UCPath

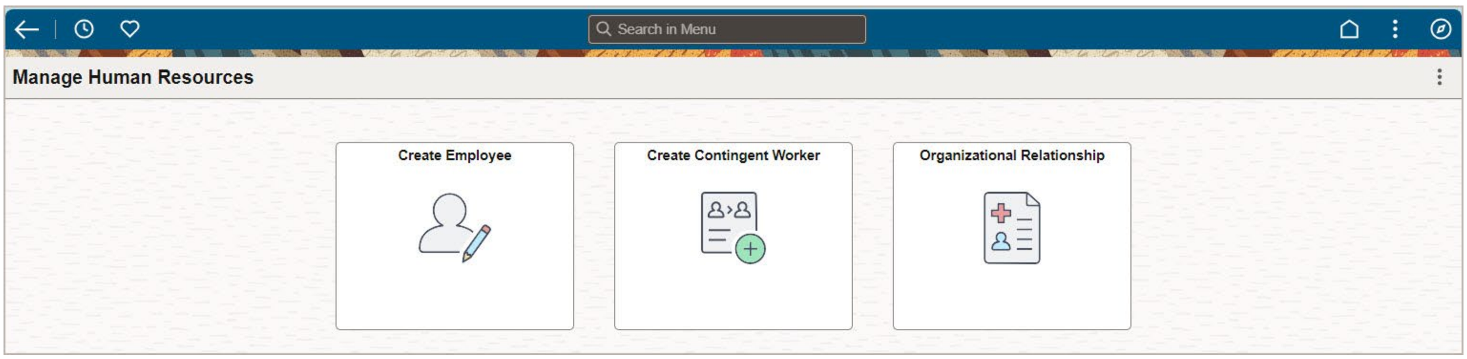
Reference Guide for Hires

This document provides information on employee hire transactions in the UCPath system, including hires, rehires, transfers, and concurrent hires for employees and contingent workers.

Location transactors with the following roles have access to **Manage Human Resources** and can transact:

ULSHR WFA Admin CWR Relationsh
ULSHR WFA Admin Contingent Wor
ULSHR WFA Admin EMP Relationsh
ULSHR WFA Admin Hire Employee

Navigation: Workforce Administration (Homepage) > **Manage Human Resources (Tile)**



To add a new hire, for a person without an employee identification number (EMPL ID) in UCPath, use the **Create Employee** or **Create Contingent Worker** tile, depending on the type of appointment they have been offered. Each process will generate an EMPL ID, and an employee job record (EMPL Record).

Use the **Organizational Relationship** tile process to add a new employee job record (EMPL Record) for employees or contingent workers who already have an Employee ID (EMPL ID). Person data (EMPL ID) cannot be updated from here.

Location transactors with the role ULSHR_HR_WFA_INQUIRY will have view access to **Organizational Relationship** but will be unable to transact.

Process

- Search to Verify
- Add a Person
- Add Job Data
- Summary Review and Submit
- Resources

Search to Verify

Perform a search to ensure the person does not already exist in UCPath. Duplicate records cause payroll, taxes, retirement and benefits issues for employees.

You can search for the person using the search page provided in this process or use Person Organization Summary. Refer to the *View Person Organization Summary* simulation for more information.

To use the search pages provided by **Manage Human Resources**, enter search values in the fields of the **Personal Details** section of the **Create Employee** or **Create Contingent Worker** page.

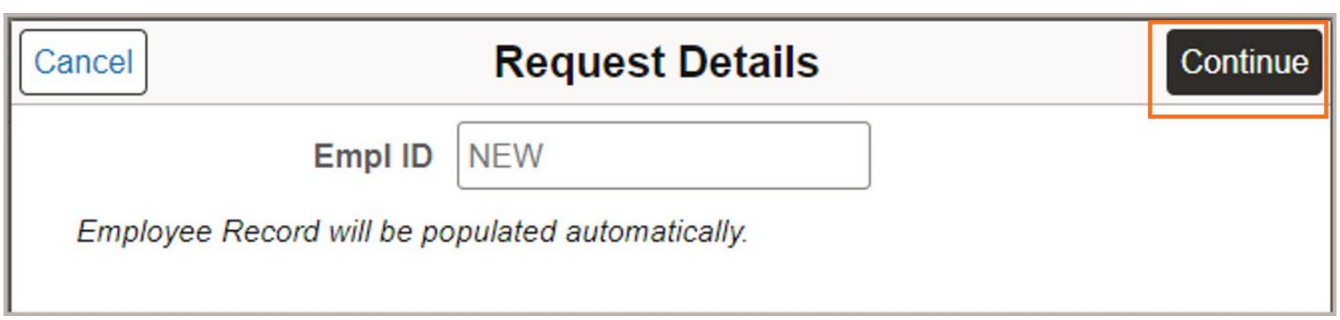
- ⚠ The best search value to use is the **National ID** (Social Security Number) field, as it is the most precise identifier of a person.
- ⚠ If **National ID** is not used, at least two of the other search fields must be populated. The name fields are typically the next best fields to use.

Field Name	Description
National ID	The person's Social Security Number (SSN). This is the recommended field to use.
Date of Birth	The person's date of birth. Use the drop-down menu to search and select if needed.
Legal First Name	The person's legal first name. This is a required field if a **Legal Last Name** is also used.
Legal Middle Name	The person's legal middle name.
Legal Last Name	The person's legal last name. A **Legal First Name** is required if this field is used.

Click the **Search** button to initiate the search.

The system checks for employees who fully or partially match the search values.

The **Request Details** box appears if there are no matches.



Click the **Continue** button to begin the entry process for the employee or **Cancel** to return to the search page.

The **Potential duplicates** table appears if there are matches. Review these to determine if the new hire already exists in UCPath.

There are two potential scenarios here:

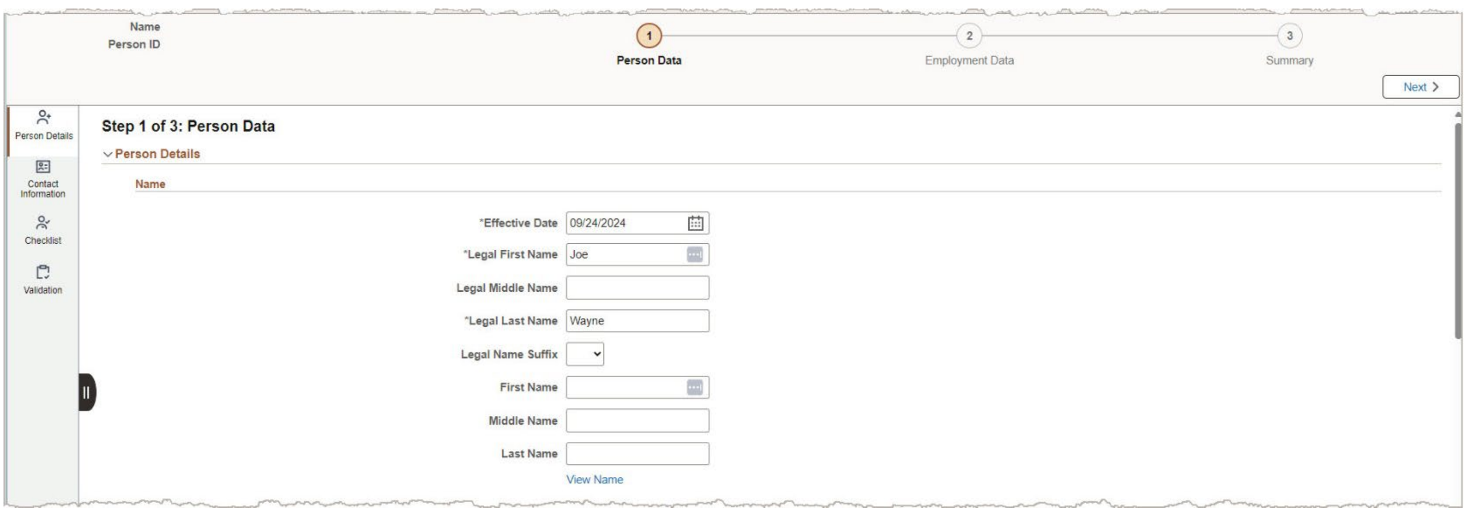
- The search criteria entered matches a listed person. This means the new hire already exists in the UCPath system and must not be re-entered. To prevent creating two **EMPL IDs** for the same person, click the back arrow to leave the page and this process, or refer to the *Job Aid: Hire No Prior UC Experience* for more information on processing existing employees.
- The search criteria entered does not match any of the listed people. There is no concern about creating two **EMPL IDs** for the same person.

Click the **Create Employee** button and then click **Continue** to proceed to the next step.

Add a Person

The **Person Data** section gathers the information needed to add a person to the system and assign them an EMPL ID.

UC employees are represented in the system via a unique employee identification number (**EMPL ID**), which the UCPath system assigns.



The section is divided into several topic areas, listed in the left panel in the order of the process sequence.

You can either work through these sections sequentially per the process or select any topic to navigate directly to that section. Alternatively, you can scroll down to the desired section.

Use these steps to provide the information required by the UCPath system.

> ⚠ Be especially diligent when entering data into the **Person Data** section. Once submitted, this information cannot be edited from this process.

Person Details

Name

Enter or select values for the **Name** information fields. These are required fields, as indicated in the following table.

> ⚠ **Legal Name** identifies a person for legal or certain official purposes. In UCPath, the **Legal Name** is always labeled "**Legal Name**". Its presentation and use are restricted to protect confidentiality.
>
> ⚠ The **Name** field is a self-chosen or personal and/or preferred professional name used instead of a **Legal Name**. The **Name** fields (First, Middle & Last) are the data typically returned in searches and reports throughout the system; while the **Legal Name** fields are usually reserved for legal documentation such as W-2's, tax forms. If **Name** is not entered, it is defaulted from **Legal Name**.

Field Name	Required	Description
***Effective Date**	Yes	The date the person is active in the UCPath system. The creation date of the **EMPL ID**. This may differ from the **Effective Date** of the job, if you entered a future dated job. A person cannot be future dated. To update, enter a new date or use the drop-down calendar to search and select. Must be equal to or less than today's date.
***Legal First Name**	Yes	The person's <u>legal</u> first name. Defaulted from the search screen if entered there. You may update if needed.
Legal Middle Name	No	The person's <u>legal</u> middle name. Defaulted from the search screen if entered there. You may update if needed.
***Legal Last Name**	Yes	The person's <u>legal</u> last name. Defaulted from the search screen if entered there. You may update if needed.
Legal Name Suffix	No	The legal value they use to denote familial relationships. To update, use the drop-down menu to search and select.
First Name	No	The self-chosen first name they prefer to use instead of their legal first name. If not entered, defaulted from **Legal First Name** when **Person Data** is saved.
Middle Name	No	If provided, the self-chosen middle name they prefer to use instead of their legal middle name. If not entered, defaulted from **Legal Middle Name** when **Person Data** is saved.
Last Name	No	If provided, the self-chosen last name they prefer to use instead of their legal last name. If not entered, defaulted from **Legal Last Name** when **Person Data** is saved.

To see how the name fields display with these name values, click the **View Name** link.

Personal Information

Date of birth is required for employees, but not for Contingent Workers.

Field Name	Required	Description
***Date of Birth**	Conditional	The person's date of birth. Required for employees, but not for Contingent Workers. To update, enter a date or use the drop-down calendar to search and select.

Biographical Details

In the **Biographical Details** sub-section, click the **Add Biographical Details** button to add their education level.

Field Name	Required	Description
***Effective Date**	N/A	Defaulted from the **Personal Information** sub-section and cannot be changed.
Highest Education Level	No	The default value is **A-Not Indicated.** Use the drop-down menu to search and select if needed.

Click the **Done** button to save the data.

⚠ Only one record can be active for **Biographical Details**.

⚠ To update or delete Biographical Details, click the **View Biographical Details** icon › at the end of the row.

National ID

Enter the employee's Social Security Number (**SSN**) here.

⚠ Ensure a **National ID** is provided for all employees.

⚠ Do not use an Individual Taxpayer Identification Number (ITIN).

⚠ If an employee doesn't have a Social Security Number (SSN) yet, leave the SSN field blank and note 'SSN pending' in the comments. Once the SSN is received, update it using the Person Data Template / Modify a Person.

Submitter: Ensure a **National ID** is provided for all current or retroactive employee hires. Do not enter for contingent (CWR) hires. A **National ID** is not mandatory for future-dated hires.

Approver: If the **National ID** is missing and there are no comments explaining its absence, take appropriate action.

Click the **Add National ID** button and enter values as appropriate.

Field Name	Required	Description
***Country**	N/A	The default value is **USA** and cannot be changed.
***National ID Type**	N/A	The default value is **Social Security Number** and cannot be changed.
National ID	No	The employee's **SSN**. Do not use an Individual Taxpayer Identification Number (ITIN).
Primary ID	No	The default is **Yes**, meaning this is the primary identification number.

Click the **Done** button to complete this section.

To update **National ID** information, click the **View National ID** icon [>] at the end of the applicable row.

Contact Information

Addresses

In the **Addresses** sub-section, click the **Add Address** button and enter or select values as appropriate.

Field Name	Required	Description
Address Type	Yes	The first address record is defaulted to **Home** and cannot be changed. All subsequent records require selection using the drop-down menu.
***Effective Date**	N/A	Defaulted to the date entered in the **Names** section and cannot be changed.
Country	No	Defaulted to **USA**. Use the search menu to select a different country if needed.
*** Status**	N/A	Set to **Active** and cannot be changed.
***Address 1**	Yes	The primary street address of the person. If country is not USA, address fields adjust to selected country's address layout.
Address 2	No	Secondary street address information.
Address 3	No	Additional street address information.
***City**	Yes	The locality (city, town, village, route) of the person.
***State**	Yes	The US state of the person's address. To select a state, use the search menu. Use the state's name, not abbreviation, to search and select.

Field Name	Required	Description
***Postal**	Yes	The applicable US postal code.
County	No	The county of the address.

Click the **Done** button to complete this section.

Optional. Click the **Add Address** icon [+] to add another address type.

Optional. To update **Addresses** information, click the **Add/Edit Address** icon [>] at the end of the applicable row.

Phone

In the **Phone** sub-section, click the **Add Phone** button and enter or select values as appropriate.

Field Name	Required	Description
***Type**	Yes	Select the category or purpose of the phone from the drop-down menu. Do not enter work numbers; these are automatically updated from the overnight processes.
***Number**	Yes	The phone number.
Extension	No	The phone's extension number, if applicable.
Preferred	No	The default is **No**, meaning this is not the preferred phone number to use when contacting the person. If applicable, click to toggle to **Yes.** If only one phone number is added, it will be identified as the **Preferred** phone and be set to **Yes.**

Click the **Done** button complete this section.

Click the **Add Phone** icon [+] to add another phone number.

To update **Phone** information, click the **Edit Phone** icon [>] at the end of the applicable row.

Email

In the **Email** sub-section, click the **Add Email** button and enter or select values as appropriate.

Field Name	Required	Description
***Email Type**	Yes	Select the category or purpose of the email from the drop-down menu. Do not enter work email addresses; these are automatically updated from the overnight processes.

Field Name	Required	Description
Preferred	No	The default is **No**, meaning this is not the preferred email address to use when contacting the person. If applicable, click to toggle to **Yes.** If only one email address is added, it will be identified as the **Preferred** email address and be set to **Yes.**
***Email Address**	Yes	The email address of the person.

Click the **Done** button to complete this section.

Optional. Click the **Add Email** icon to add another email address.

Optional. To update **Email** information, click the **Edit** icon at the end of the applicable row.

Checklist

The **Select Checklist Code** is defaulted to the **UC New Hire Checklist** or **UC Contingent Worker Checklist** as applicable. No other checklist is available; accept the default.

Next

Once **Person Data** has been completed, validation must be run.

After completing all the **Person Data** sections, click the **Next** button in the upper right corner of the page to validate the information.

If there are warnings or errors, appropriate messages are displayed in the **Validation Messages** of the **Validation** sub-section.

Errors cause hard stops and must be corrected before continuing.

Warnings are informational and can be reviewed and accepted before continuing.

If there are no **Validation Messages**, the next section, **Job Data,** displays.

Validation

Validation Messages

This section displays messages for errors or warnings identified by the validation process.

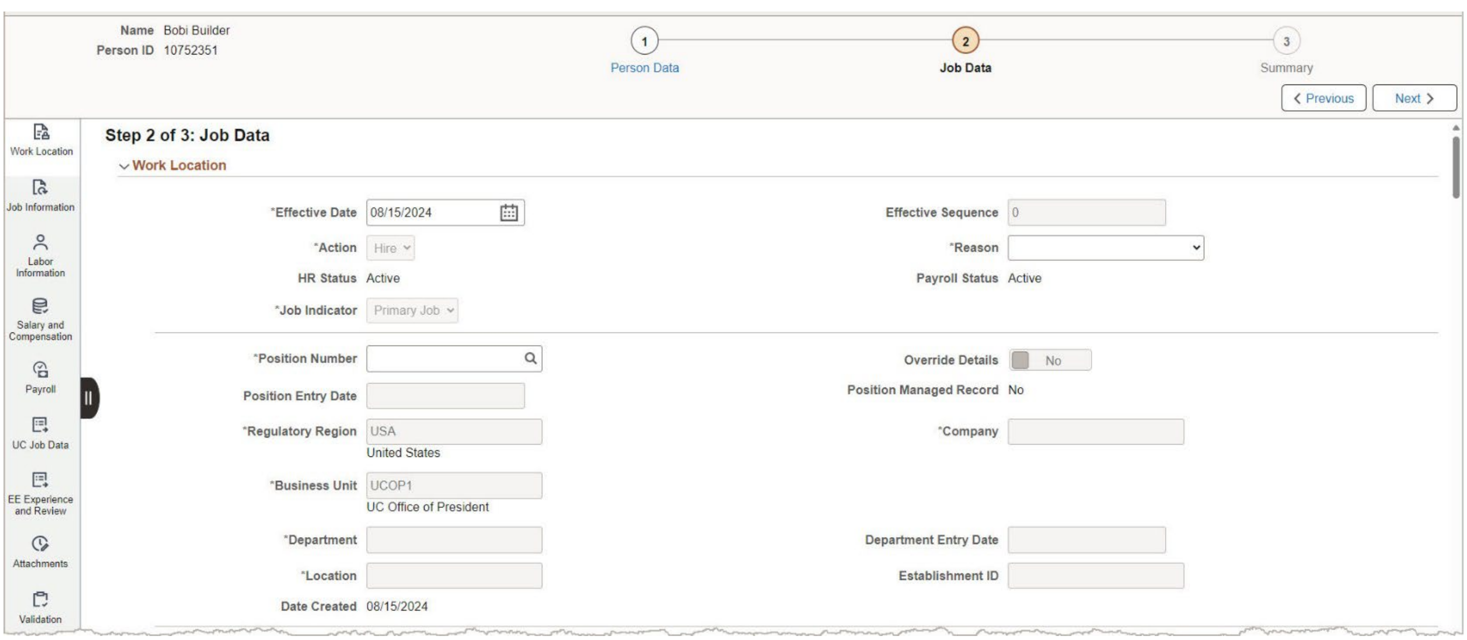
Review any messages displayed and take corrective actions if needed, then click the **Next** button to re-run validation.

After resolving all errors and carefully reviewing all warnings, click the **Proceed with warning** check box and then the **Next** button to continue.

> ⚠ The **EMPL ID** is now created and added to the system; no approval is required. This data cannot be updated in **Manage Human Resources** once the transaction is submitted for approval. If the transaction is cancelled, changes can be made until you exit the transaction.
>
> ⚠ Copy the **EMPL ID** for later reference if needed.

Add Job Data

The **Job Data** section gathers the job or Contingent Worker appointment information needed to create the **EMPL Rec**.



The section is divided into several topic areas, listed in the left panel in the order of the process sequence. Topics are action reason code specific which will determine the fields displayed and information needed for each.

You can either work through these sections sequentially per the process or select any topic to navigate directly to that section. Alternatively, you can scroll down to the desired section.

Use these topic sections to provide the information needed to create the **EMPL Rec** for employee job or organization instance record for a Contingent Worker.

Many fields in **Job Data** default from position, job and other selected values. Required fields or those of importance are discussed below.

Work Location

Enter or select values for the **Work Location** fields.

Field Name	Required	Description
***Effective Date**	Yes	The date this job or Contingent Worker instance takes effect. Defaulted to today's date; must be equal to or greater than the **Effective Date** field of the **Person Data** section. If incorrect, pay and benefits could be impacted. To update, enter a new date or use the drop-down menu to search and select.
Effective Sequence	N/A	The **Effective Sequence** is a numerical field displaying the number of job actions entered on the same date. For new hires, it starts at 0.
***Reason**	Yes	The **Reason Action Code** for this transaction. For a description of **Reason Action Codes**, refer to *Job Aid: Hire Action Reason Codes Descriptions*.

Enter or select values for the second section of the **Work Location** fields.

Field Name	Required	Description
***Position Number**	Yes	The position number of the employee or Contingent Worker's job. You can only use position numbers within your business unit or related business unit.
Business Unit	N/A	The Location or campus of the position. Defaulted from Position.
Location	Yes	The Location of the position. Defaulted from Position.
Department	Yes	The description of the department the job is in. This will default in if a position is entered, but if adding a Contingent Worker without a position, you may need to enter this value.
Establishment ID	No	Identifies the Location or campus of the person.

Enter or select values for the third section of the **Work Location** fields.

Field Name	Required	Description
Expected Job End Date	Conditional	If the employment is a short-term assignment or temporary hire, enter the date the job ends in this field. An Expected Job End Date is required for the following employee classes: Academic: Academic Student Staff: Contract Staff: Floater Staff: Limited Staff: Per Diem Student: Casual/Restricted Strongly recommended for Contingent Workers.
End Job Automatically	Conditional	The default is **No**, meaning that the job will not end automatically. If it will end automatically, click to toggle to **Yes**.

Job Information

This section displays information about the job for the position selected.

Field Name	Required	Description
Job Code	Conditional	The job code number of the position. For employees these default from the **Position Number** selected above. For Contingent Workers this will need to be entered.
Reports to	Conditional	The position number of this person's supervisor. For employee, defaulted in from **Position Number**. For Contingent Worker, if not defaulted, must be entered or selected.
Employee Class	Yes	Select for staff positions or student appointments. Use the drop-down menu to search and select. This is defaulted in for Academic positions.
Full/Part	N/A	Defaulted from the **Position Number** selected above. Indicates if the appointment hours are fixed or variable. This field impacts holiday hours and accruals.
Shift Rate	N/A	If used at your Location, the compensation rate per shift.
Shift Factor	N/A	Not used.

Standard Hours

This section displays information on hours, full-time status, and work period.

Field Name	Required	Description
Standard Hours	N/A	The number of standard hours for the job. Defaulted from the **Position Number**.
FTE	Dependent	The full-time equivalent values of the job. Defaulted from **Position Number**. Required for employees and optional for Contingent Workers. If required and not entered, enter the FTE manually.
Work Period	N/A	Indicates the period of work for the job.

USA

This section displays information on the Fair Labor Standards Act (**FLSA**) and Equal Employment Opportunity (**EEO**) data of the job.

Click the expand icon [>] to display the fields.

Field Name	Required	Description
FLSA Status	N/A	The exemption status of the job. Concurrent jobs require FLSA alignment.
***EEO Class**	N/A	Indicates which EEO Class (race, gender, and job classifications) applies to the job.

Labor Information

This section displays bargaining, labor and union information for employees. They do not display for Contingent Workers.

Field Name	Required	Description
Bargaining Unit	N/A	When applicable, the identifier of the Bargaining Unit.
Labor Agreement	N/A	When applicable, the identifier of the Labor Agreement.
Union Code	N/A	When applicable, the identifier of the Union. Defaulted from **Position Number**.
Union Seniority Date	No	If applicable, enter the date the employee joined the union.

Assigned Seniority Dates

Field Name	Required	Description
Assigned Seniority Dates	N/A	The dates used to calculate an employee's seniority. Use is Location specific.

Salary and Compensation

These display for employees; they do not display for Contingent Workers.

Salary Plan

Field Name	Required	Description
Salary Admin Plan	N/A	When applicable, the identifier of the Salary Admin Plan. Defaulted from **Position Number**.
Grade	N/A	The employee's Grade level. Defaulted from **Position Number**.
Step	Dependent	Some job codes have compensation levels, called Steps, associated with them. When a Step is entered, UCPath automatically updates the **Job Compensation - Pay Components** fields and locks the compensation information fields. 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 an above-scale pay component, then the step does not need to be selected. Enter the applicable above-scale comp rate codes in **Job Compensation**.

Compensation

Field Name	Required	Description
Compensation Rate	N/A	The employee's compensation rate and currency.
Frequency	No	This indicates how often the employee is paid. Frequency automatically populates based on the job code, either **Hourly** or **Monthly**. Defaulted from **Job Code**; use the drop-down menu to change.

Comparative Information

This section shows a comparison of salary amounts between the person and the position. The **Compensation Rate** is defaulted to zero.

Pay Rates

This section displays for open-range positions. This section does not apply to most step-based positions. It displays the primary rates for the employee, with the default being USD.

A **Rate Code** needs to be entered for employees on an open range. To add a **Rate Code**, click the **Default Pay Components** button.

The **Pay Components** table opens.

Pay Components

This section will default values in from the step entered if the position is step-based. You will only need to add this information for open-range records.

To add a pay component for open-range records, click the **Add Pay Component** button.

If needed, click the **Show All** heading to expand the table and display all columns.

Field Name	Required	Description
***Rate Code**	Yes	The employee's compensation rate. Enter or use the search and select table to select the appropriate rate code.
Compensation Rate	Yes	The employee's compensation amount.

Click the **Calculate Compensation** button to calculate the new **Compensation Rate** in the table.

This updates the **Compensation Rate** and ***Frequency** in the **Compensation** section above.

Payroll

This section displays for employees; it does not display for Contingent Workers. Payroll and earnings information and values are displayed in this section.

Payroll for North America

This sub-section displays payroll data.

Field Name	Required	Description
Pay Group	N/A	The employee's default Pay Group, which may be updated during the next payroll process (E-019), is represented by a three-character code. This code is essential for creating paysheets, calculating and confirming payroll, and generating reports and files. UCPath assigns pay groups to employees based on factors such as union affiliation and available benefits. This default value can be overridden in the **Pay Group Override** field within the **Probation Details** sub-section of the **UC Job Data** section. Refer to the *Job Aid: Pay Group Assignment, Configuration and Code List* for more information on Pay Group.
Employee Type	N/A	The employee's defaulted **Employee Type**, which may be updated when the payroll process runs next.
FICA Status	N/A	FICA requirement status.

Earnings Distribution

This sub-section displays rate, hours and frequency information.

Field Name	Required	Description
Compensation Rate	N/A	The employee's compensation rate is set in the **Pay Components** sub-section of **Salary and Compensation**.
***Earnings Distribution Type**	No	The basis of the employee's compensation calculation.

Job Earnings Distribution

In most cases, these values are automatically calculated and displayed. If the **Compensation Rate** code entered previously has a mapped Earnings Code, the **Job Earnings Distribution** values are calculated and displayed here.

The **Job Earnings Distribution** section also allows you to manually enter distribution information if applicable.

Click the **Add Job Earnings Detail** button to add or update earnings distributions.

Field Name	Required	Description
***Earnings Code**	Yes	Identifies the type of earnings. When needed, use the lookup table to search for and select the appropriate rate code.
Compensation Rate	Dependent	If the ***Earnings Distribution Type in the Earnings Distribution** section is set to By Amount, the total of all compensation rates entered must add up to the monthly comp rate.

Field Name	Required	Description
Percent of Distribution	Dependent	If the ***Earnings Distribution Type** in the **Earnings Distribution** section is set to By Percent, the total of all compensation rates entered must add up to 100%.

UC Job Data

General job administrative information is displayed and set here.

All of these fields display for employees; only the **Cubicle** and **External System ID** fields display for Contingent Workers.

Probation Details

Field Name	Required	Description
***Probation Code**	Dependent	Required if in the **Job Information** section: • The Classified Ind field is Professional and_Support Staff • The Employee Class is set to Career or Partial Year Career. Select the applicable code from the drop-down menu.
Probation End Date	Dependent	Required if the **Probation Code** value is something other than **Completed** or **Probation Completed, Other Job** or left blank.
Trial Employment End Date	No	Enter if applicable at your Location.
Academic Duration of Appt	Dependent	If required, select from the drop-down menu.
ERIT/Phased Retirement End Dt	N/A	Displays applicable retirement date or end of ERIT.
Location Use End Date	Dependent	This field and the associated **Location Use Type** may be used for reporting purposes. If a **Location Use Type** is selected, this field is required. Enter or select the end date.
Post Docs Anniversary Date	Dependent	Required for Postdoc employees.
Location Use Type	No	This field and the associated **Location Use End Date** may be used for reporting purposes. If a type is selected here, then also enter a **Location Use End Date**. Use the drop-down menu to select the type.
PY Career Duration	Dependent	Required for **PY Career Duration** employee classes. Select the applicable duration from the drop-down menu.

Field Name	Required	Description
Eligibility Group Override	N/A	Indicates if overrides are in place.
Pay Group Override	No	Use the lookup table to override the default Pay Group. If overridden, the payroll process will not determine the Pay Group and will use this value instead.
Alternate Work Week	N/A	Displays the alternate workweek setting.
Cubicle	Dependent	Enter the employee's cubicle number if your Location is tracking cubicle for employee location requirements. This field is required for represented employees per AB-119.
Termination Override	N/A	Indicates if termination will be overridden.
HR Primary Job Override	N/A	Indicates if overrides are in place.

Oath Signature Date

Field Name	Required	Description
Oath Signature Date	Dependent	Only for US citizens. This only needs to be completed if this is a new hire or a rehire after more than 365 days. Enter the date the new hire signed the UC oath agreement. The date cannot be later than the current date.

Patent Acknowledgment Date

Field Name	Required	Description
Patent Acknowledgement Signature Date	Dependent	If already signed, enter the date the new hire signed the UC patent agreement. The date cannot be later than the current date.
Modified Patent Ackmnt Sign Dt	No	The default is **No**, meaning that the person did not enter the acknowledgment signature. If acknowledged, click to toggle to **Yes**.

UC I-9 Information

Field Name	Required	Description
Tracker Profile ID	Dependent	If the new hire has an existing tracker profile, enter their **Tracker Profile ID** number.

Field Name	Required	Description
Remote I-9 Section 2	Dependent	The default is **No**. This means that **I-9 section 2** will not need to be completed remotely. If it does, click to toggle to **Yes**.

UC External System ID

This section allows you to enter external system information to facilitate the matching of IDs with IDM (Identity Management) systems.

Field Name	Required	Description
External System	No	Enter or use the search and select table to identify the external system being used for IDM matching.
External System ID	Dependent	Required if **External System** is entered.

Employee Experience and Review

These display for employees; they do not display for Contingent Workers.

This section allows you to set up the employee's first review dates and to document their relevant work experience for possible career and compensation opportunities.

UC Employee Review

Field Name	Required	Description
Review Type	No	Use the drop-down menu to select the review cycle type for the employee.
Next Review Date	Dependent	If Review Type is selected, enter the date of the next review.

UC Employee Prior Work Experience

If your Location uses this section, enter data related to the employee's prior work experience for represented staff.

Having this information is helpful in determining new compensation rates for the new hire.

Fill out the table columns as applicable and if known. There are no required fields.

Field Name	Required	Description
Employer Name	No	The name of the employer.
Job Description	No	A description of the responsibilities, duties, qualifications, and expectations for the job position.
Start Date	No	The date the job started.
End Date	No	The date the job ended.

Field Name	Required	Description
UC Relevant Experience	No	Click to indicate that this job provided experience relevant to a UC job.
UC Relevant Service	No	Click to indicate that this job provided service relevant to a UC job.

Attachments

Attachments

Click the **Add Attachment** button to load relevant or supporting files. Do not upload onboarding paperwork.

For **Dual Employment** and/or **Multi Location Agreement (MLA)** transactions, approval forms must be attached. Transactions submitted without the corresponding forms/approvals are sent back for review and resubmission.

Next

After completing all the **Job Data** sections, click the **Next** button in the upper right corner of the page to validate the information.

If there are warnings or errors, appropriate messages are displayed in the **Validation Messages** of the **Validation** sub-section.

Errors cause hard stops and must be corrected before continuing.

Warnings are informational and can be reviewed and accepted before continuing.

If there are no **Validation Messages**, the next section, **Summary**, displays.

Validation

Validation Messages

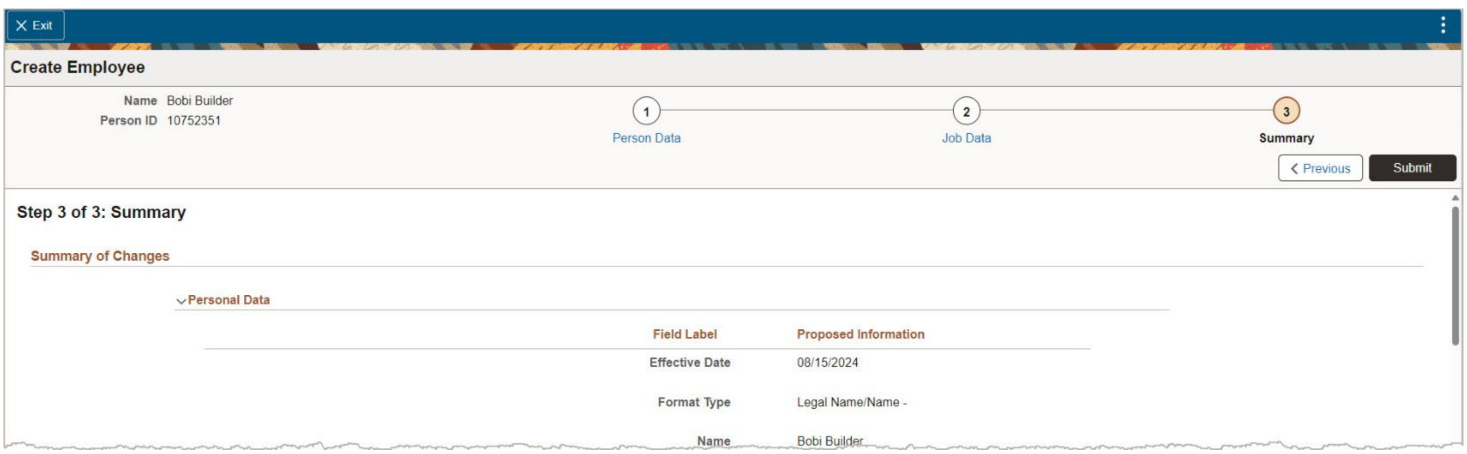
This section displays messages for errors or warnings identified by the validation process.

Review any messages displayed and take corrective actions, then click the **Next** button to re-run validation.

After resolving all errors and carefully reviewing all warnings, click the **Proceed with warning** check box and then the **Next** button to continue.

Summary Review and Submit

This page provides a summary of the **Personal** and **Job** data values entered, selected or defaulted.



Review and ensure that the information is complete and accurate.

Review the **Effective Date** fields for both **Person Data** and **Job Data**. Remember, this data cannot be updated in **Manage Human Resources** once the transaction is submitted for approval.

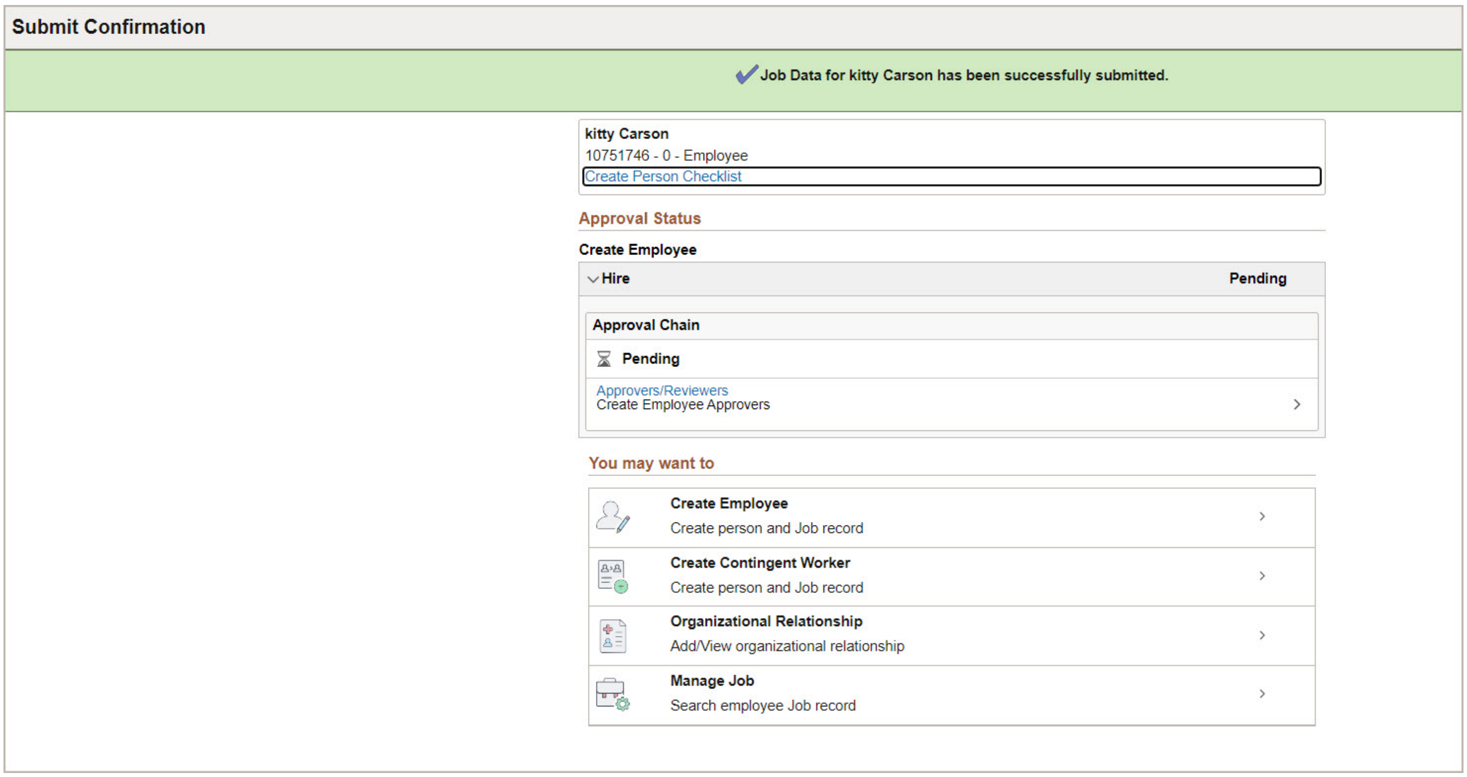
If corrections are needed, click the **Previous** button to return to the previous steps and correct or input as appropriate.

If there are issues with updating data, record the **EMPL ID**, exit out of the transaction instead of submitting for approval and then go to **Organizational Relationship** and add the **Job Data** there with the correct data.

To create the transaction, click the **Submit** button.

The **Comments** box appears. Enter any useful or applicable comments, then click the **Submit** button to continue. The transaction is automatically routed for approval.

Approvers review **Comments** and take actions as appropriate.



The **Submit Confirmation** page displays next, listing the Approver(s). The transaction is now routed for approval per the **Approval Chain** list, which can include multiple Approvers. The submitter will receive an email notification about the transaction and additional emails as the transaction moves through the approval process. Refer to the *Job Aid: Hire Approval Process* for more information.

For any denials or pushbacks, the submitter will receive an email notice. However, notes from the Approver will not be included in the email. The submitter can read the Approver's notes by reviewing them in **Organizational Relationship**.

Please note that Approvers cannot approve transactions during the payroll lockout period. However, they can deny or push back transactions during this period. Transactors will still be able to submit transactions during the lockout. Refer to the payroll calendar for the payroll lockout dates.

When approved, the process is completed and the new hire is now in the UCPath system with an **EMPL ID** and an **EMPL Rec**.

Resources

Refer to these resources for information on **Manage Human Resources**.

Job Aid: Decision Tree Hiring Action Reason Codes

Job Aid: Hire Action Reason Codes and Descriptions

Job Aid: Hire No Prior UC Experience

Job Aid: Hire for Inter-Location Transfers

Job Aid: Concurrent Hires

Job Aid: Hire for Intra-Location Transfers

Job Aid: Contingent (CWR) Hires

Job Aid: Hire Approval Process

Job Aid: Manage Human Resources Errors and Warnings