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

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

Human Resources, Administrative Services Division
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
Align Position Data with Job Description

Most Employees
1 Position
1 Corresponding Approved 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
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
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
Step 2 - Create a New Position or Update an Existing Position

Use the Job Description as a reference
Required Data on the **POSITION**

<table>
<thead>
<tr>
<th>Description</th>
<th>Specific Information</th>
<th>UC Position Data</th>
<th>Supporting Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Code</td>
<td>Max Head Count Multi-headcount positions are only for student job codes</td>
<td>HR Worksite Always 91-BFS</td>
<td>N/A</td>
</tr>
<tr>
<td>Full/Part Time</td>
<td>FTE</td>
<td>Special Training Code</td>
<td>Can upload documents, but not required.</td>
</tr>
<tr>
<td>Union Code</td>
<td>Budgeted Position If the position is not budgeted, you can uncheck this box.</td>
<td>Employee Relations Code</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td>Security Clearance</td>
<td></td>
</tr>
<tr>
<td>Reports To</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salary Admin Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salary Grade</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FLSA Status</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

**INITIATOR**
- Request a new Position
- Update a vacant Position

**APPROVER**
- Dept
- WFA

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

**UCSB WFA Team**
- Amy Arnold
- Sarah Soto
- Edna Arellano
- Karen Reynolds-Moreno

UCPC not involved

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

*POSITION DATA changes apply to **ALL** incumbents.*
Creating & Updating Positions

Filled Single-headcount Positions

- Create Using: Position Control Request
- Update Position Data: PayPath
- Update Job Data: PayPath

Filled (or partially filled) Multi-headcount Positions

- Create Using: Position Control Request
- Update Position Data: HR ServiceNow ticket
- Update Job Data: PayPath
Ready for Recruitment

HR Employment Unit and the hiring process
Relationship Between HR Units

- Hiring Proposal based on Approved JD
- Reviews Position Control Request
- Approves JD
- Approves, assigns Position Number, and adds to JD

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

<table>
<thead>
<tr>
<th>Department submits Smart HR Template</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCPC assigns Employee ID</td>
</tr>
<tr>
<td>Empl ID + Position + Fulfilled Hiring Template = Job in UCPath</td>
</tr>
</tbody>
</table>

**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

NOTE: The initiator enters Employee Classification per the Job Description
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.
Template Transaction Approval Workflow – STAFF

INITIATOR | APPROVER
---|---
New Hire | Dept | Dept
Re-Hire Concurrnet Hire | Dept | Dept
Voluntary Terminations & Retirement | Dept | Dept
Involuntary Terminations | Dept | Dept
Personal Data Changes | Dept | Dept
Add/Renew Contingent Worker | Dept | Dept

Then fulfilled by UCPC

No stops in HR
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

INITIATOR | APPROVER
--- | ---
Job Data Change | Dept | Dept
Short Work Break | Dept | Dept
Additional Pay | Dept | Dept
  Recurring/Flat
Position Data | Dept | Dept
  PayPath Actions
Pay Rate Change | Dept | Dept

No stops in HR

Writes **DIRECTLY** to UCPath System
Data that lives on PayPath’s **POSITION** tab

See current Position Data here
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

Work Force Job Summary
Person Old Summary
Common PayPath Reason Codes - JOB DATA tab

- **Action:** PAY
  - Pay Rate Change

- **Action:** DTA
  - Data Change

<table>
<thead>
<tr>
<th>Action Reason Description</th>
<th>Action Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACR</td>
<td>Accretion to Bargaining Unit</td>
</tr>
<tr>
<td>ATB</td>
<td>Across-The-Board</td>
</tr>
<tr>
<td>DEM</td>
<td>Demotion</td>
</tr>
<tr>
<td>EQU</td>
<td>Equity</td>
</tr>
<tr>
<td>JRD</td>
<td>Job Reclass - Downward</td>
</tr>
<tr>
<td>JRL</td>
<td>Job Reclass - Lateral</td>
</tr>
<tr>
<td>JRU</td>
<td>Job Reclass - Upward</td>
</tr>
<tr>
<td>MER</td>
<td>Merit</td>
</tr>
<tr>
<td>MIN</td>
<td>Bring To Meet Minimum</td>
</tr>
<tr>
<td>PRO</td>
<td>Promotion/Academic Promotion</td>
</tr>
<tr>
<td>REF</td>
<td>Range Adjustment/Comp Refresh</td>
</tr>
<tr>
<td>STI</td>
<td>Step Increase/Progression</td>
</tr>
<tr>
<td>CAR</td>
<td>Limited to Career</td>
</tr>
<tr>
<td>COR</td>
<td>Correction - Non Pay Related</td>
</tr>
<tr>
<td>CPR</td>
<td>Correction-Pay Rate</td>
</tr>
<tr>
<td>CPT</td>
<td>Change in Percent Time (FTE)</td>
</tr>
<tr>
<td>ERI</td>
<td>Update ERIT End Date</td>
</tr>
<tr>
<td>EXP</td>
<td>Extend Expected Return Date</td>
</tr>
<tr>
<td>EXT</td>
<td>Add/Extend Appointment</td>
</tr>
<tr>
<td>LUE</td>
<td>Update Location Use End Date</td>
</tr>
<tr>
<td>PHR</td>
<td>Update Phased Retirement End Date</td>
</tr>
<tr>
<td>PRB</td>
<td>Update Probation Code/End Date</td>
</tr>
<tr>
<td>TMF</td>
<td>Update Auto Termination Flag</td>
</tr>
<tr>
<td>TRL</td>
<td>Update Trial Employment Date</td>
</tr>
</tbody>
</table>
Populating PayPath’s ADDITIONAL PAY tab

- Earnings Code: SAS
- Effective Date: 02/20/2019
- End Date: 03/31/2019
- Pay Period Amt: $652.50
- Applies To Pay Periods: First, Third

Effective Date: 01/01/2019
End Date: 03/31/2019
Pay Period Amt: $652.50
Goal Amount: Goal Balance: OK to Pay
Save and Submit PAYPATH Action

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 stops 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.

<table>
<thead>
<tr>
<th>Department: Internal Divisional Process</th>
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</thead>
<tbody>
<tr>
<td>FTE Approval</td>
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<tr>
<td>Budget Approval</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Compensation</th>
</tr>
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<tbody>
<tr>
<td>Job Description Approval</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Workforce Administration (WFA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Control Request Approval</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>BFS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Funding Questions</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receiving Hiring Requisition</td>
</tr>
<tr>
<td>Receiving Hiring Proposal</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>UCPath Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fulfilling Hiring Template</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>BFS</th>
</tr>
</thead>
<tbody>
<tr>
<td>I-9 Process</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Department: With New Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onboarding</td>
</tr>
</tbody>
</table>
Send Questions to: https://ucsb.service-now.com/hr
Position Funding & Pay Issues go to BFS: https://ucsb.service-now.com/payroll

Please use the appropriate **reference number**
when communicating with respective units.
Identify Records in Comp – WFA – Employment

**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)

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

- Full Hire
- Rehire
- Concurrent Hire
- Intralocation Transfer
- Interlocation Transfer
- Personal Data Change
- Termination
- Retirement
- Contingent Worker (CWR)
Walk the (UC)Path

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

Initiate Template at Point 10

Start Here
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.

* 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

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concurrent Hire - Dual Empl</td>
<td></td>
</tr>
<tr>
<td>Concurrent Hire - Non Dual Emp</td>
<td></td>
</tr>
<tr>
<td>Hire - No Prior UC Affiliation</td>
<td></td>
</tr>
<tr>
<td>Rehire, &lt; 120 days break</td>
<td></td>
</tr>
<tr>
<td>Rehire, &gt;= 120 Days Break</td>
<td></td>
</tr>
<tr>
<td>Rehire, fr Layoff-No Pref &lt;120</td>
<td></td>
</tr>
<tr>
<td>Rehire, fr Layoff-NoPref &gt;=120</td>
<td></td>
</tr>
<tr>
<td>Rehire, from Layoff-Pref &lt; 120</td>
<td></td>
</tr>
<tr>
<td>Rehire, from Layoff-Pref &gt;=120</td>
<td></td>
</tr>
<tr>
<td>Rehire: Retired Retiree</td>
<td></td>
</tr>
<tr>
<td>Rehire: Reinstatement</td>
<td></td>
</tr>
<tr>
<td>Rehire: Retirement Suspended</td>
<td></td>
</tr>
<tr>
<td>Rehire: Staff Recall &lt; 120</td>
<td></td>
</tr>
<tr>
<td>Rehire: Staff Recall &gt;= 120</td>
<td></td>
</tr>
<tr>
<td>Transfer-Inter BU, Demotion</td>
<td></td>
</tr>
<tr>
<td>Transfer-Inter BU, Lateral</td>
<td></td>
</tr>
<tr>
<td>Transfer-Inter BU, Promotion</td>
<td></td>
</tr>
<tr>
<td>Transfer-Inter BU, Undefined</td>
<td></td>
</tr>
<tr>
<td>With Prior UC Affiliation</td>
<td></td>
</tr>
</tbody>
</table>

### 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

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.

After the Position Number is entered, many of the other fields default and are view-only.
Salary Plan & Grade are on the Job Data Tab

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

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
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
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.

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

Human Resources, Administrative Services Division
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**

<table>
<thead>
<tr>
<th>Template</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC_ADD_CWR</td>
<td>Add Contingent Worker - No Position Data</td>
</tr>
<tr>
<td>UC_ADD_CWR_POSN</td>
<td>Add Contingent Worker With Position</td>
</tr>
<tr>
<td>UC_CONC_HIRE</td>
<td>Complete Contingent Worker Instance</td>
</tr>
<tr>
<td>UC_CONC_HIRE_AL</td>
<td>Academic Concurrent Hire/Inter Location Transfer</td>
</tr>
<tr>
<td>UC_EXT_CWR</td>
<td>Extend CWR Appointment</td>
</tr>
<tr>
<td>UC_EXT_CWR_POSN</td>
<td>Extend CWR (with Position) Appointment</td>
</tr>
<tr>
<td>UC_FULL_HIRE</td>
<td>Full Hire - Staff Only</td>
</tr>
<tr>
<td>UC_VOL_TERM</td>
<td>Voluntary Termination</td>
</tr>
<tr>
<td>UC_REHIRE</td>
<td>Rehire - Staff Only</td>
</tr>
<tr>
<td>UC_REHIRE_AL</td>
<td>Rehire - Academic</td>
</tr>
<tr>
<td>UC_REHIRE_REI</td>
<td>Rehire Reinstatement - For Staff Appointments</td>
</tr>
<tr>
<td>UC_REHIRE_REI_AL</td>
<td>Rehire Reinstatement - For Academic Appointments</td>
</tr>
<tr>
<td>UC_RENEW_CWR</td>
<td>Renew Contingent Worker - Without Position</td>
</tr>
<tr>
<td>UC_RENEW_CWR_POS</td>
<td>Renew CWR Instance - with Position</td>
</tr>
<tr>
<td>UC_TRANSF</td>
<td>Intra-Business Unit Transfer - Staff Only</td>
</tr>
<tr>
<td>UC_VOL_TERM</td>
<td>Voluntary Termination</td>
</tr>
</tbody>
</table>

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.

Select the correct Employment Record Number
Entering Termination Transaction Information

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

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

“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**.

There is only one Reason Code for the retirement template.

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.
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.
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](https://ucsb.service-now.com/payroll)

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

1. **Job Code**
   auto-populates Union Code, etc.

2. **Job Description** determines some fields on hiring template

3. **HR Website / Compensation** links to Salary Scales or TCS:
   https://www.hr.ucsb.edu/compensation/salary-scales
Resources for Template Fields

Job Descriptions determine some Position and Job Data fields

Position Data

Job Data

Question & Answer
Question & Answer

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

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

Welcome
Position Management & Workforce Administration

WELCOME
The Position Management and Workforce Administration Unit provides campus with UCPATH transactional support and training. Our goal is to provide campus with outstanding service while building user confidence in UCPATH. We help campus manage the life cycle of a Staff employee at UCSB. Including: Position Management, Training, Technical Guidance, UCPATH Troubleshooting, Mass Hires, Mass PayPath Actions, Service Credit Review/Milestones, and Reporting.

Functional User Resources
Within UCPATH, use the "Help" link to find support documentation in the UCPATH Help site specific to the page you are working on. For all UCPATH inquiries please follow the controls listed below. This information can also be found under the Contact section of the UCPATH website.

Quick Reference Navigation:
- Employee & Manager Self-Service Actions
- Quick Reference Navigation
- Where Can I Find Help Regarding UCPATH?

Access Support Documentation

Resources are updated on a regular basis. Therefore, we recommend saving the file that has been loaded and saved to your computer or a shared drive. If you find that the information you’re looking for is in one of the categories below, you can also search for system in the UCPATH help box.
Help and Resources

Ask Staff WFA Questions

UCSB HR Staff-specific Guidelines and Processes

Video Demos from UCOP (UPK)

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

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

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

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

Academic Personnel UCPaTH Team
AP-Path@UCSB.edu

E-mail questions re: Faculty and ASE

Find Job Aids, Handouts, Support Documents

Submit an Inquiry to UCPC or Search UCPaTH Help Library

Ask UCPaTH
Ask UCPaTH Center
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?

- HANDOUT 1: Functional User Resources
- HANDOUT 2: Recommended Bookmarks
- HANDOUT 7: Required Position Fields
**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
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.
JOB AIDS, created by UCOP, are sorted by topic and provide printable step-by-step instructions for many processes in UCPaht.

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

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.
Instructions are embedded in the Job Data Update form

**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.
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
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.
STAFF Full Hire Reason Codes

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.
Which optional fields do I fill out and how?
Tracking Department Submissions

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

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

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

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

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

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

- 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.
Help and Resources

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