Today’s training session includes:

• The concepts of Position Control

• The who, what, why, when, where, & how of the various requests processed in Position Control

• 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

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Questions & Parking Lot

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
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
- Personal Data Changes
- Termination
- Retirement
- Transfers
- Transaction Status
- Course Review

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

Who Are You

Show of hands: Do you …?

- Work mostly with Academics
- Work mostly with Staff
- Work with both Staff & Academics
- Have experience in our previous payroll system
- Know what UCPath is
The UCPath System
### Initiators and Approvers

<table>
<thead>
<tr>
<th>System Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>WFA Initiator</strong></td>
<td>Access to hire, maintain, and support Workforce Administration (WFA) data for employees. This user has access to personal data, job data, and position management functional areas.</td>
</tr>
<tr>
<td><strong>WFA Approver</strong></td>
<td>Access to approve Workforce Administration (WFA) transactions. This role may include access to approve transactions for all employee groups or only specific employee groups, such as staff non student, academic non student (academic, dean, and post doc), or students (staff and academic).</td>
</tr>
<tr>
<td><strong>WFA Inquirer</strong></td>
<td>View-only access to Workforce Administration (WFA) related pages in UCPath.</td>
</tr>
<tr>
<td><strong>PFA Initiator</strong></td>
<td>Access to enter Payroll/Financial Administration (PFA) transactions for employees. This user can enter payroll requests, direct retro transactions (salary cost transfers), and payroll adjustments to accrual management.</td>
</tr>
<tr>
<td><strong>PFA Approver</strong></td>
<td>Access to approve Payroll/Financial Administration (PFA) transactions, including final pay requests, off-cycle check requests, payroll adjustments for accrual management, and direct retro funding updates (salary cost transfers). This role may include access to approve transactions for all employee groups or only specific employee groups, such as staff non student, academic non student (academic, dean, and post doc), or students (staff and academic).</td>
</tr>
</tbody>
</table>
**Initiators and Approvers**

• 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
New Terminology

The Players

- UCPC:
  - The UCPATH Center in Riverside serves the entire UC system’s UCPATH fulfillment needs.

- AP Position Administrator:
  - Local team at UCSB, managing UCSB’s academic personnel needs.

- Central HR Position Administrator:
  - Local HR/WFA team at UCSB, managing UCSB's non-academic staff needs.

The Means of Communication

- UCPC Inquiry/Case:
  - The means of requesting corrections, fielding UCPATH questions, and troubleshooting UCPATH processes from all UC functional users.

- Academic Personnel:
  - AP@Path@ucsb.edu:
    - AP’s on-campus help line for submitting questions regarding AP issues in UCPATH.

- STAFF - HR ServiceNow:
  - UCSB’s Campus-based customer-service ticketing system providing support to UCSB Functional Users with questions related to non-academic staff.

The Words of UCPATH

- Component:
  - A specific functional work area within the UCPATH system.

- Tab:
  - One of several pages in a component.

- Effective Date:
  - The date an action or status takes effect.

- Action Date:
  - The date an action is created, regardless of effective date.

- Approval:
  - Confirming an action and attributes meet dept needs.

- Fulfillment:
  - UCPATH action to complete requested transactions.
Types of UCPath Transactions

- **Position Requests** - Use the Position Control Request 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 off-boarding:
  - Hiring
  - Rehiring
  - Intra-Business Unit Transfers (within campus)
  - Inter-Business Unit Transfers (between campuses)
  - Termination
  - Retirement

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

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Position Control (WFA)

Funding Entry (BFS)

Template Transactions (WFA)

PayPath (WFA)

Additional Pay (BFS)

Budget Distribution (Budget)
Position Management Overview
Module 1
Position Management

All existing employees, including student employees, are assigned a position.

Most employees have a single headcount position (one-to-one).

✓ Most transactions in UCPath require a position number.
✓ For employees with multiple jobs, each assignment has a unique position number.
✓ **Position Pool IDs** are assigned to positions for Work Study funding purposes.
Multi-headcount positions (one-to-many) at this time, are used for staff students and academic students ONLY:

Typically Students (Staff & Academic)
Job versus Position

- Each employee has a unique position number.
- A position is like an empty chair. When you create a position you assign the Business Unit, Job Code, Union Code, FLSA Status and more.
- The person assigned to the chair (hired into the position) inherits those attributes and is referred to as the incumbent.
How Position Data Works

When an employee is hired, promoted, or transferred they are assigned to a position.

Reclassifications and other position changes begin with an update to the position.

Incumbent history is stored in Job Data tables, which allows for reporting of data.

A position remains the same until it is necessary to update it.
Position Management Roles

**WFA Initiator**
Enters and submits a Position Control Request for approval.

**Approver**
There is no department approver for Position Requests.

**Position Administrator**
Approves new position requests, updates vacant and multi-head count positions.
5 Points to Remember

☑ 1. A position number is assigned to every position and is required to hire or rehire an employee.

☑ 2. Positions are typically assigned to only one employee.

☑ 3. Some positions can be multi-headcount positions, but there are many attributes that must be shared.

☑ 4. Employees are assigned to more than one position when they have more than one job.

☑ 5. Positions are maintained even when vacant.
New Positions

Module 2
**View Position Information**

*View-only* components in UCPath provide an overview of current and historical position data.

- **Position Summary**

- **Position History**
  Displays summary data for current and previous *incumbents*, including name, position entry and exit dates, and comp rate.

- **Vacant Budgeted Positions**
  Displays summary data for a *department's vacant positions* including position number, status and reports to position.

- **Add / Update Position Info**
  Displays all *department positions* and respective attributes. *View Only*.

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**UCSB UCPath**

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The Position Summary component provides current and historical information specific to the position.

**Navigation:** PeopleSoft Menu > Organizational Development > Position Management > Review Position/Budget Info > Position Summary

This example shows an Admin Manager position that had an upward job reclassification (JRU) after the position was initially created in UCPath.
The Position History component provides information specific to current and previous incumbents.

**Navigation:**
PeopleSoft Menu > Organizational Development > Position Management > Review Position/Budget Info > Position History

This component displays the employee’s position entry date and exit date (if applicable), compensation amount, salary plan and grade and exit reason (if applicable).

Click to display **Salary Components**, which displays salary details for the position entry and exit dates, depending on which link you click.
Vacant Budgeted Positions

Use to view a summary of a department’s currently vacant positions.

Navigation:
PeopleSoft Menu > Organizational Development > Position Management > Review Position/Budget Info > Vacant Budgeted Positions

In this example, there are 83 vacancies in the selected department.
This view-only component provides a list of all department positions. Select a position to view its attributes.

In this example, filled and open positions are visible.
New Position Control Requests for Non-Student Academics

1. **Appointment paperwork processed and approved** by Academic Personnel (AP) staff.

2. Position numbers are assigned by AP and sent to appropriate department contact.

AP-Path@UCSB.edu
New Position Control Requests for Staff

For new positions (or updates to existing vacant positions) Departments must:

- **First** obtain approval for:
  1. FTE
  2. Budget
  3. Job description
- **Second** submit a Position Control Request
- **Third** obtain necessary pre-approvals prior to recruitment

- **Verdict**: If approved a position number is assigned.
- **Verdict**: If denied the position request is returned to the department for correction.

See Position Control Action Steps: [https://www.hr.ucsb.edu/ucpath/position-management](https://www.hr.ucsb.edu/ucpath/position-management)
The Position establishes key job-related data elements.

- **Job Code**
- **FLSA**
- **Salary Plan & Grade & more**

When initiating a template or PayPath transaction these attributes auto-populate upon entering the position number.

These attributes remain with the position whether the position is filled or vacant and can be updated if necessary.
Key Fields for Position Data

When creating a Staff position, all fields must be completed. If the following fields are left blank, your position request will be denied.

- **Full/Part-Time (staff only)**
  - Exempt positions = FIXED
  - Nonexempt positions = VARIABLE
  - Do not leave as DEFAULT

- **Employee Relations Code**
  - Unique for every position

- **HR Worksite (compliance issue)**
  - 91-BFS - triggers I9 Tracker notification

- **Security Clearance Type**
  - U02 – Criminal Conviction Record
  - All non-student positions

* Remember, Supervisors/Managers have SHP Training

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**Rev. 7/24/2019**
New Position Control Requests for Academic Student Employees (ASE)

ASE Positions

To request new ASE positions follow the same process as described for “New Position Control Requests for Staff.”
Multi-Headcount Positions

A department can group staff student or academic student jobs with these same TEN attributes into one multi-headcount position (one-to-many).

- Department
- Job Code
- Union code
- Reports To
- FLSA
- Employee Relations Code
- Personnel Program (PSS/MSP)
- FTE
- Salary Plan & Grade
- Chartfield String

Any POSITION change applies to all incumbents.
FIRST obtain necessary approvals & Job Description

Key System Steps
New Staff, Staff Student, & ASE Positions

UCSB UCPath

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The system displays the **Add/Update Position Request** buttons.

Click the **Add New Position** option and click **Next** to begin the steps for adding a new position control request.
Use the **Position Control Request** component to enter details regarding the new position.

**Initial steps:**
1. Enter effective date
2. Enter job information and job code
3. Specify work location information
When you successfully save and submit a **Position Control Request** transaction, the system automatically routes it to the Position Administrator.

The bottom portion of the **Supporting Documents** tab displays the approval flow and the Approvers to which the system routes the transaction. In this example, there are two levels of approval and multiple Approvers set up at each level. The transaction is pending the first level approval.

To display the specific Approvers’ names for an approval level, click the **Multiple Approvers** link.
System-generated notifications confirm when your Position Control Request is submitted and when it is approved or denied.
If Your Position is Denied

Click the link provided and open the arrows to review the reasons for denial.

Click here to open transaction status

Click here to open comments and learn why your transaction may have been denied.
Copy an **Existing Position**

When creating a new position, you can copy or, in UCPath terminology, ‘initialize’ information from an existing position.

![Screenshot of UCPath system](image)

Click **Initialize** to begin the steps for copying data from an existing position.

The system displays the **Default Position Data** dialog box, which you use to specify the position from which you want to copy data.
Update Positions

Module 3
Processing Filled Non-Student Academic Position Updates

Non-Student Academics

- Department sends an email to AP-Path staff requesting updates and changes to Non-Student Academic positions.

- Question? Send an email to AP-path@ucsb.edu

Academic Personnel:
AP-Path@ucsb.edu
- Tamara Berton
- Danica Acosta
- Monique Chaidez
UCPath System Overview
New Positions
Update Positions
Course Review

Template Transactions
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Processing Filled Staff, Student, & ASE Position Updates

Staff, Student, & ASE

<table>
<thead>
<tr>
<th>INITIATOR</th>
<th>APPROVER</th>
<th>FULFILLER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filled ASE</td>
<td>Dept</td>
<td>None</td>
</tr>
<tr>
<td>Multi-Headcount ASE</td>
<td>Dept</td>
<td>None</td>
</tr>
<tr>
<td>Filled Staff &amp; Staff Student</td>
<td>Dept</td>
<td>Dept</td>
</tr>
<tr>
<td>Multi-Headcount Staff Student</td>
<td>Dept</td>
<td>None</td>
</tr>
</tbody>
</table>

UCSB UCPath

Rev. 7/24/2019
Processing **Vacant** Academic Position Updates

Non-Student Academics

- Department sends an email to AP-Path staff requesting updates and changes to Non-Student Academic positions.

- Question? Send an email to AP-path@ucsb.edu

---

**Academic Personnel:**

AP-Path@ucsb.edu

- Tamara Berton
- Danica Acosta
- Monique Chaidez
Processing **Vacant** Staff, Staff Student, & ASE **Position Updates**

- There are times when you must update the data fields on a vacant position, such as the reports to field, job code, salary plan, and so forth.

- No incumbent = fewer downstream effects.

**REMEMBER:**

- Updates to **vacant** single headcount positions are processed by submitting a **Position Control Request**.

- To update a multi-headcount staff position, (filled or vacant) submit a **ServiceNow ticket** to ucsb/service-now.com/hr requesting the change.

- To update a multi-headcount ASE position (filled or vacant) submit an inquiry to UCPC.
Update a **Vacant** single headcount
Staff, Staff Student, or ASE Position

1. Navigate to **Position Control Request** component
2. Select **Update Vacant Position** option and click **Next**
3. Search for and select appropriate position
4. Update appropriate position data
5. Click **Save and Submit** to route request to Position Administrator
The system displays the Add/Update Position Request buttons.

Click the Update Vacant Position option and then click Next to begin the steps for initiating a position.
Finding an Existing Vacant Position

Use the **Find an Existing Value** tab to search for the vacant position you want to update.

![Image of a webpage with a search function to find an existing position.]

The search results section displays only those vacant positions that match the search values you entered.

Click the **Select** button next to the position you must update.
Updates to Vacant Single Headcount Positions

After locating the vacant position, use the tabs on the **Position Control Request** component to make changes to your vacant single headcount position.

**Initial steps:**
1. Ensure current head count is 0
2. Select appropriate reason code
Selecting a **Reason Code**

All transactions in UCPath require a reason code. There are many **Reason Codes** to select for a position update.

- 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
Use the **Position Control Request** component to view submitted transactions.

This is the same component used to add a new position or update a vacant one.

Click the **Review Transaction** option and click **Next** to begin the steps for viewing an existing position control request.
Workforce Administration

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View Position Control Transactions

Use this tab to narrow the search criteria for the transaction(s) you want to view.

You have the option to search for requests with any status by leaving the Approval Status field blank or you can search for requests with one or more specific statuses.

When the Search Results display more than one transaction, click the one you want to view.
Return to the **Position Control Request** component and select ‘Review Transactions.’

![Review Transactions](image)

This page allows you to view the status and relevant information for any transaction you either submitted for approval or have reviewed yourself. For each request you can get detailed information by selecting the hyperlink.

#### Approval Transactions

<table>
<thead>
<tr>
<th>Transaction Name</th>
<th>Submitted By</th>
<th>Submitted On Behalf Of</th>
<th>Submitted On</th>
<th>Thread Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Control</td>
<td>Ima Gudadmin</td>
<td></td>
<td>8/01/2017</td>
<td>Pending</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Transaction Details**

- **Date of action**: 2017-06-01
- **Position Nbr**: NEW
- **Transaction ID**: 100000023

---

**Transaction Name**

<table>
<thead>
<tr>
<th>Transaction Name</th>
<th>Submitted By</th>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Transaction Details**

- **Date of action**: 2017-06-01
- **Position Nbr**: NEW
- **Transaction ID**: 100000024

---

Use this page to search for and access **Position Control** transactions you have submitted for approval.
Course Review

Module 5
1: Position Management Overview
2: New Positions
3: Update Positions
4: Course Review
Things to Remember

• WFA Initiators use **Position Control Requests** to add positions or update vacant positions.
  ➢ Coming up in PayPath Training: How to update filled single-headcount positions.

• **Position Control Requests** route from the department WFA initiator to the Position Administrator (in Campus HR/APO) before writing to UCPath.
  ➢ Remember there is NO department approver for this type of transaction.
https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources

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

UCSB UCPath

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How do I …?

1. View a vacant position after approval (3 options)
   - A. See email
   - B. Go to Add/Update Position Info
   - C. Go to Vacant Budgeted Positions

2. Update a multi-headcount position
   - A. Staff = HR ServiceNow
   - B. Academic = Submit a Case to UCPC

3. Learn why my Position Control Request was denied.
   - Follow the link and look at the comments (down arrow)

Oh no, how do I FIX …

1. No Salary Plan/Salary Grade
   - Position Control Request – Reason Code: COR

2. No HR Worksite information
   - Your positon was denied – submit a new transaction 91-BFS
• Review parking lot
  - Have all questions been answered during our class?
  - Are there any new questions to add to the list?
Help and Resources

1. **Ask UCPath:**
   Dashboard Menu > Help/FAQ > Ask UCPath

2. **UPK – User Productivity Kit:**
   Dashboard Menu > Help/FAQ > Self Service or Location Users

3. **Functional User Resources:**
   [https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources](https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources)

4. **ACADEMIC PERSONNEL:** Send an email: AP-Path@ucsb.edu

5. **STAFF:** UCSB HR Website / UCPath Tab:
   [https://www.hr.ucsb.edu/ucpath](https://www.hr.ucsb.edu/ucpath)

6. **STAFF:** Submit a ticket to HR Service Now:
   (Position Management/WFA)
   [https://ucsb.service-now.com/global](https://ucsb.service-now.com/global)
Academic Personnel:
AP-Path@ucsb.edu
• Tamara Berton
• Danica Acosta
• Monique Chaidez

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

Position Control Training
https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources

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