Job Aid: New Hire
(No past job record in UCPaTh)

New Hire

UCPath enables you to perform multiple types of Hire transactions by selecting the appropriate template for your hire type.

Use the Smart HR Transactions page to create a new record for an employee who receives compensation through UCPaTh Payroll processing.

There are separate hire templates for academic and staff new hires.

**NOTE:** You can use this job aid for both Student and Academic new hires. The only difference is in the template you select.

This job aid covers the following scenario:

A candidate is offered employment at UCSB for the first time. They have no past (i.e., terminated) job record in UCPaTh.

In this example Nathan will begin employment at UCSB Physics Dept effective on 9/1/2018.

**Before You Begin**

Things you need:

- Identify if this is a staff or academic position
- Vacant Position
- Position Funded
The Process

Once an approval for a Job/Position has been obtained, you can begin the UCPath process to hire an employee into the new position.

1. Request a Position via the **Position Control Request** transaction as necessary or use an existing vacant position.
2. Once the position is created, setup accounting and allocation information for the position via **Funding Entry** transaction.
3. Recruit and select your candidate to fill the position.
4. Enter a hire transaction via the **Smart HR Template** transaction by selecting the appropriate **New Hire** template: (UC_FULL_HIRE or UC_FULL_HIRE_AC).
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Smart HR Template Transaction

Navigate to the Smart HR Transactions page from your homepage in UCPath Online.

1) Click on the Select Template look up icon to view all the Smart HR Templates.

Reminder: Prior to beginning Smart HR Hire Transactions, perform an employee search to confirm the new hire does not already exist in the system. Use the Person Organizational Summary and Job Data pages.

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

Smart HR Transactions Page

All HR Hiring transactions begin at the Smart HR Transactions page. Here you select the appropriate staff or academic hiring template.

2) Select the appropriate new hire template: UC_FULL_HIRE, UC_F HIRE AC

www.ucpath.ucsb.edu
Enter the **hire effective date** in the **Effective Date** field:

**NOTE:** The effective date you use is not necessarily Today’s date. This is the hire date or the date the employee will begin work, earning hours for pay and benefits.

After selecting the appropriate template and entering the **Effective Date**, click the **Create Transaction** button to continue.
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**Enter Transaction Details Page**

The Enter Transaction Details page appears. Required fields are identified with an *Asterisk*. Continue entering the new hire data in each required field.

- **Accept the default of NEW.**
- **Select the appropriate Reason Code.**
- **Click Continue to move to the next page.**

**NOTE:** Navigate to the UCPath Help site and refer to the Template Transactions - Action Reason Codes and Descriptions Job Aid for more information about Reason Codes.

**NOTE:** Once the hire process is complete, the system will generate an Employee ID number.
**Enter Transaction Information Component**

The *Enter Transaction Information* component appears. Enter the employee and hire details on each tab. You must navigate through all five tabs before the **Save and Submit** button is enabled.

**Personal Data Tab**

**NOTE:** The **Gender** field will default to “Unknown.” You must change this selection to the appropriate option of Male or Female.

**NOTE:** Begin the address entry on the **Address Line 1** field. Do not leave this field blank and skip to Address Line 2.

**Things to Remember:**

- Always complete the **Date of Birth** field. Although there is no asterisk on this field, this is a system requirement.

- Although the **National ID Type** (i.e., Social Security Number) is not a system required field, it is required by UC and is good business practice to add this information if you have it. You eventually have to add this information into the employee’s data profile if it is not entered at this time.
  - **NOTE:** Same day hires **WILL** require this field to be populated. For employees **without** a Social Security Number, leave the field blank **BUT YOU MUST** enter a comment in the Comments box, otherwise your transaction will be denied.
Things to Remember:

- **Phone Type**: If you enter one or more phone numbers, the **Preferred** checkbox must be selected.

- **Email Type**: The option you select here must be “Home” regardless of the email address itself.

- **Comments** field:
  - Anything entered in this field will follow the history of this employee. Enter only information that is appropriate to keep in the employee’s historical records.

**NOTE**: Do not confuse the transaction **Comments** box with the separate boxes for **Initiator Comments** and **Approver Comments**.

If this transaction is entered on the same day the employee starts, enter the **Oath Signature Date**. Otherwise, leave blank and update later.

**NOTE**: This date must be on or before the 1st day of work.

If this transaction is entered on the same day the employee is starting, enter the **Patent Acknowledgement Sign Dt**. Otherwise, leave blank and update later.

**NOTE**: This date must be on or before the 1st day of work.
Things to Remember:

- Several fields default after the Position Number is entered. The fields are highlighted in grey and cannot be edited.

- The Job Code determines the following data fields:
  - Salary Admin Plan
  - Salary Grade
  (Note: Some Job Codes do not have an established Salary Plan)

**NOTE:** For staff, the Employee Classification field does not default and must be manually entered.

For academic personnel, the Employee Classification field defaults, is view-only and cannot be changed.
Things to Remember:

- **Probation Code**: Certain Job Codes require a Probation Code. Select the appropriate option.

- **Probation End Date**: If a Probation Code is entered, you must also complete this field.

- For many **Job Codes**, a **Step** must be entered to populate compensation fields.

- If a **Step** is not applicable, you must manually enter the compensation data.
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Job Data Tab, continued

- An expected end date is required for the following employee classes:
  - Staff: Contract
  - Staff: Floater
  - Staff: Rehired Retiree
  - Academic: Post Docs
  - Academic: Recall
  - Academic: Academic Student
  - Student: Casual/Restricted

The Compensation Frequency field in this section defines how the total compensation is actually paid out to the employee per paycheck.
Things to Remember:

- Job earnings distributions can be used to indicate if the compensation should be paid using a different **Earn Code** other than REG pay. For example, **ERIT** (Employee Reduction In Time).

- The majority of your transactions will not require this tab to be completed.
Things to Remember:

- There are some cases where an employee's base salary is paid through Additional Pay using a flat dollar amount (i.e., BYA).

- **Additional Pay** is also used for recurring payments.
  
  o Recurring payments are paid over multiple, consecutive pay periods in the same amount.
  
  o Recurring additional pay can be submitted on the hire templates (Full Hire, Rehire, and Concurrent Hire).
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Employee Experience Tab

Things to Remember:

- If the new employee has prior work experience, relevant to this position, add the details on this page.

- **Initiator Comments**: Use this field to enter any pertinent information for your **Department Approver** to assist them in determining to approve or deny the transaction.

Notice, when you navigate to the last tab, the **Save and Submit** button is enabled.
Save and Submit

When complete, click the [Save and Submit] button on the last tab to submit the transaction for review and approval.

You can also click the [Save for Later] button to save this transaction when it is not ready to be submitted.
Transactions In Progress Section

You can access transactions at a later time in the Smart HR Transactions page Transactions in Progress section.
Employee Job Record

When your Smart HR Template Transaction has been approved on campus, the transaction moves to the UC Path Center for processing. If there are no errors the transaction is processed and your new employee will have a new Job Record as well as an Employee ID number issued. The vacant position you used, will now be filled, the employee can update their personal data via Employee Self Service, and any additional updates on the employee records can be initiated by your department. You should review the new job record and ensure all the data is correct. Once their first pay has been generated and issues, you should review to confirm it is correct.

In this scenario Nathan was hired in the Physics Department effective 9/1/2018. His Job Record should look like this:

<table>
<thead>
<tr>
<th>EFFDT</th>
<th>EMPL RCD</th>
<th>DEPT</th>
<th>POSITION NBR</th>
<th>HR STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/1/2018</td>
<td>0</td>
<td>PHYS</td>
<td>40001234</td>
<td>Active</td>
</tr>
</tbody>
</table>