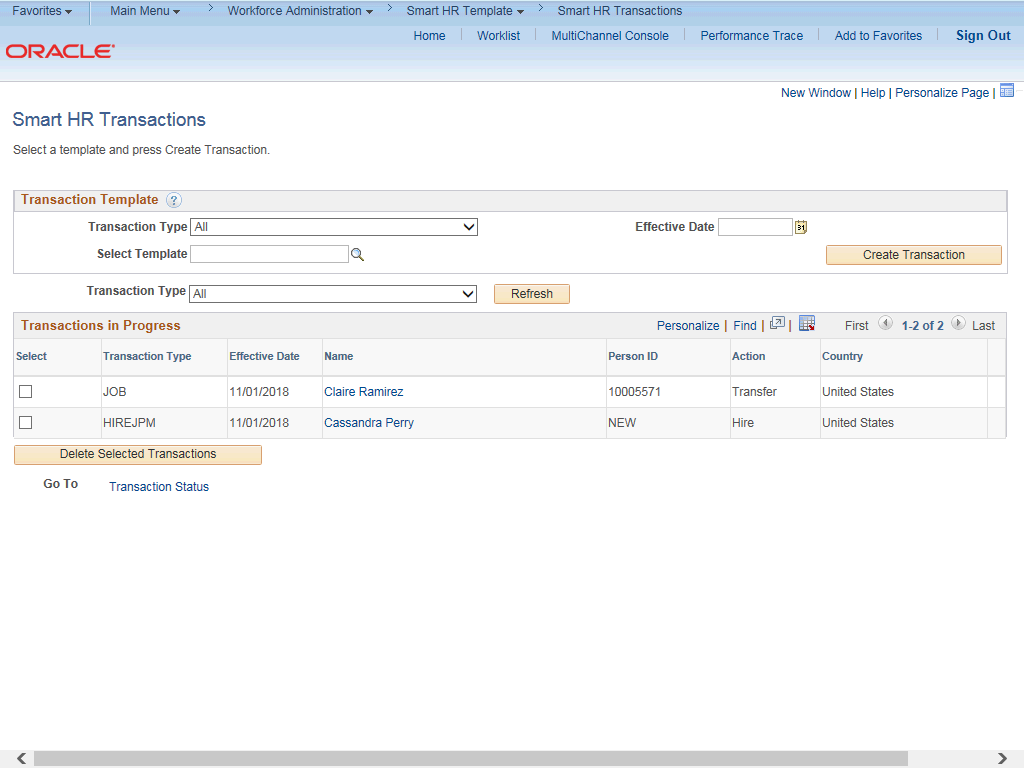
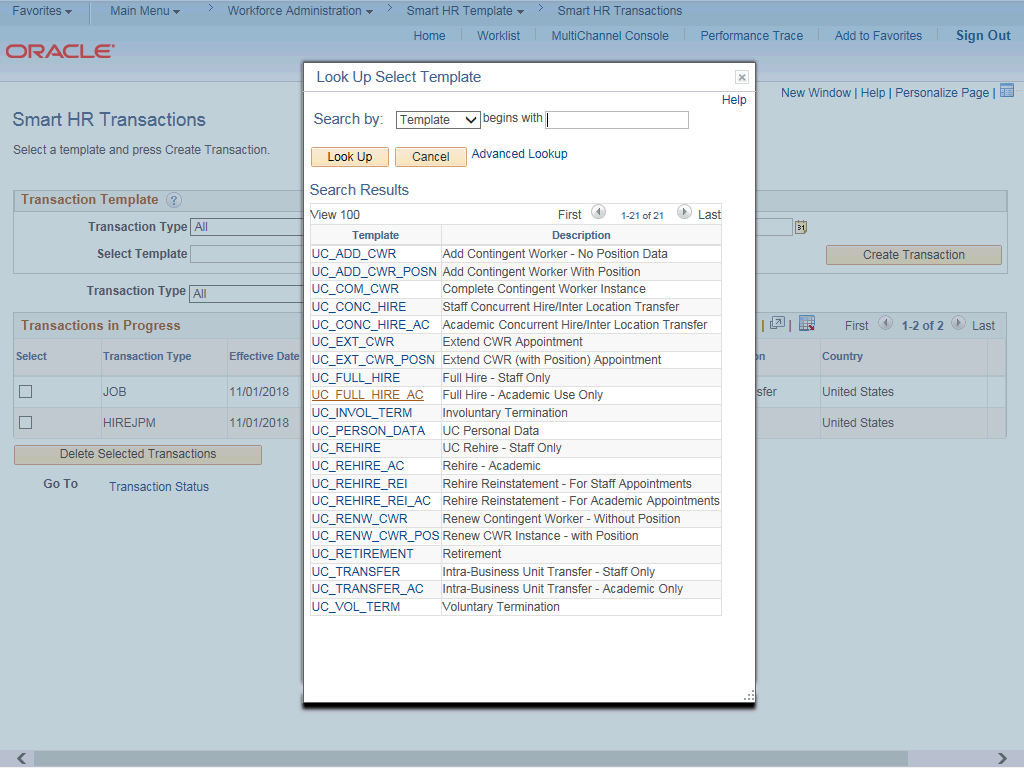
Use this task to initiate a full hire template transaction for an academic employee.

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

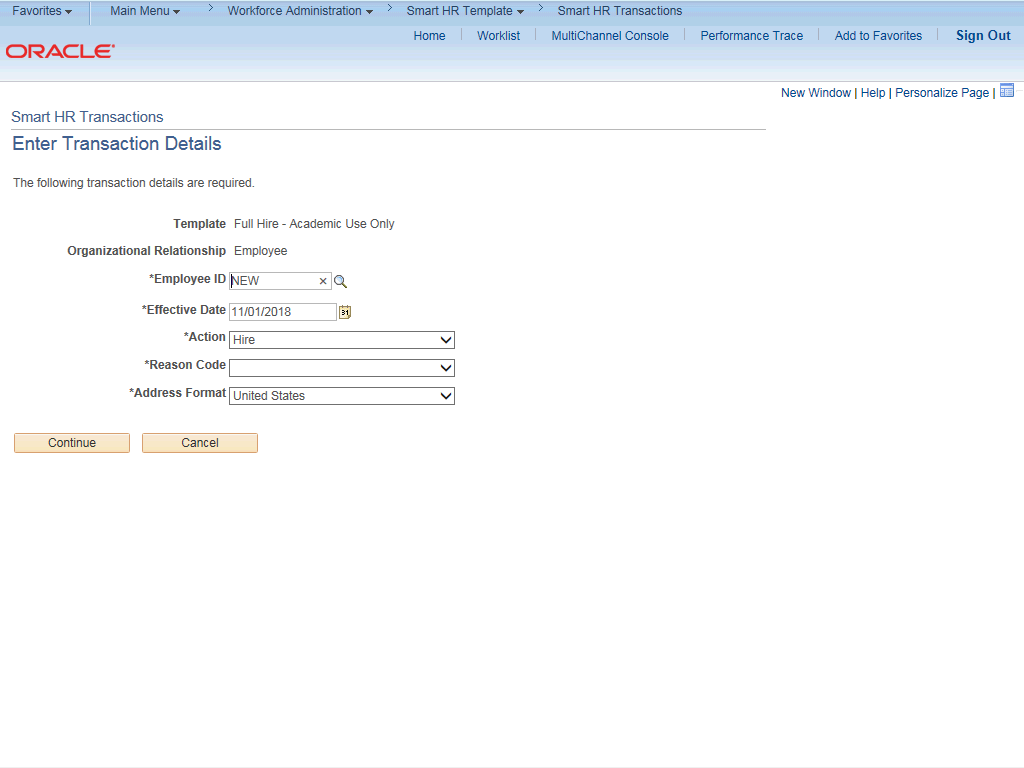
**Note:** This page also may be available in **Workcenter** depending on your security access.



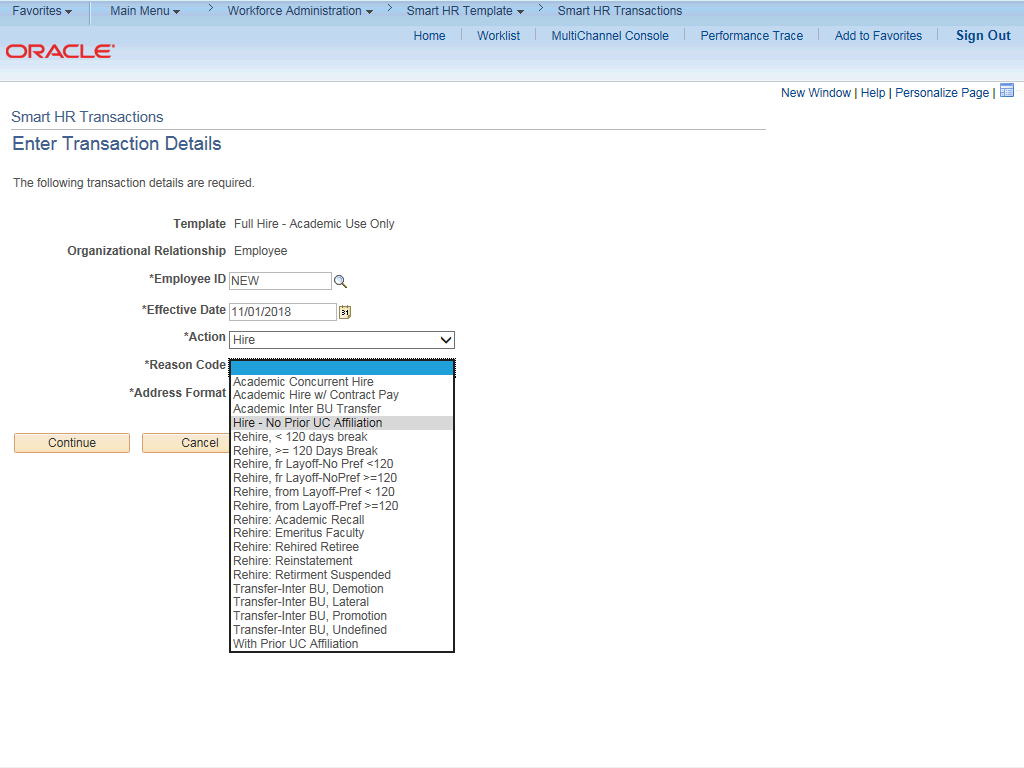
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| **Step** | **Action** |
| 1. | Use the **Smart HR Transactions** page to initiate a full hire template transaction. |
| 2. | Click the **Look up Select Template** button.  **Note:** The **Transaction Type** field is not used by UC. |



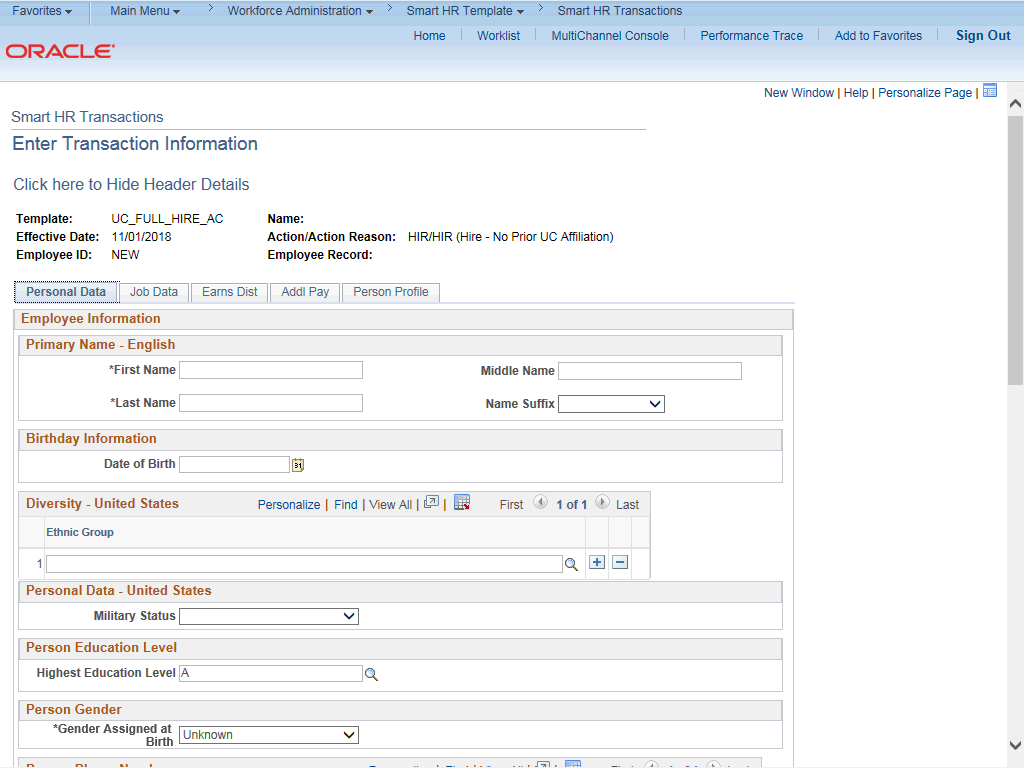
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| **Step** | **Action** |
| 3. | Select the appropriate full hire template. Notice there are two full hire templates, one for staff and one for academic.  Click the **UC\_FULL\_HIRE\_AC** list item. |
| 4. | Click in the **Effective Date** field. |
| 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. |

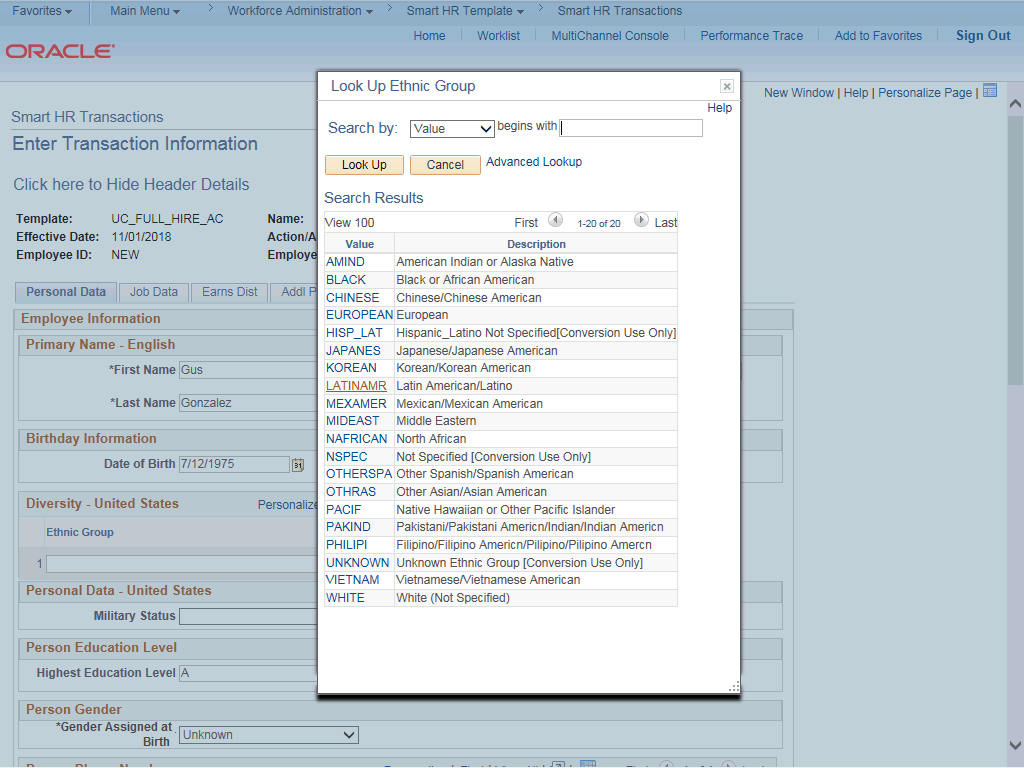


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| **Step** | **Action** |
| 10. | Select the appropriate **Reason Code**.  For this example, click the **Hire - No Prior UC Affiliation** list item. |
| 11. | In the **Address Format** field, accept the default of **United States** or select the  **Global**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

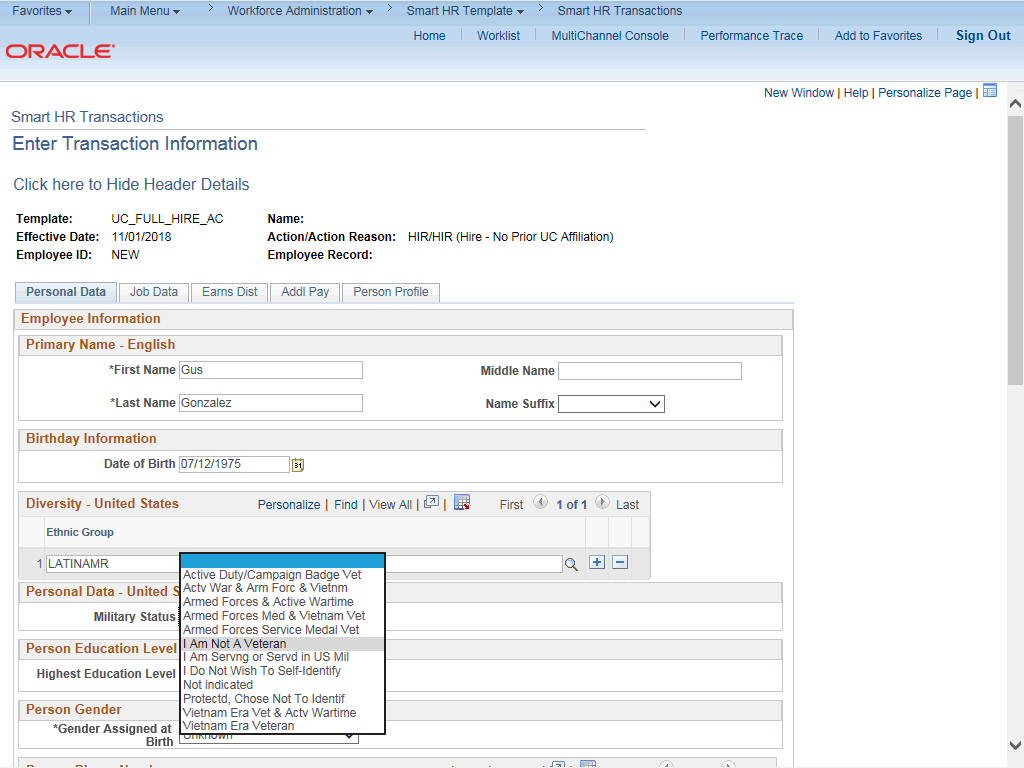


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| **Step** | **Action** |
| 13. | The academic full hire template appears. There are five tabs on this template, **Personal Data**, **Job Data**, **Earns Dist**, **Addl Pay** and **Person Profile**. Fields that are required by the system are indicated with an asterisk **\***. |
| 14. | Header details appear above the tabs. You can show/hide the header information as needed. |
| 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. |
| 20. | Enter the desired information into the **Date of Birth** field. |

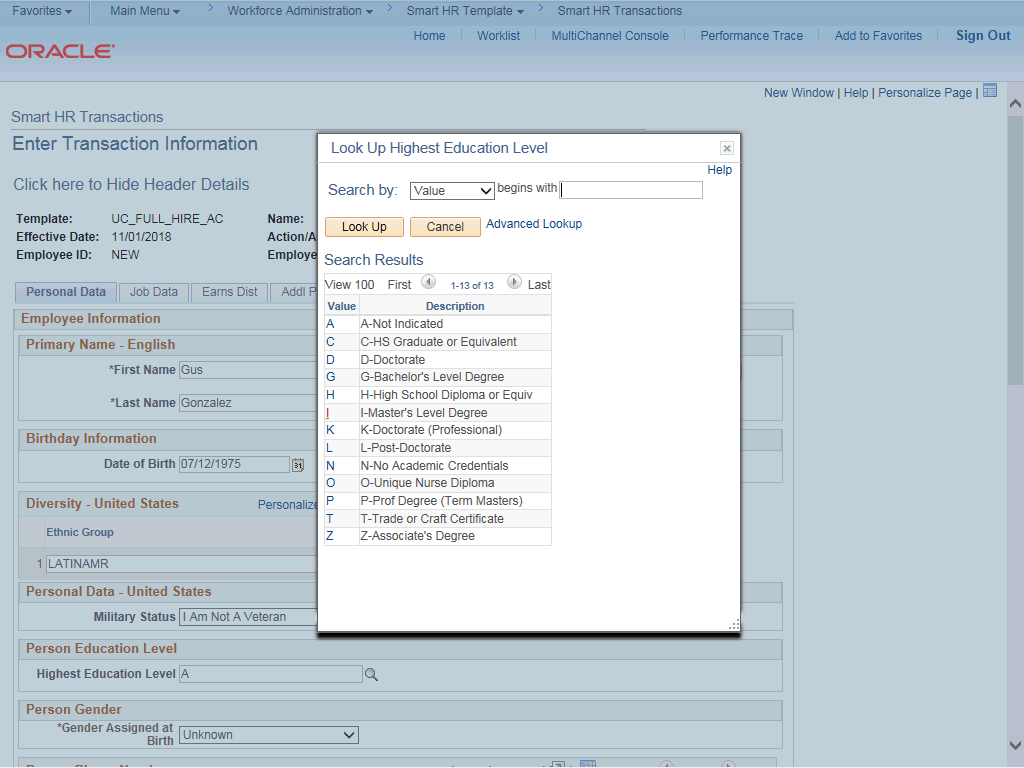
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| **Step** | **Action** |
| 21. | Click the **Look up Ethnic Group** button. |



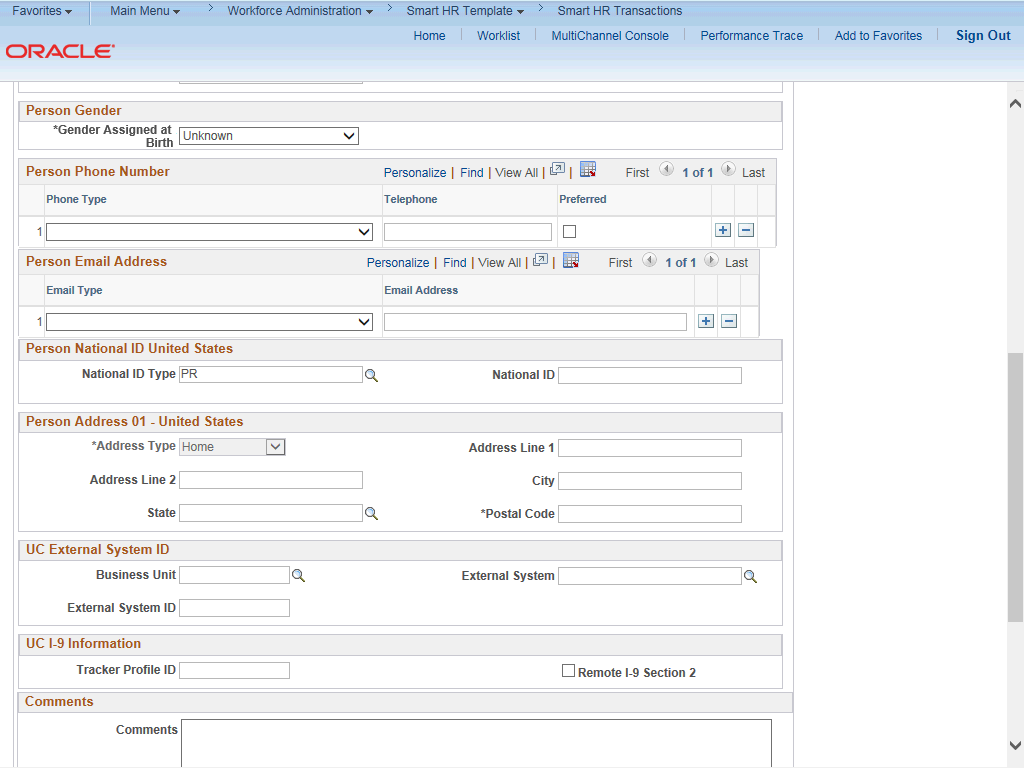
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| **Step** | **Action** |
| 22. | Select the appropriate ethnicity. |
| 23. | If the individual identifies with more than one ethnic group, click the **Add a row**  button. |
| 24. | Select the appropriate **Military Status**, if known, or leave the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



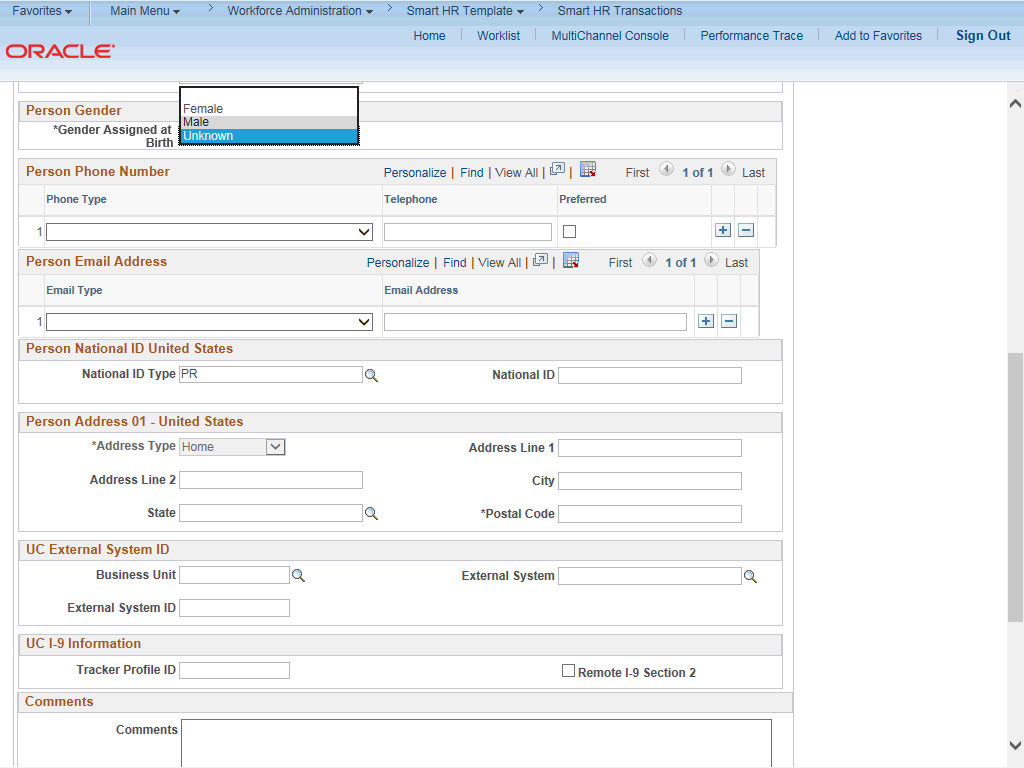
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| **Step** | **Action** |
| 25. | For this example, click the **I Am Not A Veteran** list item. |
| 26. | Select the **Highest Education Level**, if known, or accept the default of **A** (**Not Indicated**).  Click the **Look up Highest Education Level**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



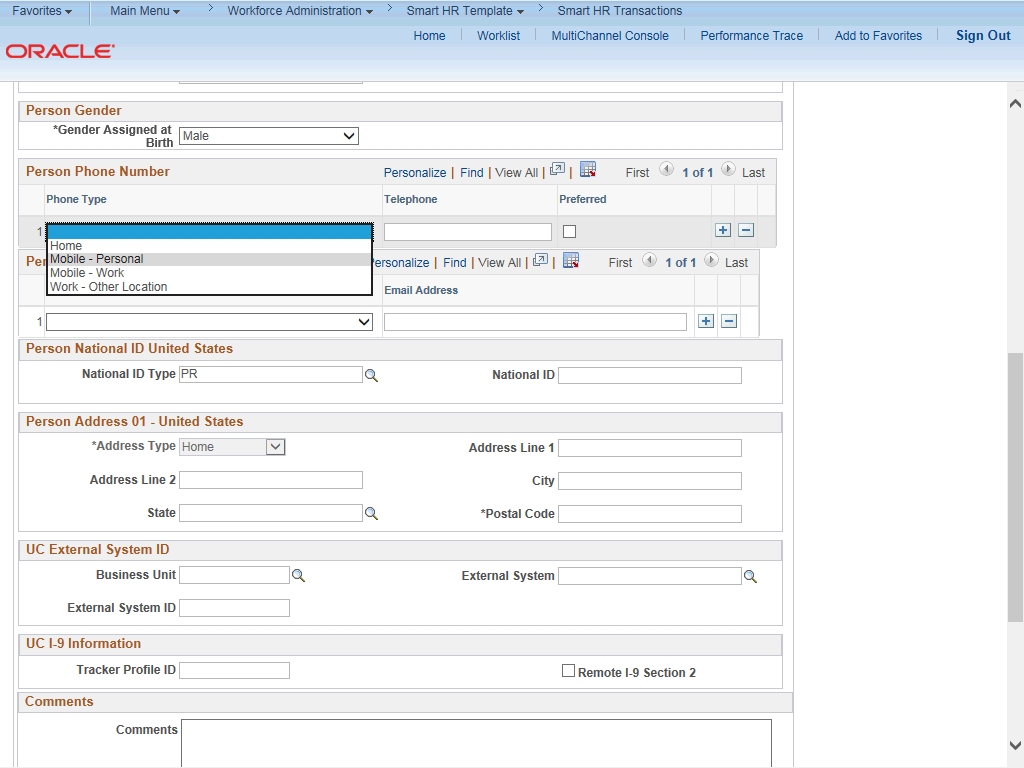
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| **Step** | **Action** |
| 27. | For this example, choose appropriately. |
| 28. | Click the scroll bar. |



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

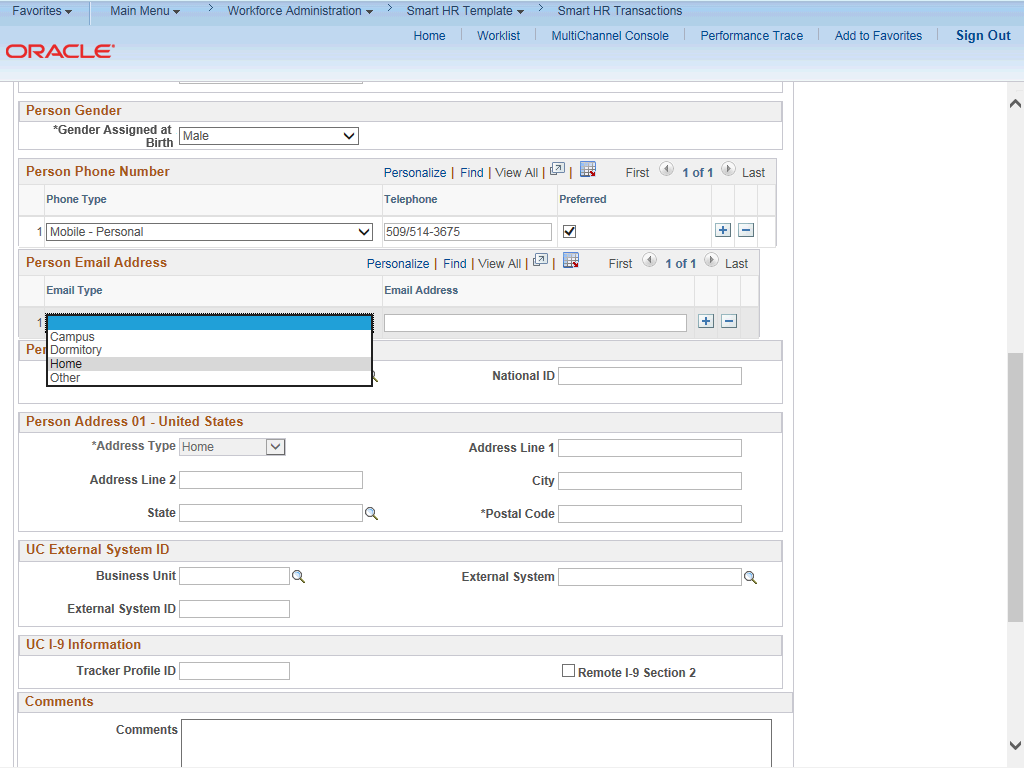


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| **Step** | **Action** |
| 30. | Select the appropriate **Gender**. |
| 31. | Click the button to the right of the **Phone Type** field. |



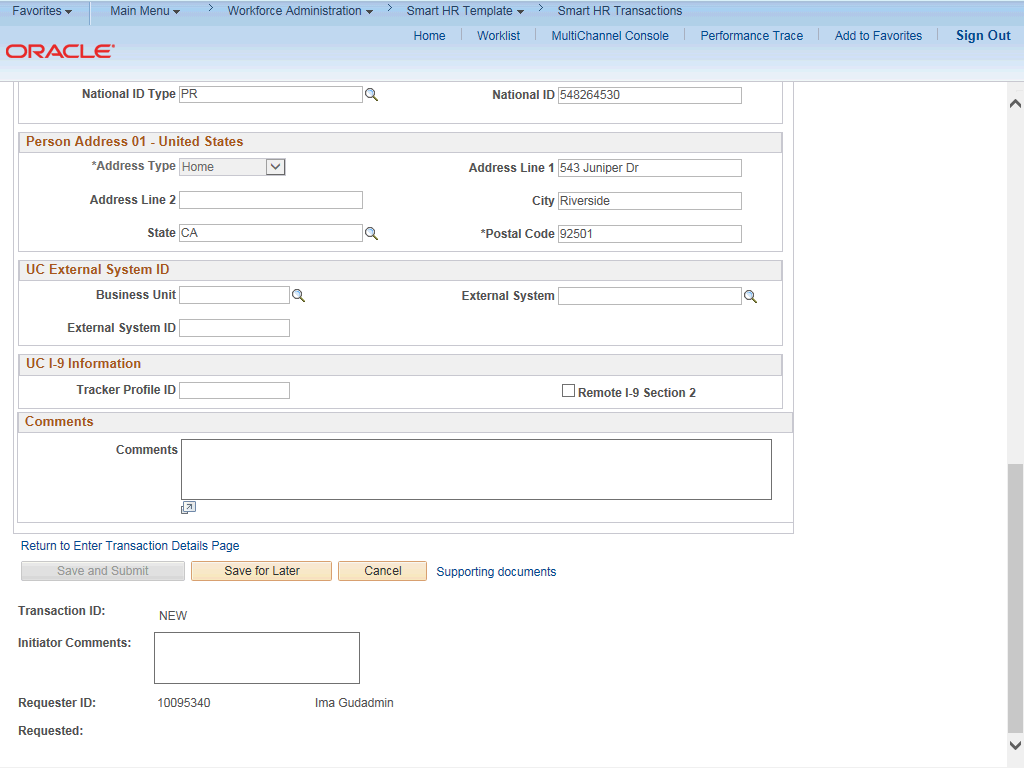
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| **Step** | **Action** |
| 32. | Select the appropriate **Phone Type**. |
| 33. | Click in the **Telephone** field. |
| 34. | Enter the desired information into the **Telephone** field. |

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| **Step** | **Action** |
| 35. | A **Preferred** phone number must be identified by selecting the check box. Click the **Preferred** option. |
| 36. | Click the button to the right of the **Email Type** field. |



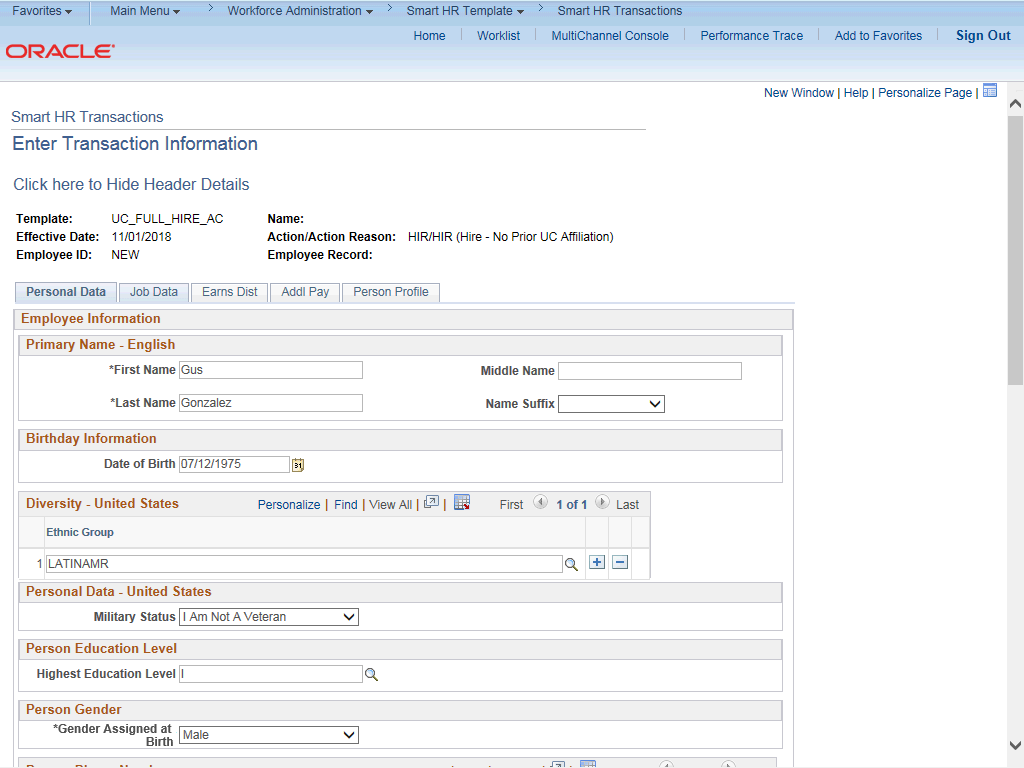
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| **Step** | **Action** |
| 37. | Select the appropriate **Email Type**. |
| 38. | Click in the **Email Address** field. |
| 39. | Enter the desired information into the **Email Address** field. |
| 40. | In the **National ID Type** field, accept the default of **PR** for Social Security Number (SSN). |

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| **Step** | **Action** |
| 41. | 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). |
| 42. | Click in the **National ID** field. |
| 43. | Enter the Social Security number into the **National ID** field. |
| 44. | Click in the **Address Line 1** field. |
| 45. | Enter the desired information into the **Address Line 1** field. |
| 46. | Click in the **City** field. |
| 47. | Enter the desired information into the **City** field. |
| 48. | Click in the **State** field. |
| 49. | Enter the desired information into the **State** field. |
| 50. | Click in the **Postal Code** field. |
| 51. | Enter the desired information into the **Postal Code** field. |
| 52. | Click the scroll bar. |

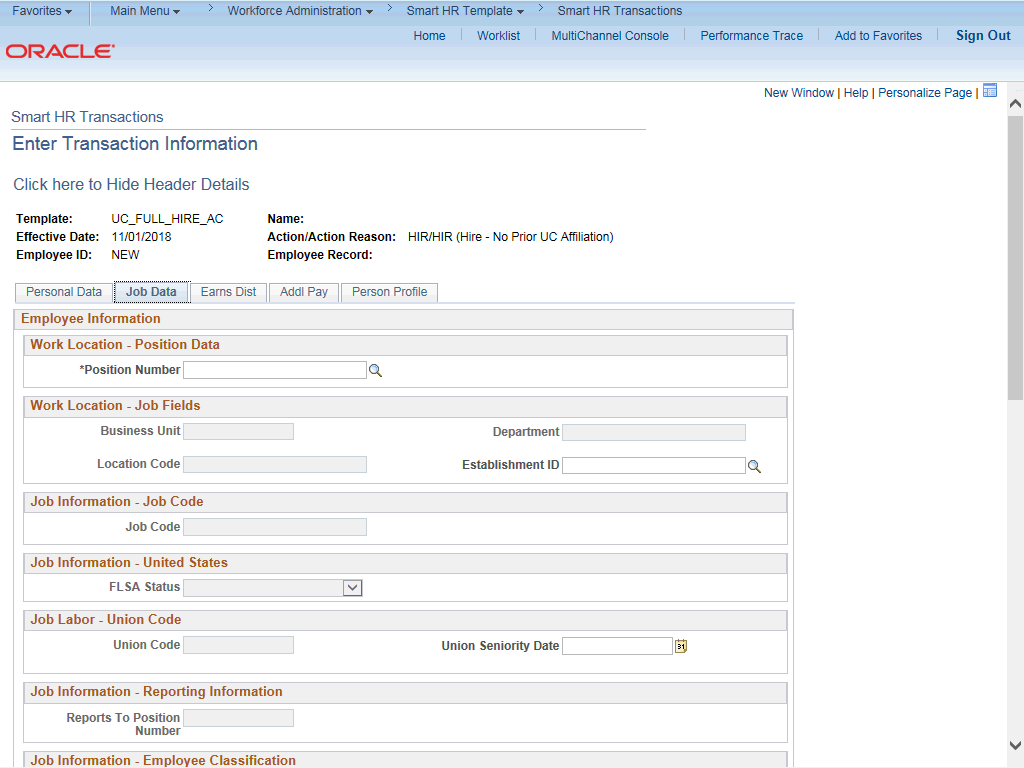


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| **Step** | **Action** |
| 53. | If applicable, use the **UC External System ID** section to enter external system information to facilitate matching of IDs with IDM systems.  If providing the information, you must enter values for all three fields. 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). |
| 54. | 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. |
| 55. | Click in the **Tracker Profile ID** field. |
| 56. | Enter the desired information into the **Tracker Profile ID** field. |

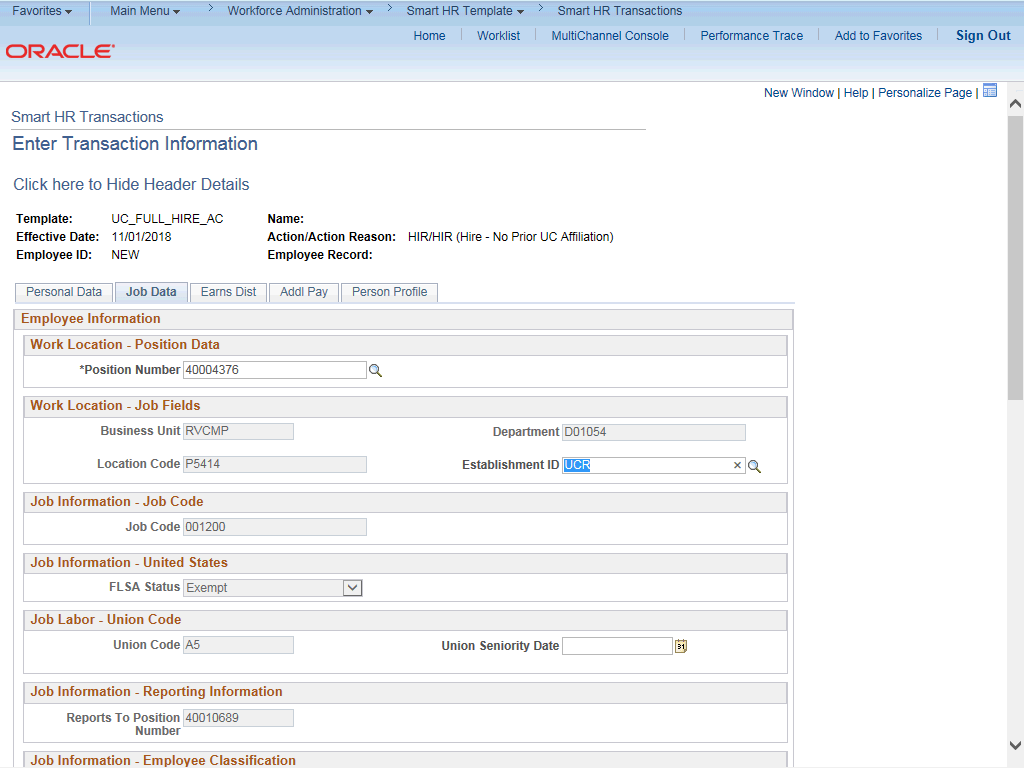
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| **Step** | **Action** |
| 57. | Use the **Comments** field to enter specific details or an explanation regarding the transaction. For example, this field can be used to:   * Enter details about a contract pay transaction, such as contract begin date and contract end date. * 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. |
| 58. | Click the scroll bar. |



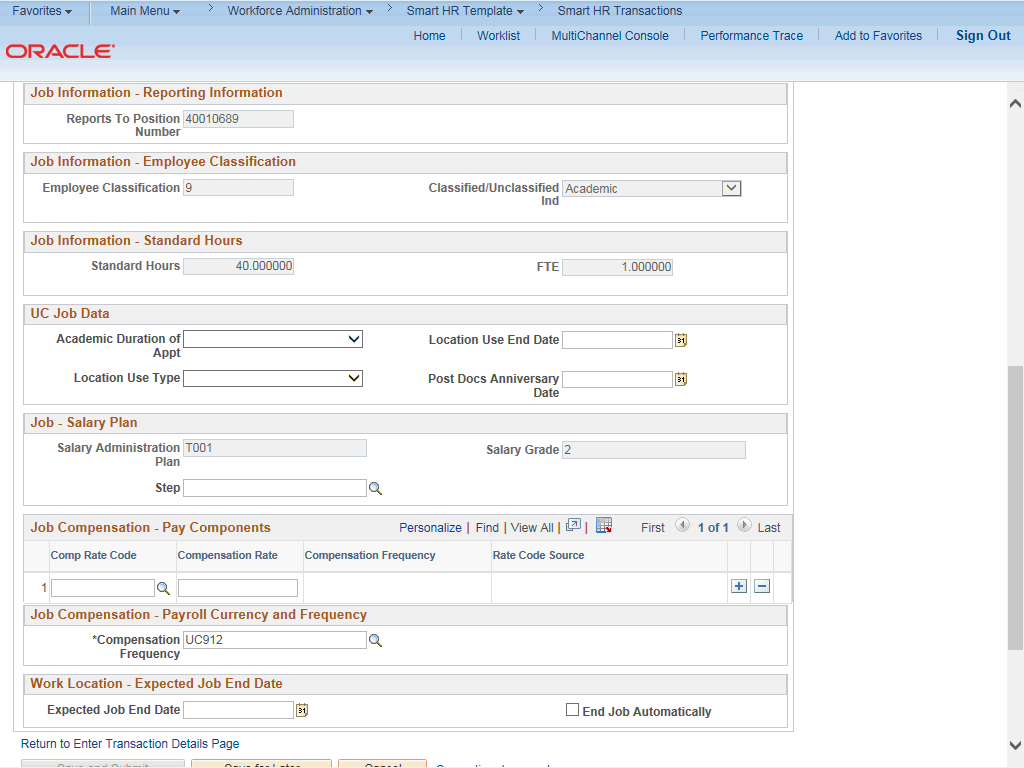
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| **Step** | **Action** |
| 59. | Click the **Job Data** tab. |



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| **Step** | **Action** |
| 60. | 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. |
| 61. | Enter the desired information into the **Position Number** field. |
| 62. | Press **[Tab]** to automatically populate the position-related fields. |

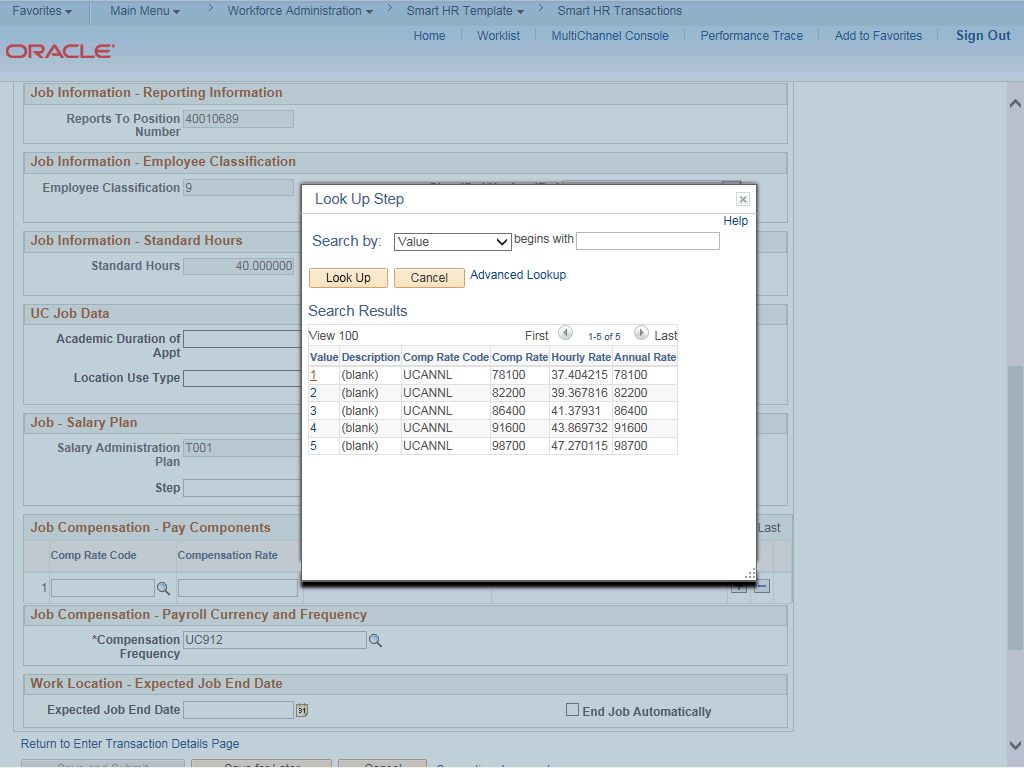


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| **Step** | **Action** |
| 63. | Click the scroll bar. |



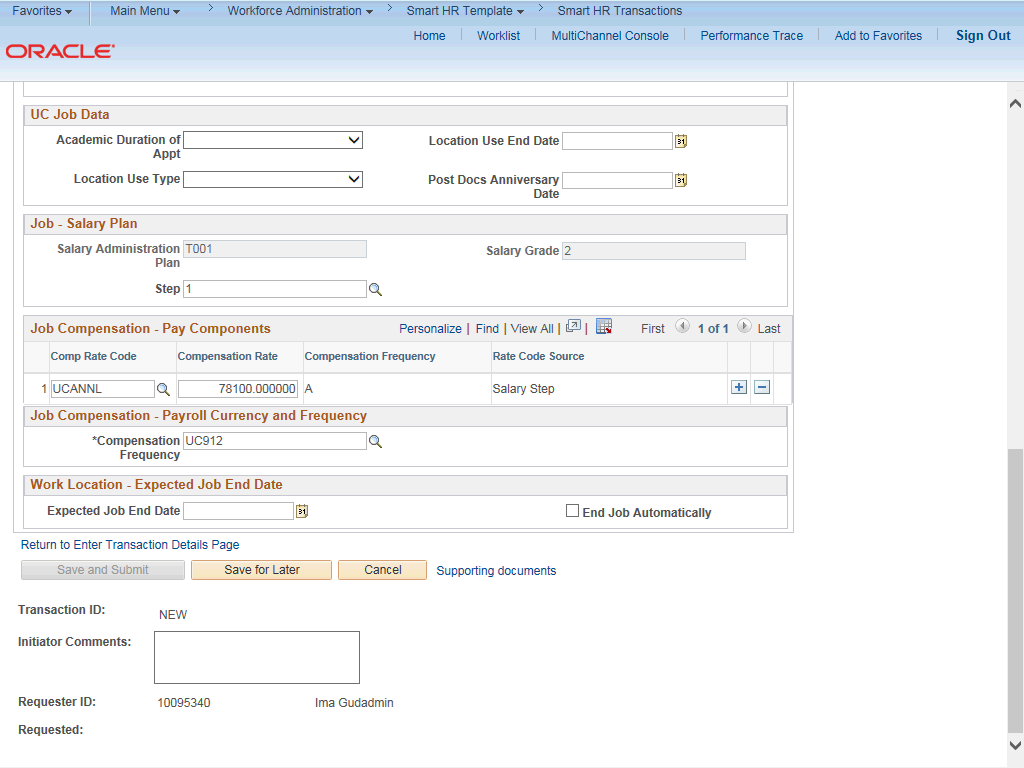
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| **Step** | **Action** |
| 64. | For academic hires, the **Employee Classification** field automatically populates based on the job code and cannot be changed. |
| 65. | In the **UC Job Data** section, enter or select the appropriate values as applicable. |
| 66. | The **Academic Duration of Appointment** options allow Locations to track additional information relating to the **Expected Job End Date** field (when entered at the bottom of this page).  **Academic Duration of Appt** options include:   * Continuing (Unit 18) * End Date (Academic Term Appts) * Indefinite * Potential Security * Security (LSOE) * Tenure Track (Ladder Rank) * Tenured |
| 67. | The **Location Use Type** and **Location Use End Date** fields allow Locations to track funding expiration and other location specific information separate from the **Expected Job End Date** field. 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 |
| 68. | **Post Docs Anniversary Date** is used to help maintain years of experience for Post Docs and assists with calculating accruals for vacation and sick leave for Post Docs. |
| 69. | 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.  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.  For contract-based pay hires, refer to the *Initiate Contract Pay Template Transaction* topic for specific steps on contract pay entries. |

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| **Step** | **Action** |
| 70. | For this example, the job code is associated with steps. Click the **Look up Step** button. |

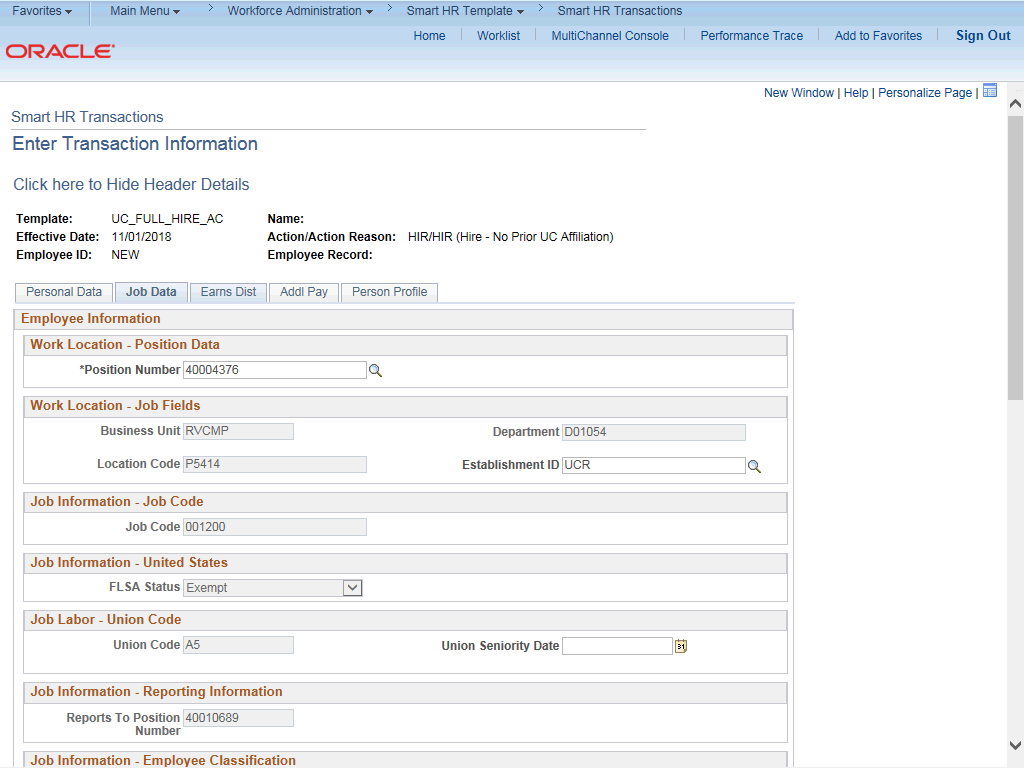


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| **Step** | **Action** |
| 71. | Use caution when selecting the appropriate step value. For some jobs, there are half steps, so be sure to review the **Hourly Rate** to ensure you are selecting the correct step value. |
| 72. | Select the appropriate **Step**.  For this example, click the **1** list item. |
| 73. | The **Comp Rate Code**, **Compensation Rate** and **Compensation Frequency** fields are automatically populated based on the **Step** that was entered. |
| 74. | You can add additional compensation rows by clicking the **add a row** (**+**) button. For example, if you need to add an offscale component. |

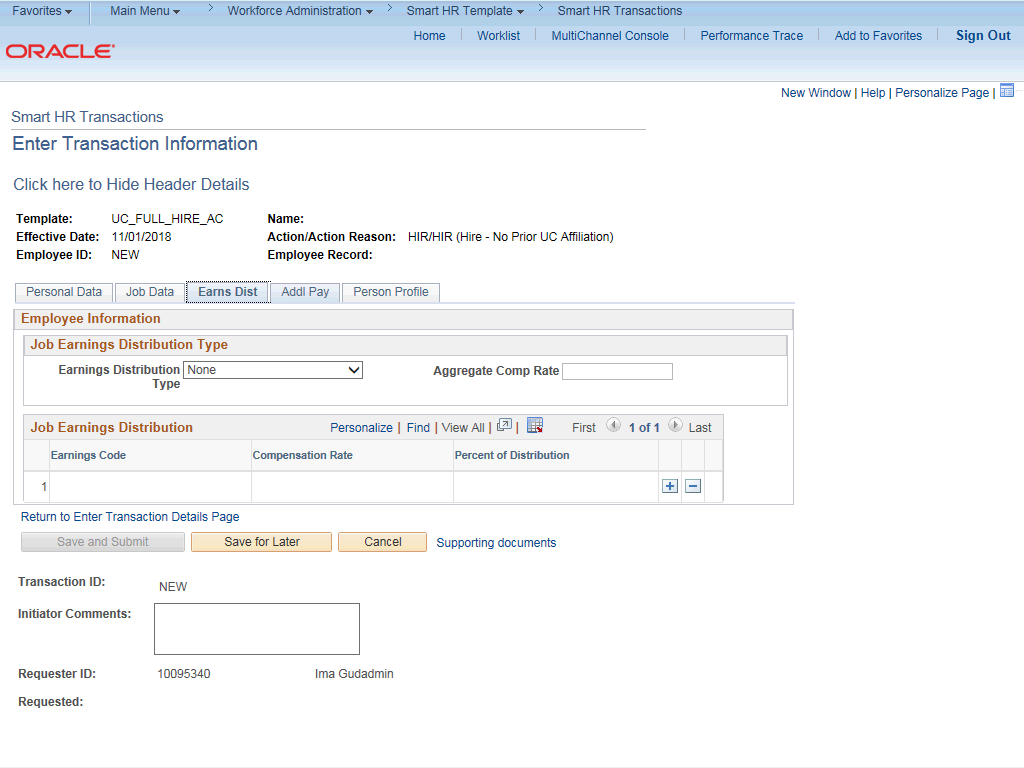
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| **Step** | **Action** |
| 75. | The payroll-related **Compensation Frequency** field automatically populates based on the job code.  The payroll-related **Compensation Frequency** field automatically populates based on the job code.  If the **Compensation 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**.  This field can be changed for specific exceptions, such as contract based pay or to change to an academic frequency. Any time this field is changed from the default enter a **Comment** (on the first tab) to explain why the field was changed. |
| 76. | Click the scroll bar. |



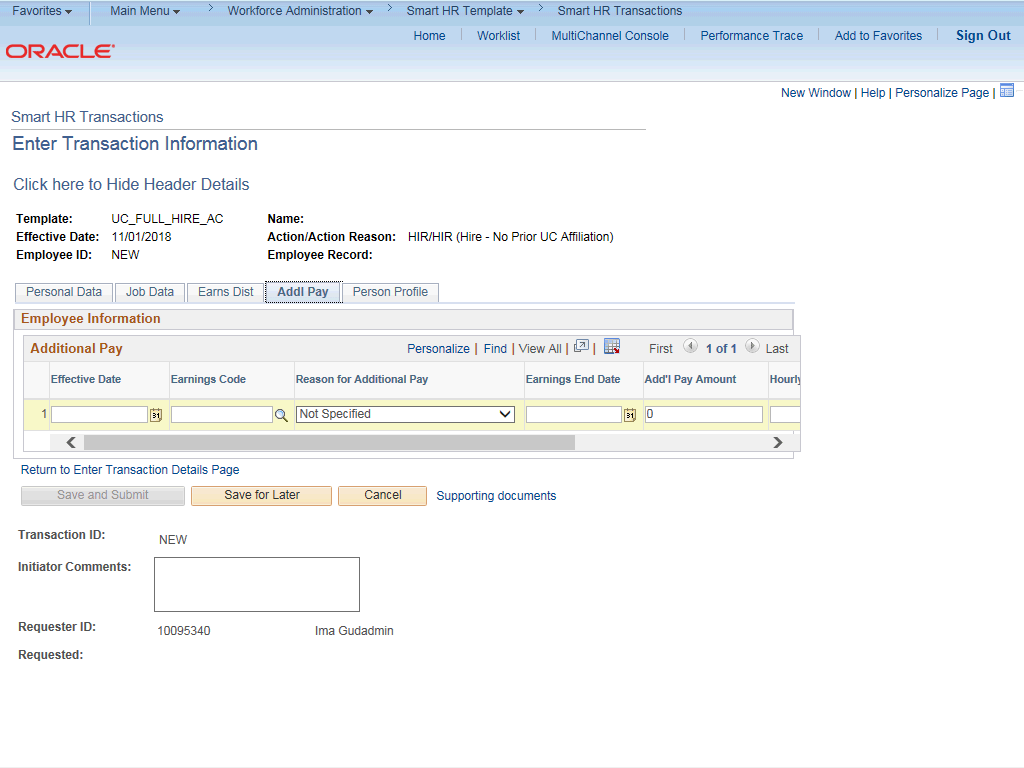
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| **Step** | **Action** |
| 77. | If the employment is a short term assignment or temporary hire, enter the date the position ends in the **Expected Job End Date** field.  An expected end date should be entered for all academic employee classes, except:  **3** - Academic Recall   1. - Faculty 2. - Non-Faculty 3. - Academic Student   **14** - Academic Contingent Worker   1. - Emeriti 2. - Deans/Faculty Administrators 3. - Post Docs |
| 78. | If the **End Job Automatically** check box is selected the UCPath Center will run a process to terminate the employee as of the **Expected Job End Date**. |
| 79. | Click the scroll bar. |



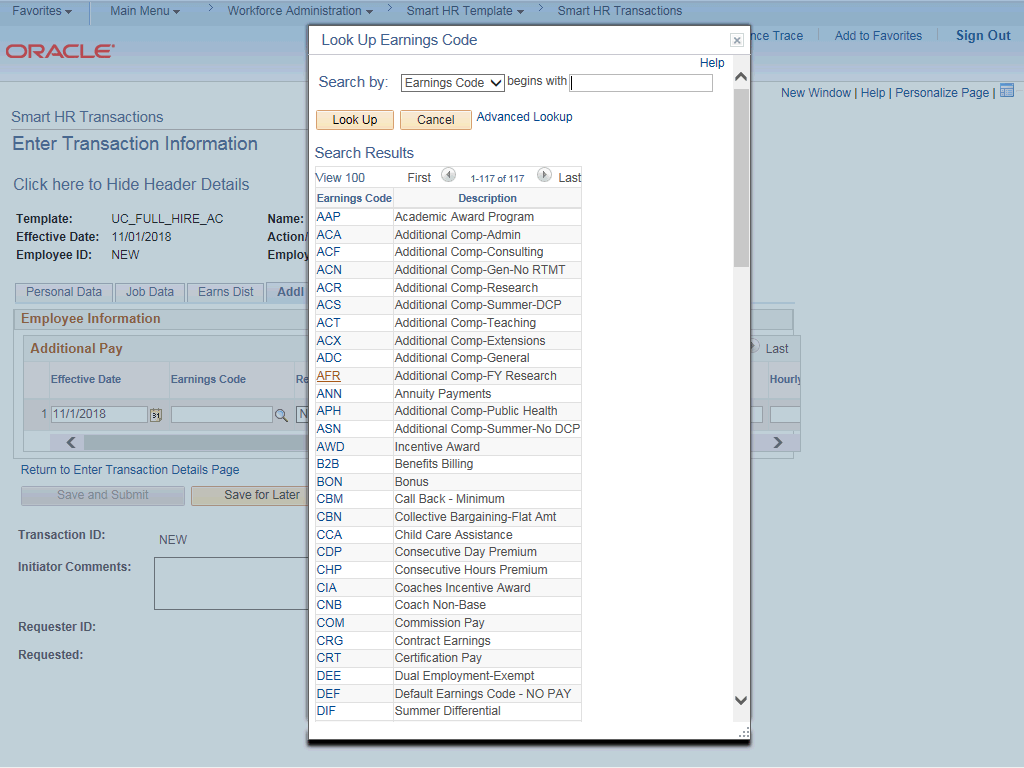
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| **Step** | **Action** |
| 80. | Click the **Earns Dist** tab. |



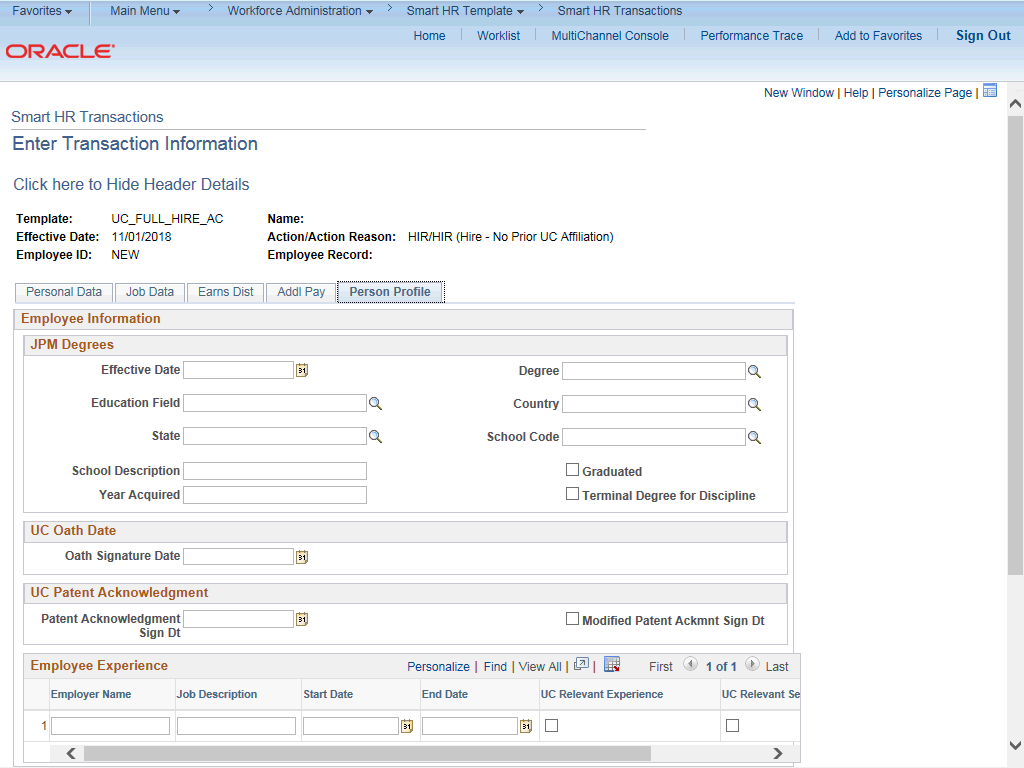
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| **Step** | **Action** |
| 81. | In most cases, the **Job Earnings Distribution** section is automated. If the **Comp Rate** code entered on the **Job Data** tab has a mapped **Earnings Code**, the **Job Earnings Distribution** section is updated automatically. |
| 82. | 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%. |
| 83. | For certain academic comp rate codes, such as Health Science Comp Plan, earnings codes are defaulted based on the **Comp Rate Code** entered on the **Job Data** tab.  Also in those cases, earning distribution type is **By Amount** and amounts are automatically calculated. |
| 84. | Click the **Addl Pay** tab. |



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| **Step** | **Action** |
| 85. | There may be cases where an employee is paid a recurring flat amount. In these types of cases, 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. |
| 86. | In this example, you'll enter additional compensation details for the new hire. Click in the **Effective Date** field. |
| 87. | Enter the desired information into the **Effective Date** field. |
| 88. | Click the **Look up Earnings Code** button. |

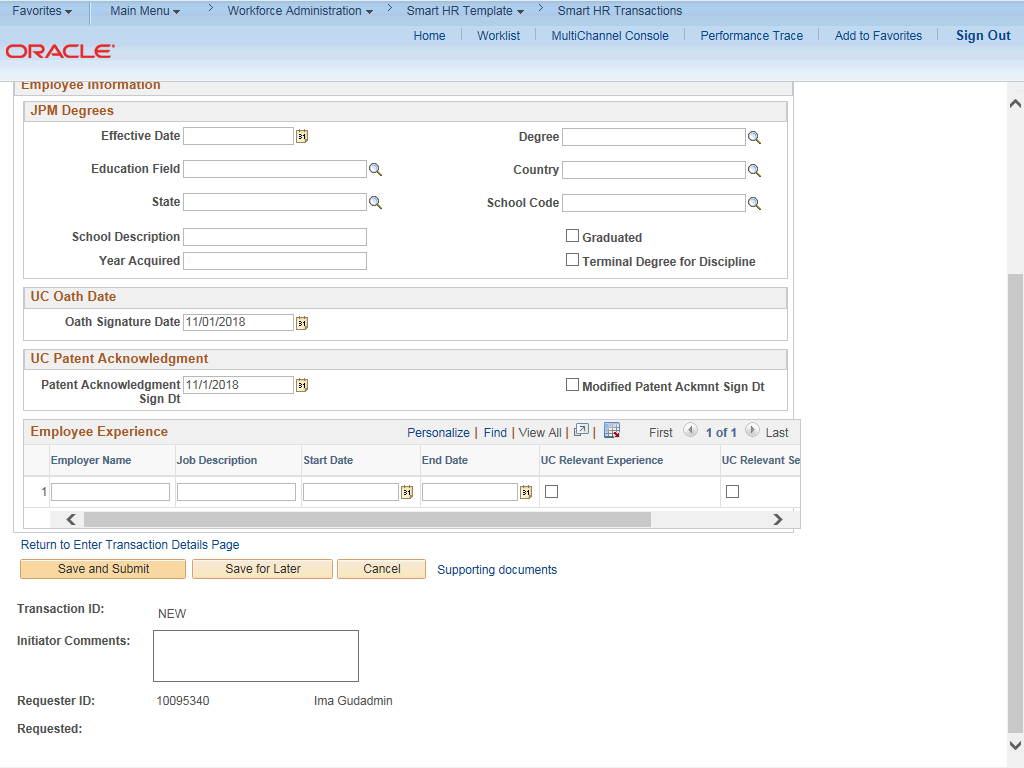


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| **Step** | **Action** |
| 89. | Select the appropriate **Earnings Code**. For this example, click the **AFR** list item. |
| 90. | Click in the **Earnings End Date** field. |
| 91. | Enter the desired information into the **Earnings End Date** field. |
| 92. | Click in the **Add'l Pay Amount** field. |
| 93. | Enter the desired information into the **Add'l Pay Amount** field. |
| 94. | Click the **Person Profile** tab. |

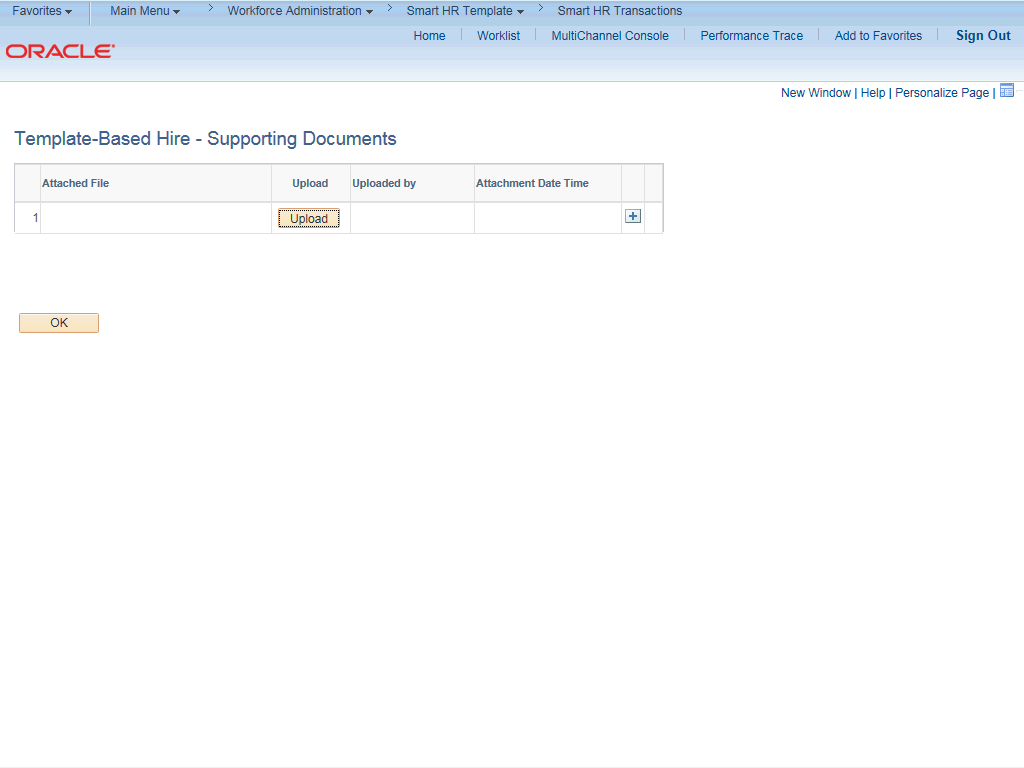


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| **Step** | **Action** |
| 95. | Use the **Person Profile** page to enter the employee's **Degrees**, **Oath Signature Date** and **Patent Acknowledgement** signature date.  The information entered in the **JPM Degrees**, **UC Oath Date** and **UC Patent Acknowledgement** sections is copied to the employee's **Person Profile** component after the template is processed by UCPC WFA Production.  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. |
| 96. | Enter the date the employee signed the UC oath agreement. This date cannot be later than today's date.  Click in the **Oath Signature Date** field. |
| 97. | Enter the desired information into the **Oath Signature Date** field. |
| 98. | Enter the date on which the individual signed the UC patent acknowledgement. This date cannot be later than today's date.  Click in the **Patent Acknowledgment Sign Dt** field. |

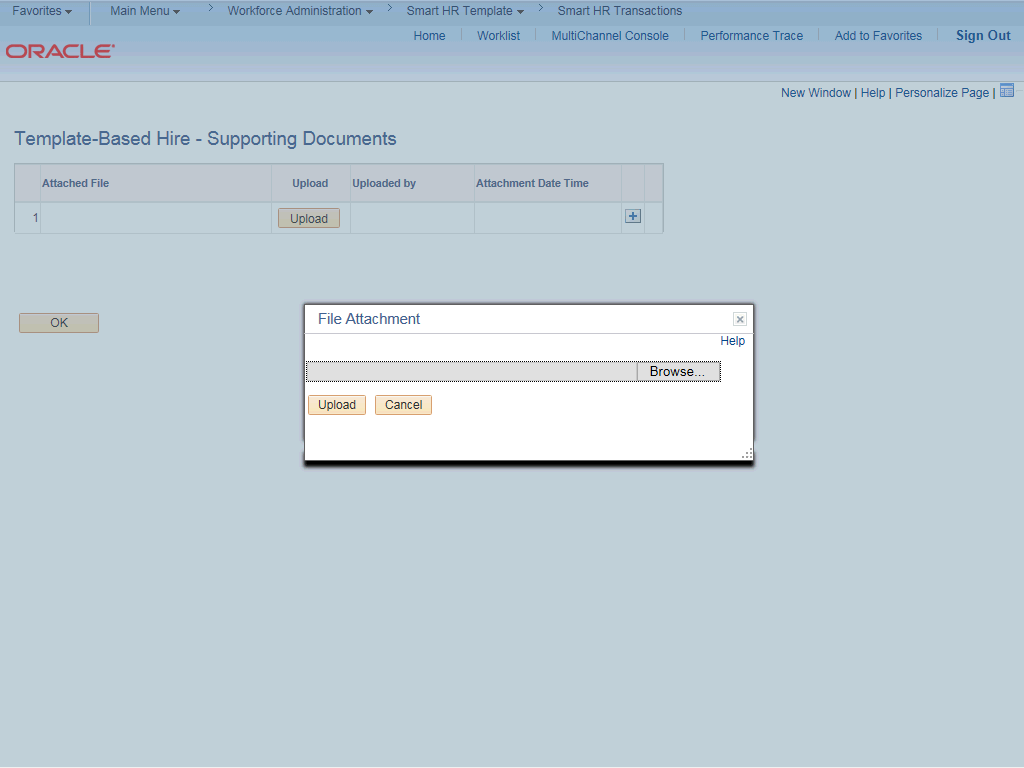
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| **Step** | **Action** |
| 99. | Enter the desired information into the **Patent Acknowledgment Sign Dt** field. |
| 100. | Click the scroll bar. |



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| **Step** | **Action** |
| 101. | Use the **Supporting documents** link to attach supporting documents for the new hire.  Click the **Supporting documents** link. |



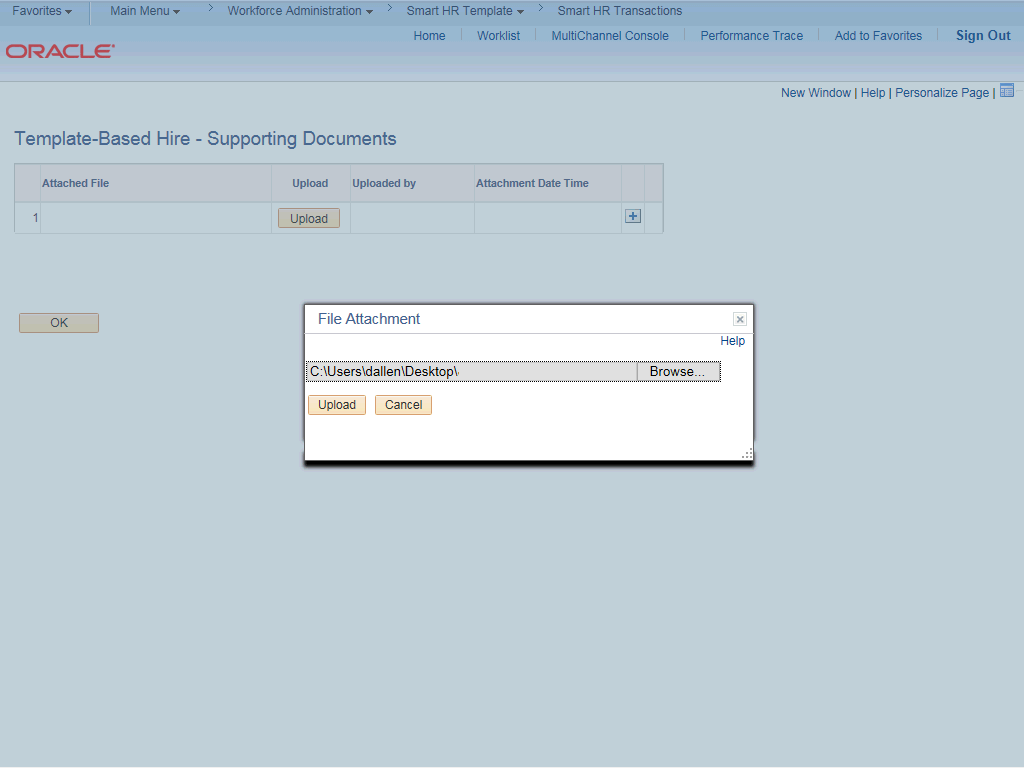
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| **Step** | **Action** |
| 102. | Click the **Upload** button. |



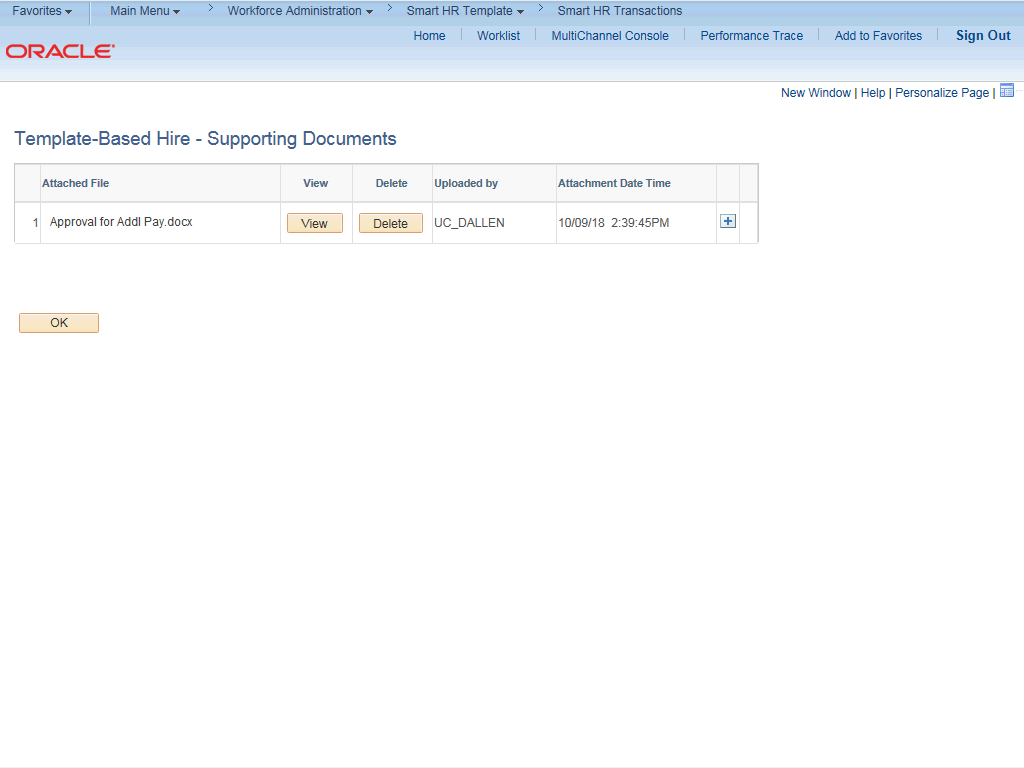
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| **Step** | **Action** |
| 103. | Click the **Browse...** button. |



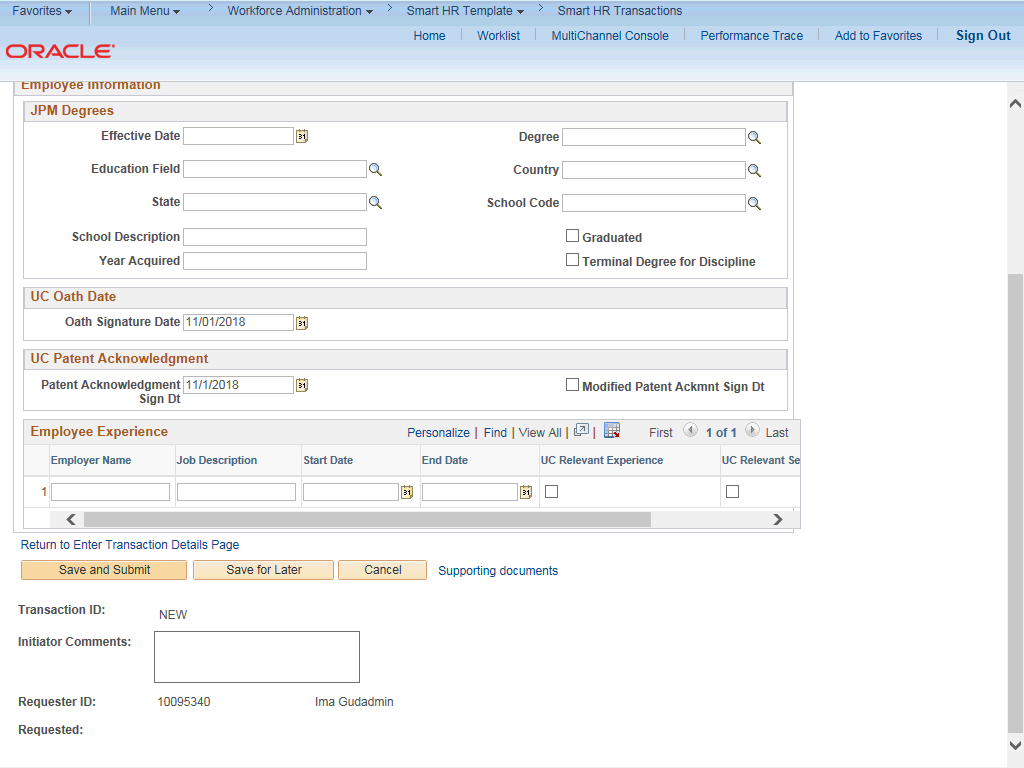
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| **Step** | **Action** |
| 104. | Select the appropriate document to attach. |



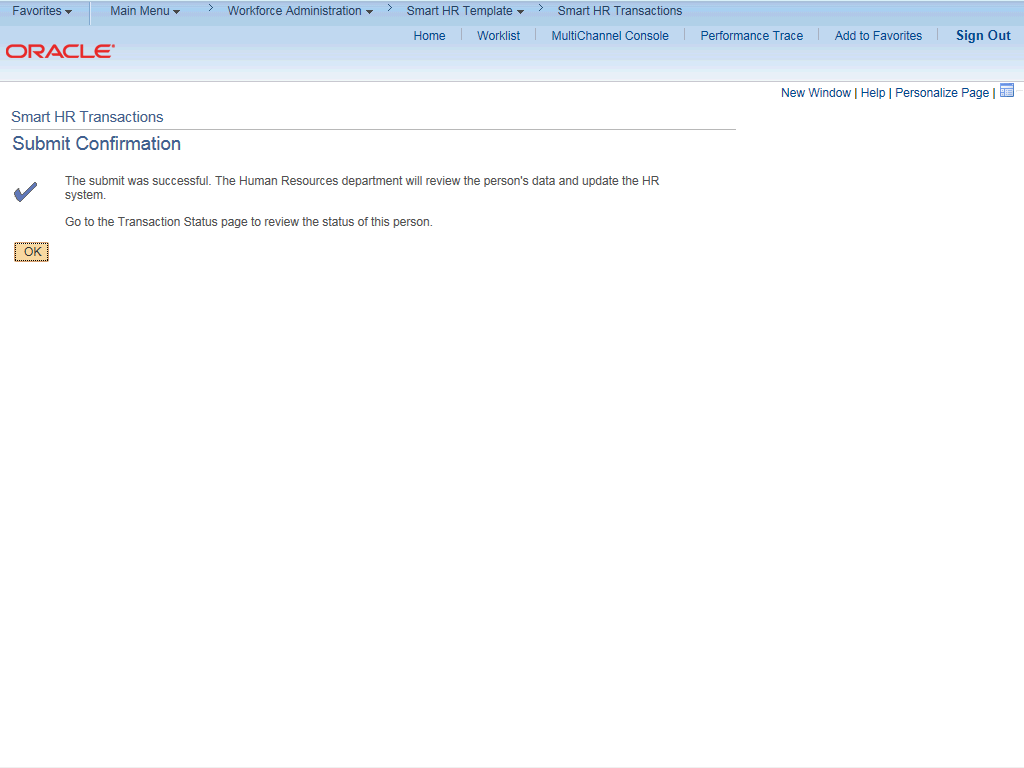
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| **Step** | **Action** |
| 105. | Click the **Upload** button. |



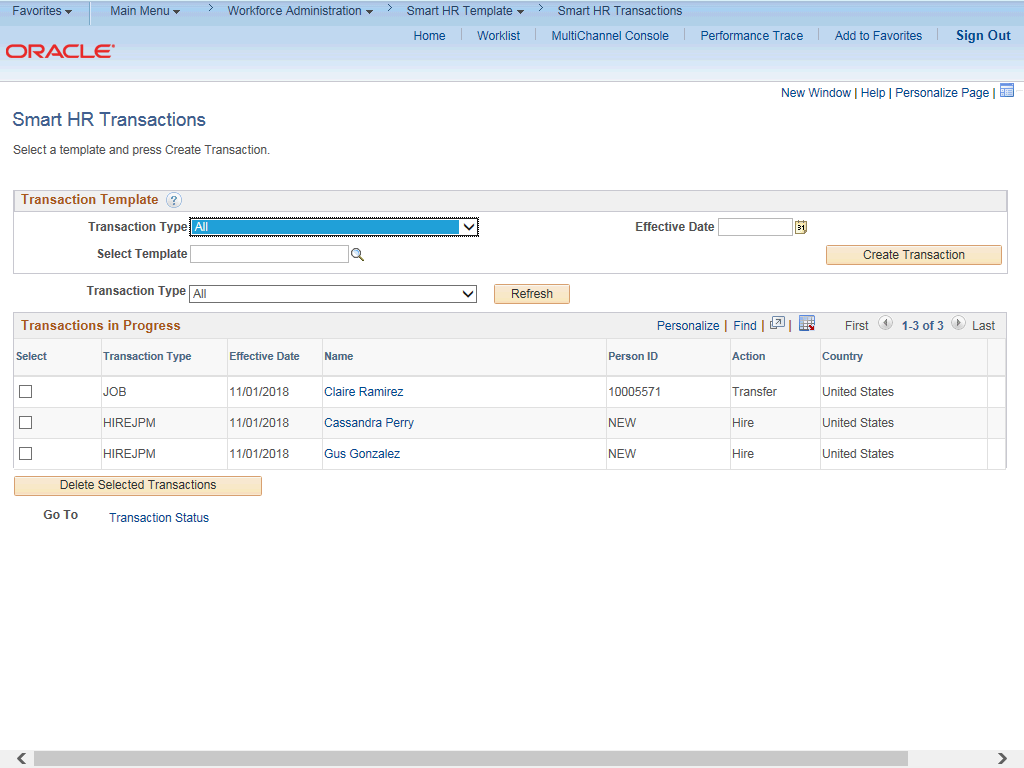
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| **Step** | **Action** |
| 106. | You also can view and delete the attachments from this page. |
| 107. | Click the **OK** button. |



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| **Step** | **Action** |
| 108. | 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. |
| 109. | 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** |
| 110. | Click the **OK** button. |



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| **Step** | **Action** |
| 111. | The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed. |
| 112. | You have initiated a full hire template transaction for an academic employee.  **End of Procedure.** |