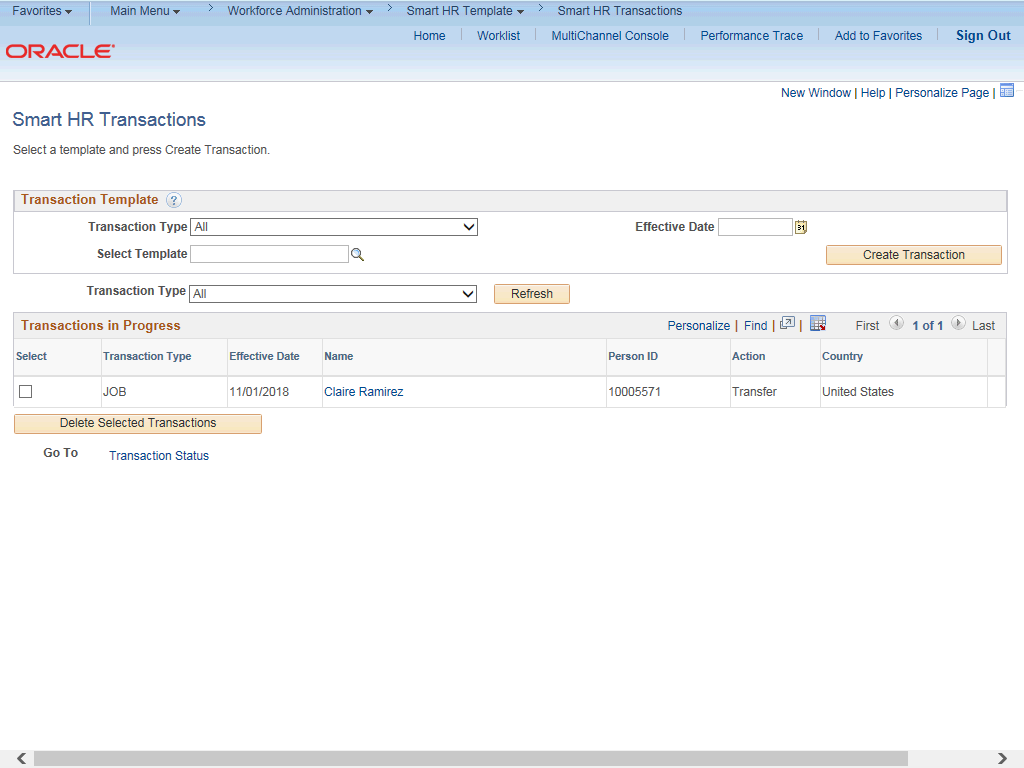
Use this task to initiate a full hire template transaction for a staff employee.

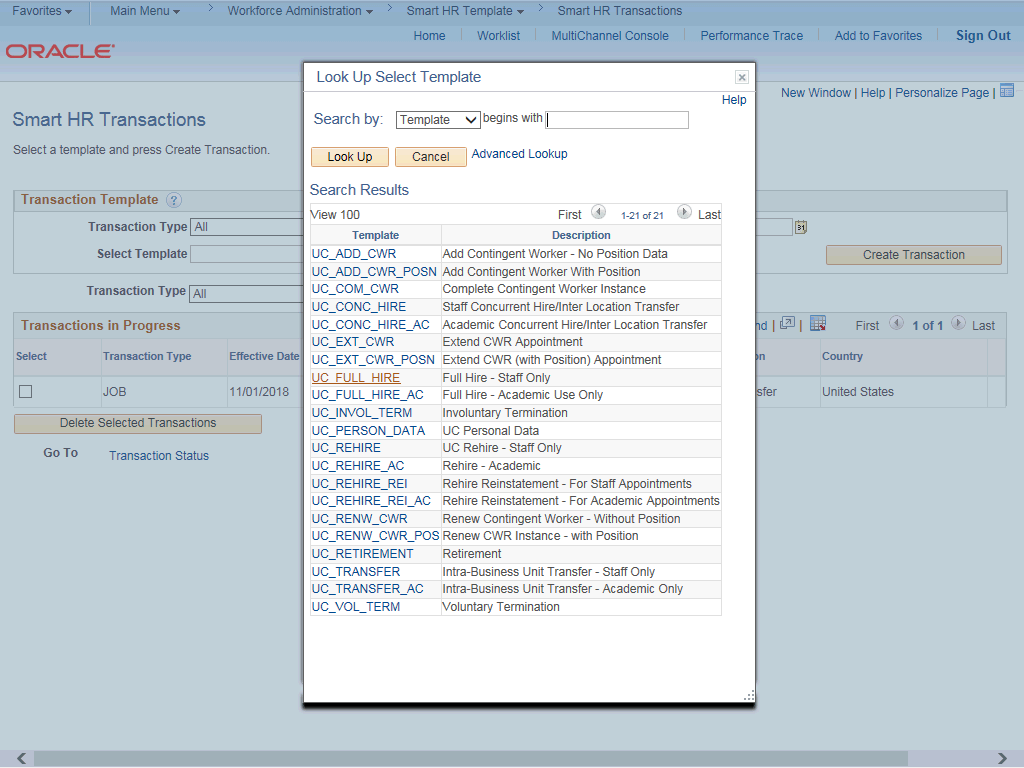
**Navigation:** PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

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

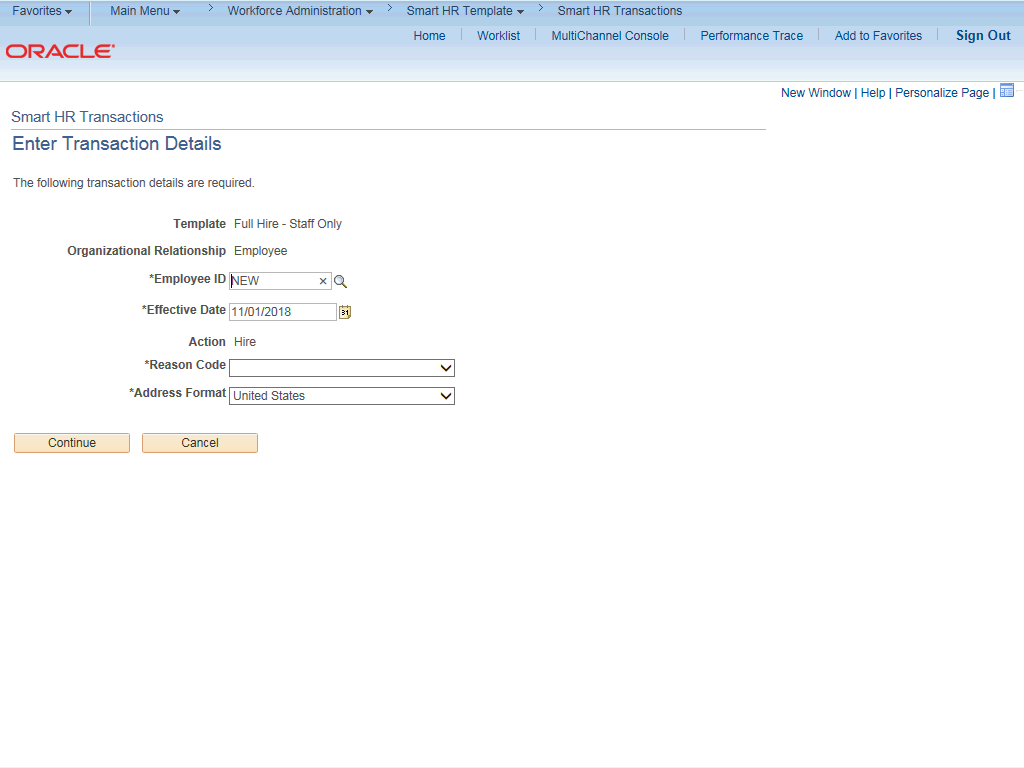
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| **Step** | **Action** |
| 1. | Use the **Smart HR Transactions** page to initiate a full hire template transaction. |



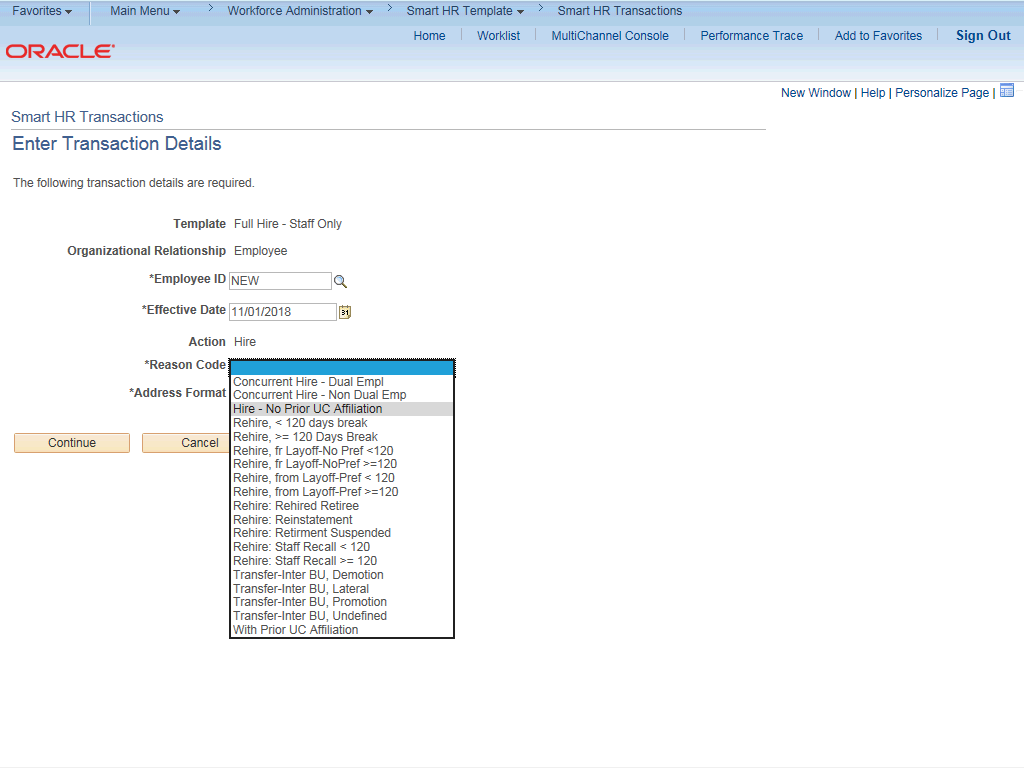
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| **Step** | **Action** |
| 2. | Click the **Look Up Select Template** button.  **Note:** The **Transaction Type** field is not used by UC. |



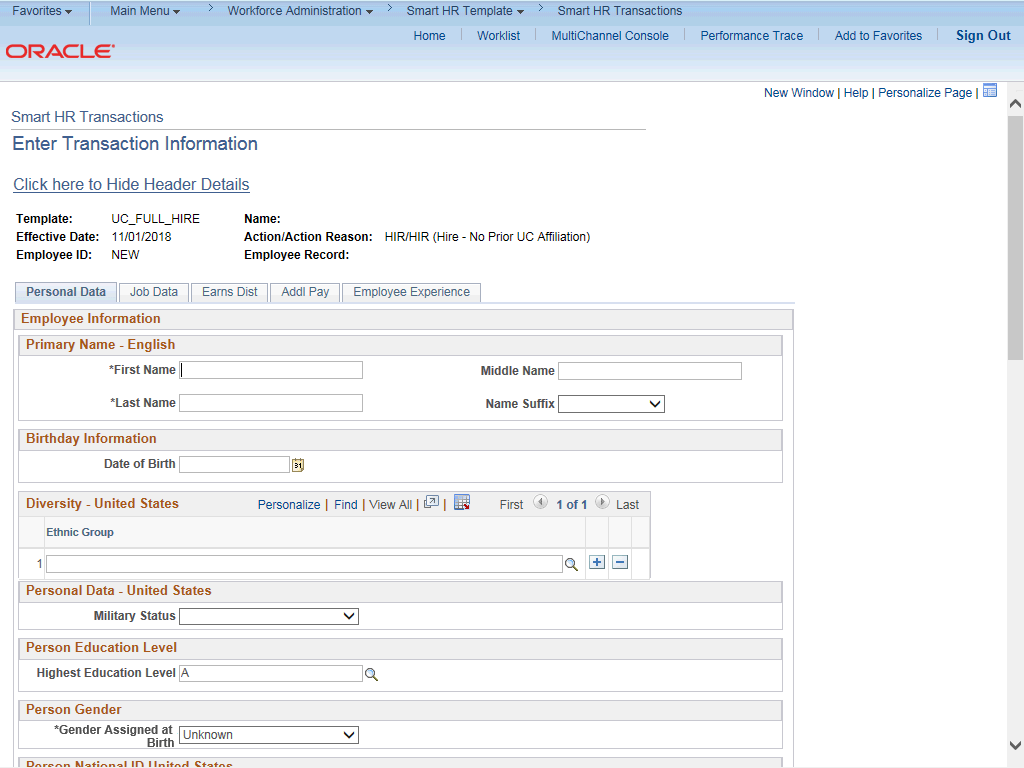
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| **Step** | **Action** |
| 3. | Select the appropriate full hire template. Notice there are two full hire templates, one for staff and one for academic.  Click the **UC\_FULL\_HIRE** list item. |
| 4. | Click in the **Effective Date** field. |
| 5. | 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, accept the default value of **NEW**.  After UCPC WFA Production processes the full hire template, the system automatically generates the next sequential UC Employee ID number for the employee. |
| 8. | The **Effective Date** is populated based on your entry on the previous page. Ensure that you entered the correct hire date or the date the employee begins the job.  For this example, accept the default. |
| 9. | Click the button to the right of the **Reason Code** field. |

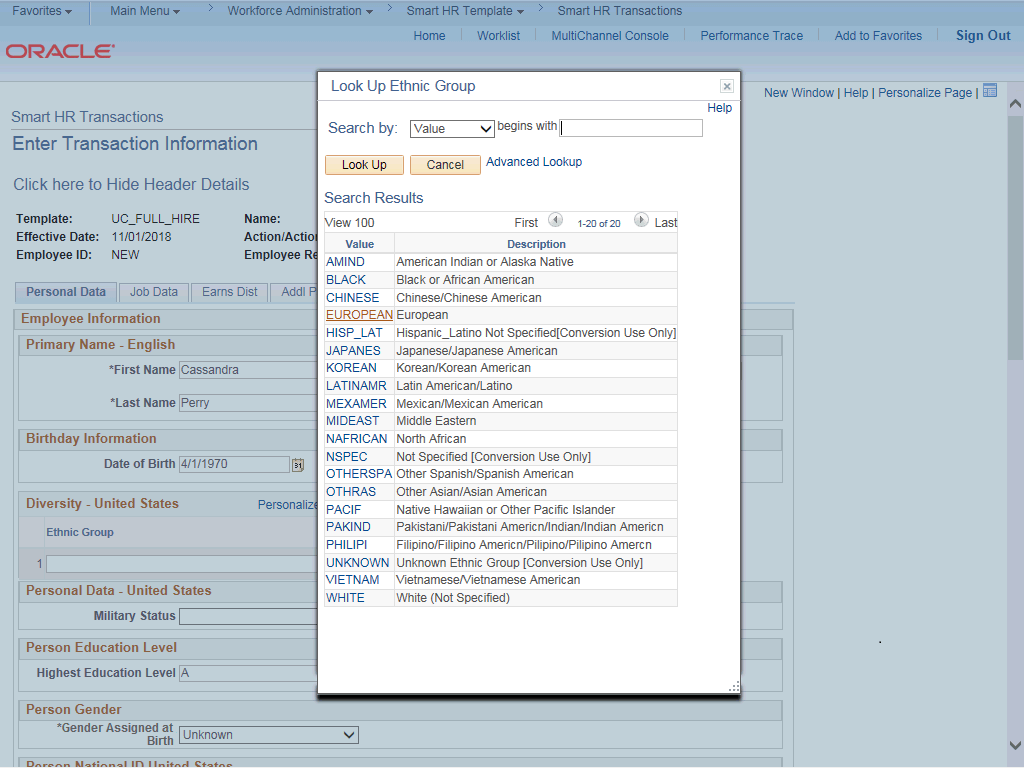


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| **Step** | **Action** |
| 10. | Select the appropriate **Reason Code**.  For this example, click the **Hire - No Prior UC Affiliation** list item. |
| 11. | In the **Address Format** field, accept the default of **United States** or select the  **Global** option, if applicable. |
| 12. | Click the **Continue** button. |

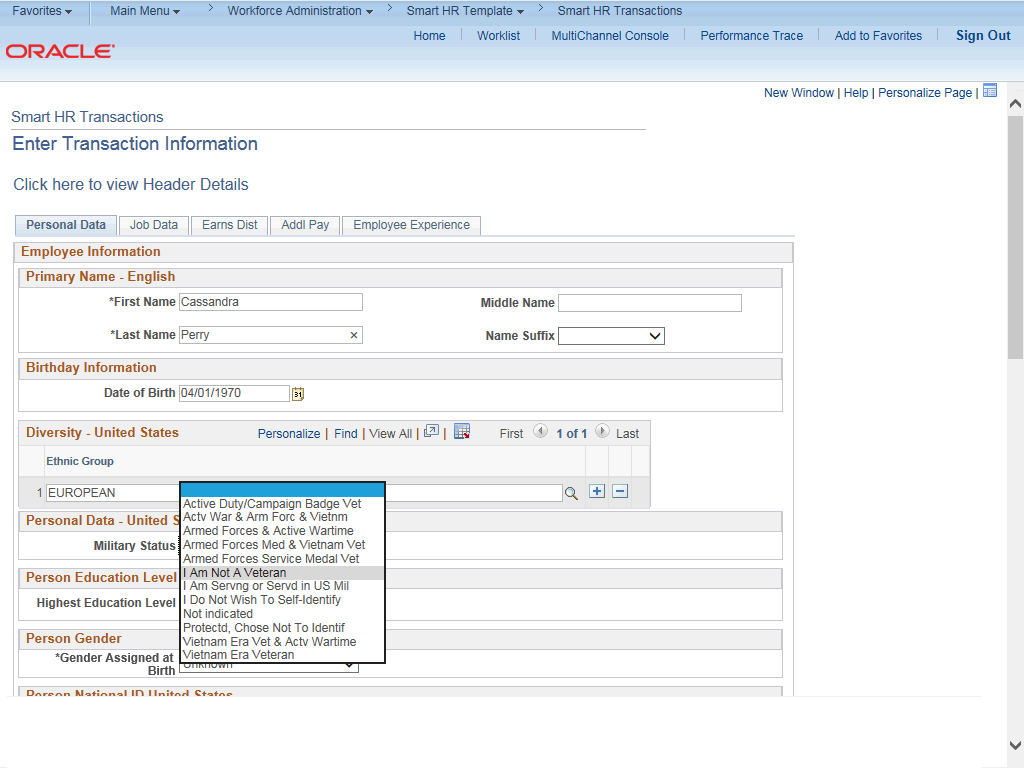


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| **Step** | **Action** |
| 13. | The full hire template appears. There are five tabs on this template: **Personal Data**, **Job Data**, **Earns Dist**, **Addl Pay** and **Employee Experience**. Fields that are required by the system are indicated with an asterisk **\***. |
| 14. | For this example, click the **Click here to Hide Header Details** link to hide the header details. |
| 15. | Click in the **First Name** field. |
| 16. | Enter the desired information into the **First Name** field. |
| 17. | Click in the **Last Name** field. |
| 18. | Enter the desired information into the **Last Name** field. |
| 19. | The **Date of Birth** is required if the **Effective Date** of the template is prior to the current date. The **Date of Birth** is not required if the **Effective Date** of the template is on or after to the current date.  Click in the **Date of Birth** field. |

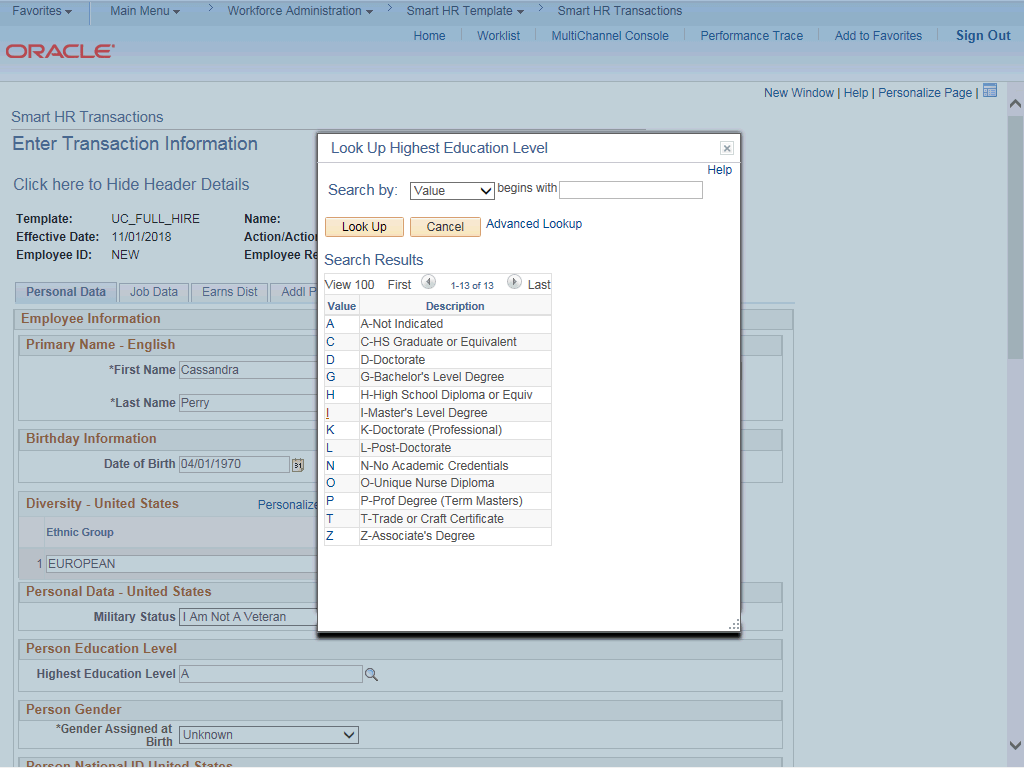
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| **Step** | **Action** |
| 20. | Enter the desired information into the **Date of Birth** field. |
| 21. | Click the **Look up Ethnic Group** button. |



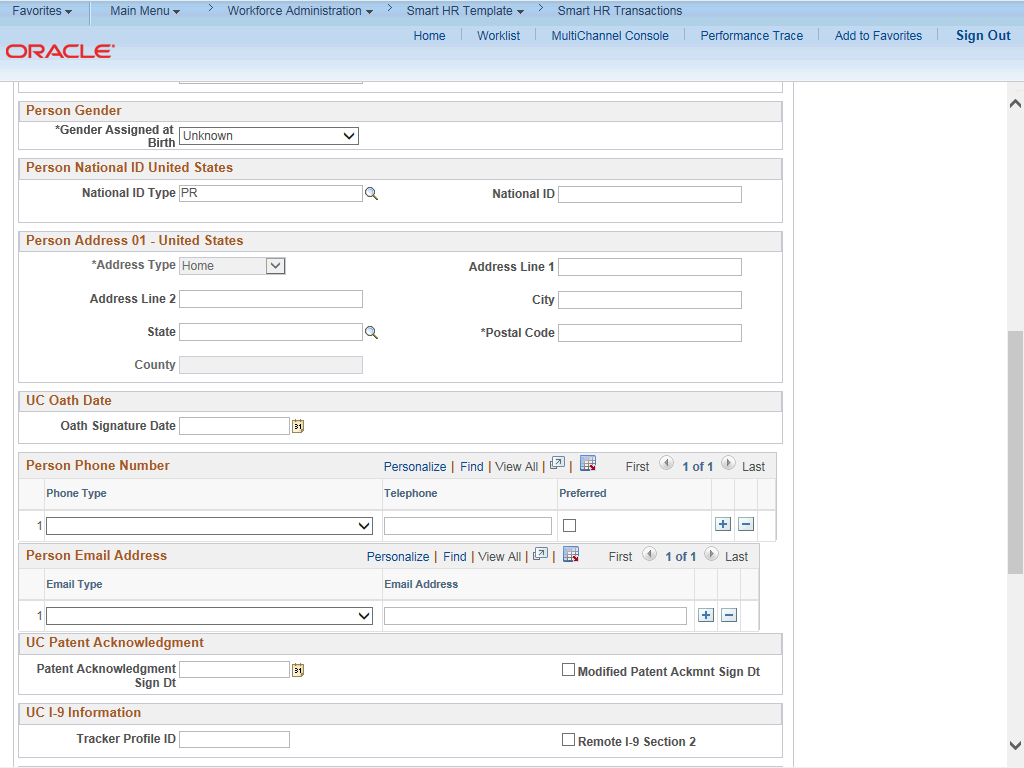
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| **Step** | **Action** |
| 22. | Select the appropriate ethnicity. |
| 23. | If the individual identifies with more than one ethnic group, click the **Add a row**  button and enter the additional ethnic group. |
| 24. | Select the appropriate **Military Status**, if known, or leave the field blank. Click the button to the right of the **Military Status** field. |



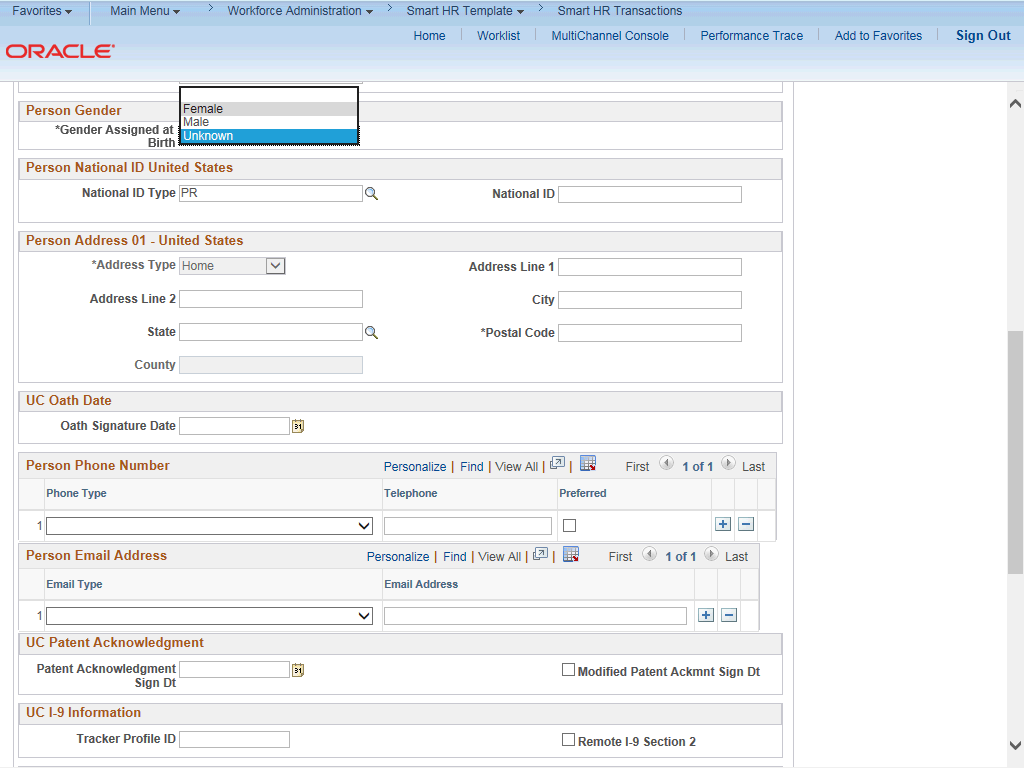
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| **Step** | **Action** |
| 25. | Click the **I Am Not A Veteran** list item. |
| 26. | Select the new hire's **Highest Education Level**, if known, or accept the default of  **A** (**Not Indicated**).  Click the **Look up Highest Education Level** button. |



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| **Step** | **Action** |
| 27. | For this example, Choose Appropriately. |
| 28. | Click the scroll bar. |

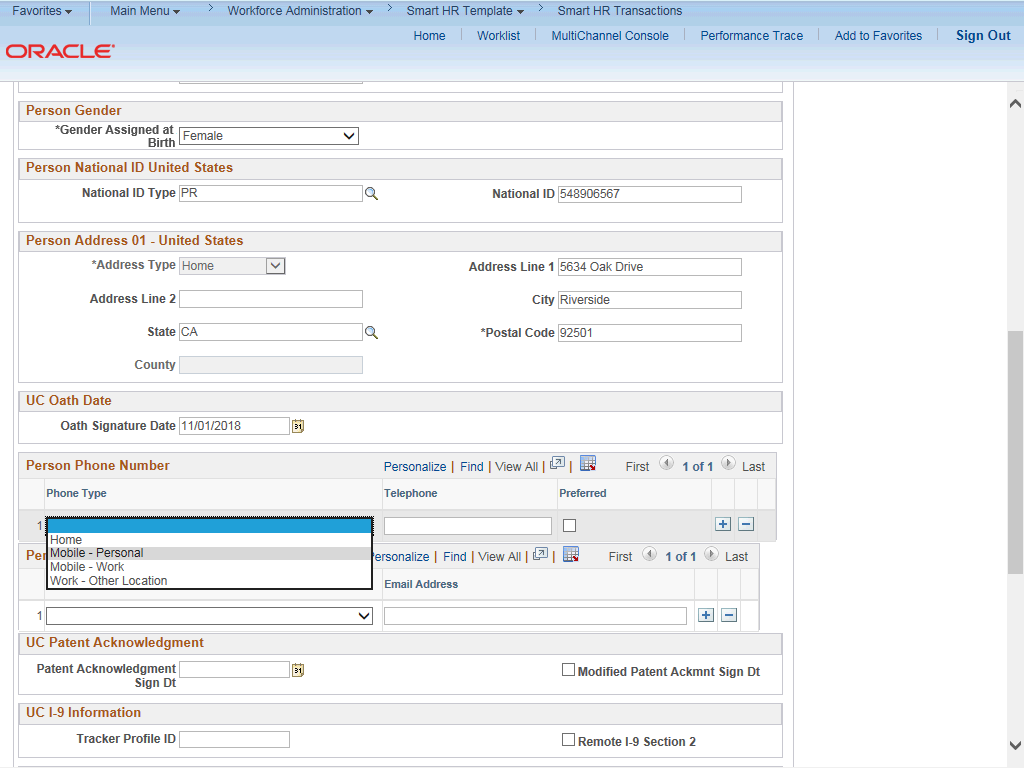


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| **Step** | **Action** |
| 29. | Click the button to the right of the **Gender** field. |

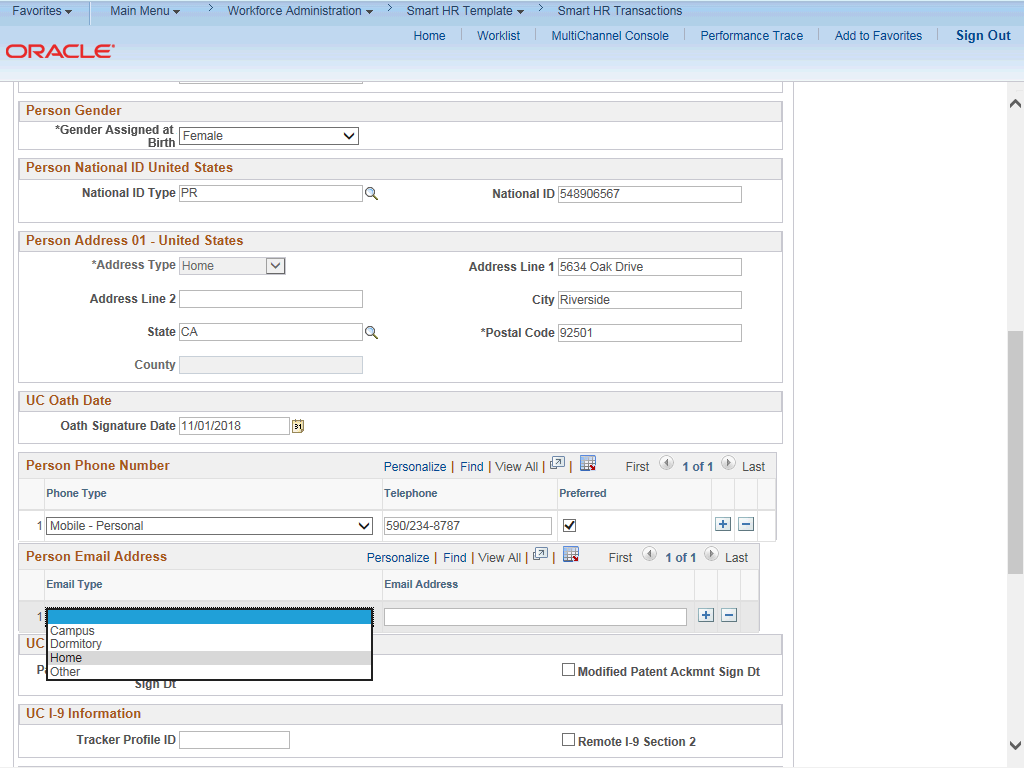


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| **Step** | **Action** |
| 30. | Select the appropriate **Gender**. |
| 31. | In the **National ID Type** field, accept the default of **PR** for Social Security Number (SSN). |
| 32. | The **National ID** (SSN) is required if the **Effective Date** of the template is prior to the current date. The SSN is not required if the **Effective Date** of the template is on or after to the current date.  Every effort should be taken to include the SSN before submitting the template. Leaving the **National ID** field blank has downstream impacts. For example, it impacts the employees ability to enroll in benefits plans (including retirement). |
| 33. | Click in the **National ID** field. |
| 34. | Enter the Social Security number into the **National ID** field. |
| 35. | Click in the **Address Line 1** field. |
| 36. | Enter the desired information into the **Address Line 1** field. |
| 37. | Click in the **City** field. |
| 38. | Enter the desired information into the **City** field. |
| 39. | Click in the **State** field. |
| 40. | Enter the desired information into the **State** field. |
| 41. | Click in the **Postal Code** field. |
| 42. | Enter the desired information into the **Postal Code** field. |
| 43. | Enter the date the new hire signed the UC oath agreement. This date cannot be later than the current date.  Click in the **Oath Signature Date** field. |

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| **Step** | **Action** |
| 44. | Enter the desired information into the **Oath Signature Date** field. |
| 45. | Click the button to the right of the **Phone Type** field. |

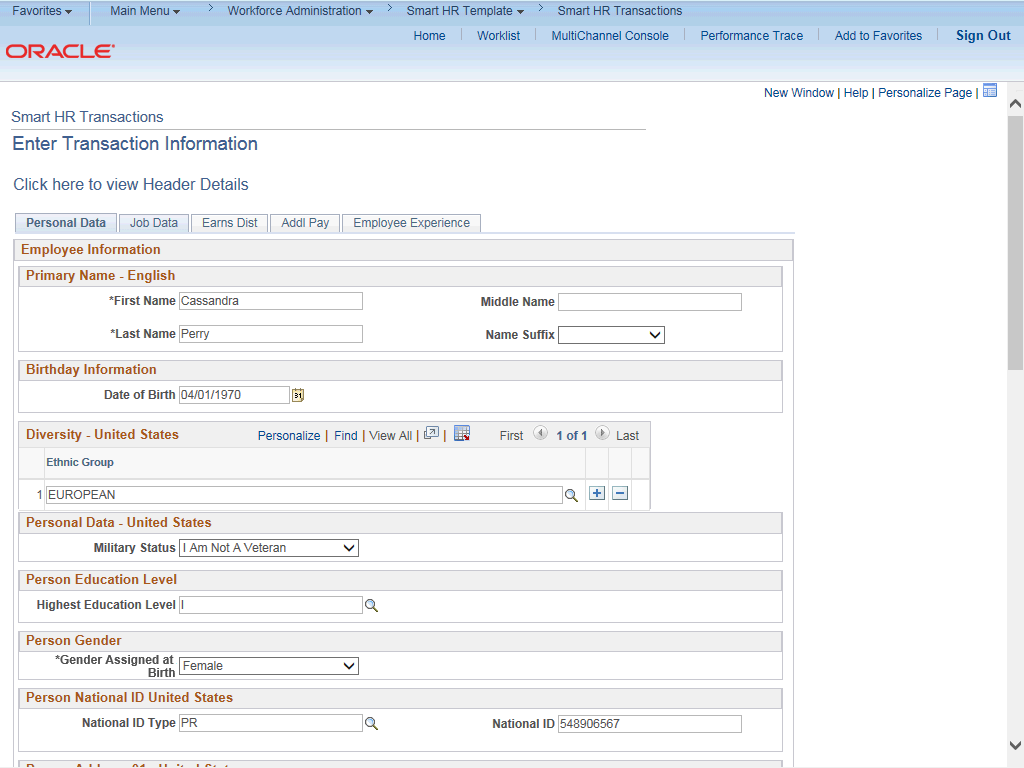


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| **Step** | **Action** |
| 46. | Select the appropriate phone type.  For this example, click the **Mobile - Personal** list item. |
| 47. | Click in the **Telephone** field. |
| 48. | Enter the desired information into the **Telephone** field. |
| 49. | A **Preferred** phone number must be identified by selecting the check box. Click the **Preferred** option. |
| 50. | Click the button to the right of the **Email Type** field. |

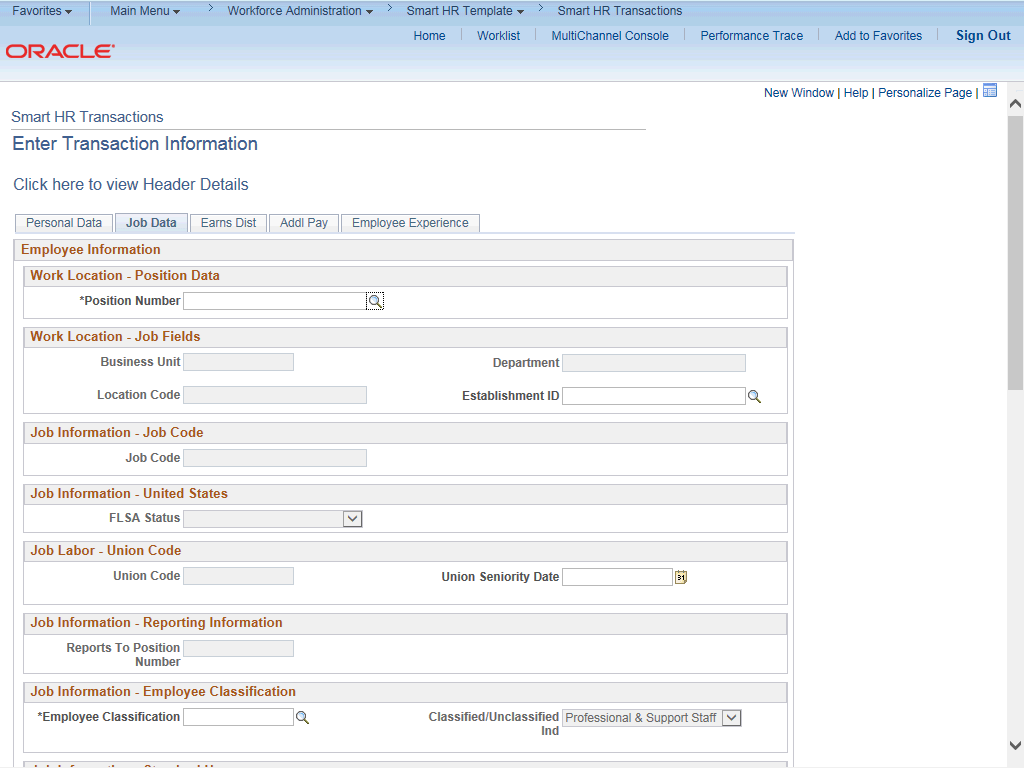


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| **Step** | **Action** |
| 51. | Select the appropriate email type. |
| 52. | Click in the **Email Address** field. |
| 53. | Enter the desired information into the **Email Address** field. |
| 54. | Enter the date on which the individual signed the UC patent acknowledgment. This date cannot be later than the current date.  Click in the **Patent Acknowledgment Sign Dt** field. |
| 55. | Enter the desired information into the **Patent Acknowledgment Sign Dt** field. |
| 56. | Select the **Modified Patent Ackmnt Sign Dt** check box to indicate the employee did not originally sign the standard Patent Acknowledgment form. |
| 57. | Click the scroll bar. |

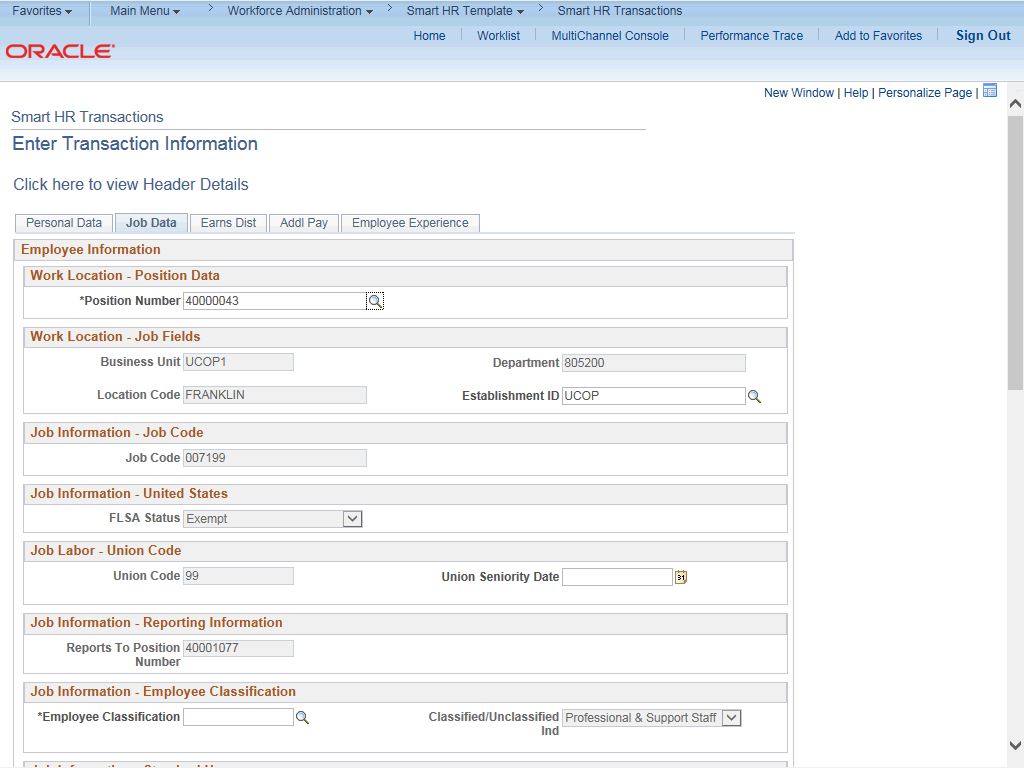
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| **Step** | **Action** |
| 58. | If the new hire has an existing tracker profile, then you can add their **Tracker Profile ID** and indicate whether their I-9 section 2 needs to be completed remotely.  This information is copied to the employee's **Person Profile** component. |
| 59. | Click in the **Tracker Profile ID** field. |
| 60. | Enter the desired information into the **Tracker Profile ID** field. |
| 61. | If applicable, use the **UC External System ID** section to enter external system information to facilitate matching of IDs with IDM systems.  If providing the information, you must enter values for all three fields. The **Business Unit** in this section must match the **Business Unit** associated with the **Position Number** you enter on the **Job Data** tab (the next tab). |
| 62. | Use the **Comments** field to enter specific details or an explanation regarding the transaction. For example, this field can be used to 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. |
| 63. | Click the scroll bar. |



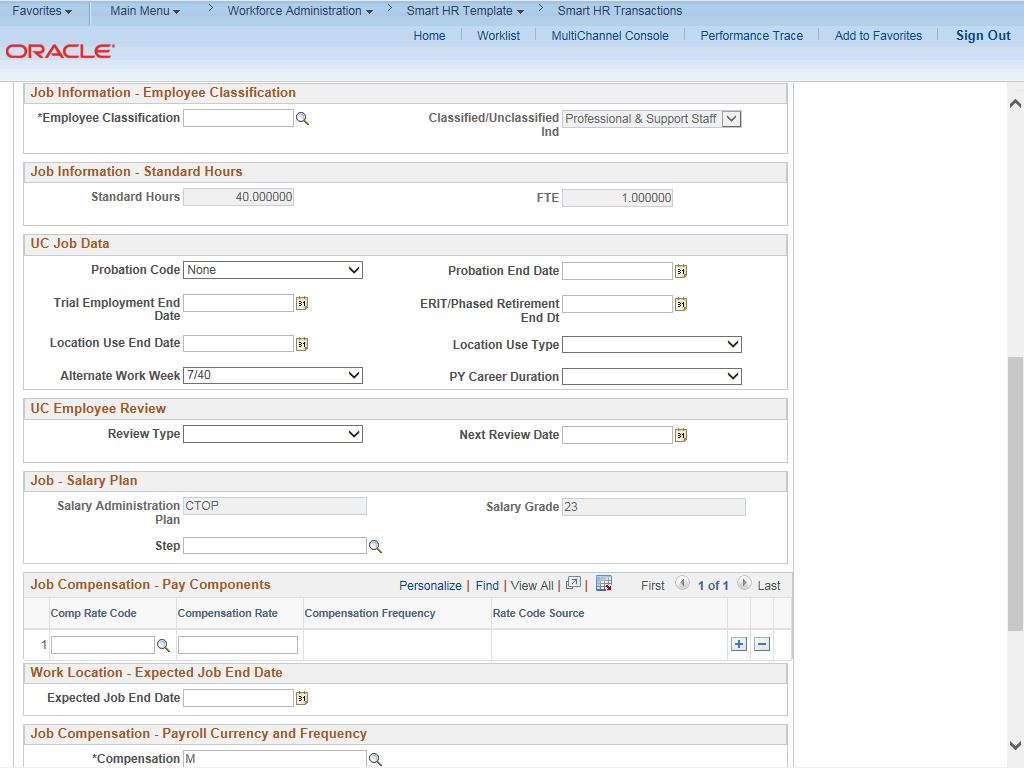
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| **Step** | **Action** |
| 64. | Click the **Job Data** tab. |



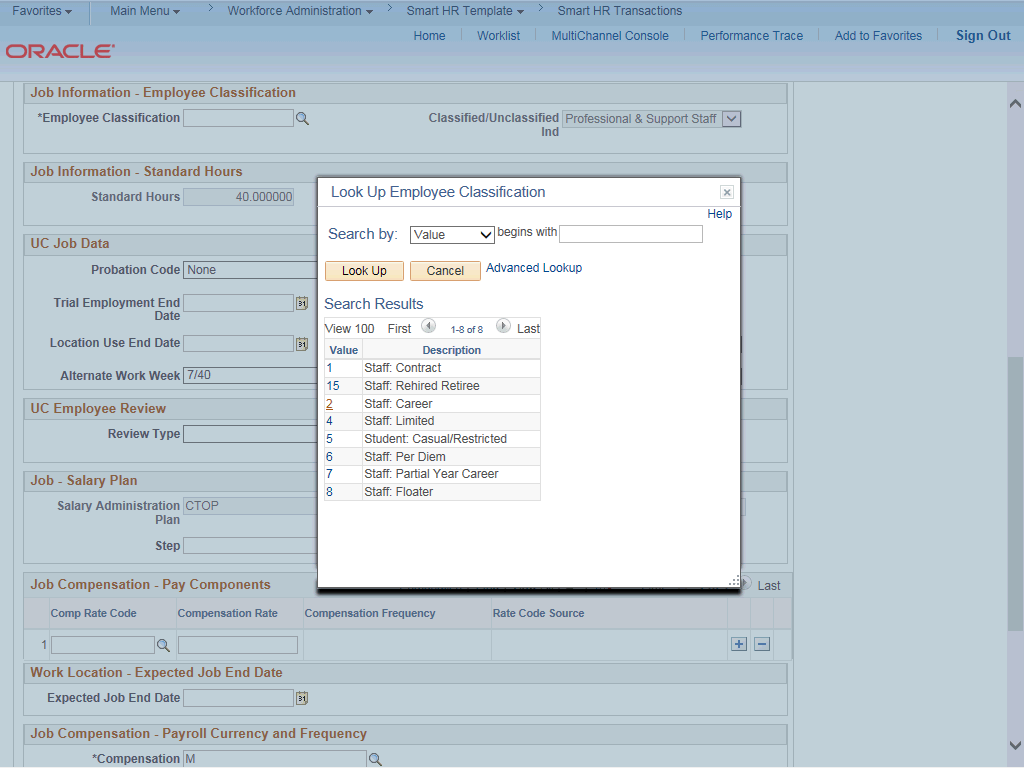
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| **Step** | **Action** |
| 65. | Enter the position number or search for it using the look up. You only have access to position numbers within your business unit or related business unit.  Click in the **Position Number** field. |
| 66. | Enter the desired information into the **Position Number** field. |
| 67. | Press **[Tab]** to automatically populate the position-related fields. |



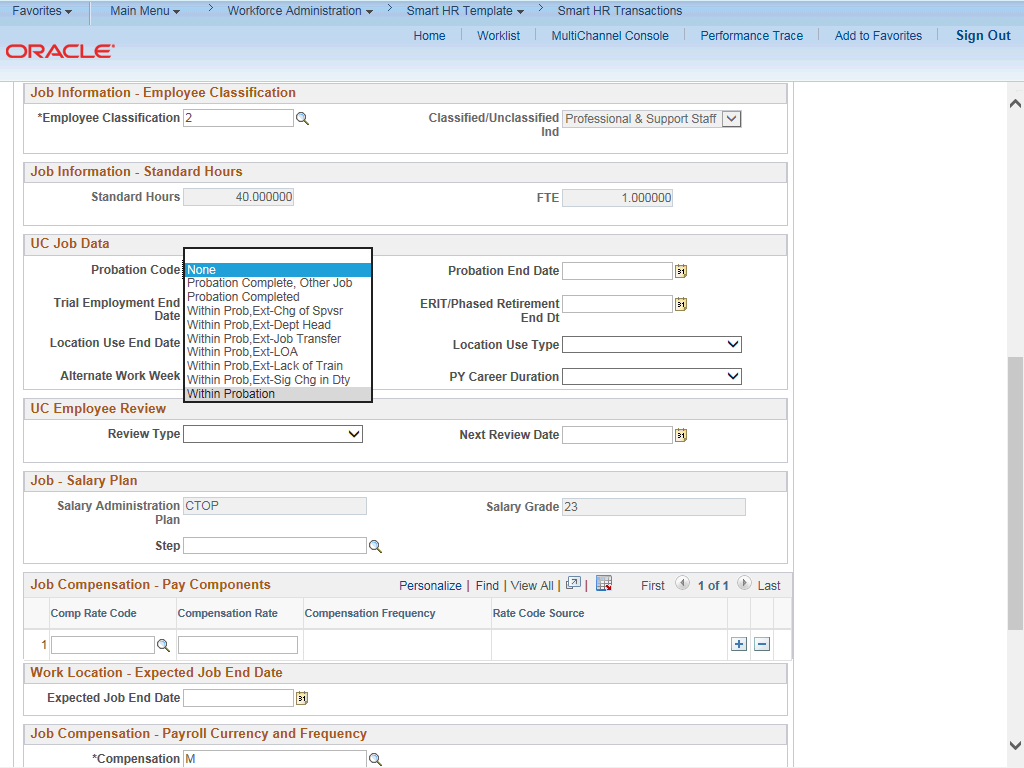
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| **Step** | **Action** |
| 68. | Click the scroll bar. |



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| **Step** | **Action** |
| 69. | For staff hires, the **Employee Classification** field must be entered. Click the **Look up Employee Classification** button. |

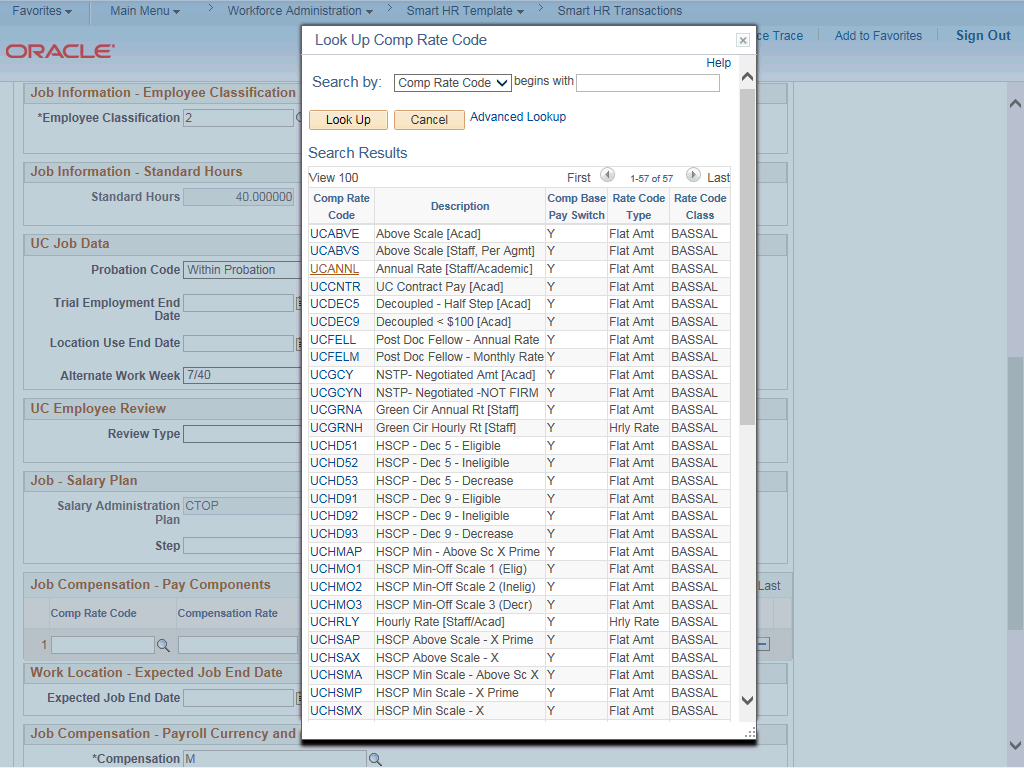


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| **Step** | **Action** |
| 70. | Select the appropriate **Employee Classification**.  For this example, click the **2** (**Staff: Career**) list item. |
| 71. | In the **UC Job Data** section, enter or select the appropriate values as applicable. |
| 72. | 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 End Date** field is required if the **Probation Code** value is something other than **Completed** or **Probation Completed, Other Job**. |
| 73. | Click the button to the right of the **Probation Code** field. |



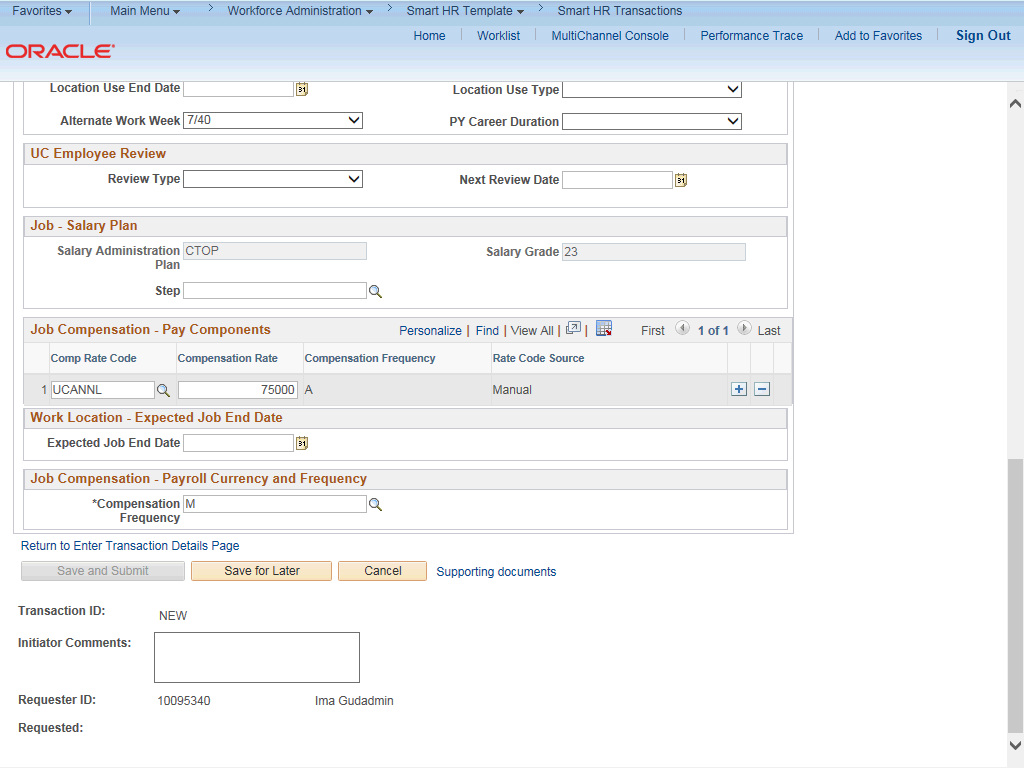
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| **Step** | **Action** |
| 74. | Select the appropriate **Probation Code**.  For this example, click the **Within Probation** list item. |
| 75. | Click in the **Probation End Date** field. |
| 76. | Enter the desired information into the **Probation End Date** field. |
| 77. | **Location Use Type** and the associated **Location Use End Date** are used for reporting purposes. If a **Location Use Type** is selected you should select a **Location Use End Date**.  **Location Use Type** options include:   * Funding End Date * Review Remaining Budget * Review Job * NSTP Review * Temporary Off-Scale * Temporary Reduction in Time * LA: Dual Employment Job * Temporary Increase in Time |
| 78. | Enter **UC Employee Review** information, if applicable. |

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| **Step** | **Action** |
| 79. | 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 **Job Compensation- Pay Components** section. |
| 80. | For this example, click the **Look up Comp Rate Code** button. |

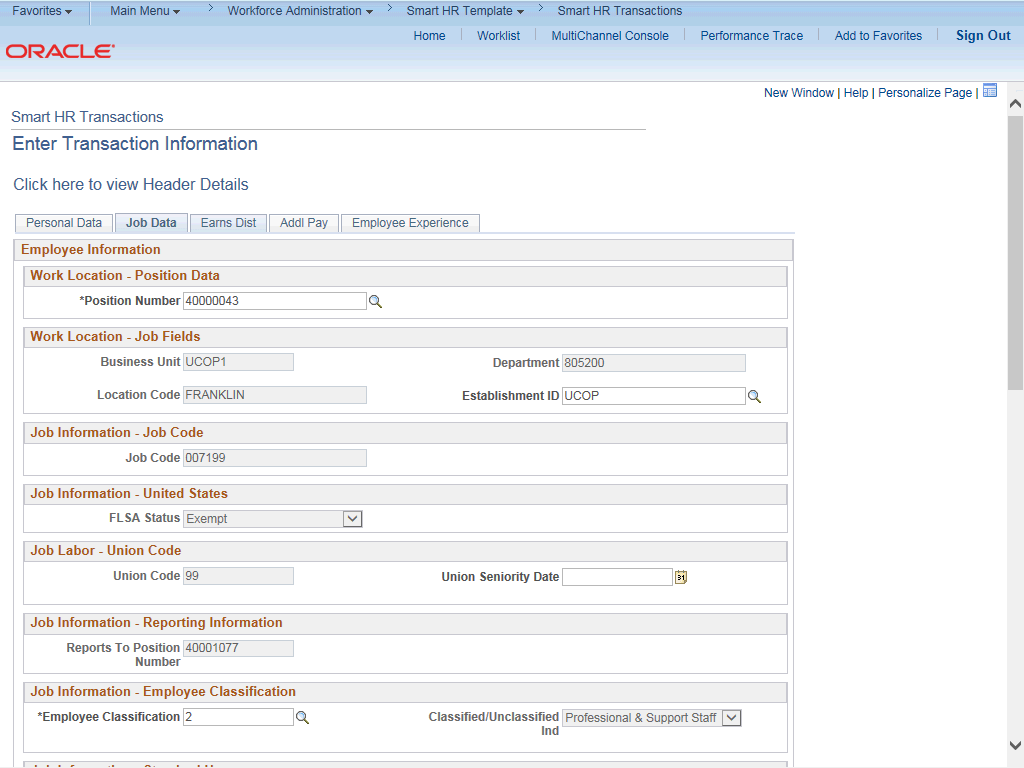


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| **Step** | **Action** |
| 81. | Select the appropriate **Rate Code**. |

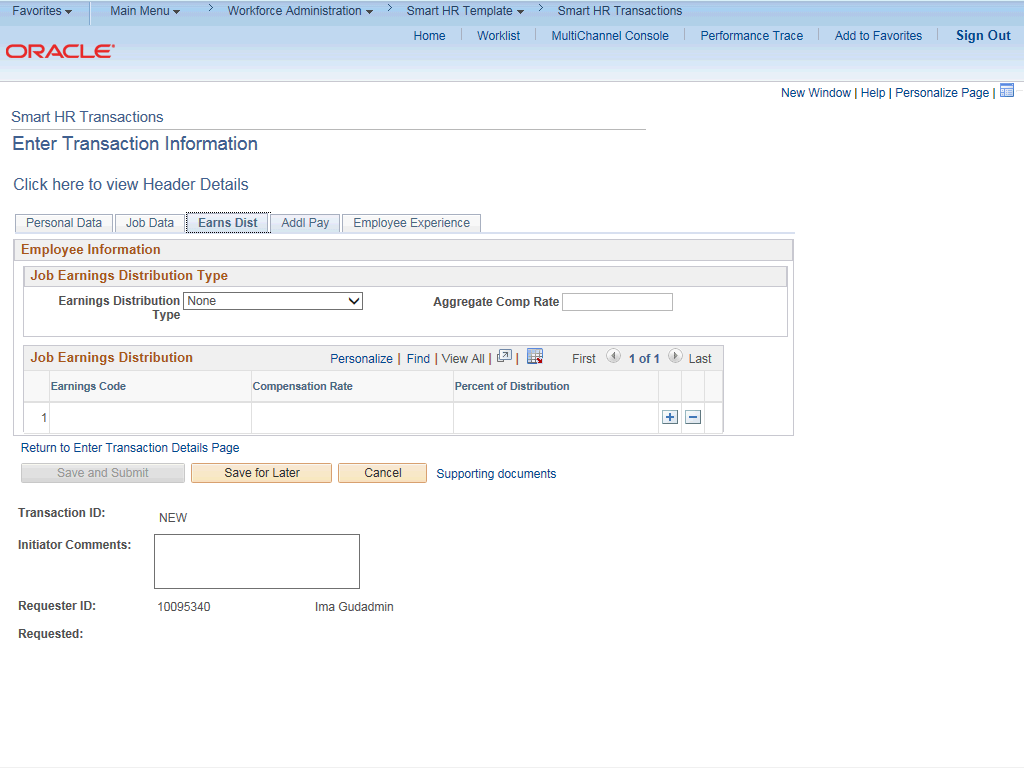
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| **Step** | **Action** |
| 82. | Click in the **Compensation Rate** field. |
| 83. | Enter the desired information into the **Compensation Rate** field. |
| 84. | If the employment is a short term assignment or temporary hire, enter the date the position ends in the **Expected Job End Date** field. Non-Academic employees are automatically terminated in UCPath on this date.  An expected end date is required for following employee classes:   * Staff: Contract * Staff: Floater * Staff: Limited * Staff: Rehired Retiree * Academic: Post Docs * Academic: Recall * Academic: Academic Student * Student: Casual/Restricted |
| 85. | Click the scroll bar. |



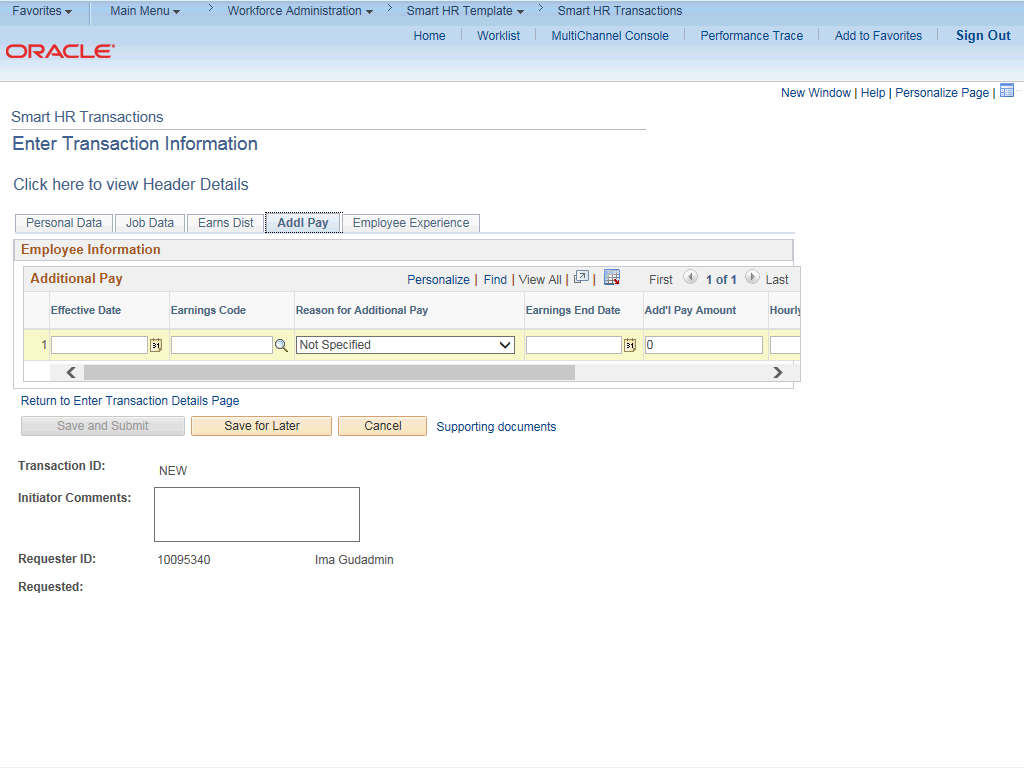
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| **Step** | **Action** |
| 86. | The payroll-related **Compensation Frequency** field automatically populates based on the job code.  If the **Compensation Frequency** in the **Job Compensation - Pay Components** section is **A**, then the **Compensation Frequency** in the **Job Compensation - Payroll Currency and Frequency** section can be any of the following: **B**, **M**, **UC912**, **UC\_10**, **UC\_11**, **UC\_12**, **UC\_9M** or **UC\_FY**.  If the **Compensation Frequency** in the **Job Compensation - Pay Components** section is **H**, then the **Compensation Frequency** in the **Job Compensation - Payroll Currency and Frequency** section should be **H**. |
| 87. | Click the scroll bar. |



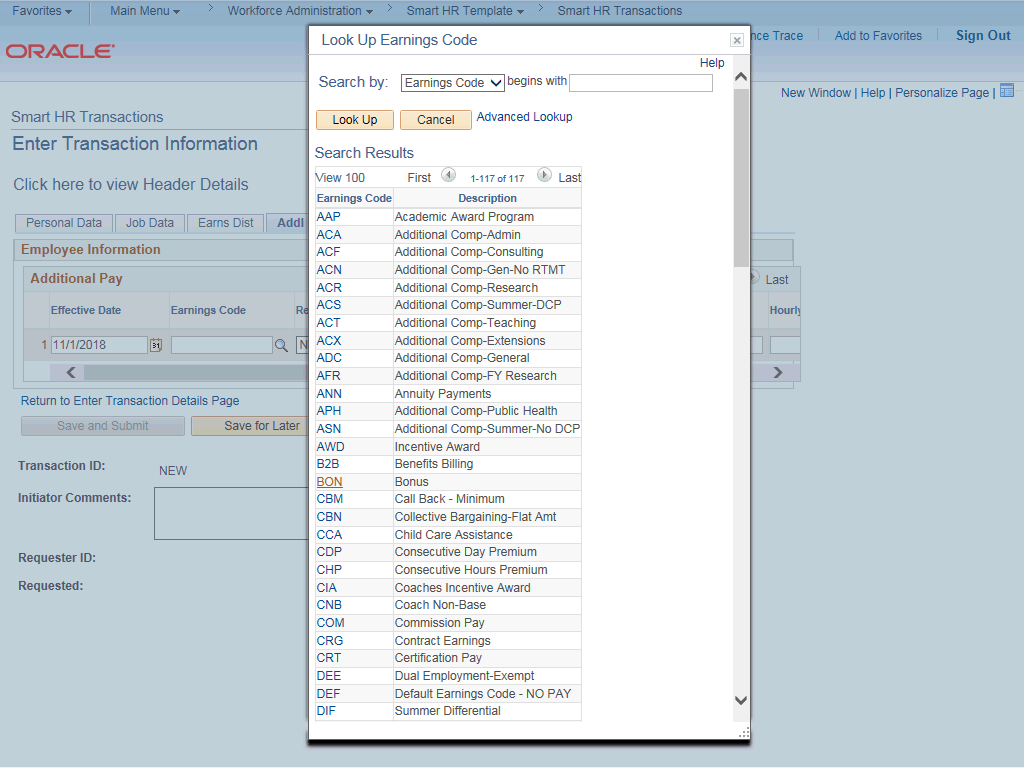
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| **Step** | **Action** |
| 88. | Click the **Earns Dist** tab. |



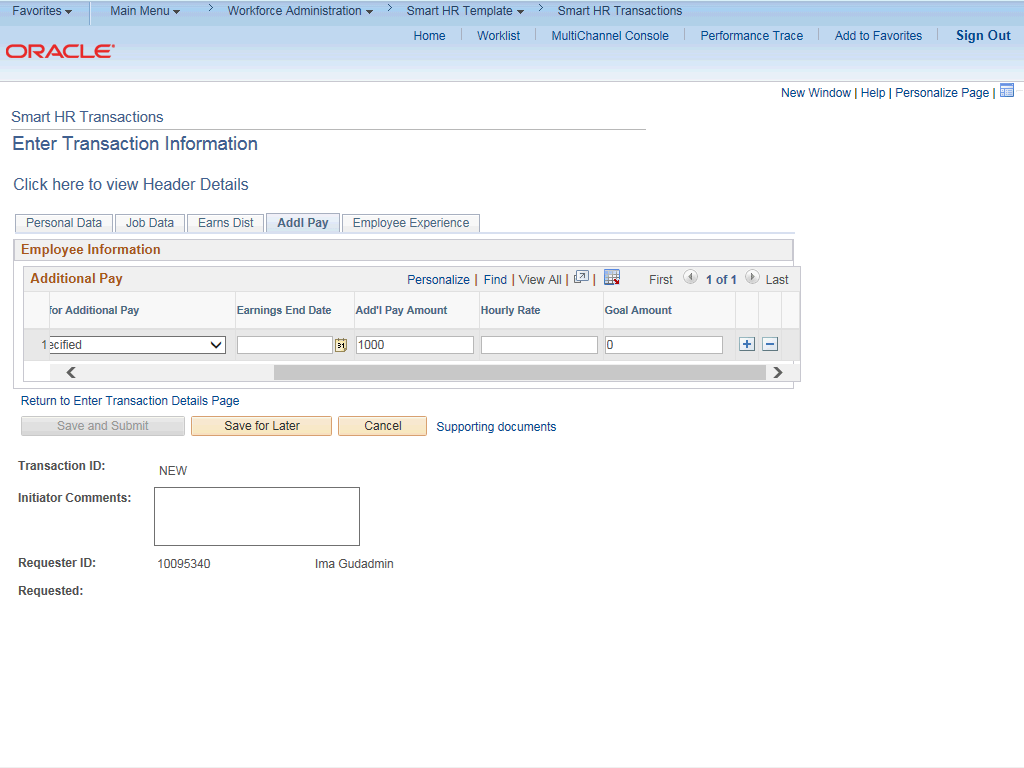
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| **Step** | **Action** |
| 89. | In most cases, the **Job Earnings Distribution** section is automated. If the **Comp Rate** code entered on the **Job Data** tab has a mapped **Earnings Code**, the **Job Earnings Distribution** section is updated automatically. |
| 90. | 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%. |
| 91. | Click the **Addl Pay** tab. |



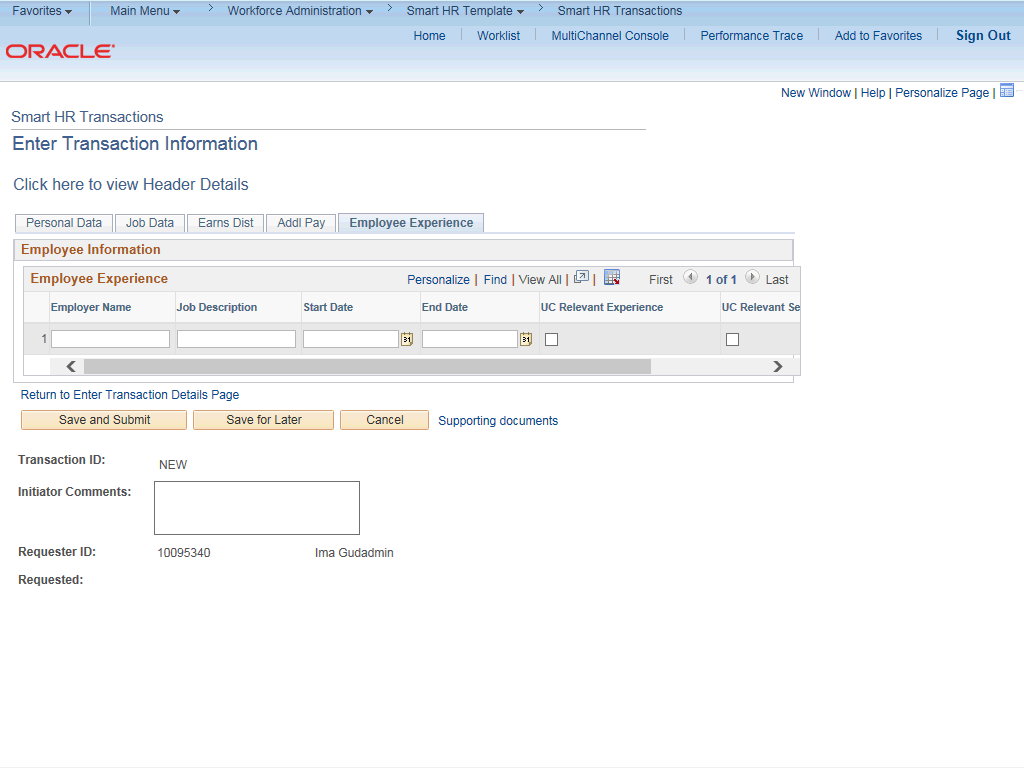
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| **Step** | **Action** |
| 92. | There may be cases where an employee is paid a recurring flat amount. For recurring flat amount entry, the compensation section is not populated on the **Job Data** tab. Instead, the **Additional Pay** section is used.  There may also be cases where neither compensation rate nor additional pay is entered. In those cases, it is recommended that you enter a comment to explain how the employee is to be paid.  It is recommended not to use this template for one time additional pay. Instead, use payroll's one time payments page. |
| 93. | In this example, you'll enter a new hire's bonus. Click in the **Effective Date** field. |
| 94. | Enter the desired information into the **Effective Date** field. |
| 95. | Click the **Look up Earnings Code** button. |



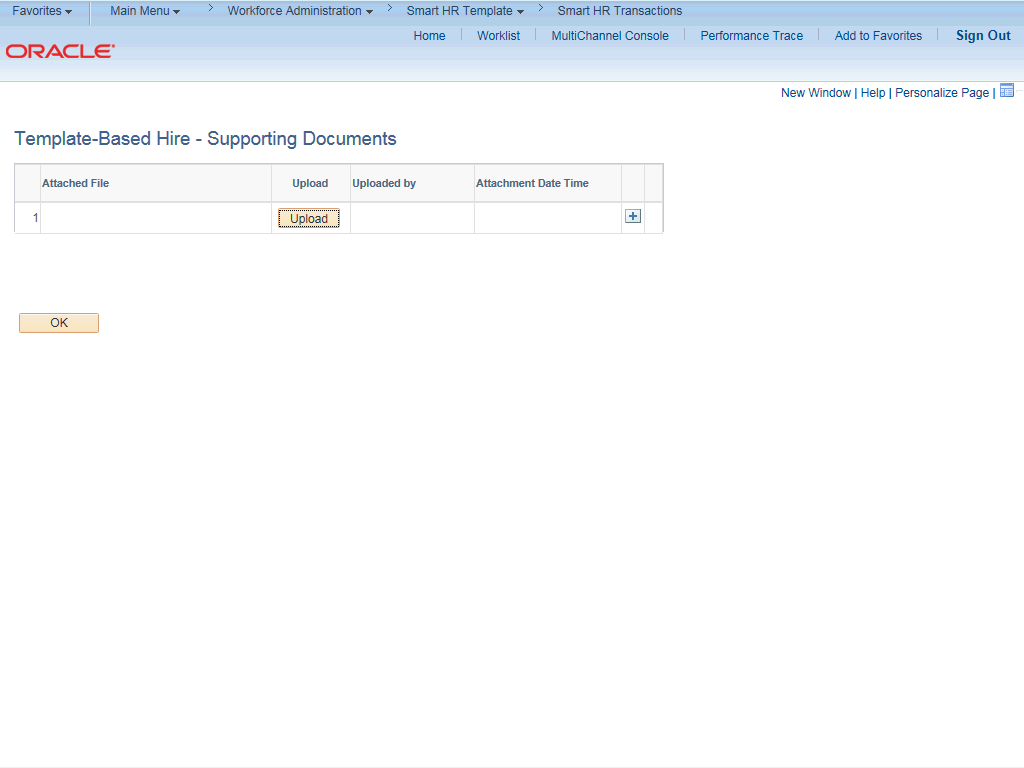
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| **Step** | **Action** |
| 96. | Select the appropriate **Earnings Code**. For this example, click the **BON** list item. |
| 97. | Click in the **Add'l Pay Amount** field. |
| 98. | Enter the desired information into the **Add'l Pay Amount** field. |
| 99. | Click the scroll bar. |



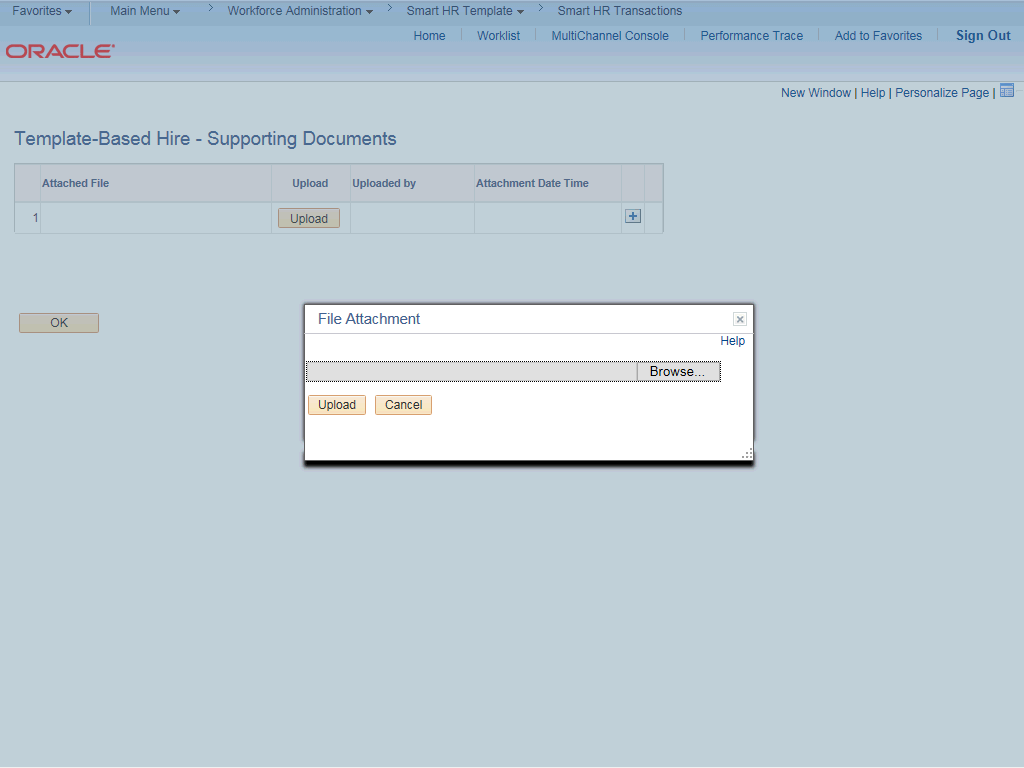
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| **Step** | **Action** |
| 100. | Click in the **Goal Amount** field. |
| 101. | Enter the desired information into the **Goal Amount** field. |
| 102. | Click the **Employee Experience** tab. |



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| **Step** | **Action** |
| 103. | For represented staff, use the fields on this page to enter data related to the employee's prior work experience. Having this information is helpful in determining new compensation rates for the new hire.  The information entered in the **Employee Experience** section is copied to the employee's **UC Employee Experience** page after the template is fully processed by UCPC WFA Production. |
| 104. | Use the **Supporting documents** link to attach supporting documents for the new hire.  Click the **Supporting documents** link. |



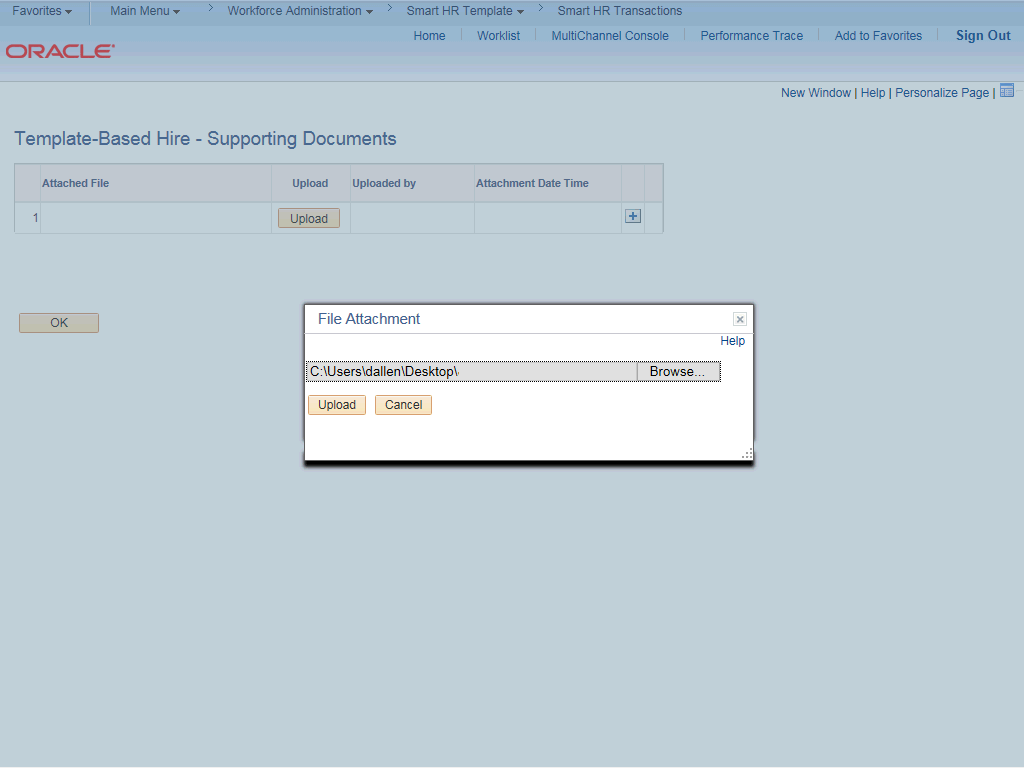
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| **Step** | **Action** |
| 105. | Click the **Upload** button. |



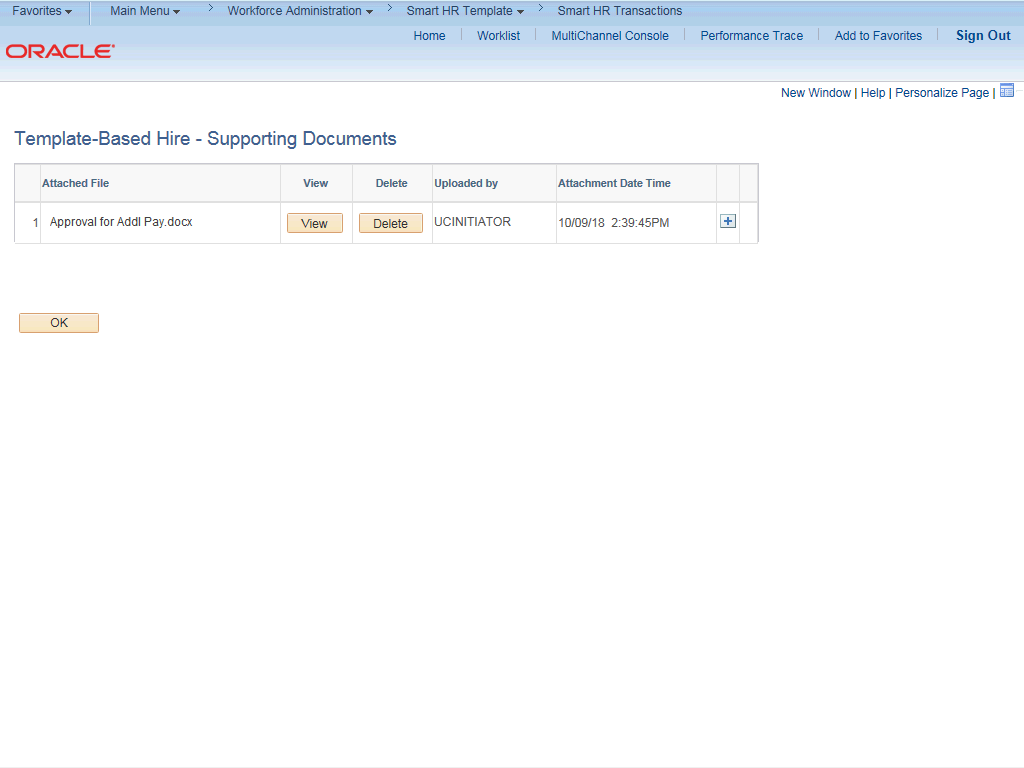
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| **Step** | **Action** |
| 106. | Click the **Browse...** button. |



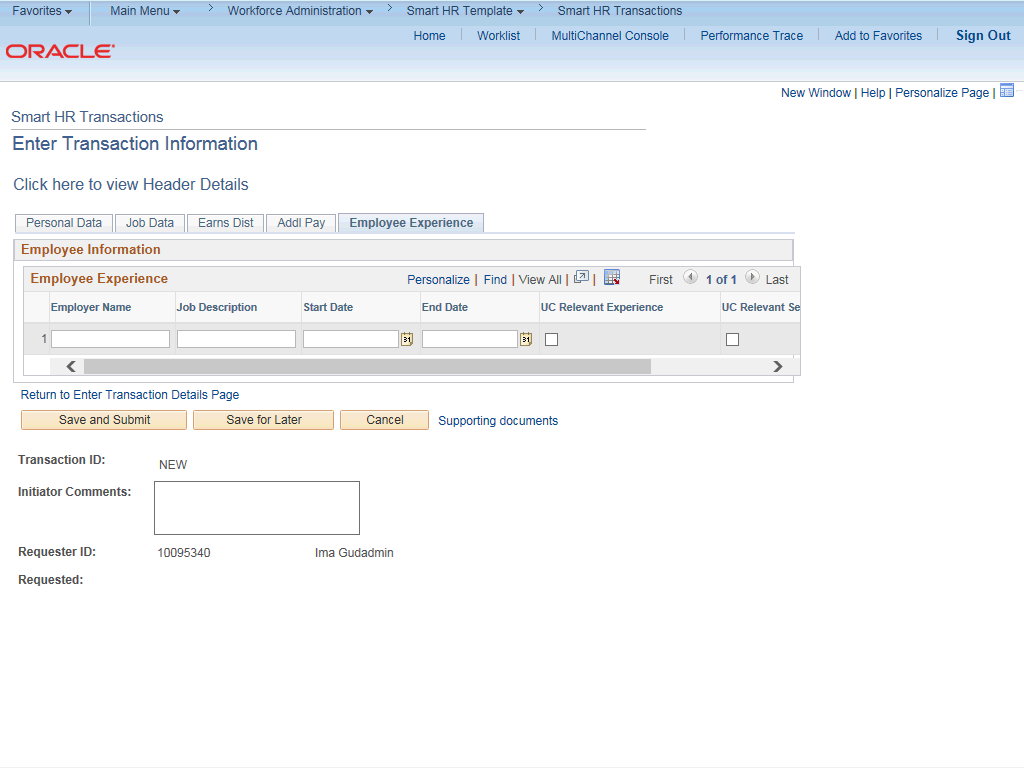
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| **Step** | **Action** |
| 107. | Select the appropriate document to attach. |



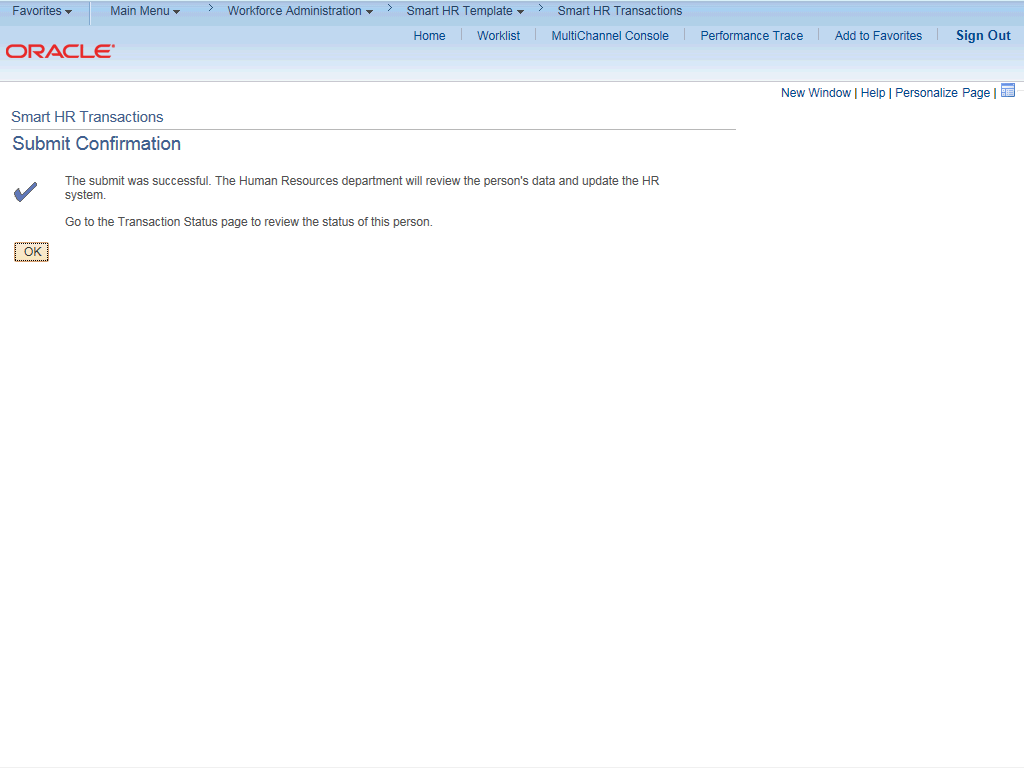
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| **Step** | **Action** |
| 108. | Click the **Upload** button. |



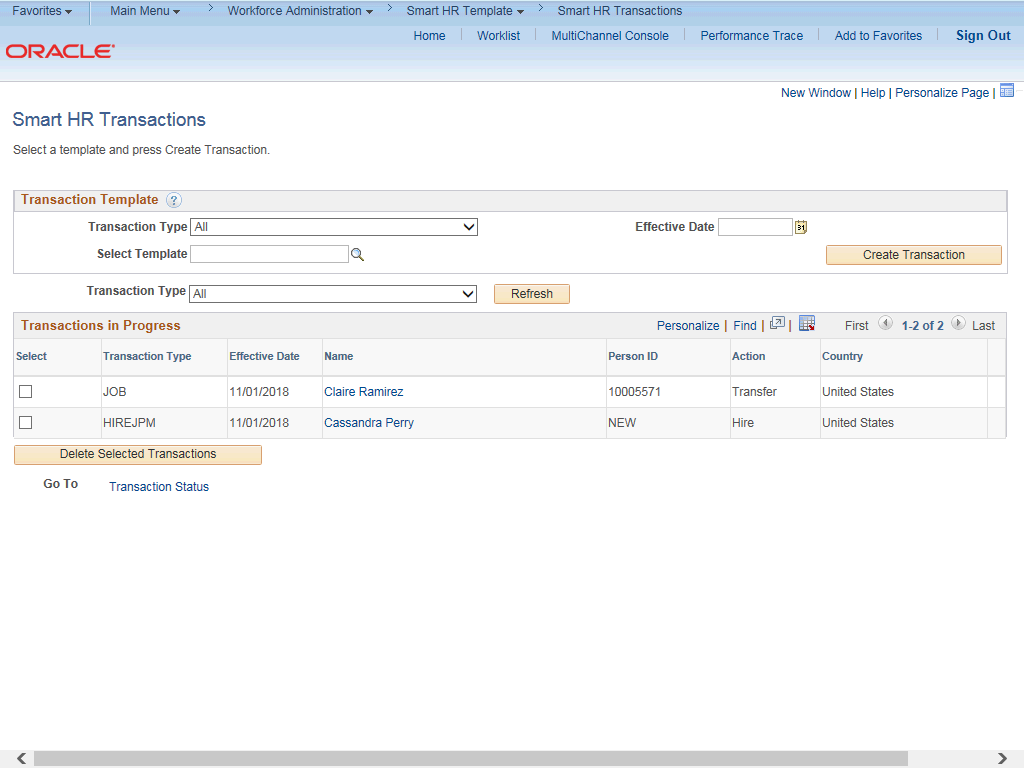
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| **Step** | **Action** |
| 109. | You also can view and delete the attachments from this page. |
| 110. | Click the **OK** button. |



|  |  |
| --- | --- |
| **Step** | **Action** |
| 111. | 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. |
| 112. | 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** |
| 113. | Click the **OK** button. |



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| **Step** | **Action** |
| 114. | The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed. |
| 115. | You have initiated a full hire template transaction for a staff employee.  **End of Procedure.** |