationship Between HR Units



*Departments follow this process and **wait for approval notification at each step***

Step 3 - The Employment Unit ...



Unites Position Data and Job Description in Hiring Requisition

- Position Number + Job Description
- Verifies accurate relationship between Position, JD, and Hiring Requisition



Finalizes Job Data and Position Data in Hiring Proposal

- Employee name & other details formalized



Department submits Smart HR Template

UCPC assigns Employee ID

Empl ID + Position + Fulfilled Hiring Template = Job in UCPATH

I-9 Process (BFS)

Must be completed within 3 days of the hiring effective date or the Department can be assessed a fine by the federal government.

Employee Onboarding

Completed by the department



Time for Templates

How to populate template fields and understand the workflow process

Step 4 - Complete the SMART HR TEMPLATE TRANSACTION

Position Number
auto-populates
many (but not all)
Template Fields

Smart HR Transactions
Enter Transaction Information

Click here to Hide Header Details

Template: UC_FULL_HIRE Name:
Effective Date: 11/20/2019 Action/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation)
Employee ID: NEW Employee Record:

Personal Data **Job Data** Earns Dist Addl Pay Employee Experience

Employee Information

Work Location - Position Data
*Position Number

Work Location - Job Fields
Business Unit Department
Location Code Establishment ID

Job Information - Job Code
Job Code

Job Information - United States
FLSA Status

Job Labor - Union Code
Union Code Union Seniority Date

Job Information - Reporting Information
Reports To Position Number

Job Information - Employee Classification
*Employee Classification Classified/Unclassified Ind

Job Information - Standard Hours
Standard Hours FTE

UC Job Data

NOTE: The initiator enters Employee Classification per the Job Description

SMART HR TRANSACTION – Job Data Tab

Department Initiator *enters* Job Data in appropriate **Template Fields**



NOTE:
If a job has a step, upon entering that step, the Compensation Rate auto-populates

UC Job Data

Probation Code Probation End Date

Trial Employment End Date ERIT/Phased Retirement End Dt

Location Use End Date Location Use Type

Alternate Work Week PY Career Duration

UC Employee Review

Review Type Next Review Date

Job - Salary Plan

Salary Administration Plan Salary Grade

Step

Job Compensation - Pay Components Personalize | Find | View All | First 1 of 1 Last

Comp Rate Code	Compensation Rate	Compensation Frequency	Rate Code Source
1			

Work Location - Expected Job End Date

Expected Job End Date

Job Compensation - Payroll Currency and Frequency

*Compensation Frequency

Return to Enter Transaction Details Page

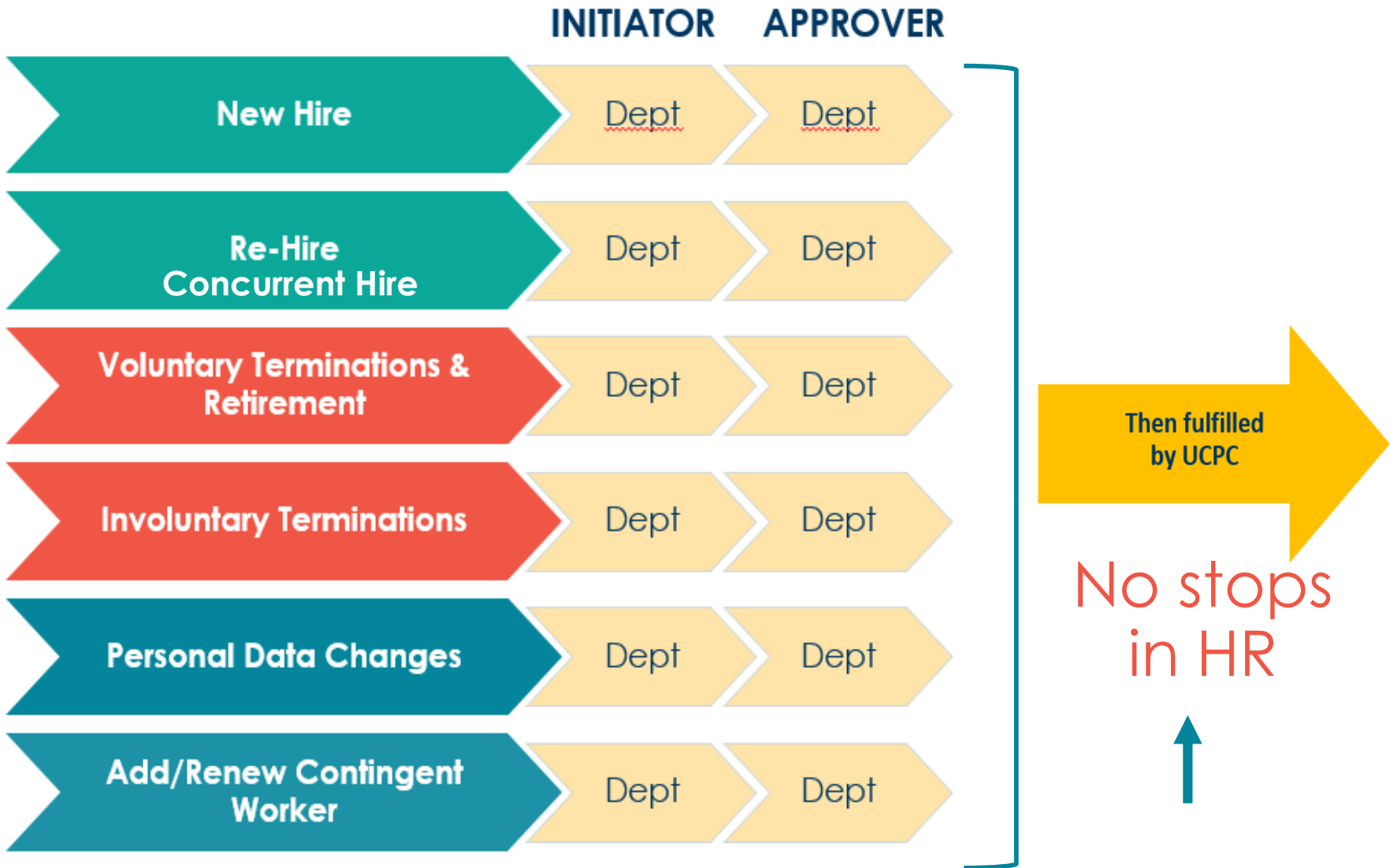
Save and Submit Save for Later Cancel Supporting documents

Transaction ID: NEW

Initiator Comments:

Requester ID: 10072304 Sarah Soto

Template Transaction **Approval Workflow – STAFF**



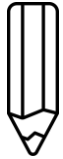


PayPath actions on employee records

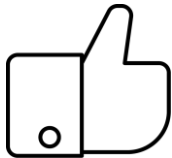
Maintaining filled positions – a UCSB campus responsibility

Job Data Updates **Use PayPath**

PayPath actions never leave campus



Initiate in the **Department**



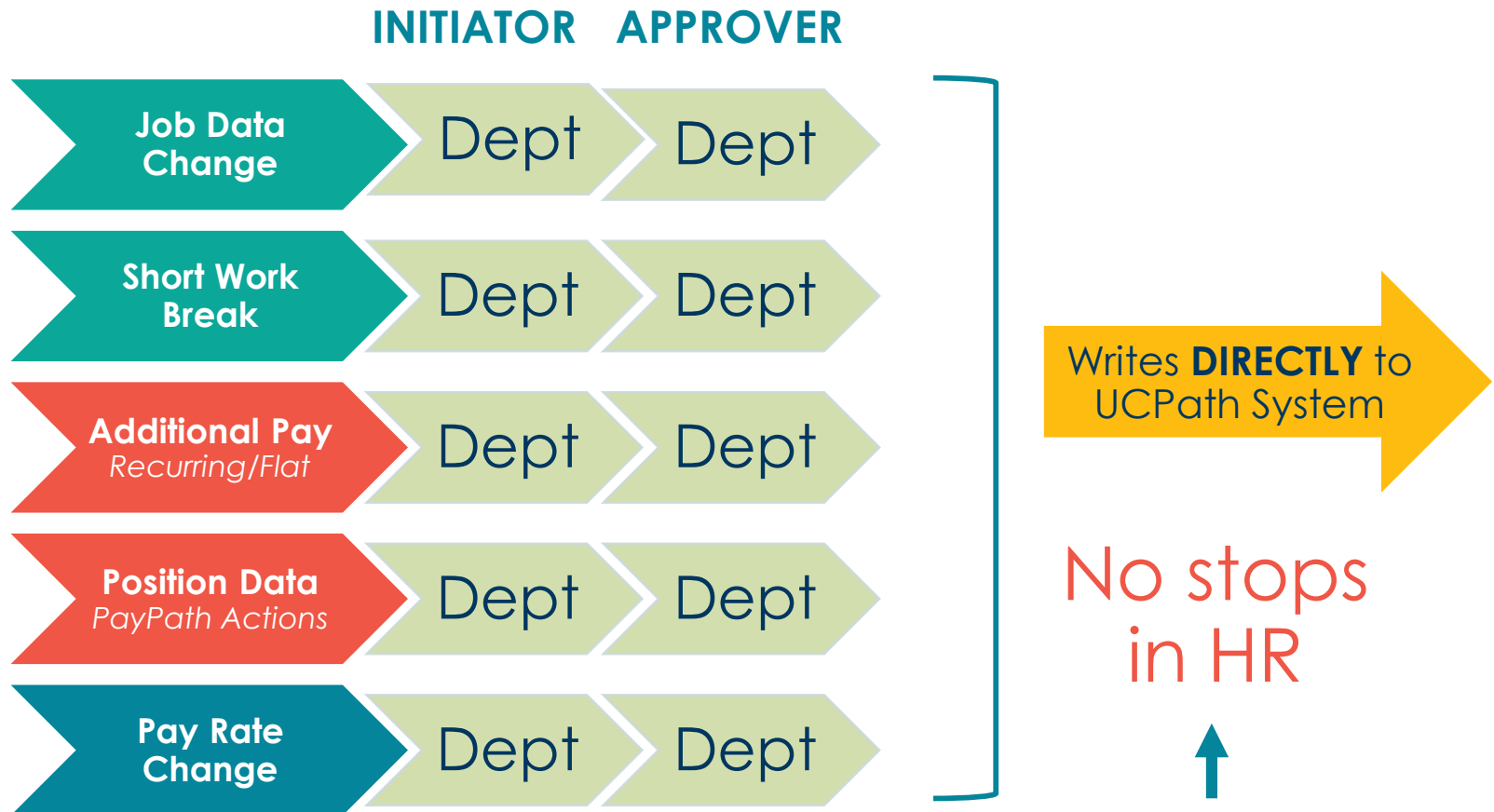
Approve in the **Department**



Saves immediately to UCPath System



PayPath Approval Workflow – STAFF




Data that lives on PayPath's POSITION tab

See current Position Data here

↓

Position Data | Job Data | Additional Pay Data

Chen Allen Employee Empl ID 1000077 Empl Record 0

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

Common PayPath Reason Codes - POSITION tab

- CID: Change in Duty Station
- CNV: Conversion Use Only
- **COR: Correction Salary Plan, etc.**
- CWT: Change in Working Title
- **ERC: Update EE Relations Code**
- FL2: FLSA Update- Does Not Meet
- FL3: FLSA Revert
- **FLS: FLSA Override Due to Review**
- IN1: Inactive - Bus Unit Transfer
- IN2: Inactive - No Plan to Refill
- INA: Position Inactivated
- **JFT: Job Data FTE Override**
- JRD: Job Reclass -Downward
- JRL: Job Reclass - Lateral
- **JRU: Job Reclass - Upward**
- MCD: Update Mail Code
- PIT: Permanent Increase in Time
- **POC: Position Only Change**
- PRI: Permanent Reduction - Layoff
- **PRO: Promotion**
- PRT: Perm. Reduction in Time
- REG: Regularization
- REO: Re-Org/Restructure
- **RTC: Reports To Change**
- SEC: Series Change
- **TIT: Temporary Increase in Time**
- **TRT: Temp. Reduction in Time**
- **XFR: Transfer**

How PayPath Job Data is Determined

This data lives on the **JOB** in UCPath (*not the position*)



Pay Components established on the **Hiring Proposal**

- Effective start date
- Comp rate
- Step



Job Data established by the **Job Description**

- Job FTE (typically same as Position FTE, but can be different)
- Employee Class (career vs limited vs casual restricted*)
- Expected Job End Date as applicable

* Remember in UCPath:

- Limited jobs = Employee Class 4
- Student/Casual Restricted = Employee Class 5

Data that lives on PayPath's JOB DATA tab

See current Job Data here

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: [] [+] [-]
Effective Sequence: 0 Action Reason: []

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 FTE: 1.000000 Employee Class: 2 Staff: Career
Appointment End Date: []

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

Pay Components Personalize | Find | [] [] First 1 of 1 Last
Rate Code Comp Rate Compensation Frequency
1 UCANNL 94,163.010000 Annual

Earnings Distribution Personalize | Find | [] [] First 1 of 1 Last
Earnings Code Comp Rate Distribution %

UC Job Data

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

Job Data Comments:

Return to Search

Position Data | Job Data | Additional Pay Data

Common PayPath Reason Codes - JOB DATA tab

Look Up Action Reason

Action: 🔍

Search by: Action Reason begins with

Action Reason: 🔍

Look Up Cancel Advance

Search Results

View 100 First 1-12 of 12 Last

Action Reason	Description
ACR	Accretion to Bargaining Unit
ATB	Across-The-Board
DEM	Demotion
EQU	Equity
JRD	Job Reclass - Downward
JRL	Job Reclass - Lateral
JRU	Job Reclass - Upward
MER	Merit
MIN	Bring To Meet Minimum
PRO	Promotion/Academic Promotion
REF	Range Adjustment/Comp Refresh
STI	Step Increase/Progression

Pay Rate Change

Look Up Action Reason

Action: 🔍

Search by: Action Reason begins with

Action Reason: 🔍

Look Up Cancel Advance

Search Results

View 100 First 1-12 of 12 Last

Action Reason	Description
CAR	Limited to Career
COR	Correction - Non Pay Related
CPR	Correction-Pay Rate
CPT	Change in Percent Time (FTE)
ERI	Update ERIT End Date
EXP	Extend Expected Return Date
EXT	Add/Extend Appointment
LUE	Update Location Use End Date
PHR	Update Phased Retirement End Date
PRB	Update Probation Code/End Date
TMF	Update Auto Termination Flag
TRL	Update Trial Employment Date

Data Change

Populating PayPath's ADDITIONAL PAY tab

Position Data | Job Data | **Additional Pay Data** New Window | Help

Amy Frohlich Employee Empl ID 10038740 Empl Record 0

New Additional Pay Find | View All First 2 of 2 Last

*Earnings Code: Stipend-Admin-Staff

Effective Date Find | View All First 1 of 1 Last

*Effective Date:

▼ **Payment Details** Find | View All First 1 of 1 Last

Addl Seq #: 1

End Date: 03/31/2019 Reason: Not Specified

Pay Period Amt: \$652.50

Goal Amount: Goal Balance:

Prorate Additional Pay

Applies To Pay Periods

First Second Third

Current Additional Pay Find | View All First 1 of 1 Last

Earnings Code: Stipend-Admin-Staff

Effective Date Find | View All First 1 of 3 Last

Effective Date:

▼ **Payment Details** Find | View All First 1 of 1 Last

Addl Seq # 1

End Date: Reason: Not Specified

Pay Period Amt: \$652.50

Goal Amount: Goal Balance:

OK to Pay

Applies To Pay Periods

First Second Third

The diagram illustrates the process of populating the 'Current Additional Pay' tab. It shows two side-by-side panels. The left panel, titled 'New Additional Pay', contains several fields: 'Earnings Code' (SAS), 'Effective Date' (02/20/2019), 'Payment Details' (Addl Seq #: 1, End Date: 03/31/2019, Pay Period Amt: \$652.50), and 'Applies To Pay Periods' (First selected). The right panel, titled 'Current Additional Pay', shows the same information populated: 'Earnings Code' (SAS), 'Effective Date' (01/01/2019), 'Payment Details' (Addl Seq #: 1, End Date: 03/31/2019), and 'Applies To Pay Periods' (First selected). Red and blue boxes highlight corresponding fields in both panels. A red arrow points from the 'Earnings Code' field in the 'New' panel to the 'Current' panel. A blue arrow points from the 'Effective Date' field in the 'New' panel to the 'Current' panel. A blue arrow points from the 'Override Data' button in the 'New' panel to the 'End Date' field in the 'Current' panel. A purple circle highlights the '+' and '-' buttons in the 'New' panel, with a red line connecting them to the 'Earnings Code' field.

Save and Submit PAYPATH Action

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

Chen Allen Employee Empl ID 10

New Additional Pay Find | View All First 1

*Earnings Code:

Effective Date Find | View All First 1

*Effective Date: 07/31/2017

Payment Details Find | View All First 1

Addl Seq #: 1

End Date: Reason: Not Specified

Pay Period Amt:

Goal Amount: Goal Balance:

Prorate Additional Pay

Applies To Pay Periods

First Second Third

Job Information

Employee Type: Salaried Standard Hours: 40.00

Compensation Rate: \$7,846.917500 Frequency: Monthly

Default Job Data

Position: 40000157 PROJECT POLICY ANL 4 GF

Business Unit: UCOP1 UC Office of President

Department: 805600 UNDERGRADUATE ADMISSIONS

Job Code: 005883 PROJECT POLICY ANL 4 GF

FTE: 1.000000

Employee Status: Active Expected Job End Date:

Save for Later Save And Submit Cancel Upload

Transaction ID NEW

Workflow Status Apprvl Prc

Request Status In Progress

Initiator's Comments

User ID:

Return to Search

Position Data | Job Data | Additional Pay Data

Save and Submit is visible on the Additional Pay Data tab only



Key Take-Aways and Resources

Key Take-Aways from Part 1 (see more in Part 2)

Several HR Units are involved in the hiring workflow:

Step 1: Compensation approves the Job Description and therefore defines the related Position Data *(uses Job Code, Dept., Employee Name)*

Step 2: WFA verifies that the position attributes align with the Job Description, assigns the position number, and adds the position number to the Job Description *(uses Transaction no., Position No.)*

Step 3: Employment facilitates the Hiring Requisition and the Hiring Proposal based on the Position Number *(uses Requisition No.)*

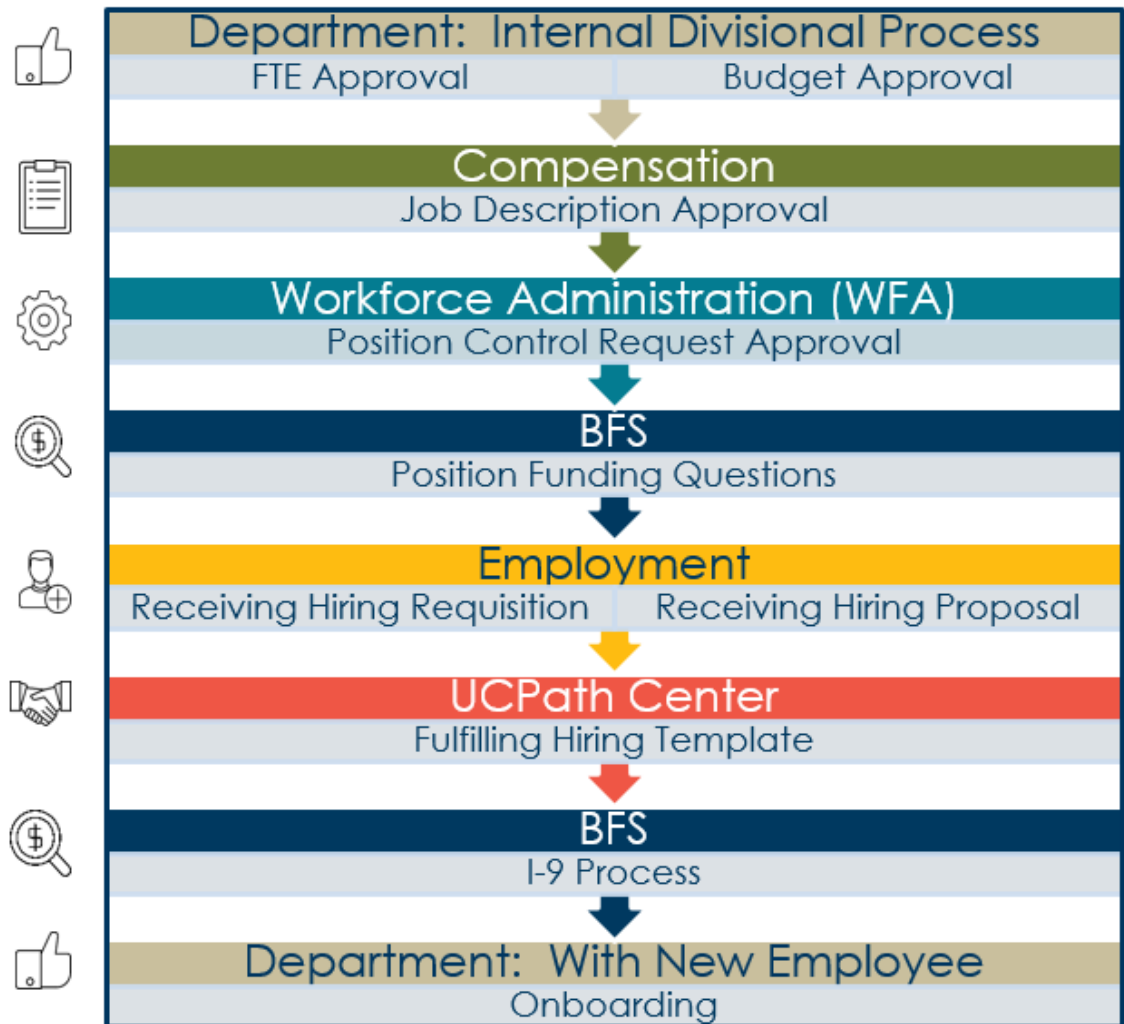
- The department waits for approval notification after each step before proceeding to the next.
- After Step 3 approval, the department submits hiring template to UCPath Center. At this point, no further steps in HR are necessary.

TEMPLATES: Provide information to UCPC regarding an employee's relationship with UC

PAYPATH: Enables on-campus maintenance of an employee record at UCSB

Find the answers

Resources vary based on the help you need



Send Questions to: <https://ucsb.service-now.com/hr>

Position Funding & Pay Issues go to BFS: <https://ucsb.service-now.com/payroll>

The screenshot shows the UC Santa Barbara Human Resources service portal. At the top, the navigation bar includes 'UC SANTA BARBARA Human Resources', 'MyApprovals', 'MyCases', 'Sites', and a user profile for 'Sarah So'. A sidebar on the left lists 'Other Services' such as Open Enrollment, UCPath, Human Resources website, Training Videos, Payroll Services, and UCNet. The main content area features ten service tiles, each with an icon, title, and description. The 'Classification & Compensation' tile is highlighted with a green border, and the 'Employment Services' tile is highlighted with a red border. Other tiles include Academic & Staff Assistance Program, Benefits Administration, Employee & Labor Relations, Health Care Facilitator, Leave Administration, Position Management & Workforce Administration, Training & Development, HR/UCPath, and Workplace Accommodations.

Other Services

- Open Enrollment
- UCPath
- Human Resources website
- Training Videos
- Payroll Services
- UCNet

Academic & Staff Assistance Program
Get help with appointments with our ASAP staff, as well as general questions about our program.

Benefits Administration
Get help with Benefits questions, Orientations, and Reduced Fee Enrollment.

Classification & Compensation
Get help with salary equity questions, formal requests for equity review, and the Employee-Initiated Reduction in Time (ERIT) program.

Employee & Labor Relations
Get help with questions related to performance management, workplace concerns, labor issues and other personnel matters.

Employment Services
Get help with Background Checks, Employment Contracts, Hiring-Related Requests, or OACIS Access.

Health Care Facilitator
Get help with billing, appeals & grievances, access to physicians, and cost of care for your medical, dental or vision plan.

Leave Administration
Get help with your time away from work.

Position Management & Workforce Administration
Get help with Position Management updates and Workforce Administration questions in UCPath.

Training & Development
Get help with Training & Development questions, or apply for a Dilling Yang Staff Scholarship.

HR/UCPath
Get help from HR with questions concerning UCPath.

Workplace Accommodations
Get help with temporary or ongoing workplace accommodations.

Please use the appropriate **reference number** when communicating with respective units.

Identify Records in Comp – WFA – Employment

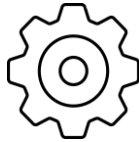
When communicating with Comp, WFA, and Employment please use the appropriate identifying information



Compensation

- **Identifies Job Description**

- Department Code
- Title Code / Payroll Title
- Employee Name



Workforce Administration (WFA)

- **Identifies Position and/or Incumbent**

- Position Number
- Department + Job Code
- Transaction ID (*Position Control Request*)
- Empl ID or Employee Name (*filled positions*)



Employment

- **Identifies Requisition / Proposal by:**

- Requisition Number (Hiring Requisition)
- Job Number (Hiring Proposal)

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>

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

Find Job Aids, Handouts, Support Documents

Video Demos from UCOP (UPK)

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

Ask UCPath

Ask UCPath Center

Submit an Inquiry to UCPC or Search UCPath Help Library

Refresher – Part 2

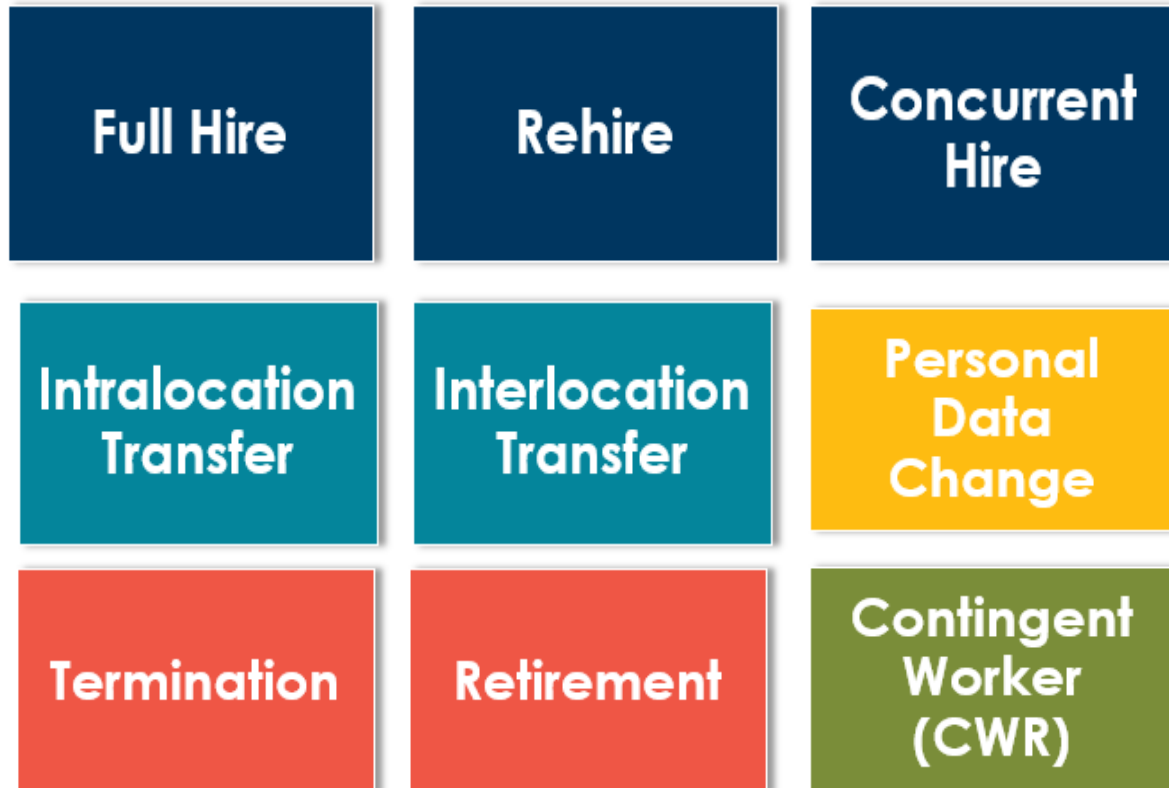
Time to Talk about Templates

Hiring Templates

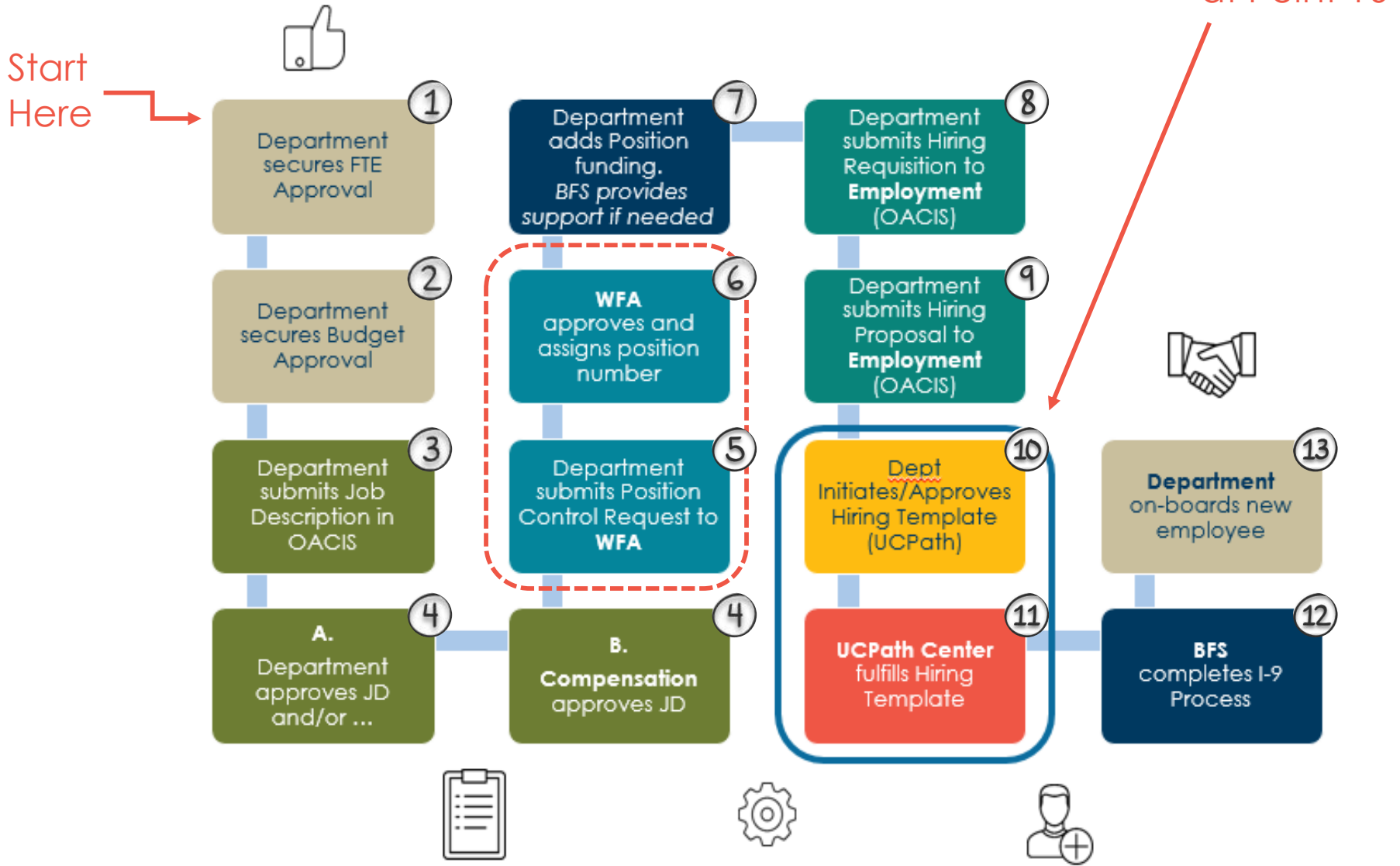
Transactions Processed Using Templates

TEMPLATES:

Provide information to UCPC regarding an employee's relationship with UC



Walk the (UC)Path



Full Hire Overview

The full hire template transaction creates a record for an employee receiving compensation through UCPath Payroll processing and establishes the employee – UC relationship.

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

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

When to use a Full Hire Template

New Hire

Hiring someone
from another UC
campus or medical
center

First time hiring
former staff
employee as an
academic

First time hiring a
former academic
employee as staff

Hiring Template Considerations

To Help Avoid Template Cancellation

STAFF Full Hire

Reason Codes



A screenshot of a dropdown menu with a blue header and a white background. The menu is open, showing a list of hiring reason codes. The codes are: 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, and With Prior UC Affiliation.

1. Understand who you are hiring, why, & when
 - a) **Review Person Org Summary**
 - b) Work with other Department (as needed)
 - c) Determine effective date
2. Update Position attributes & receive approval from Position Administrator prior to initiating hiring template
 - a) Refer to **Handout 07**
 - b) FLSA
 - c) Is FTE accurate?
3. Concurrent Hire
 - a) Does FLSA match? **Override**
 - b) Does Pay Group match? **Request UCPC update**
 - c) Is FTE accurate or exceed 100%? **Update Position**

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

Effective Date



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

Position Updates must be approved before AND have an effective date ***prior to initiating*** a template transaction.

If you notice something wrong with the position data as you are populating the template. STOP - CANCEL - UPDATE the position – INITIATE a new template.

OOPS!

- You can cancel a template prior to saving
- You can delete a template in Transaction Status
- If your Template Transaction has been fulfilled by UCPC, submit a **Job Data Update Form** or **Position Update Form** to the UCPath Center and request they make the update

Full Hire Template Job Data

Smart HR Transactions

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_FULL_HIRE Name:
Effective Date: 02/01/2019 Action/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation)
Employee ID: NEW Employee Record:

Personal Data **Job Data** Earns Dist Addl Pay Employee Experience

Employee Information

Work Location - Position Data

*Position Number

Work Location - Job Fields

Business Unit

Department

Location Code

Establishment ID

Job Information - Job Code

Job Code

Job Information - United States

FLSA Status

Job Labor - Union Code

Union Code

Union Seniority Date

Job Information - Reporting Information

Reports To Position Number

Job Information - Employee Classification

*Employee Classification

Classified/Unclassified Ind

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.

Salary Plan & Grade are on the Job Data Tab

Template: UC_FULL_HIRE Name:
Effective Date: 05/06/2019 Action/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation)
Employee ID: NEW Employee Record:

Personal Data **Job Data** Earns Dist Addl Pay Employee Experience

Employee Information

Work Location - Position Data
*Position Number 40034861

Work Location - Job Fields
Business Unit SBCMP Department MUSC
Location Code MUSIC-0301 Establishment ID UCSB

Job Information - Job Code
Job Code 000547

The Job Code determines the Salary Admin Plan and Salary Grade (and default from Position Control)

Job - Salary Plan

Salary Administration Plan CTSB Salary Grade 25

Step

Job Compensation - Pay Components Personalize | Find | View All | First 1 of 1 Last

Comp Rate Code	Compensation Rate	Compensation Frequency	Rate Code Source
1			

FYI: Job Codes with no established Salary Plan and Grade are typically By Agreement (BYA)

For BYA jobs, tab through the compensation field, leaving it blank

Expected Job End Date Staff



The image shows a screenshot of a web form with a torn paper effect. At the top, there is a header bar that says "Work Location - Expected Job End Date". Below this, there is a form field labeled "Expected Job End Date" which is highlighted with an orange border. To the right of the text input is a small calendar icon. A red arrow points from the text below to this field.

Enter the date the job ends in the **Expected Job End Date** field for:

- Contract (1)
- Limited (4)
- Casual/Restricted (5)
- CWR (13)
- Rehired Retiree (15)

- Non-Academic employees in class 1, 4, 5, 13, and 15 are automatically terminated in UCPATH on the **expected job end date**.
- Departments monitor expected job end dates and, if needed, update/extend the expected job end date (in **PayPath**) to ensure termination occurs only as intended.
- **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.**

Transfer Templates

Choosing the Correct Template

STAFF Transfer Templates

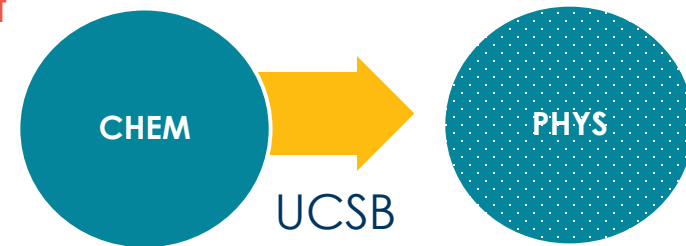
1. INTRA-Campus Transfer - **SAME** department

An employee transfers from one position to another at UCSB, *within the same department.*



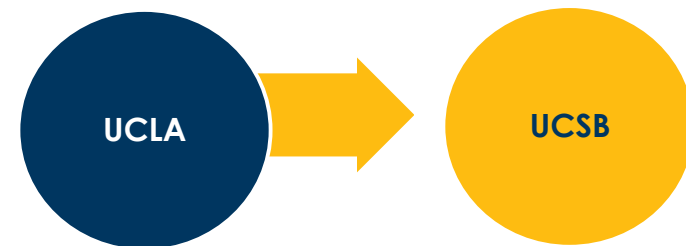
2. INTRA-Campus Transfer - **DIFFERENT** department

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.



Intra-Campus Transfer Template – a closer look

INTRA-Campus Transfer –

Same OR Different department at UCSB

- Used to transfer a staff employee *within* or *between* departments at UCSB.
- The new department initiates the **intra**location transfer template.

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



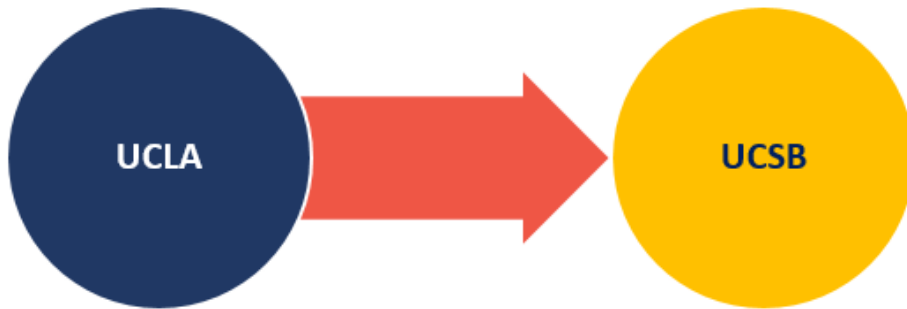
Available Templates

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



Inter-Campus Transfer – a closer look

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.



STEP 1 New Campus (UCSB)
Submits and **confirms**
Concurrent Hire Template

STEP 2 Former Campus (UCLA)
Submits **Termination Template**

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

The **Job Termination Effective Date** should be the same as the **Job Effective Date** for the concurrent hire.

Termination & Retirement Templates

Termination Templates

Use VOLUNTARY

Termination Template when ...

- ☑ An employee resigns their UC employment.
- ☑ As one part of Inter-Campus transfer.
- 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.

Use INVOLUNTARY

termination template when ...

- ☑ It is necessary to terminate an employee, lay off an employee or you learn of the death of an employee
- (If the termination reason is **Death**, only one termination template is initiated (Involuntary Termination); UCPC WFA Production terminates all other jobs for the employee.

IMPORTANT

- Job Effective Date
- Reason Code

These fields are important entry points for the employee's record and have many downstream effects.

Smart HR Transactions
Enter Transaction Details

The following transaction details are required.

Template UC Voluntary Termination

Organizational Relationship Employee

*Employee ID

*Employment Record Number 0 (PROF-AY) ▼

*Job Effective Date 12/15/2017

Action Termination

*Reason Code Resign - Moved out of Area ▼

Continue Cancel

Select the correct Employment Record Number

Entering Termination Transaction Information

Smart HR Transactions

Enter Transaction Information

[Return to Previous Page](#)

Job Data

Work Location - Position Data

Position Number

Work Location - Job Fields

Business Unit

Location Code

Job Information - United States

Last Date Worked

Comments

Comments

[Return to Previous Page](#)

[Supporting documents](#)

Transaction ID: NEW

Initiator Comments:

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

Update the **Last Date Worked** if
needed and enter
a **Comment**.

*When complete, click
Save and Submit*

Retirement Template

Initiate a RETIREMENT Template when:

- ☑ An employee decides to retire
- When UCPC WFA Production receives a retirement transaction, they retire the employee **from all UC jobs**.

Smart HR Transactions

Enter Transaction Details

The following transaction details are required.

Template UC Retirement

Organizational Relationship Employee

*Employee ID 10069686 Archer Witt

*Employment Record Number 0 (PROGR ANL 3 SUPV)

*Job Effective Date 12/20/2017

Action Retirement

Reason Code Retirement

Continue Cancel

Click **Continue** to enter the remaining details of the template.

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.

Entering Retirement Template Information

- ☑ 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 **Save and Submit***

NOTE: End of FY retirements have specific requirements for termination date, last day work, and effective date.

Smart HR Transactions

Enter Transaction Information

[Return to Previous Page](#)

Job Data

Work Location - Position Data

Position Number

Work Location - Job Fields

Business Unit

Location Code

Job Information - United States

Last Date Worked

Comments

Comments

[Return to Previous Page](#)

[Supporting documents](#)

Transaction ID:

Initiator Comments:

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

Update the **Last Date Worked** if needed and enter a **Comment**.

Termination & Retirement Final Pay

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

Key Take-Away from Part 2 (see more in Part 1)



Bookmark

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

Carefully examining the **Person Org Summary** is critical to successfully submitting templates and hiring staff employees.

Person Org Summary can help determine:

- Hiring Template
- Reason Code
- Certain Position Attributes (FLSA)
- Pay Group
- Timing / Effective Date
- Impacts on Other Departments

Specific Questions

Let's answer some of YOUR specific questions

Resources for Template Fields

- Job Code**
auto-populates Union Code, etc.
- Job Description** determines some fields on hiring template
- HR Website / Compensation** links to Salary Scales or TCS:
<https://www.hr.ucsb.edu/compensation/salary-scales>

Position Information

Position Number: NEW
Headcount Status: Open
*Effective Date: 12/05/2019
*Reason: NEW
Approval Status: Initial
*Status: Active
Transaction ID: 1111111111

Job Information

*Business Unit: SBCMP UC Santa Barbara Campus
Job Code: 009617 SRA 2 NEX
Reg/Temp: Not Applicable
Shift: Not Applicable
Title: SRA 2 NEX
Manager Level: All Other Positions
Full/Part Time: System Default - Sele
Union Code: RX Research Support Professionals
Short Title: SRA 2 NEX Detailed Position Description

Human Resources

COMPENSATION & CLASSIFICATION

SALARY SCALES

Useful Links

- UC Title Code System (TCS)
- UCSB Salary Scales - Oct 2019
- UCSB Career Tracks Salary Grade Ranges - July 2019
- UCSB Career Tracks Salary Grade Ranges - July 2019 (pdf)
- UCPath Step Translation Chart

Unit	Unit Description	Unit Organization	Effective date of ranges in this report
99	NO BARGAINING UNIT	NCT REP	4/1/2018
CK	IBT CLERICAL	CUE	7/1/2019
DX	PHYSICIANS & DENTISTS	UAPD	7/1/2019
EX	PATIENT CARE TECHNICAL	AFSCME	11/1/2018
HX	RESIDUAL PATIENT CARE PROFESSIONALS	UPTE	7/1/2019
KB	SKILLED CRAFTS--UCSB	501	3/10/2019
KX	REGISTERED NURSES	CNA	1/1/2019 & 9/22/2019
PA	POLICE OFFICERS	FUPOA	7/1/2019
RX	RESEARCH SUPPORT PROFESSIONALS	UPTE	7/1/2019
SK	SERVICE	AFSCME	6/3/2018
TX	SYSTEMWIDE TECHNICAL	UPTE	7/1/2019

Set Id	Job Code	Job Code Descr	FLSA Status	Union Code	Union Code Descr	Salary Admin Plan	Salary Admin Plan Descr
5324	SBCMP 9613 SRA 1		N	RX	Research Suppc	UCRX	RX Salary Plan
5325	SBCMP 9613 SRA 1		N	RX	Research Suppc	UCRX	RX Salary Plan
5326	SBCMP 9613 SRA 1		N	RX	Research Suppc	UCRX	RX Salary Plan
5327	SBCMP 9613 SRA 1		N	RX	Research Suppc	UCRX	RX Salary Plan
5328	SBCMP 9613 SRA 1		N	RX	Research Suppc	UCRX	RX Salary Plan
5329	SBCMP 9613 SRA 1		N	RX	Research Suppc	UCRX	RX Salary Plan
5330	SBCMP 9614 SRA 4 SUPV		E	99	Non-Represent	SB	Locally Assigned - PSS
5331	SBCMP 9615 SRA 3 SUPV		E	99	Non-Represent	SB	Locally Assigned - PSS
5332	SBCMP 9616 SRA 2 SUPV		E	99	Non-Represent	SB	Locally Assigned - PSS
5333	SBCMP 9617 SRA 2 NEX		N	RX	Research Suppc	UCRX	RX Salary Plan
5334	SBCMP 9617 SRA 2 NEX		N	RX	Research Suppc	UCRX	RX Salary Plan
5335	SBCMP 9617 SRA 2 NEX		N	RX	Research Suppc	UCRX	RX Salary Plan
5336	SBCMP 9617 SRA 2 NEX		N	RX	Research Suppc	UCRX	RX Salary Plan
5337	SBCMP 9617 SRA 2 NEX		N	RX	Research Suppc	UCRX	RX Salary Plan
5338	SBCMP 9617 SRA 2 NEX		N	RX	Research Suppc	UCRX	RX Salary Plan
5339	SBCMP 9617 SRA 2 NEX		N	RX	Research Suppc	UCRX	RX Salary Plan
5340	SBCMP 9617 SRA 2 NEX		N	RX	Research Suppc	UCRX	RX Salary Plan

Question & Answer

Resources for Template Fields

Job Descriptions determine some Position and Job Data fields

Position Data

Job Data

PROV #: 40072965					
UNIVERSITY OF CALIFORNIA, SANTA BARBARA JOB DESCRIPTION					
Classified By: Moore, Kathy				Decision Date: 09-27-2019	
EMPLOYEE NAME:		EMPLOYEE ID:		NEW HIRE START DATE: 11/06/2019	
APPROVED PAYROLL TITLE: BLANK AST 3		TITLE CODE: 4722	WORKING TITLE: Performing Arts Coordinator		RECLASSIFICATION EFFECTIVE DATE: 04/27/2014
JOB FAMILY:		JOB FUNCTION:	JOB LEVEL:		JOB LEVEL CODE :
PERCENT OF TIME: 100.00	CBU: CX - Clerical Unit (Teamsters)	ERC: E	GRADE TYPE: Other	GRADE: None	FLSA STATUS: Non-Exempt
APPT TYPE: Career		DEPARTMENT/DIVISION: ALEC-Arts And Lectures Office		WORK LOCATION: Arts & Lectures Building 402	
NAME OF SUPERVISOR: Sarah Jane Bennett		SUPERVISOR'S PAYROLL TITLE: Events Specialist 4		NAME OF DEPARTMENT HEAD: Celesta Billeci	
EMPLOYEE'S FORMER PAYROLL TITLE: BLANK AST 3				NAME OF PREVIOUS INCUMBENT: Vacant (repl Lyndsay Cooke)	
HR APPROVED ACTION: Update	TEMP BEGIN DATE:	TEMP END DATE:	LTD APPT BEGIN DATE:	LTD APPT END DATE:	END DATE (OTHER):
TYPE OF SUPERVISION RECEIVED: General supervision					
Other: Frequency of Other Activity: No Response					
SPECIAL CONDITIONS OF EMPLOYMENT: The below licenses, certificates, credentials, bondability, altered work schedules, furloughs, travel, etc are required for this position: Maintain a valid CA driver's license, a clean DMV record and enrollment in the DMV Employee Pull-Notice Program Satisfactory criminal history background check -Some evening and occasional weekend hours required (subject to overtime pay in accordance with University/CBU agreement). -Ability to lift/move up to 50 lbs.					
Employee's Signature		Supervisor's Signature		Department Head's Signature	

Where Do I Go For Help?

Question & Answer

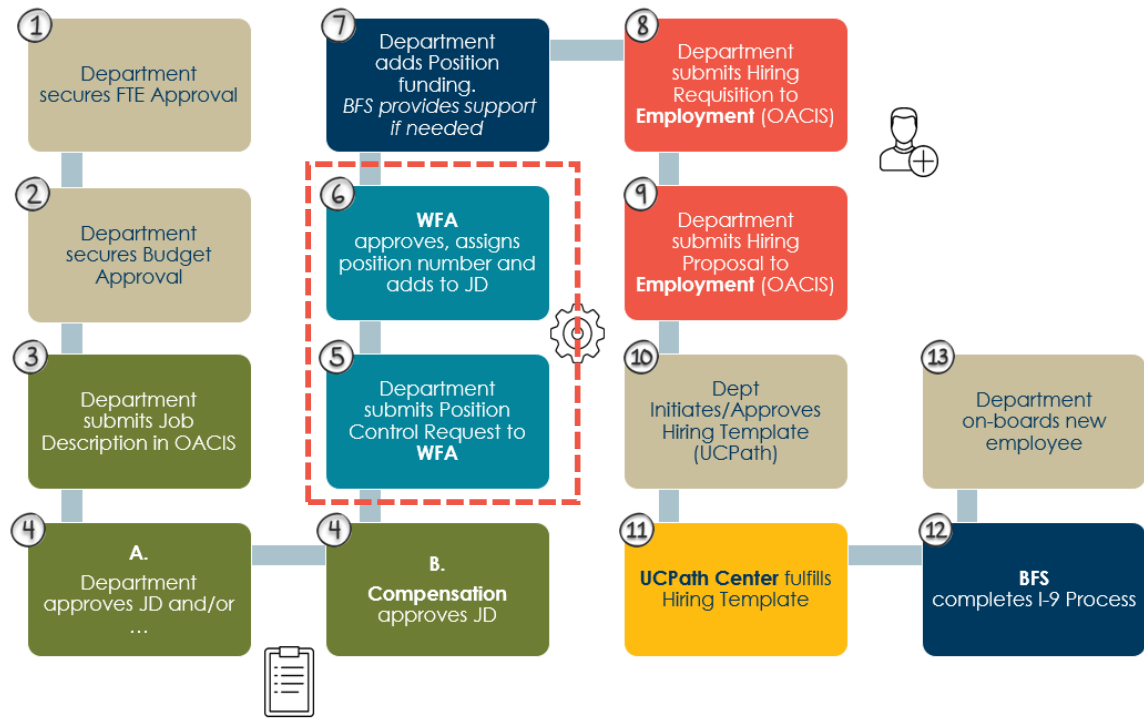
- How to get all units to be on the same page?
- Why am I getting sent in circles?
- When to call HR?

Question & Answer

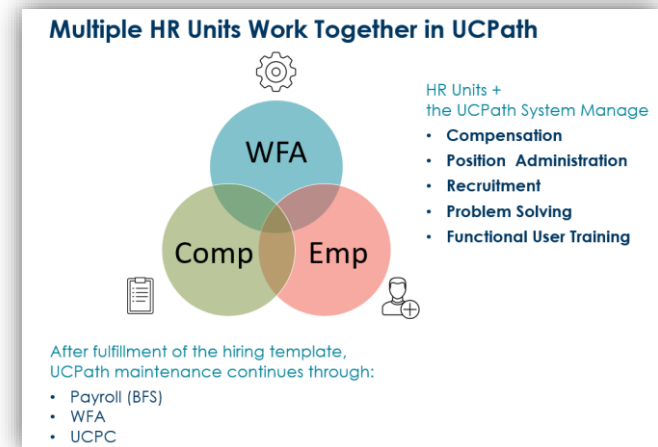
Where Do I Go For Help?

ANSWER

Start at the beginning and proceed in order waiting for approvals. Identify where the issue lies.



- Call **Compensation** with questions about a Job Description
- Call **WFA** (Amy & Sarah) with questions about Staff Positions, PayPath Actions, and Template Transactions.
- Call **Employment** with questions about Hiring Requisitions, Hiring Proposals
- Call **BFS** with questions about Funding, Paychecks, Salary Cost Transfers/Direct Retros, and I-9



Accessing Resources & Step-by-Step Guides

HR Website

<https://www.hr.ucsb.edu/ucpath>

The screenshot shows the HR Website interface. At the top, there is a navigation bar with 'Human Resources' and 'ADMINISTRATIVE SERVICES UCSB'. Below this, a menu lists various employee categories: PROSPECTIVE EMPLOYEES, NEW EMPLOYEES, CURRENT EMPLOYEES, MANAGERS-SUPERVISORS, and RETIREES. Under 'CURRENT EMPLOYEES', several sub-links are visible, with 'UCPath' highlighted in a red box. On the left, a 'Welcome' sidebar menu is also highlighted in red, containing links for Position Management, PayPath Actions, HR Smart Template Transactions, Tools & Resources, Forms, and Contacts. The main content area features a 'UCPath' banner with a 'Position Management & Workforce Administration' graphic. Below the banner, there are quick reference navigations, with a red box highlighting a list of three items: 'Quick Reference Navigations', 'Employee & Manager Self-Service Actions', and 'Where Can I Find Help Regarding UCPath?'. A footnote at the bottom states: '* PPS (Personnel Payroll System) is inquiry-only for authorized PPS users.'

UCSB UCPath Website

<https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources>

The screenshot shows the UCSB UCPath Website interface. At the top, there is a navigation bar with 'UCSB UCPath' and a search bar. Below this, a menu lists various support options: Home, About UCPath, Functional User Support, Employee Support, News, FAQ, UCPath Center, and Contact. The main content area features a 'Functional User Resources' section with a red box highlighting an 'Access Support Documentation' button. Below this, there is a 'UCPath Help' section with a red box highlighting a link to 'Access Support Documentation'. A 'Job Aids' section is also present, with a red box highlighting a link to 'Job Aids'. At the bottom, there is a table with two columns: 'UCPath' and 'Job Aids'. The table lists various resources and their corresponding job aids.

UCPath	Job Aids
Basics and Navigation	UCPath Portal Basics Clear Your Web Browser Cache Disable Pop-Up Blockers Who Does What Transaction Lifecycle Effective Dates UCPath Help Site
Approval Workflow Engine (AWE)	Desk Reference: Approval Workflow Engine (AWE)
Position Control	Initiate New Position Control Request for Staff and Academic Student Positions Update Single Headcount Vacant Staff and Academic Student Positions UCPath View Vacant Budgeted Positions
Position Funding	UCPath Position Funding Entry
	WFA Basics UCPath WFA Navigation UCPath Pay/Path and Additional Pay Navigation Smart HR Templates Concurrent Jobs Supplemental Chart with FLSA status UCPath Hire Template Matrix UCPath New Hire UCPath Rehire - Change Employee Class UCPath Rehire - Same Employee Class
Work Force Administration (WFA)	UCPath Transfer Intra-Location No Break in Service - Same Empl Class UCPath Transfer Intra-Location

Question & Answer

Help and Resources



Step-by-step guides, UPK, Navigations

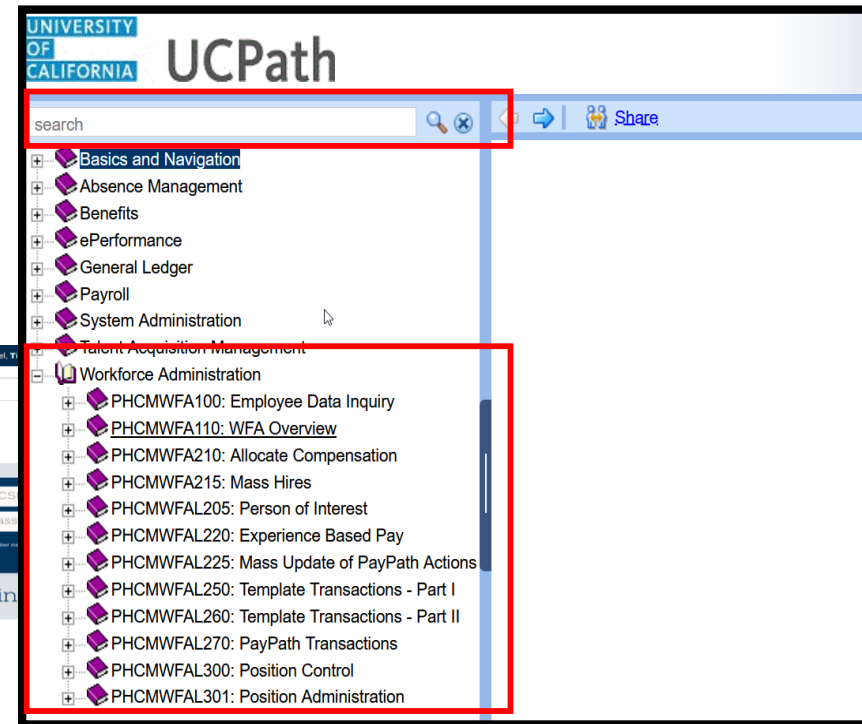
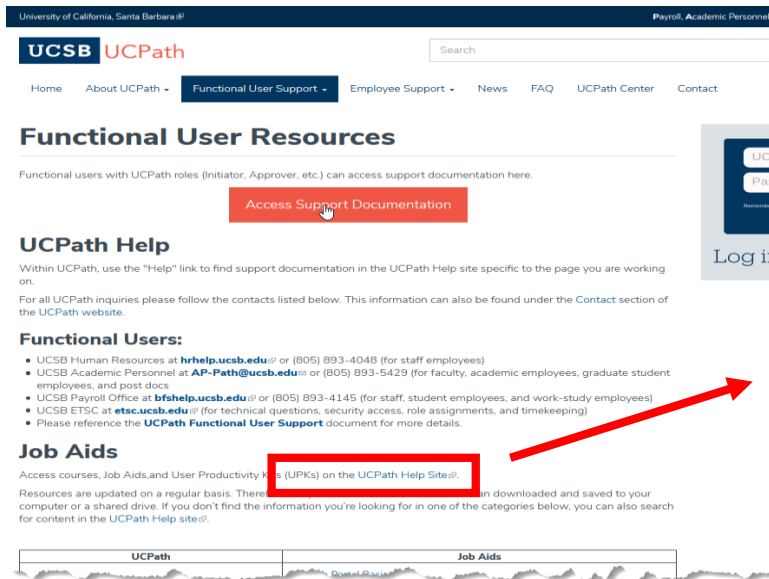
- Real-life demonstrations of UCPath Transactions
- Why are there no step-by-step guides or even answers to emails?
- What is UPK?
- Navigation tools for approvers?
 - HANDBOUT 1: Functional User Resources
 - HANDBOUT 2: Recommended Bookmarks
 - HANDBOUT 7: Required Position Fields

Step-by-step guides, UPK, Navigations

Question & Answer

User Productivity Kit (UPK), located under “UCPath Help Site” and created by UCOP. Provides step-by-step video demonstrations and printed guides. Look under “workforce administration” or search by key word.

<https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources>

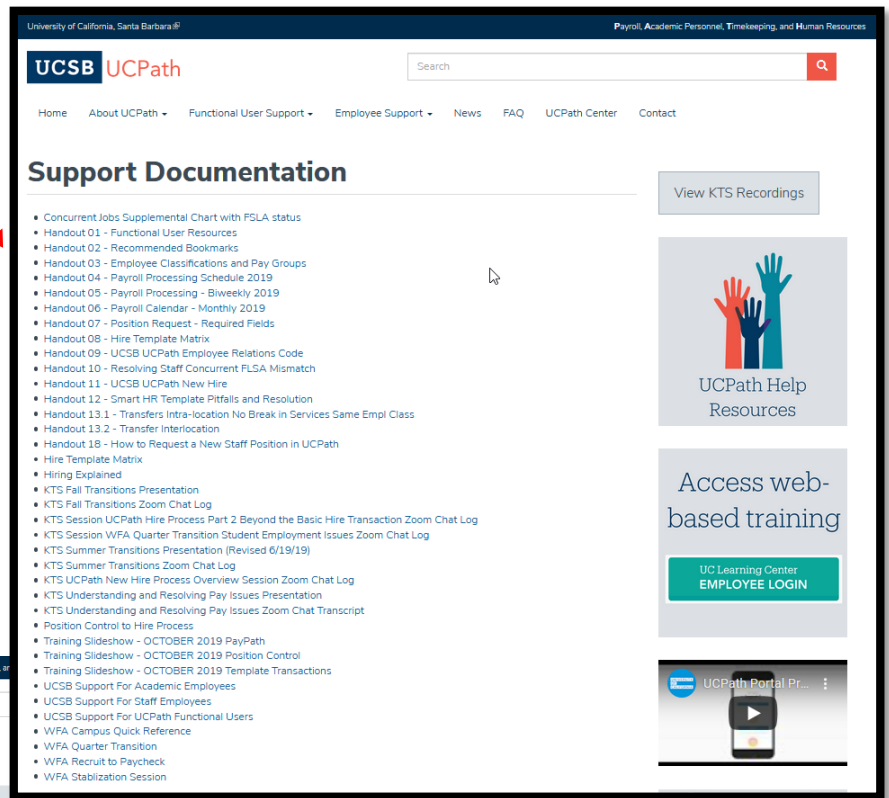
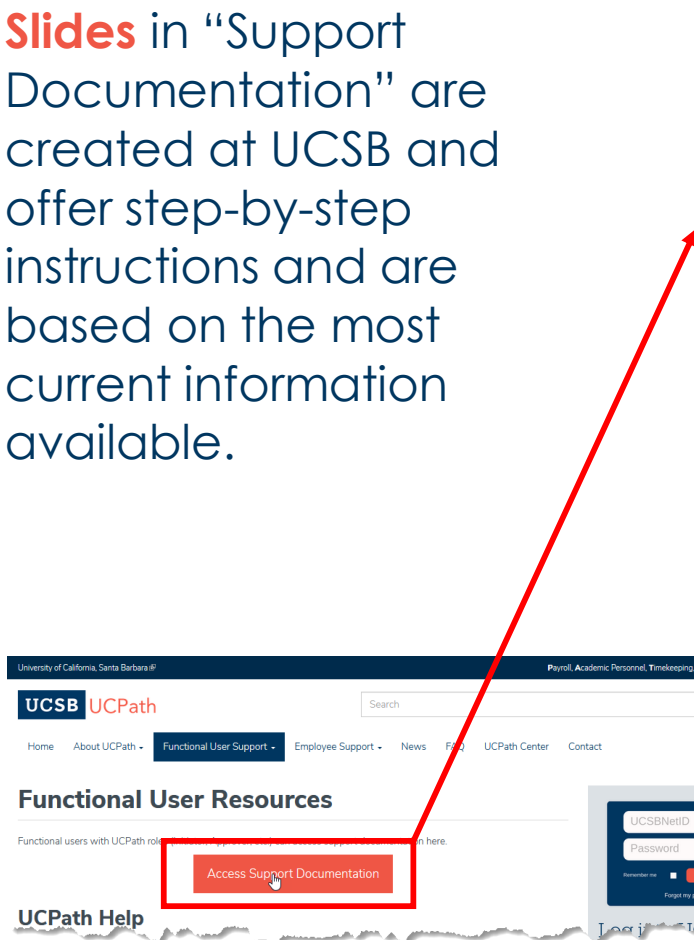


Step-by-step guides, UPK, Navigations

Question & Answer

Handouts and Trainings Slides in “Support Documentation” are created at UCSB and offer step-by-step instructions and are based on the most current information available.

<https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources>



Step-by-step guides, UPK, Navigations

Question & Answer

JOB AIDS, created by UCOP, are sorted by topic and provide printable step-by-step instructions for many processes in UCPATH.

<https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources>

UCPATH	Job Aids
Basics and Navigation	UCPATH Portal Basics Clear Your Web Browser Cache Disable Pop-Up Blockers Who Does What Transaction Lifecycle Effective Dates UCPATH Help Site
Approval Workflow Engine (AWE)	Desk Reference: Approval Workflow Engine (AWE)
Position Control	Initiate New Position Control Request for Staff and Academic Positions Update Single Headcount Vacant Staff and Academic Staff UCPATH View Vacant Budgeted Positions
Position Funding	UCPATH Position Funding Entry
Work Force Administration (WFA)	WFA Basics UCPATH WFA Navigation UCPATH PayPath and Additional Pay Navigation Smart HR Templates Concurrent Jobs Supplemental Chart with FLSA status UCPATH Hire Template Matrix UCPATH New Hire UCPATH Rehire - Change Employee Class UCPATH Rehire - Same Employee Class UCPATH Concurrent Hire UCPATH Transfer Intra-Location No Break in Service - Same Empol Class UCPATH Transfer Inter-Location Desk Reference: Work Authorization Verification Desk Reference: Common Smart HR Template Pitfalls to Resolve PayPath UCPATH PayPath Transactions Additional Pay UCPATH Additional Pay Self Service Transactions Links Direct Retro/Salary Cost Transfers UCPATH Direct Retro Salary Cost Transfers

Question & Answer

Step-by-step guides, UPK, Navigations

Handouts and Training Slides in "Support Documentation" are created at UCSB and offer step-by-step instructions and are based on the most current information available.

The image displays two screenshots of the UCSB UCPath website. The top screenshot shows the 'Support Documentation' page, which lists various handouts and training resources. The bottom screenshot shows the 'Functional User Resources' page, which includes a red button labeled 'Access Support Documentation'. A blue arrow points from this button to the 'Support Documentation' page. The 'Support Documentation' page lists the following items:

- Concurrent Jobs Supplemental Chart with FLSA status
- Handout 01 - Functional User Resources
- Handout 02 - Recommended Bookmarks
- Handout 03 - Employee Classifications and Pay Groups
- Handout 04 - Payroll Processing Schedule 2019
- Handout 05 - Payroll Processing - Biweekly 2019
- Handout 06 - Payroll Calendar - Monthly 2019
- Handout 07 - Position Request - Required Fields
- Handout 08 - Hire Template Matrix
- Handout 09 - UCSB UCPath Employee Relations Code
- Handout 10 - Resolving Staff Concurrent FLSA Mismatch
- Handout 11 - UCSB UCPath New Hire
- Handout 12 - Smart HR Template Pitfalls and Resolution
- Handout 13.1 - Transfers Intra-location No Break in Services Same Empl Class
- Handout 13.2 - Transfer Interlocation
- Handout 18 - How to Request a New Staff Position in UCPath
- Hire Template Matrix
- Hiring Explained
- KTS Fall Transitions Presentation
- KTS Fall Transitions Zoom Chat Log
- KTS Session UCPath Hire Process Part 2 Beyond the Basic Hire Transaction Zoom Chat Log
- KTS Session WFA Quarter Transition Student Employment Issues Zoom Chat Log
- KTS Summer Transitions Presentation (Revised 6/19/19)
- KTS Summer Transitions Zoom Chat Log
- KTS UCPath New Hire Process Overview Session Zoom Chat Log
- KTS Understanding and Resolving Pay Issues Presentation
- KTS Understanding and Resolving Pay Issues Zoom Chat Transcript
- Position Control to Hire Process
- Training Slideshow - OCTOBER 2019 PayPath
- Training Slideshow - OCTOBER 2019 Position Control
- Training Slideshow - OCTOBER 2019 Template Transactions
- UCSB Support For Academic Employees
- UCSB Support For Staff Employees
- UCSB Support For UCPath Functional Users
- WFA Campus Quick Reference
- WFA Quarter Transition
- WFA Recruit to Paycheck
- WFA Stabilization Session

The 'Functional User Resources' page also includes a login form with fields for 'UCSBNetID' and 'Password', and a 'Log in' button. Below the login form is a link for 'Forgot my password'.

<https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources>

Pay Group Overrides

Pay Group Override is typical when a STDT 1 employee holds a concurrent exempt academic position. The circumstance of the staff student employee determines the process for the Override:

Vacant Position

ASE adds a *staff student position*:

1. **Navigate** to *Position Control Request*
2. **Update** FLSA on the staff student position to “Exempt”
3. **Submit** hiring template to UCPC
 - In the comments field request UCPC update the Pay Group to 8MH (paid hourly/monthly)

Filled Position

Staff Student adds a concurrent exempt position (ASE):

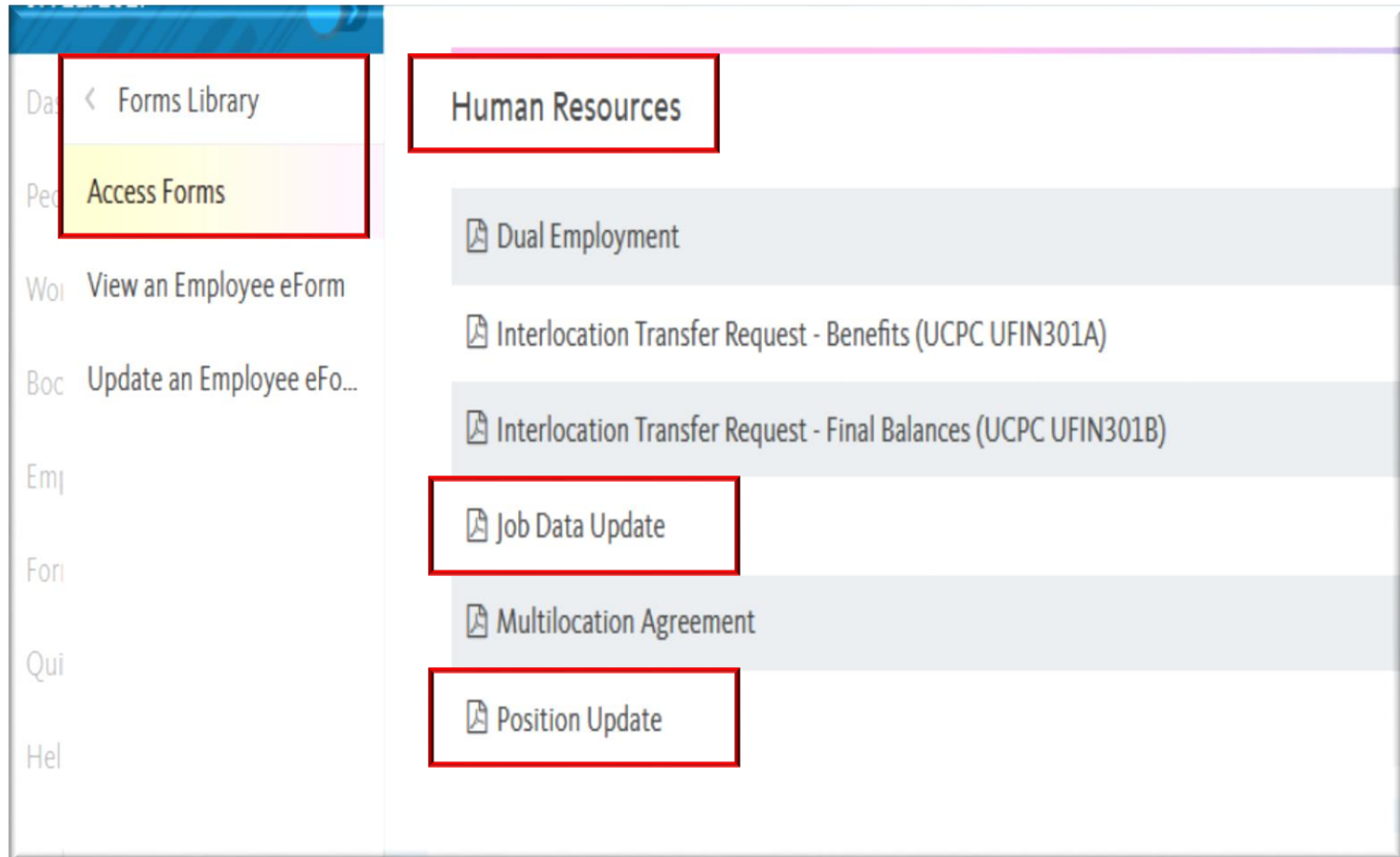
1. **Navigate** to *PayPath*
2. **Search** by employee ID
3. On Staff Student’s Position Tab:
Change FLSA to “Exempt”
4. **Submit** Job Data Update Form to UCPC to change Staff Student’s Pay Group to “8MH”

On a filled position the only way to update a *Pay Group* is with a **Job Data Update** form to UCPC

Job Data Update and Position Update Forms

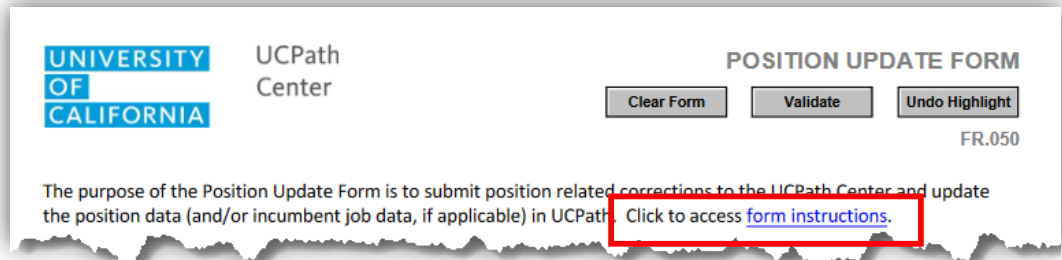
Position Update Forms
Correct history

Job Data Update Forms
Correct history
Update Pay Group



Position Update Form Instructions

Instructions are embedded in the Position Update Form



Instructions

Record corrections to position data may require special handling in UCPath and must be processed by the UCPath Center. Business Units will complete applicable sections of the Position Update Form to notify the UCPath Center of these updates.

- Section 1: Key Information – Business unit completes this section in its entirety. This section should indicate the data row in Position Management which requires an update.
 - Type of Update:
 - **Add New Row** – Select to insert a position data row.
 - **Update Existing Row** – Select to edit the data of an existing position data row.
 - **Remove Existing Row** – Select to delete an existing position data row entered in error.
 - **Position/Job Data Sync** – Select when a position update has been made but does not reflect in the incumbent's job data. UCPath Center will use the completed form to update the incumbent's job data record.
 - Sections 2-4: Business Unit completes applicable sections with requested updates.
 - Section 5: Business Unit approver(s) completes appropriate approval information.
 - To submit the form, please visit UCPath (<http://ucpath.universityofcalifornia.edu>):
 - Click on "Ask UCPath Center" and then select "Submit an inquiry" on behalf of the employee listed on the form.
 - Select "Workforce Administration" as the Inquiry Topic and "Submit a Form" as the Inquiry Category.

Position Update Form

Section 1

All fields are required. These fields are used to identify the record that needs to be updated.

Section 2

Business Unit is required. Populate only those fields that need to be updated.

Section 3

Populate only those fields that need to be updated.

Section 4

Always include comment

Once approved, submit this form via inquiry to UCPath.

SECTION 1. KEY INFORMATION

*Indicates Required Fields

Type of Update*	Position #*	Effective Date* (mm/dd/yyyy)	Reason Code*
—			—

SECTION 2. POSITION INFORMATION

Business Unit*	Department #	Location	
—			
Full / Part Time	Reports To Position #	Job Code	Union Code
<input type="radio"/> Fixed <input type="radio"/> Variable			
Classified Indicator	FLSA Status	Salary Admin Plan	
—	<input type="radio"/> Exempt <input type="radio"/> Non-Exempt		
Salary Grade	Standard Hours	FTE	
Adds to FTE Actual Count	Max Head Count	Health Certificate	
<input type="checkbox"/> Yes <input type="checkbox"/> No			
Signature Authority	Worksite	Employee Relations Code	

SECTION 3. INCUMBENT INFORMATION

Update Incumbents	Include Salary Plan/Grade	
<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Empl ID# (8 Digits)	Last Name	First Name

SECTION 4. INITIATOR COMMENTS

Type Comments Below

Job Data Update Form Instructions

Instructions are embedded in the Job Data Update form

The screenshot shows the top portion of a web form. On the left is the University of California logo. To its right is the text 'UCPath Center'. On the far right, the title 'JOB DATA UPDATE FORM' is displayed above three buttons: 'Clear Form', 'Validate', and 'Undo Highlight'. Below the title is the identifier 'FR.107'. The main text reads: '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.' A red box highlights the text 'Click to access form instructions.' which is a blue hyperlink.

Use

Business Units will complete the Job Data Update Form to correct erroneous job data which should not exist in UCPath. The Business Unit will submit the form via Case Management to the UCPath Center for processing.

Instructions

Record corrections to job data must be processed by the UCPath Center. Business Units will complete applicable sections of the Job Data Update Form to notify the UCPath Center of these updates.

1. Section 1: Key Information – Business Unit completes this section in its entirety. This section should indicate the data row in Job Data which requires an update.
 - a. Type of Update:
 - **Add New Row** – Select to insert a job data row.
 - **Update Existing Row** – Select to edit the data of an existing job data row.
 - **Remove Existing Row** – Select to delete an existing job data row entered in error.
2. Sections 2-5: Business Unit completes applicable sections with requested corrections.
3. Section 6: Business Unit approver(s) completes appropriate approval information.
4. To submit the form, please visit UCPath (<http://ucpath.universityofcalifornia.edu>):
 - a. Click on “Ask UCPath Center” and then select “Submit an inquiry” on behalf of the employee listed on the form.
 - b. Select “Workforce Administration” as the inquiry Topic and “Submit a Form” as the inquiry Category.

Job Data Update Form

Question & Answer

Section 1

All fields are required. These fields are used to identify the record that needs to be updated.

Section 2

Business Unit is required. Populate only those fields that need to be updated.

Section 3

Populate only those fields that need to be updated.

Section 4

Always include comment

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 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* (mm/dd/yyyy)	Effective Sequence*	
Action*	Reason*				
Submitter Name*		Submitter Email*		Date Submitted* (mm/dd/yyyy)	

SECTION 2. JOB DATA					
Business Unit*	Department #	Position #	Reports To Position #		
Employee Pay Type	Job Code		Union Code		
<input type="radio"/> Hourly <input type="radio"/> Salary					
Empl Class # / Code	Standard Hrs		FTE		
Expected Job End Date (mm/dd/yyyy)	End Job Automatically	Classified Indicator	FLSA Status		
	<input type="radio"/> Yes <input type="radio"/> No				
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	Pay Group Override	Salary Admin Plan	Salary Grade		
<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No				
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		

Job Data Update Form

Section 2 - 4
Business Unit is required. Populate only those fields that need to be updated.

Section 5
Always include comment

Section 6
Approval 1
Required

Once approved,
submit this form via
inquiry to UCPath.

2)	Reason	Rate Code	
	—	—	
	Seq	Comp Rate	Frequency
			Apply to Future Rows
			<input type="radio"/> Yes <input type="radio"/> No

3)	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 (mm/dd/yyyy)	Date Returned to Work (mm/dd/yyyy)

SECTION 4. TERMINATION / RETIREMENT

Last Date Worked (mm/dd/yyyy)	Date of Death, (if applicable) (mm/dd/yyyy)	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* (mm/dd/yyyy)
Approval #2 Type/Print Name	Approval #2 Signature	Date Approved (mm/dd/yyyy)
Approval #3 Type/Print Name	Approval #3 Signature	Date Approved (mm/dd/yyyy)

UCPATH CENTER INTERNAL USE ONLY

Processed By	Completion Date (mm/dd/yyyy)

Help Avoid Template Cancellation

Question & Answer

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
With Prior UC Affiliation

1. Understand who you are hiring, why, & when
 - a) Review Person Org Summary
 - b) Work with other Department
 - c) Determine effective date
2. Update Position attributes & get approval from Position Administrator prior to initiating hiring template
 - a) Refer to **Handout 07 (Support Documentation)**
 - b) FLSA
 - c) Is FTE accurate?
3. Concurrent Hire
 - a) Match FLSA? **Override**
 - b) Align Pay Group? **Request UCPC update**
 - c) Accurate FTE less than 100%? **Update Position**

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

Hiring Template Demonstration

Question & Answer

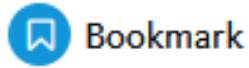
Which optional fields do I fill out and how?



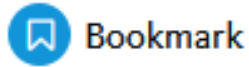
Login to UCPath

Tracking Department Submissions

Question & Answer



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



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

Use the following pages to view the status of template transactions.



SS Smart HR Transaction Page

ON
CAMPUS

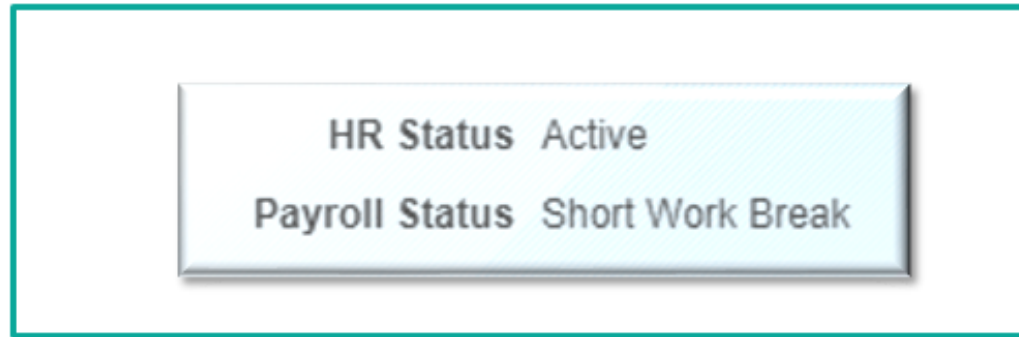
Use to view Smart HR template transactions requiring on-campus approval, and their status in the AWE (on campus)

Transaction Status Page

AT UC
PATH
CENTER

Use to view the status of template transactions that completed the AWE on campus and are being fulfilled by UCPath Center WFA Production

What is Short Work Break



- SWB **stops pay** for an employee for a **temporary** period of time.
- This process applies to certain **staff** and **academic** employees.
- Max length of SWB is **four months**.
- Employee's on SWB are monitored by the department on a regular basis.
- Departments are responsible for returning employees from SWB.

Short
Work
Break
(SWB)

NOTE: Short Work Break is NOT a Leave of Absence.

More About Short Work Break

Type	Description
Partial-Year Career Furlough	Used to place a partial-year career employee on furlough. Action Reason selection is based on the number of working months the partial-year career employee is scheduled to work: 9, 10 or 11 months. <i>(mostly in STHL)</i>
Undergraduate Students	Used to put undergraduate students (covered under PPSM) off pay status over the summer or in between quarters.

Be sure to extend the appointment date through and beyond the return from SWB if needed.

**Short
Work
Break
(SWB)**

- Return from SWB is a PayPath Action - RWB
- If the **Job End Date** passes while staff student is on SWB, the staff student job will auto-term upon return from SWB (RWB).
- If student will continue working after SWB, be sure to extend the initial **Job End Date** before that date passes.

Key Pay Processing Dates

Question & Answer

UNIVERSITY OF CALIFORNIA UCPATH Center

2019 UCPATH Production Processing Schedule

Pay Cycle	Check Date	Pay Period Dates		Run ID Schedule	Location						UCPath Center				
		Begin	End		Campus			Med Center Only			Pay Confirm	A Post Confirm	GL Post Confirm	Pay Statements on UCPATH	Leave Accrual Available on UCPATH (After 5pm)
					• PayPath	• Inbound Files Due*** (7-30am)	• Location Corrections To Msg Error Log (2pm)	• Inbound Files Due **** (4am)	• Location Correction To Msg Error Log (2pm)						
MO	Wed 01-02-19	12-01-18	12-31-18	181231M0X	• PayPath	• I-156: FICA (3pm)	• Inbound Files Due*** (7-30am)	• Location Corrections To Msg Error Log (2pm)	• Inbound Files Due **** (4am)	• Location Correction To Msg Error Log (2pm)	Wed 12-26-18 *	Wed 01-02-19 *	Fri 12-28-18	Mon 12-31-18	Wed 01-02-19
B1	Wed 01-09-19	12-16-18	12-29-18	181229B1X	• HR template		• Msg Error Log Distribution (5pm)	• E-703 Funding Upload	Msg Error Log Distribution (8am)		Fri 01-04-19 *	Mon 01-07-19 *	Tue 01-08-19 *	Mon 01-07-19	
B2	Wed 01-23-19	12-30-18	01-12-19	190112B2X	• Union Enrollment (3pm)						Thu 01-17-19	Mon 01-21-19	Mon 01-21-19	Mon 01-21-19	Mon 01-21-19
MO	Fri 02-01-19	01-01-19	01-31-19	190131M0X	• Retro Pay (4pm)}}						Mon 01-28-19	Fri 02-01-19	Wed 01-30-19	Wed 01-30-19	Fri 02-01-19
B1	Wed 02-06-19	01-13-19	01-26-19	190126B1X							Thu 01-31-19	Mon 02-04-19	Mon 02-04-19	Mon 02-04-19	Mon 02-04-19

Data Due

Corrections Due

View Paycheck

Help and Resources



UC SANTA BARBARA

