UCPath Training Refresher

LTSC

Human Resources, Administrative Services Division
# 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](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](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

<table>
<thead>
<tr>
<th>Position Data</th>
<th>Job Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMPLOYEE NAME</td>
<td>SUPERVISOR'S PAYROLL TITLE</td>
</tr>
<tr>
<td>EMPLOYEE ID</td>
<td>EMPLOYEE'S FORMER PAYROLL TITLE</td>
</tr>
<tr>
<td>NEW HIRE START DATE</td>
<td>NAME OF PREVIOUS INCUMBENT</td>
</tr>
<tr>
<td>PERCENT OF TIME</td>
<td>HR APPROVED ACTION</td>
</tr>
<tr>
<td>CBU</td>
<td>TEMP BEG DATE</td>
</tr>
<tr>
<td>DEPARTMENT/ DIVISION</td>
<td>TEMP END DATE</td>
</tr>
<tr>
<td>WORK LOCATION</td>
<td>LTD APPT BEGIN DATE</td>
</tr>
<tr>
<td>NAME OF DEPARTMENT HEAD</td>
<td>LTD APPT END DATE</td>
</tr>
<tr>
<td>NAME OF Previous INCUMBENT</td>
<td>END DATE (OTHER)</td>
</tr>
</tbody>
</table>

SPECIAL CONDITIONS OF EMPLOYMENT:
The above 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 30 lbs.
Align Position Data with Job Description

Approved Job Description

Determines

WFA’s Position fields

• 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
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

THE POSITION

Add comments to position administrator here.
# Required Data on the POSITION

## Required Fields on Position by Tab

<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>
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<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  APPROVER

Request a new Position
Dept WFA

Update a vacant Position
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
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

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

1. **Compensation** Approves JD
2. **Reviews Position Control Request**
3. **Hiring Proposal based on Approved JD**
4. **Hiring Requisition based on Position Number**
5. **Approves, assigns Position Number, and adds to JD**

Employment follows this process and waits 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

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

- New Hire
  - Initiator: Dept
  - Approver: Dept

- Re-Hire
  - Concurrent Hire
  - Initiator: Dept
  - Approver: Dept

- Voluntary Terminations & Retirement
  - Initiator: Dept
  - Approver: Dept

- Involuntary Terminations
  - Initiator: Dept
  - Approver: Dept

- Personal Data Changes
  - Initiator: Dept
  - Approver: Dept

- Add/Renew Contingent Worker
  - Initiator: Dept
  - Approver: 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

Human Resources, Administrative Services Division
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

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**Position Data**

- **Effective Date:** 07/31/2017
- **Effective Sequence:** 0
- **Current Effective Date:** 10/17/2016
- **Current Eff Sequence:** 0

**Position Number:** 40000157
- **Business Units:** UC Office of President
- **Department:** 805600
- **Location Code:** FRANKLIN
- **Job Code:** 065883
- **Union Code:** 99
- **Reports To Position Number:** 40000003
- **FLSA Status:** Exempt
- **Salary Administration Plan:** CTOF

**Establishment ID:** UCOP

**Salary Grade:** 23

**FTE:** 1.000000

**Employee Class:** Staff: Career

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**Pay Components**

- **Rate Code:** UCANNL
- **Comp Rate:** 94,163.016003

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**UC Job Data**

- **ERIT/Phased Retirement End D:** 11
- **Probation Code:** None
- **Location Use End Date:** 35
- **Probation End Date:** 35

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**Earnings Distribution**

**Comp Rate:** 7,846.917500

**Standard Hours:** 40.00

**Pay Frequency:** Monthly

---

**Work Force Job Summary**

**Person Org Summary**
Common PayPath Reason Codes - JOB DATA tab

Look Up Action Reason

Search Results

View 100  First  1-12 of 12  Last

Action Reason Description
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
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

Action: PAY
Pay Rate Change

Action: DTA
Data Change
Populating PayPath’s **ADDITIONAL PAY** tab

**New Additional Pay**
- **Earnings Code:** SAS
- **Effective Date:** 02/20/2019

**Current Additional Pay**
- **Effective Date:** 01/01/2019
- **End Date:** 03/31/2019
- **Pay Period Amt:** $652.50
- **Goal Amount:**
- **Goal Balance:**
- **Applies To Pay Periods:**
  - First
  - Second
  - Third

*Stipend-Admin-Staff*
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.

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<tr>
<th>Department: Internal Divisional Process</th>
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<tbody>
<tr>
<td>FTE Approval</td>
<td>Budget Approval</td>
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<table>
<thead>
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<th>Compensation</th>
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<td>Job Description Approval</td>
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<table>
<thead>
<tr>
<th>Workforce Administration (WFA)</th>
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<tbody>
<tr>
<td>Position Control Request Approval</td>
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<table>
<thead>
<tr>
<th>BFS</th>
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<tr>
<td>Position Funding Questions</td>
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</table>

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

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

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

<table>
<thead>
<tr>
<th>Department: With New Employee Onboarding</th>
</tr>
</thead>
</table>

Human Resources, Administrative Services Division
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

Start Here

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

Initiate Template at Point 10
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
- First time hiring former staff employee as an academic
- Hiring someone from another UC campus or medical center
- First time hiring a former academic employee as staff
Hiring Template Considerations
To Help Avoid Template Cancellation

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
Expected Job End Date Staff

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

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

<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>
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<tr>
<td>UC_FULL_HIRE</td>
<td>Full Hire - Staff Only</td>
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<td>UC_FULL_HIRE_AC</td>
<td>Full Hire - Academic Use Only</td>
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<tr>
<td>UC_REHIRE_REL_AC</td>
<td>Rehire Reinstatement - For Academic Appointments</td>
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<td>UC_RENY_CWR</td>
<td>Renew Contingent Worker - Without Position</td>
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<td>UC_RENY_CWR_POSN</td>
<td>Renew CWR Instance - with Position</td>
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<td>UC_TRANSFER_AC</td>
<td>Intra-Business Unit Transfer - Academic Only</td>
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<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

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.
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.”

When complete, click Save and Submit.

Update the Last Date Worked if needed and enter a Comment.
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.
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*. 
Key Take-Away from Part 2 (see more in Part 1)

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 ....
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
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?
Where Do I Go For Help?

**Question & 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

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**Human Resources, Administrative Services Division**
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.

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

Human Resources, Administrative Services Division

UC SANTA BARBARA
Human Resources, Administrative Services Division

Job Data Update and Position Update Forms

Position Update Forms
Correct history

Job Data Update Forms
Correct history
Update Pay Group

Question & Answer

Human Resources

- Dual Employment
- Interlocation Transfer Request - Benefits (UCPC UFIN301A)
- Interlocation Transfer Request - Final Balances (UCPC UFIN301B)
- Job Data Update
- Multilocation Agreement
- Position Update
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](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.
Job Data Update Form Instructions

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.

Human Resources, Administrative Services Division
Job Data 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
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.
Help Avoid Template Cancellation

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?

Login to UCPath
Tracking Department Submissions

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

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

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**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

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Human Resources, Administrative Services Division

UC SANTA BARBARA
What is Short Work Break

**Question & Answer**

- 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.
### Key Pay Processing Dates

#### Data Due

<table>
<thead>
<tr>
<th>Pay Cycle</th>
<th>Check Date</th>
<th>Pay Period Dates</th>
<th>Run ID Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>MO</td>
<td>Wed 02-19</td>
<td>12-01-19 to 12-31-19</td>
<td>13122120</td>
</tr>
<tr>
<td>B1</td>
<td>Wed 02-05</td>
<td>12-01-19 to 12-31-19</td>
<td>13122120</td>
</tr>
<tr>
<td>B2</td>
<td>Wed 02-02</td>
<td>12-01-19 to 12-31-19</td>
<td>13122120</td>
</tr>
<tr>
<td>MO</td>
<td>Fri 02-22</td>
<td>01-01-19 to 01-31-19</td>
<td>13012120</td>
</tr>
</tbody>
</table>

#### Corrections Due

<table>
<thead>
<tr>
<th>Location</th>
<th>Campus</th>
<th>Med Center Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Confirm</td>
<td>X Pay Confirm</td>
<td>GL Pay Confirm</td>
</tr>
<tr>
<td>GL Pay Confirm</td>
<td>GL Pay Confirm</td>
<td>Pay Statements on UCPath</td>
</tr>
</tbody>
</table>

#### 2019 UCPath Production Processing Schedule

- PayPath
- Mass Hire
- HR template
- Leave
- Transaction
- Union Enrollment (2pm)
- Retro Pay (4pm)

- Inbound Files Due
- FICA
- Inbound Files Due
- Migr Error Log Distribution
- Location Corrections
- To Migr Error Log
- Location Corrections
- To Migr Error Log Distribution

- Location Corrections
- To Migr Error Log
- Location Corrections
- To Migr Error Log Distribution

- Pay Confirm
- X Pay Confirm
- GL Pay Confirm
- Pay Statements on UCPath
- Leave Accrual Available on UCPath (After 5pm)

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**Question & Answer**

**View Paycheck**
Help and Resources

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