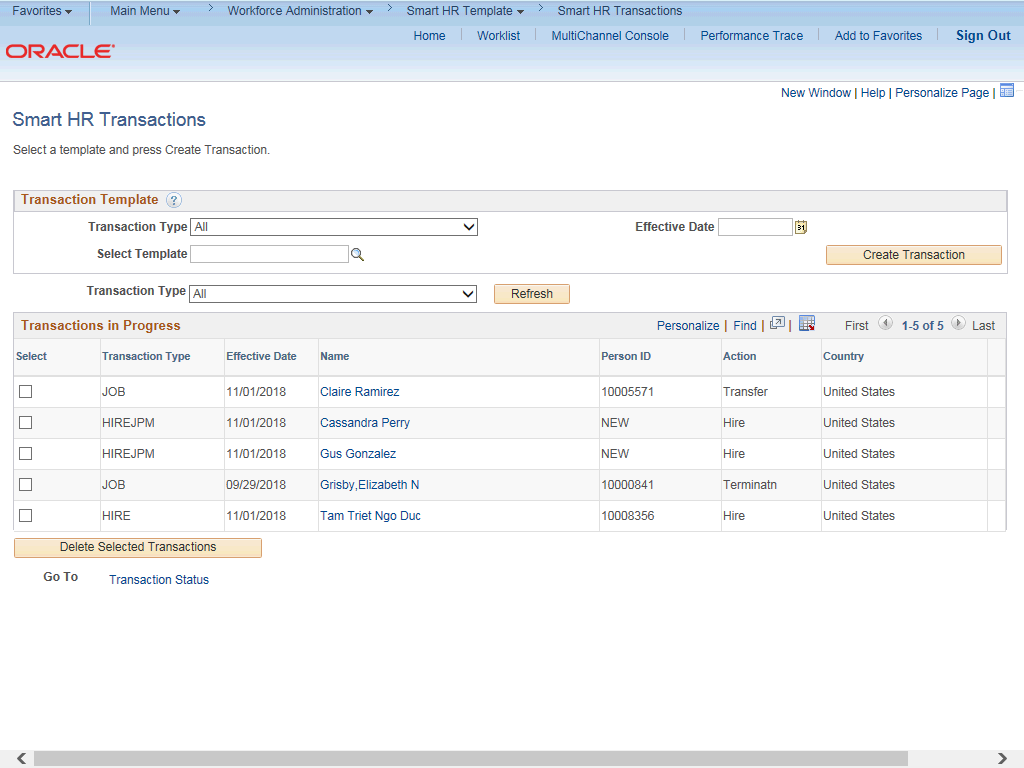
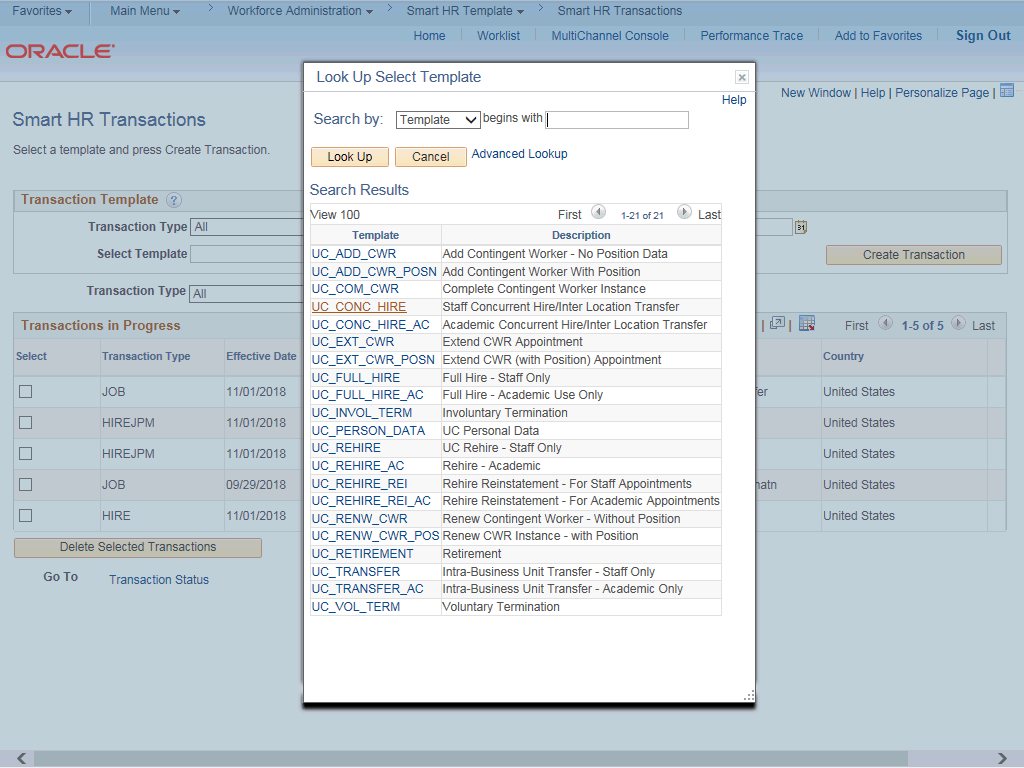
Use this task to initiate a concurrent hire template transaction for a staff employee.

**Navigation:** PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

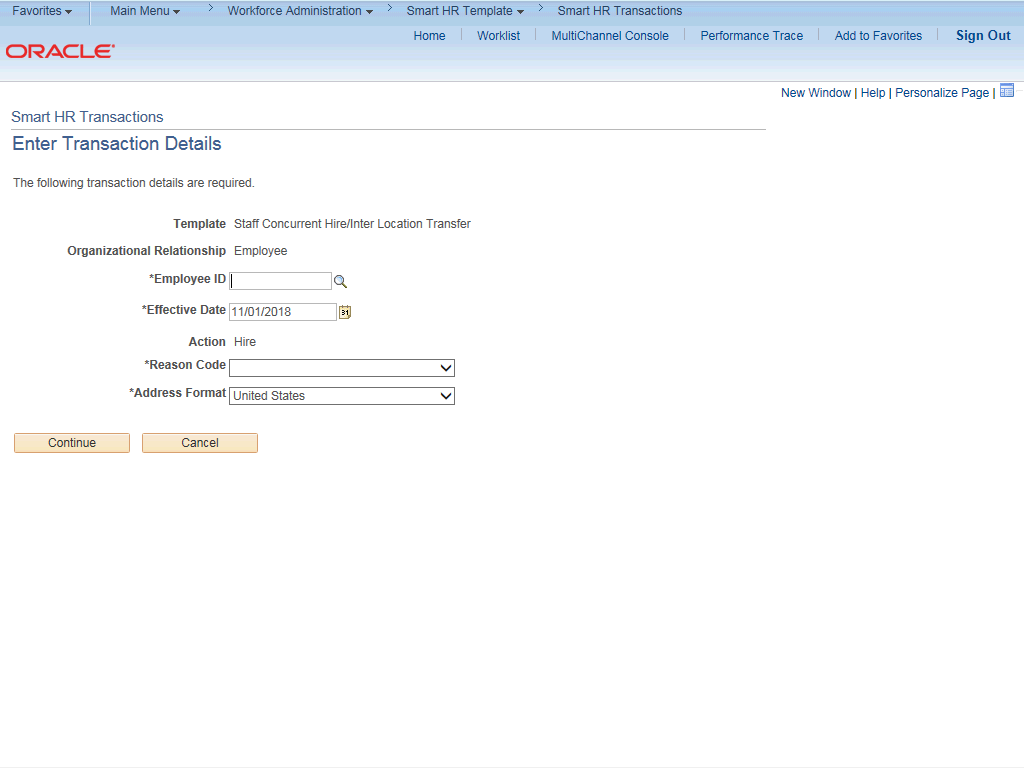
**Note:** This page also may be available in **Workcenter** depending on your security access.



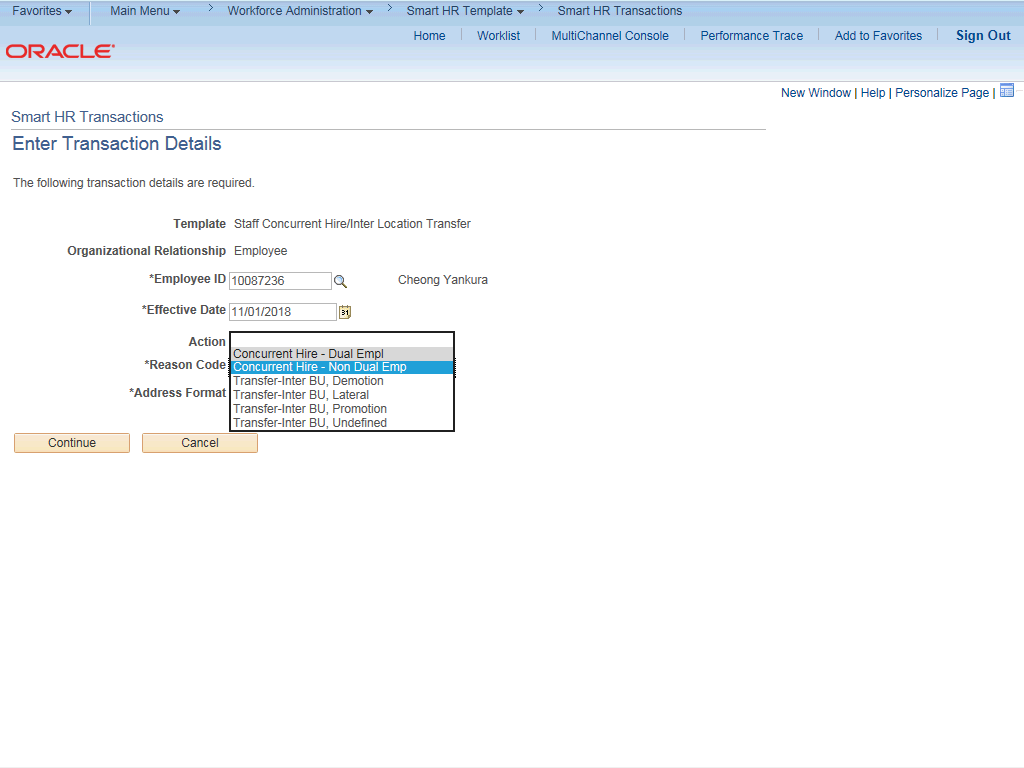
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| **Step** | **Action** |
| 1. | Use the **Smart HR Transactions** page to initiate a concurrent hire template transaction. |
| 2. | Click the **Look up Select Template** button.  **Note:** The **Transaction Type** field is not used by UC. |



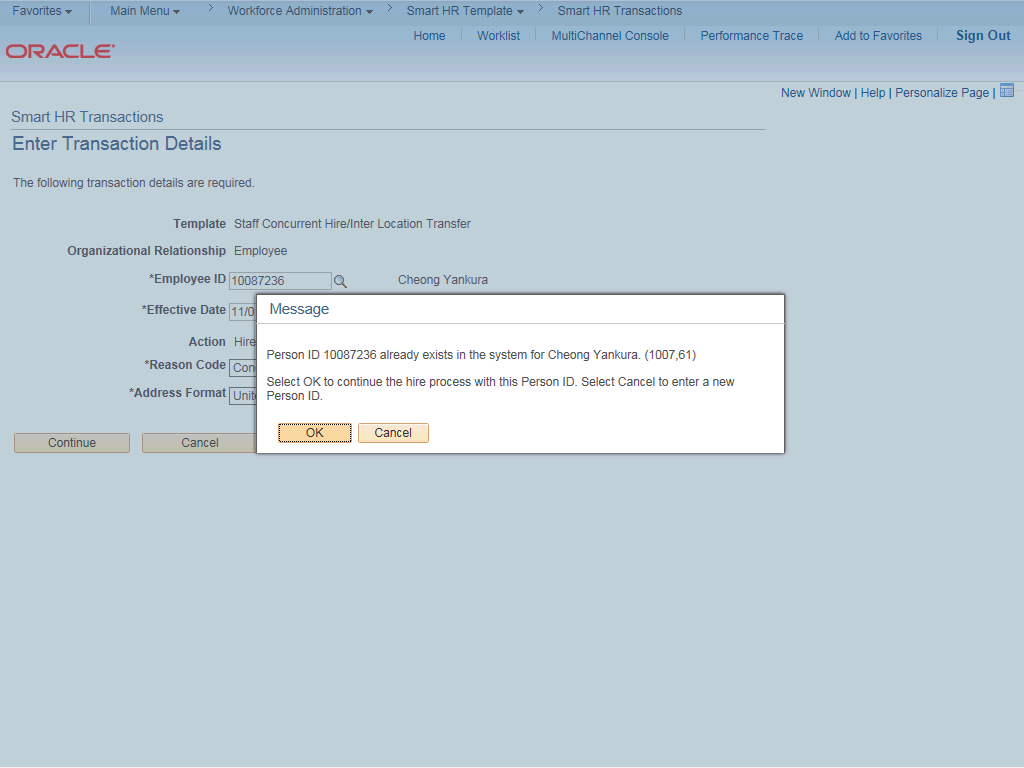
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| **Step** | **Action** |
| 3. | Select the appropriate concurrent hire template. Notice there are two concurrent hire templates, one for staff and one for academic.  Click the **UC\_CONC\_HIRE** list item. |
| 4. | Click in the **Effective Date** field. |
| 5. | The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. You can update the **Effective Date** on the **Enter Transaction Details** page if needed.  Enter the desired information into the **Effective Date** field. |
| 6. | Click the **Create Transaction** button. |



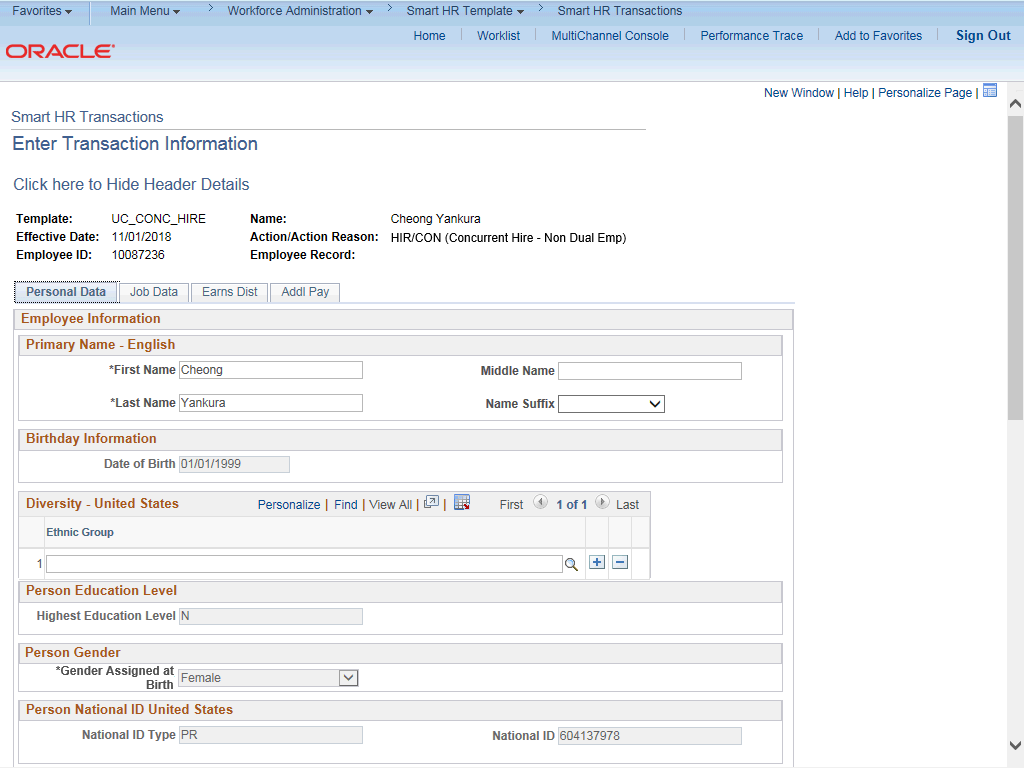
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| **Step** | **Action** |
| 7. | In the **Employee ID** field, enter the employee’s ID number or use the lookup to search for and select it.  Click in the **Employee ID** field. |
| 8. | Enter the desired information into the **Employee ID** field. |
| 9. | The **Effective Date** is populated based on your entry on the previous page. Ensure that you entered the correct **Effective Date**. |
| 10. | Click the button to the right of the **Reason Code** field. |



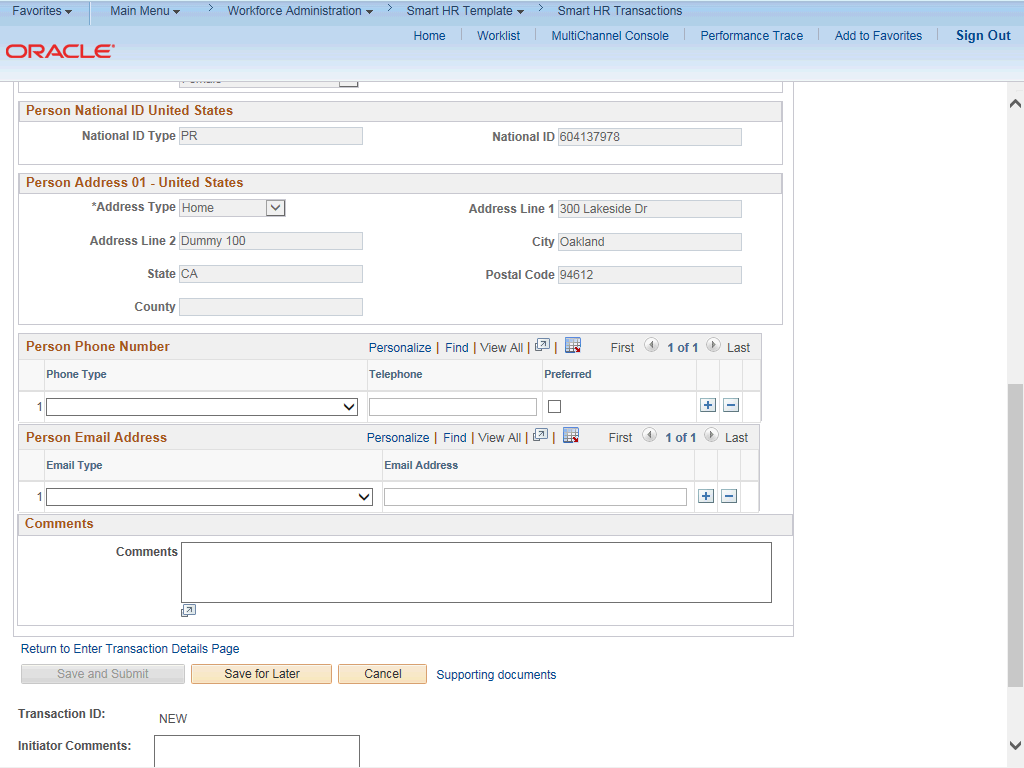
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| **Step** | **Action** |
| 11. | Select the appropriate **Reason Code**.  **Dual Employment:** Two or more jobs that exceed a total percent time of 100%. **Non-Dual Employment:** Two or more jobs that do not exceed a total percent time of 100%.  For this example, click the **Concurrent Hire - Non Dual Empl** list item. |
| 12. | In the **Address Format** field, accept the default of **United States** or select the  **Global** option, if applicable. |
| 13. | Click the **Continue** button. |



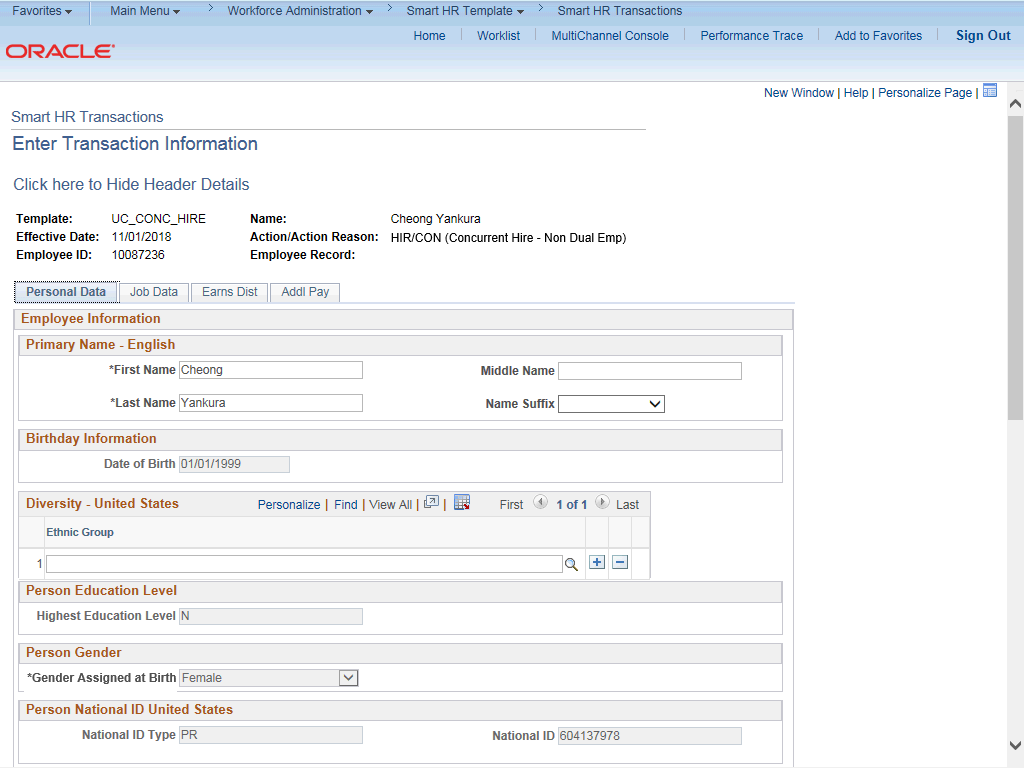
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| **Step** | **Action** |
| 14. | UCPath displays a message indicating the individual already exists in the system.  Verify that the displayed employee ID and name correspond with the individual you are hiring into a concurrent job.  Click the **OK** button. |



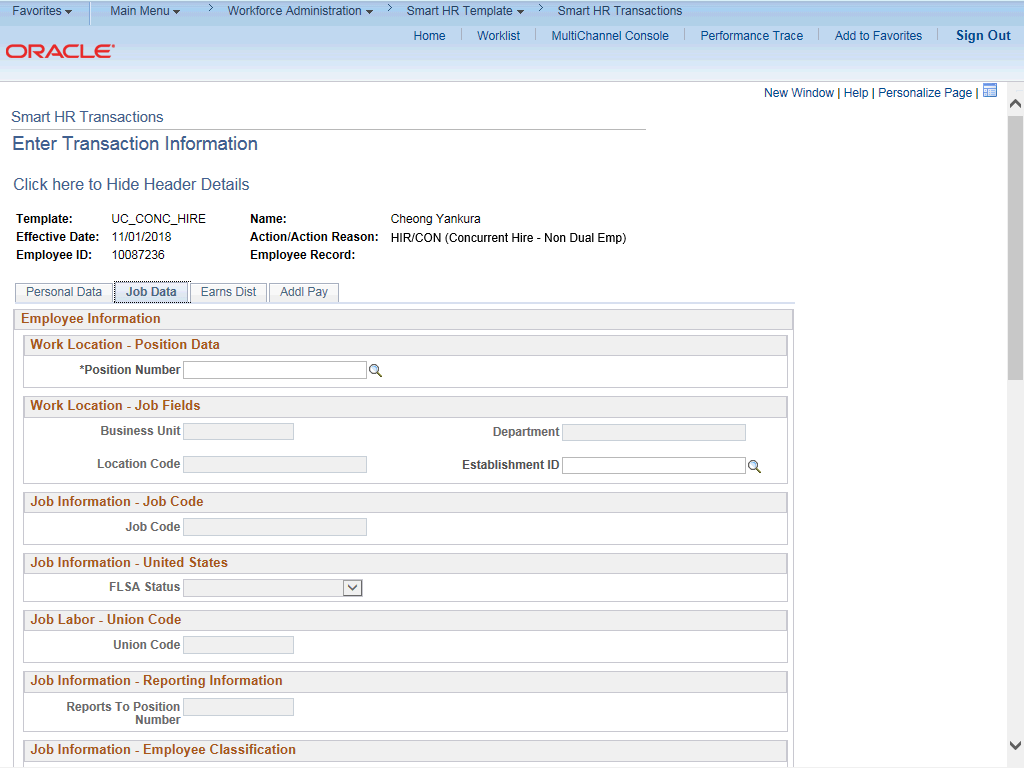
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| **Step** | **Action** |
| 15. | The concurrent hire template appears. Four tabs are available on this template:  **Personal Data**, **Job Data**, **Earns Dist** and **Addl Pay**.  The employee's personal data automatically populates from the employee's existing personal data information. If a change is required for personal data, it should be submitted using Employee Self Service or the **Personal Data Change Template**. |
| 16. | Header details appear above the tabs. You can show/hide the header information as needed. |
| 17. | Click the scroll bar. |



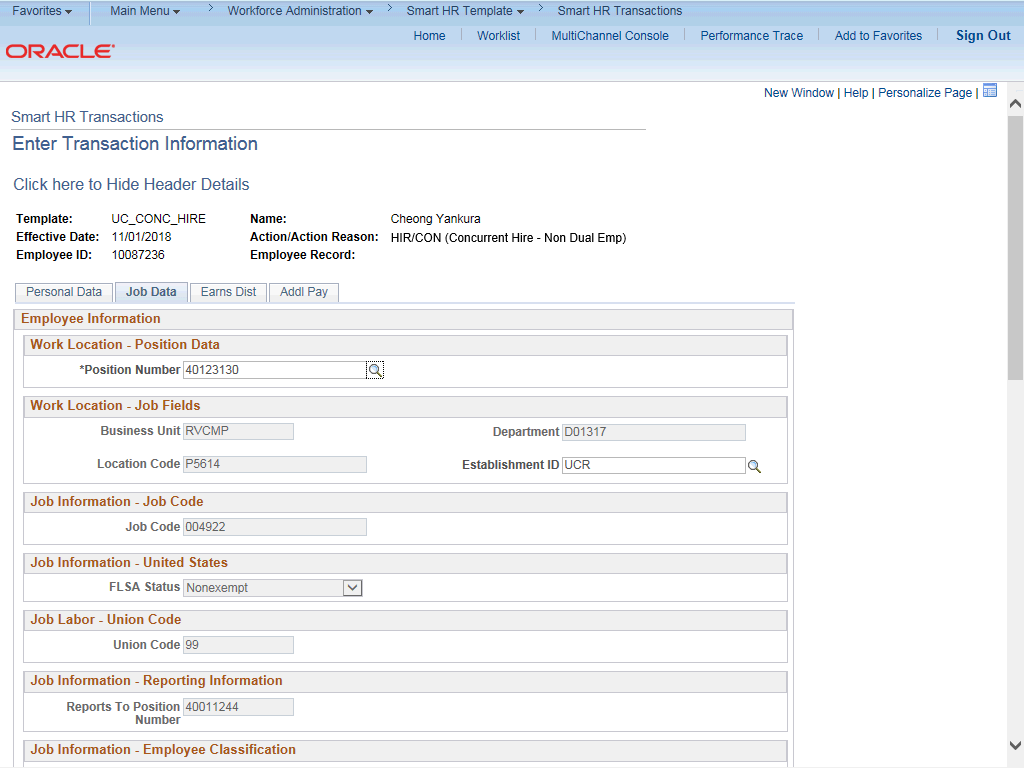
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| **Step** | **Action** |
| 18. | Use the **Comments** field to enter specific details or an explanation regarding the transaction. For example, this field can be used to:   * Enter comments to have UCPC WFA Production override the **Pay Group** on the new concurrent job to align with the existing job. (However, if the existing job's pay group needs to be overridden to align with the job on the template, you need to submit an inquiry.) * Indicate that the employee lives and works outside the US. For these employees, UCPC WFA Production will add the **NRA Working Outside the US** citizenship status on the **Identification Data** page.   This field is referenced by UCPC WFA Production to assist with the processing of the transaction. |
| 19. | Click the scroll bar. |



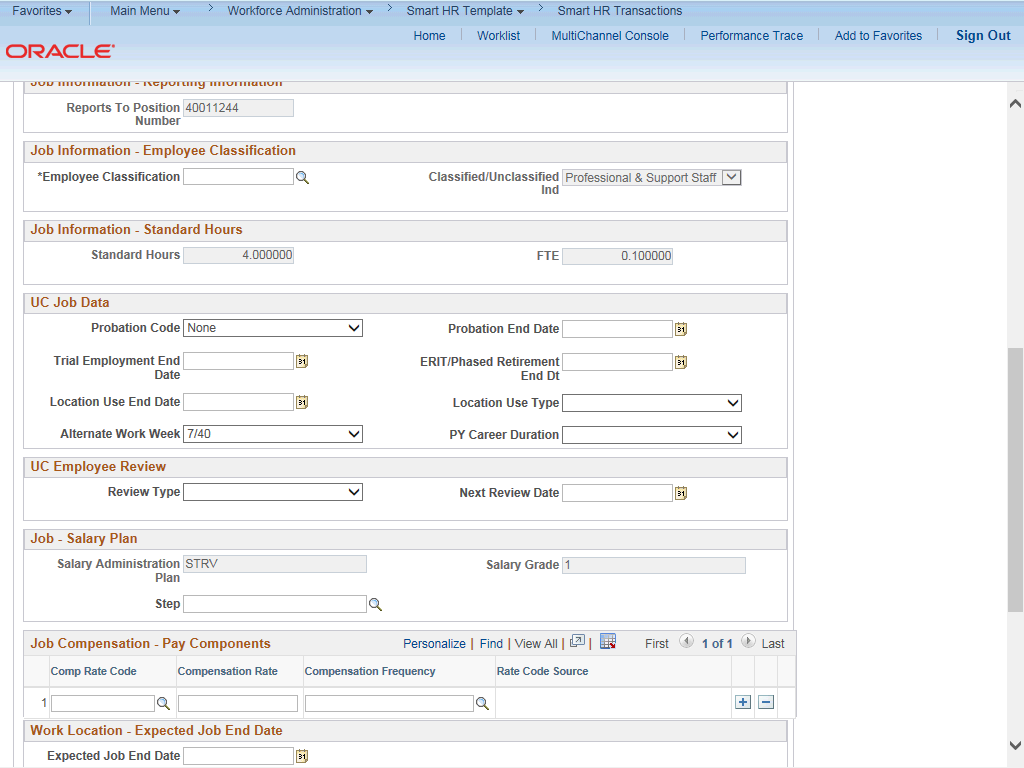
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| **Step** | **Action** |
| 20. | Click the **Job Data** tab. |



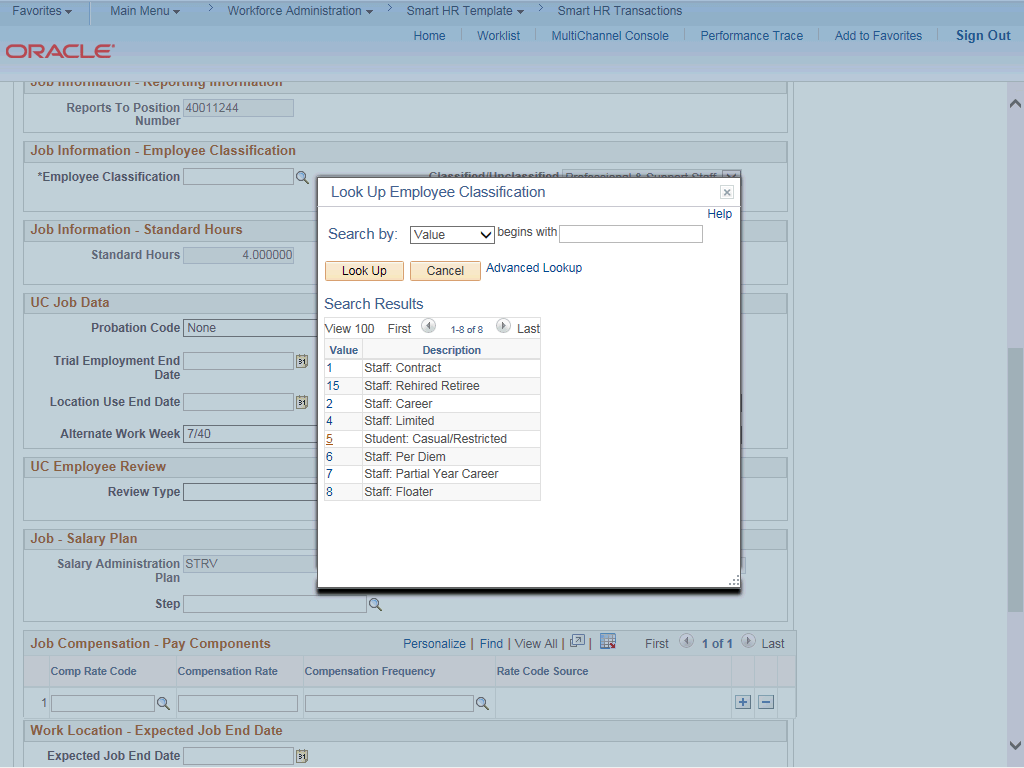
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| **Step** | **Action** |
| 21. | Enter the position number of the concurrent job or search for it using the look up. You only have access to position numbers within your business unit or related business unit.  Click in the **Position Number** field. |
| 22. | Enter the desired information into the **Position Number** field. |
| 23. | Press **[Tab]** to automatically populate the position-related fields. |



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| **Step** | **Action** |
| 24. | Click the scroll bar. |

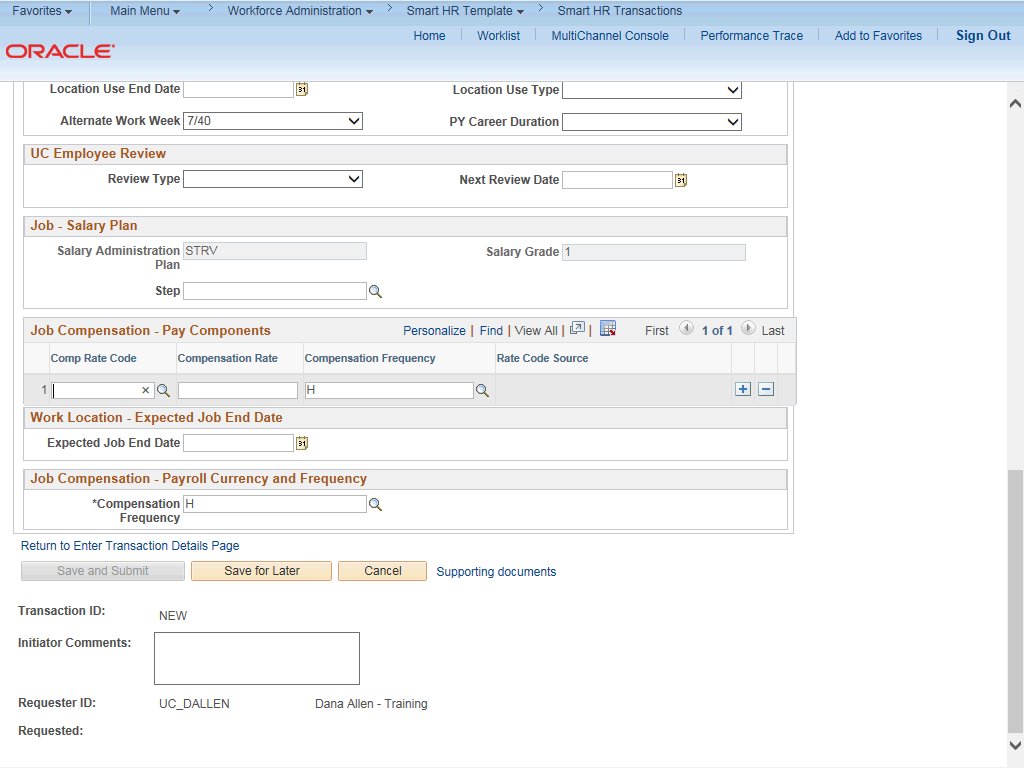


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| **Step** | **Action** |
| 25. | For staff hires, the **Employee Classification** field must be entered. Click the **Look up Employee Classification** button. |

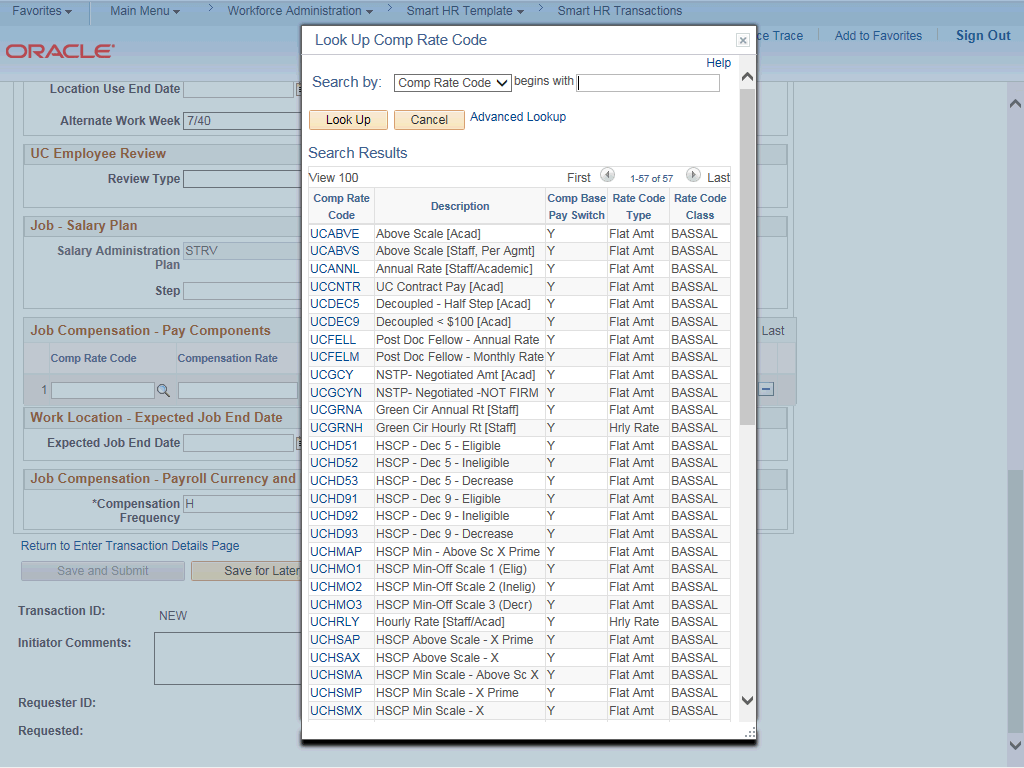


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| **Step** | **Action** |
| 26. | Select the appropriate **Employee Classification**.  For this example, click the **5** (**Student: Casual/Restricted**) list item. |
| 27. | In the **UC Job Data** section, enter or select the appropriate values as applicable.  The **Probation Code** field is required if:   * the **Classified/Unclassified Ind** field is **Professional and Support Staff**, and * the **Employee Class** is **Career** or **Partial Year Career**.   The **Probation Date** field is required if the **Probation Code** field value is something other than **Completed** or **Probation Completed, Other Job**. |

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| **Step** | **Action** |
| 28. | Some job codes have steps associated with them. When a **Step** is entered, UCPath automatically updates the **Job Compensation - Pay Components** fields and the compensation information cannot be changed. Use caution when selecting the appropriate step value. For some jobs, there are half steps, so be sure to use the **Look up** icon and review the **Hourly Rate** to ensure you are selecting the correct step value.  Some job codes do not have steps associated with them, in which case the **Job Compensation - Pay Components** fields must be manually entered.  If the job has above scale component of pay, then step does not need to be selected. Enter applicable above scale comp rate codes in the **Job Compensation - Pay Components** section. |
| 29. | Click the scroll bar. |

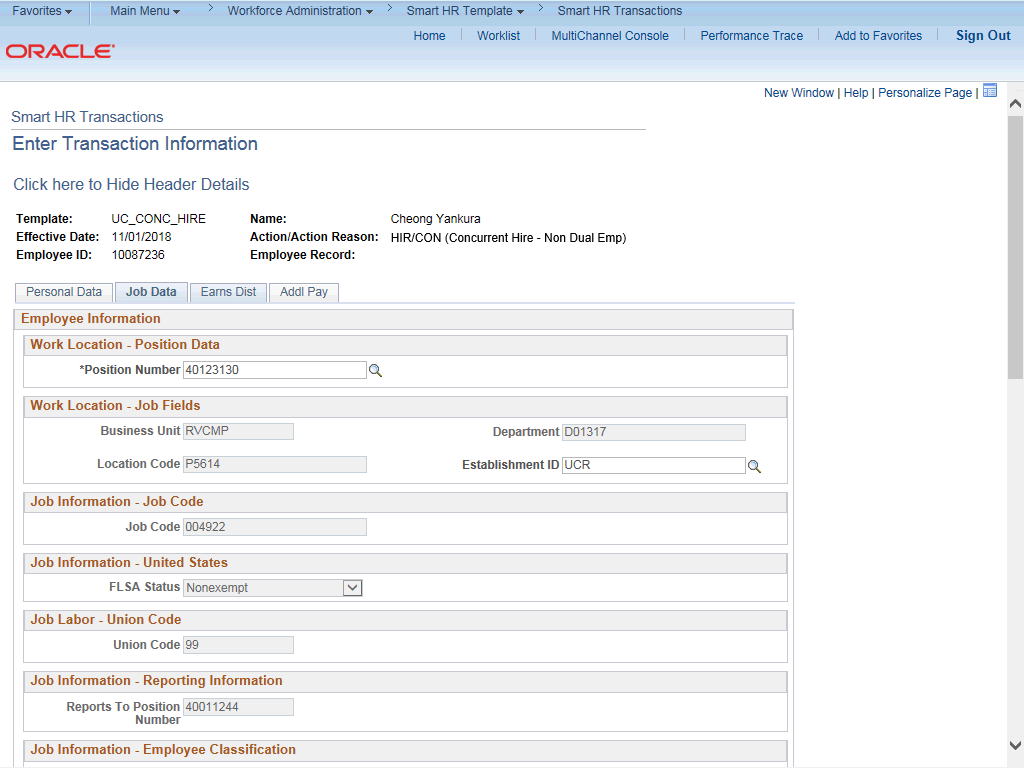


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| **Step** | **Action** |
| 30. | For this example, the job code is not associated with steps so the compensation fields must be entered manually.  Click the **Look up Comp Rate Code** button. |

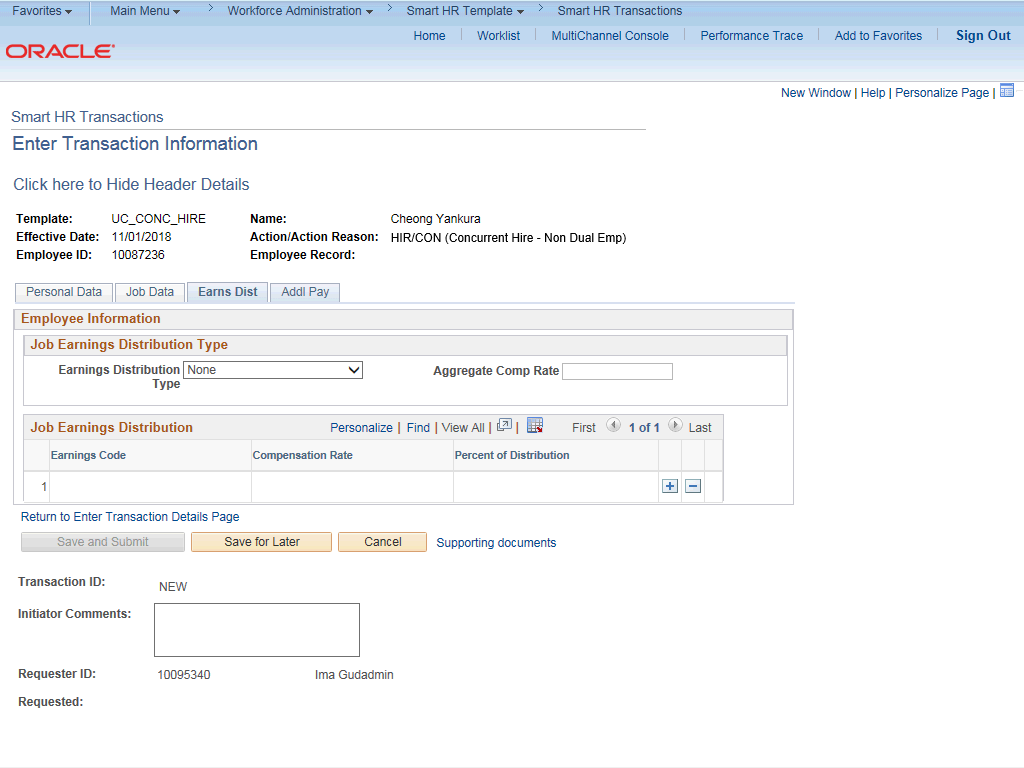


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| **Step** | **Action** |
| 31. | Select the appropriate **Comp Rate Code** value. For this example, select the **UCHRLY** list item. |
| 32. | Click in the **Compensation Rate** field. |
| 33. | Enter the desired information into the **Compensation Rate** field. |
| 34. | If the employment is a short term assignment or temporary hire, enter the date the position ends in the **Expected Job End Date** field. Non-Academic employees are automatically terminated in UCPath on this date.  An **Expected Job End Date** is required for following employee classes:  **1** - Contract   1. - Limited 2. - Casual/Restricted 3. - Per Diem (If applicable)   **8** - Floater  **15** - Staff - Rehired Retiree |
| 35. | Click in the **Expected Job End Date** field. |

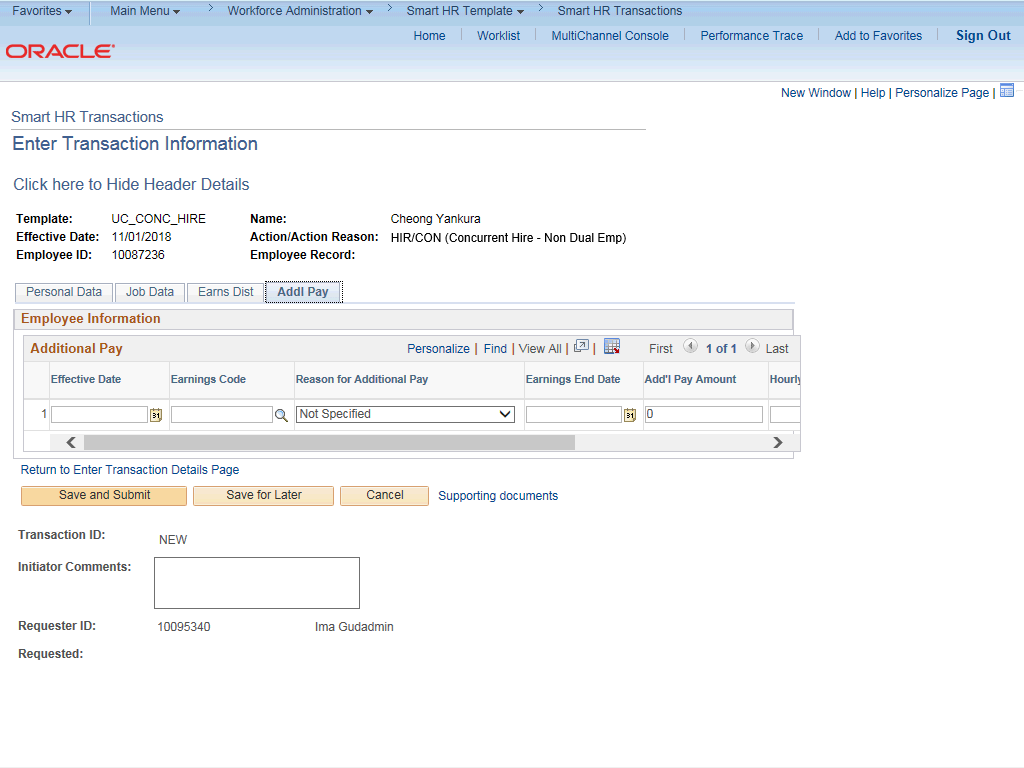
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| **Step** | **Action** |
| 36. | Enter the desired information into the **Expected Job End Date** field. |
| 37. | The payroll-related **Compensation Frequency** field automatically populates based on the job code. This field defines how the total compensation is paid out to the employee per paycheck. |
| 38. | Click the scroll bar. |



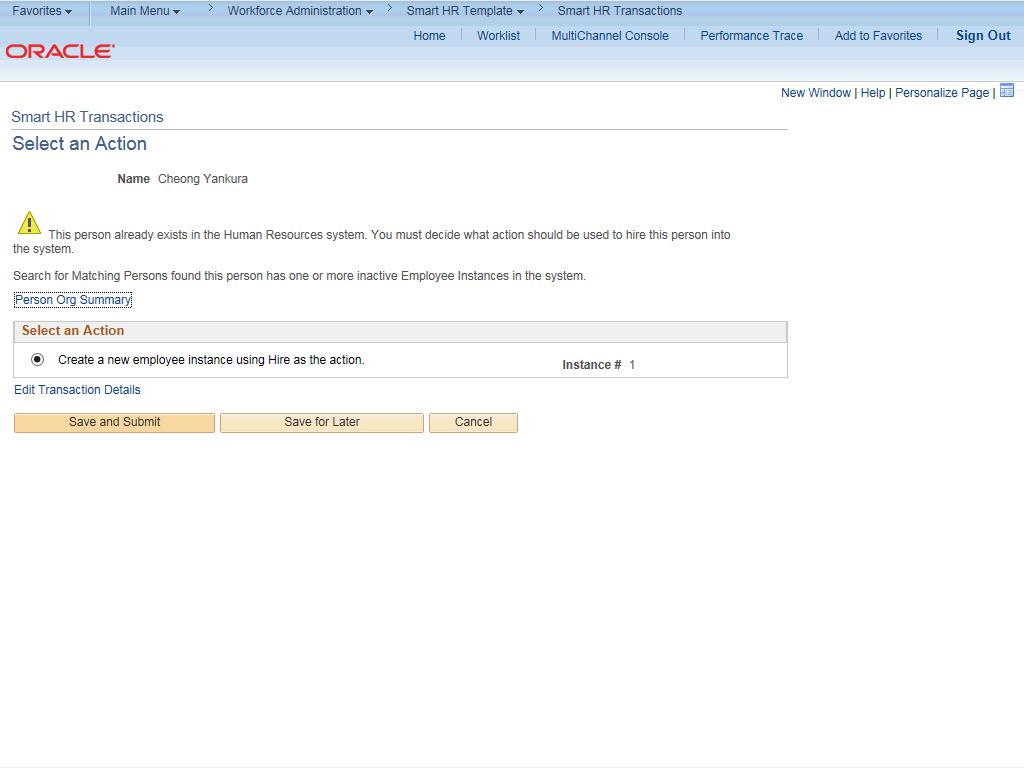
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| **Step** | **Action** |
| 39. | Click the **Earns Dist** tab. |



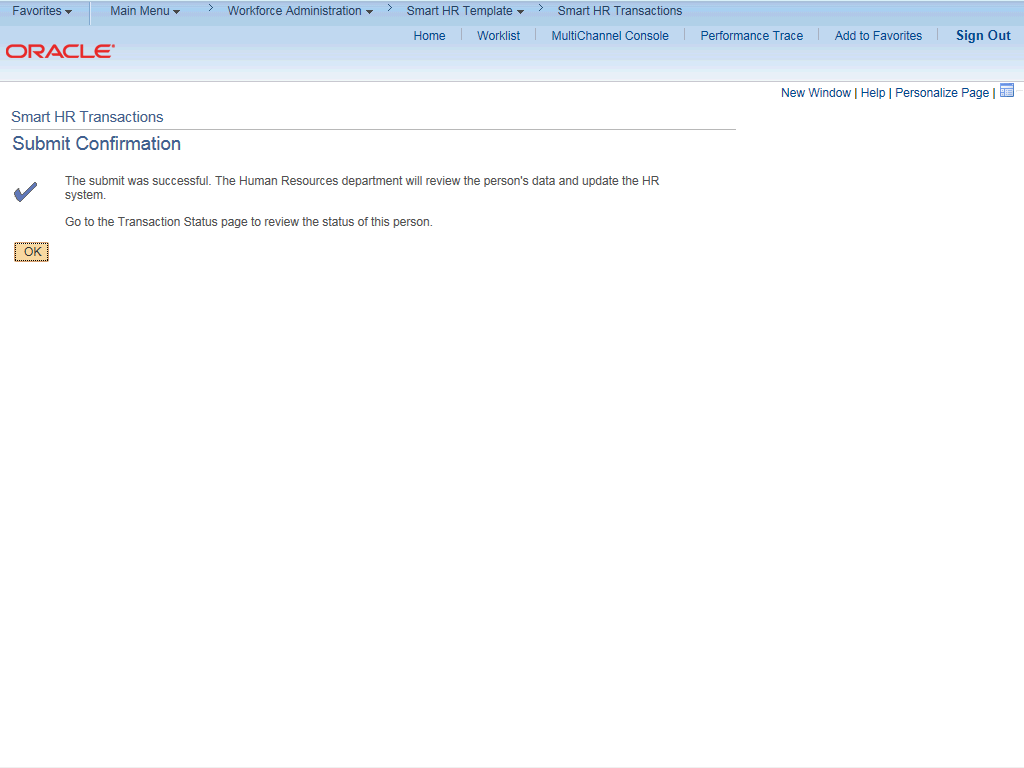
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| **Step** | **Action** |
| 40. | In most cases, the **Job Earnings Distribution** section is automated. If the **Comp Rate** code entered on the **Job Data** tab has a mapped **Earnings Code**, the **Job Earnings Distribution** section is updated automatically. |
| 41. | The **Job Earnings Distribution** section also can be used to manually enter distribution information. Use the **Earnings Distribution Type** field to enter distribution **By Amount** or **By Percent**. After the **Earnings Distribution Type** is selected, the **Aggregate Comp Rate** field is populated with the monthly amount.   * If **By Amount** is selected, the total of all compensation rates entered must add up to the monthly comp rate. * If **By Percent** is selected, the total of all percentages entered must add up to 100%. |
| 42. | Click the **Addl Pay** tab. |



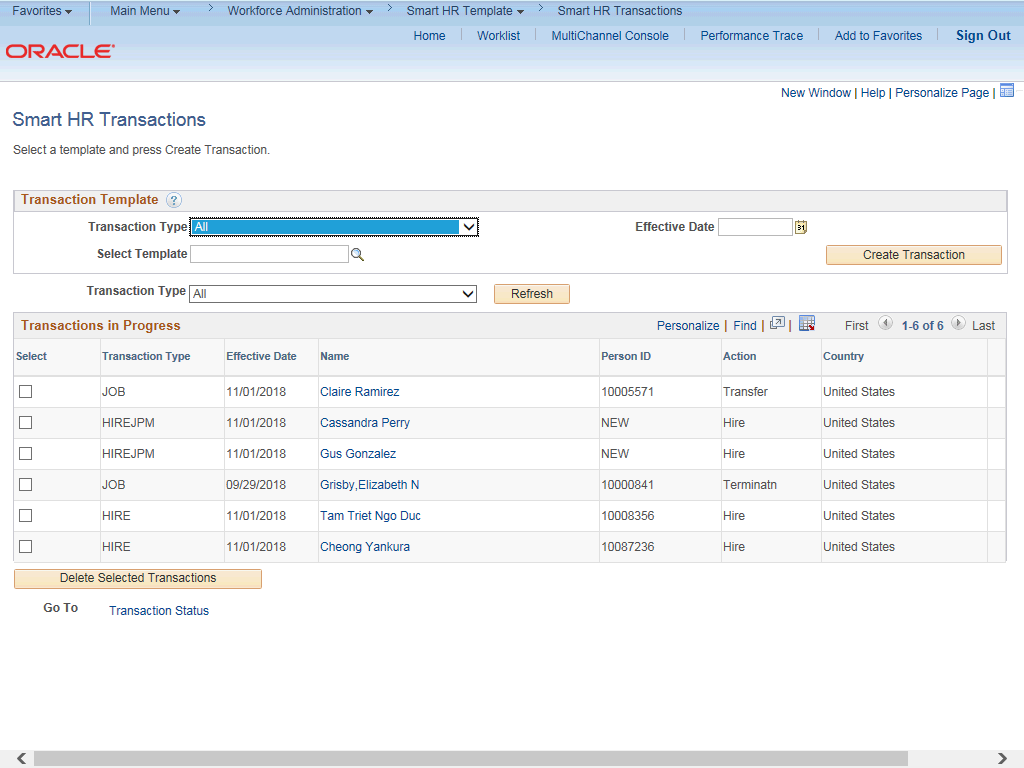
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| **Step** | **Action** |
| 43. | There may be cases where an employee is paid a recurring flat amount. In this case, the compensation section is not populated on the **Job Data** tab. Instead, the **Additional Pay** section is used.  There also may be cases where neither compensation rate nor additional pay is entered. In those cases, it is recommended that you enter a comment that explains how the employee will be paid.  It is recommended not to use this template for one time additional pay. Instead, use payroll's one time payments page. |
| 44. | Use the **Supporting documents** link to attach supporting documents for the concurrent hire. |
| 45. | Enter comments for the Approver in the **Initiator Comments** field.  Comments you enter here appear only with the request; they do not appear on the employee’s record after the transaction is processed to completion. You can enter **Initiator Comments** on any of the tabs within this template. |
| 46. | The **Save and Submit** button is not available until all required fields on each tab are completed.  Click the **Save and Submit** button. |



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| **Step** | **Action** |
| 47. | Click the **Save and Submit** button. |



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| **Step** | **Action** |
| 48. | Click the **OK** button. |



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| **Step** | **Action** |
| 49. | The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed. |
| 50. | You have initiated a concurrent hire template transaction.  **End of Procedure.** |