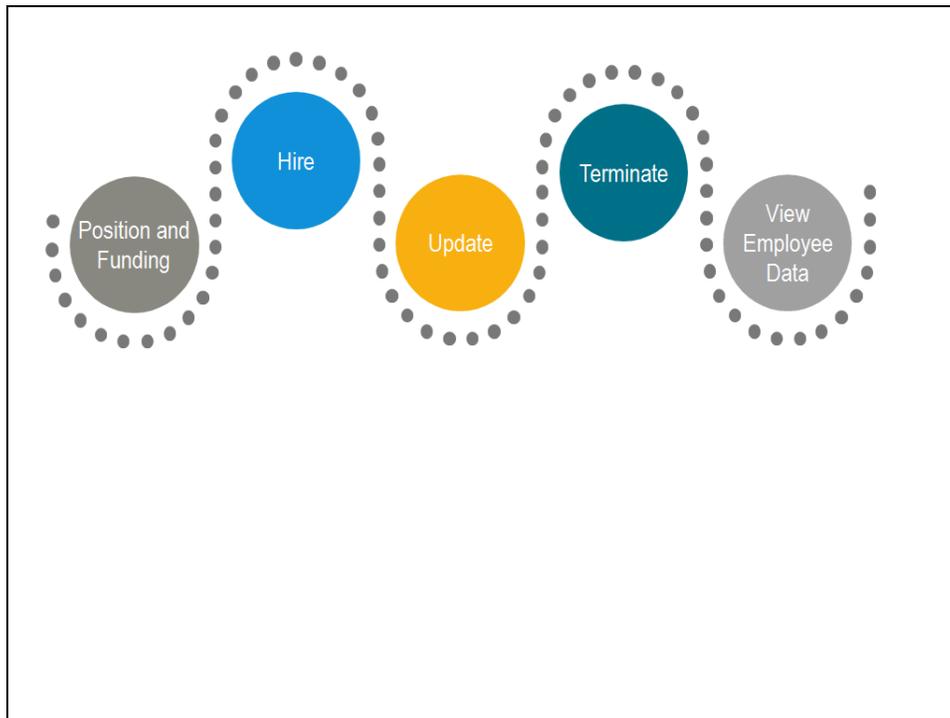


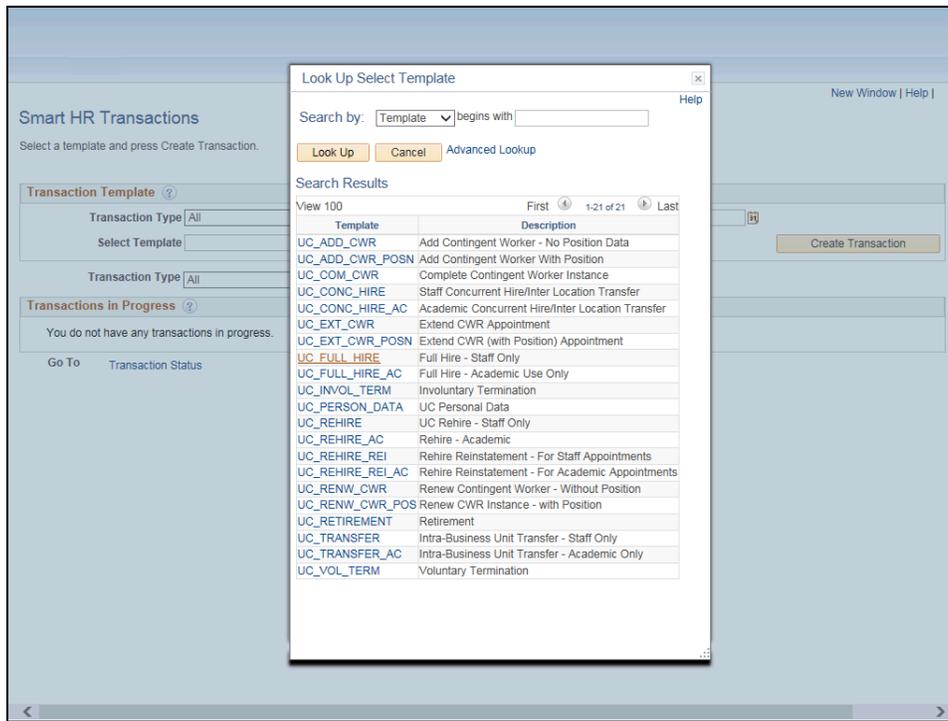
This simulation provides an overview of how to initiate, approve and process a new hire template transaction in UCPath for an employee named Jose Merced.

This simulation is for informational purposes only. The tasks included in this simulation are performed by those with the appropriate UCPath security role.



Step	Action
1.	The following tasks are covered in this demonstration: <ul style="list-style-type: none"> - Initiate a new hire template (Location Template Initiator). - Approve a new hire template (Location Template Approver). - Process a new hire template (UCPC WFA Production).

Step	Action
2.	Location Template Initiators use the Smart HR Transactions page to initiate a new hire template in UCPath.
3.	Click the Look up Select Template button. 



Step	Action
4.	<p>Select the appropriate hire template. Notice there are two full hire templates, one for staff and one for academic.</p> <p>This example uses the UC_FULL_HIRE template.</p> <p>Click to select.</p> <p>UC FULL HIRE</p>

New Window | Help | Personalize Page

Smart HR Transactions

Select a template and press Create Transaction.

Transaction Template ?

Transaction Type: Effective Date:

Select Template: x | Q Full Hire - Staff Only Create Transaction

Transaction Type: Refresh

Transactions in Progress ?

You do not have any transactions in progress.

Go To [Transaction Status](#)

Step	Action
5.	Enter the Effective Date (hire date). Click in the Effective Date field. <input style="width: 80px; height: 20px;" type="text"/>
6.	Click the Create Transaction button. <div style="text-align: center; margin-top: 5px;"> Create Transaction </div>

New Window | Help | Personalize Page

Smart HR Transactions

Enter Transaction Details

The following transaction details are required.

Template Full Hire - Staff Only

Organizational Relationship Employee

*Employee ID x Q

*Effective Date B

Action Hire

*Reason Code

*Address Format

Step	Action
7.	<p>The Employee ID field defaults to NEW.</p> <p>The system automatically generates the next sequential UC Employee ID after the UCPC WFA Production team processes the new hire template.</p>
8.	Select the appropriate Reason Code .
9.	<p>Click the Continue button.</p> <div style="text-align: center; margin-top: 10px;"> <input type="button" value="Continue"/> </div>

Smart HR Transactions New Window | Help | Personalize Page

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_FULL_HIRE **Name:**
Effective Date: 09/01/2018 **Action/Action Reason:** HIR/HR (Hire - No Prior UC Affiliation)
Employee ID: NEW **Employee Record:**

Employee Information

Name - Legal Name/Name

*Legal First Name Legal Middle Name
 *Legal Last Name Legal Suffix
 First Name Middle Name
 Last Name

Birth Information

Date of Birth

Person Education Level

Highest Education Level

Person National ID United States

National ID Type National ID

Person Address 01 - United States

*Address Type Home Address Line 1

Step	Action
10.	<p>The new hire template appears.</p> <p>Five tabs are available on this template: Personal Data, Job Data, Earns Dist, Addl Pay and Employee Experience.</p> <p>Fields that are required by the system are indicated with an asterisk (*).</p>
11.	Complete the fields on the Personal Data tab.

Smart HR Transactions New Window | Help | Personalize Page

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_FULL_HIRE **Name:**
Effective Date: 09/01/2018 **Action/Action Reason:** HIR/HR (Hire - No Prior UC Affiliation)
Employee ID: NEW **Employee Record:**

Employee Information

Name - Legal Name/Name

*Legal First Name Legal Middle Name

*Legal Last Name Legal Suffix

First Name

Last Name

Middle Name

Birth Information

Date of Birth

Person Education Level

Highest Education Level

Person National ID United States

National ID Type National ID

Person Address 01 - United States

*Address Type Address Line 1

Step	Action
12.	<p>For this example, the fields have been filled out for you.</p> <p>Scroll down to complete additional Personal Information fields.</p> <p>Click the scroll bar.</p>

UC Oath Date
Oath Signature Date

Person Phone Number Personalize | Find | View All | | First 1 of 1 Last
Phone Type Telephone Preferred
1

Person Email Address Personalize | Find | View All | | First 1 of 1 Last
Email Type Email Address
1

UC Patent Acknowledgment
Patent Acknowledgment Sign Dt Modified Patent Ackmnt Sign Dt

UC I-9 Information
Tracker Profile ID Remote I-9 Section 2

UC External System ID
Business Unit External System
External System ID

Comments
Comments

[Return to Enter Transaction Details Page](#)
 [Supporting documents](#)

Transaction ID: NEW

Step	Action
13.	Complete the additional Personal Information fields.

UC Oath Date
Oath Signature Date 08/01/2018

Person Phone Number Personalize | Find | View All | | First 1 of 1 Last
Phone Type Telephone Preferred
1 Mobile - Personal 503/234-7676

Person Email Address Personalize | Find | View All | | First 1 of 1 Last
Email Type Email Address
1 Home jmerced@yahoo.com

UC Patent Acknowledgment
Patent Acknowledgment Sign Dt Modified Patent Ackmnt Sign Dt

UC I-9 Information
Tracker Profile ID Remote I-9 Section 2

UC External System ID
Business Unit External System
External System ID

Comments
Comments

[Return to Enter Transaction Details Page](#)
 [Supporting documents](#)

Transaction ID: NEW

Step	Action
14.	<p>For this example the fields have been filled in for you.</p> <p>The Location Template Initiator can use the Comments field to enter specific details or explanation regarding the hire transaction.</p> <p>This field is referenced by UCPC WFA Production during their processing of the transaction.</p>
15.	<p>Scroll to the top of the page to navigate to the next tab.</p> <p>Click the scroll bar.</p>

Step	Action
16.	<p>Click the Job Data tab.</p> <p></p>

Smart HR Transactions New Window | Help | Personalize Page

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_FULL_HIRE **Name:**
Effective Date: 08/01/2018 **Action/Action Reason:** HIR/HR (Hire - No Prior UC Affiliation)
Employee ID: NEW **Employee Record:**

Employee Information

Work Location - Position Data

*Position Number

Work Location - Job Fields

Business Unit Department

Location Code Establishment ID

Job Information - Job Code

Job Code

Job Information - United States

FLSA Status

Job Labor - Union Code

Union Code Union Seniority Date

Job Information - Reporting Information

Reports To Position Number

Job Information - Employee Classification

Step	Action
17.	Use the Job Data tab to add the employee's position, job details and compensation.

Smart HR Transactions New Window | Help | Personalize Page

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_FULL_HIRE **Name:**
Effective Date: 08/01/2018 **Action/Action Reason:** HIR/HR (Hire - No Prior UC Affiliation)
Employee ID: NEW **Employee Record:**

Employee Information

Work Location - Position Data

*Position Number

Work Location - Job Fields

Business Unit Department

Location Code Establishment ID

Job Information - Job Code

Job Code

Job Information - United States

FLSA Status

Job Labor - Union Code

Union Code Union Seniority Date

Job Information - Reporting Information

Reports To Position Number

Job Information - Employee Classification

Step	Action
18.	After the Position Number field is entered, the system automatically populates many of the Job Data fields based on the data from the position record. For this example the fields have been filled in for you.
19.	Click the scroll bar.

The screenshot displays the UCPath Job Information form with the following sections and data:

- Job Information - Reporting Information:** Reports To Position Number: 40022388
- Job Information - Employee Classification:** *Employee Classification: [Searchable], Classified/Unclassified Ind: Professional & Support Staff
- Job Information - Standard Hours:** Standard Hours: 40.000000, FTE: 1.000000
- UC Job Data:**
 - Probation Code: None, Probation End Date: [Date]
 - Trial Employment End Date: [Date], ERIT/Phased Retirement End Dt: [Date]
 - Location Use End Date: [Date], Location Use Type: [Dropdown]
 - Alternate Work Week: 7/40, PY Career Duration: [Dropdown]
- UC Employee Review:** Review Type: [Dropdown], Next Review Date: [Date]
- Job - Salary Plan:** Salary Administration Plan: CTRV, Salary Grade: 23, Step: [Searchable]
- Job Compensation - Pay Components:** Table with columns: Comp Rate Code, Compensation Rate, Compensation Frequency, Rate Code Source. Row 1: [Searchable], [Searchable], [Searchable], [Searchable].
- Work Location - Expected Job End Date:** Expected Job End Date: [Date]

Step	Action
20.	Complete the remaining Job Data fields. For this example the fields have been filled in for you.
21.	For academic hires, the Employee Classification field is automatically populated based on the job code and cannot be changed. For this example, the employee is a staff member, so the field must be entered manually.

The screenshot displays the UCPath system interface for a new hire template transaction. The form is organized into several sections:

- Job Information - Reporting Information:** Reports To Position Number: 40022388
- Job Information - Employee Classification:** Employee Classification: 2, Classified/Unclassified Ind: Professional & Support Staff
- Job Information - Standard Hours:** Standard Hours: 40.000000, FTE: 1.000000
- UC Job Data:** Probation Code: Within Probation, Probation End Date: 02/01/2019, Trial Employment End Date, ERIT/Phased Retirement End Dt, Location Use End Date, Location Use Type, Alternate Work Week: 7/40, PY Career Duration
- UC Employee Review:** Review Type: Annual Performance Apprais, Next Review Date: 8/1/2019
- Job - Salary Plan:** Salary Administration Plan: CTRV, Salary Grade: 23, Step
- Job Compensation - Pay Components:** Personalize | Find | View All | 1 of 1 | First | Last
- Work Location - Expected Job End Date:** Expected Job End Date

Step	Action
22.	Probation Code and Probation End Date are required if the class indicator is Professional and Support Staff and the employee class is either Career or Partial Year Career .
23.	Some jobs require a Step . After the Step is entered for the job, the compensation fields are automatically populated.
24.	Scroll down to complete the remaining Job Data fields. Click the scroll bar.
25.	If a Step is not associated with the job, the Comp Rate Code , Compensation Rate and Compensation Frequency fields must be entered manually, as in this example.

Step	Action
26.	<p>If the employment is a short-term assignment or temporary hire, enter the date the job ends in the Expected Job End Date field. The employee will be automatically terminated on this date.</p> <p>An expected end date is required for the following employee classes:</p> <ul style="list-style-type: none"> -Staff: Contract -Student: Casual/Restricted -Staff: Floater -Staff: Rehired Retiree -Academic: Post Docs -Academic: Recall -Academic: Academic Student
27.	The payroll-related Compensation Frequency field automatically populates based on the job code.
28.	<p>Scroll up to navigate to the next tab.</p> <p>Click the scroll bar.</p>

Step	Action
29.	<p>Click the Earns Dist tab.</p> <p><input type="button" value="Earns Dist"/></p>

Smart HR Transactions New Window | Help |

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_FULL_HIRE **Name:**
Effective Date: 08/01/2018 **Action/Action Reason:** HIR/HR (Hire - No Prior UC Affiliation)
Employee ID: NEW **Employee Record:**

[Personal Data](#) | [Job Data](#) | **[Earns Dist](#)** | [Addl Pay](#) | [Employee Experience](#)

Employee Information

Job Earnings Distribution Type

Earnings Distribution Type: Aggregate Comp Rate:

Job Earnings Distribution Personalize | Find | View All | First 1 of 1 Last

Earnings Code	Compensation Rate	Percent of Distribution		
1				

Return to Enter Transaction Details Page

[Supporting documents](#)

Transaction ID: NEW
Initiator Comments:
Requester ID: 10173879 Anita Apptor
Requested:

Step	Action
30.	Use the fields in the Job Earnings Distribution section if the standard earnings for the employee just be distributed.
31.	Click the Addl Pay tab. 

New Window | Help |

Smart HR Transactions

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_FULL_HIRE **Name:**
Effective Date: 09/01/2018 **Action/Action Reason:** HIR/HR (Hire - No Prior UC Affiliation)
Employee ID: NEW **Employee Record:**

Personal Data | Job Data | Earnings Dist | **Add Pay** | Employee Experience

Employee Information

Additional Pay Personalize | Find | View All | | First | 1 of 1 | Last

Effective Date	Earnings Code	Reason for Additional Pay	Earnings End Date	Add'l Pay Amount	Hours
1	<input type="text"/>	<input type="text" value="Not Specified"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>

Return to Enter Transaction Details Page

 Supporting documents

Transaction ID: NEW
Initiator Comments:
Requester ID: 10173879 Anita Apptor
Requested:

Step	Action
32.	Use the fields in the Additional Pay section if the hire offer includes incentive pay or additional pay.
33.	Click the Employee Experience tab. 

Smart HR Transactions New Window | Help |

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_FULL_HIRE **Name:**
Effective Date: 08/01/2018 **Action/Action Reason:** HIR/HR (Hire - No Prior UC Affiliation)
Employee ID: NEW **Employee Record:**

[Personal Data](#) | [Job Data](#) | [Earns Dist.](#) | [Add'l Pay](#) | **[Employee Experience](#)**

Employee Information

Employee Experience Personalize | Find | View All | First 1 of 1 Last

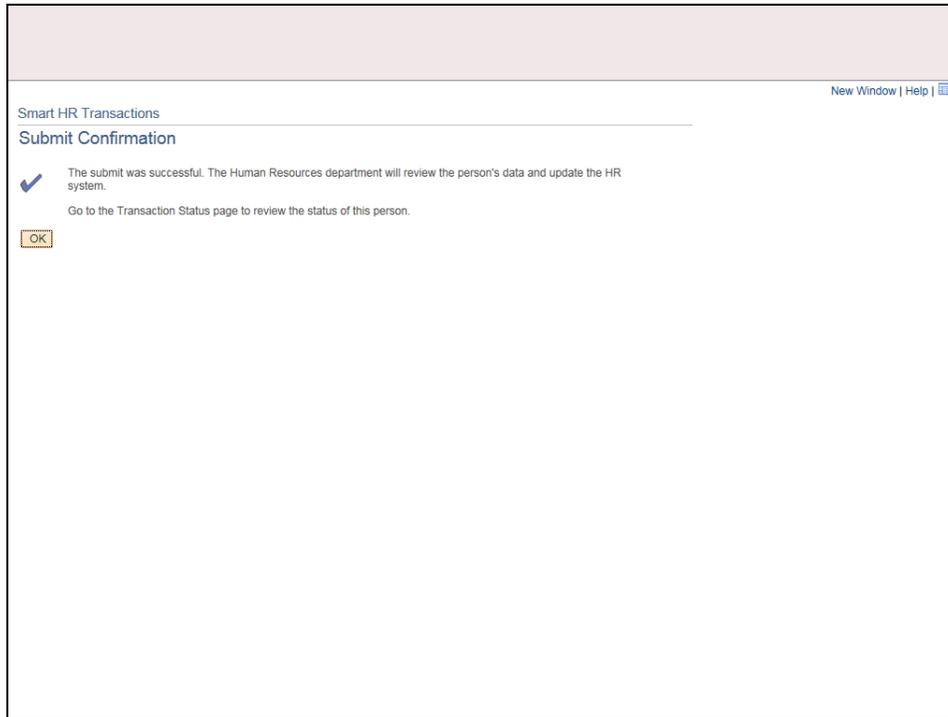
Employer Name	Job Description	Start Date	End Date	UC Relevant Experience	UC Relevant Se
1				<input type="checkbox"/>	<input type="checkbox"/>

[Return to Enter Transaction Details Page](#)

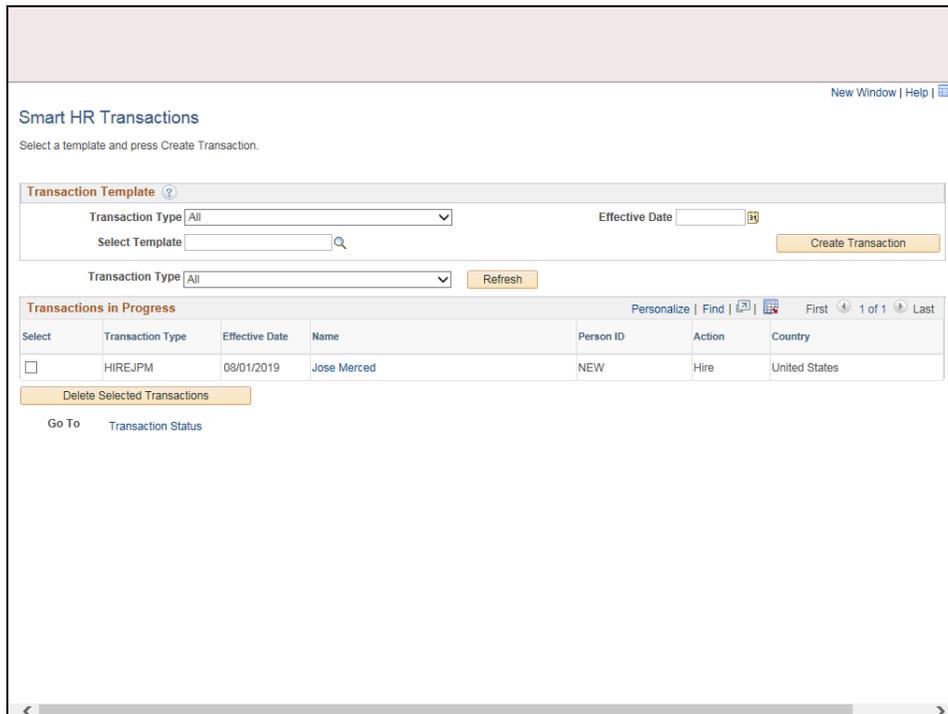
[Supporting documents](#)

Transaction ID: NEW
Initiator Comments:
Requester ID: 10173879 Anita Apptor
Requested:

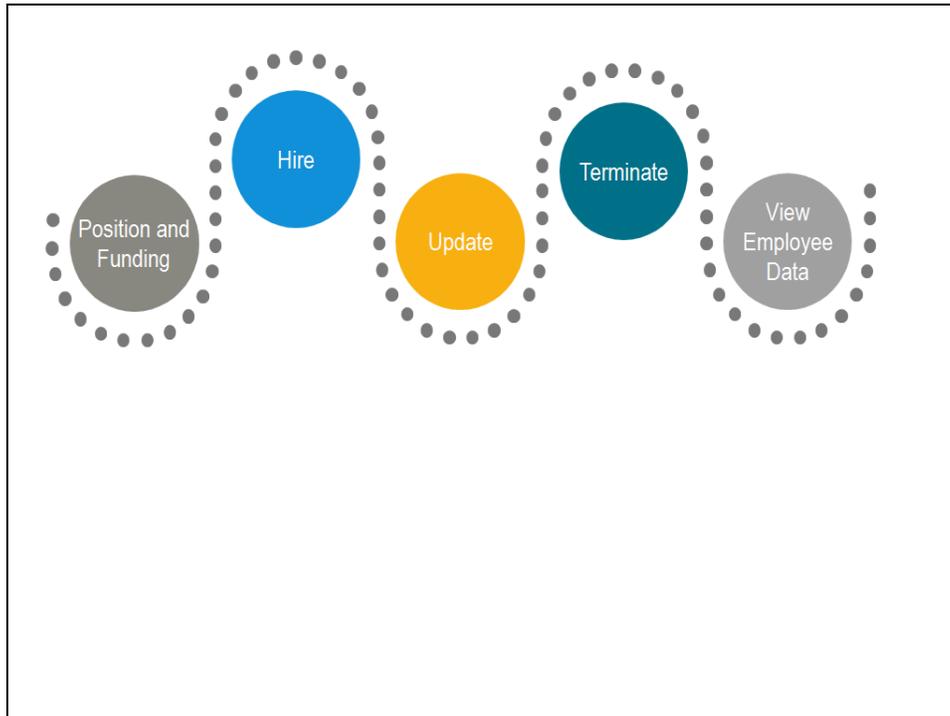
Step	Action
34.	<p>For represented staff, use the fields on this page to enter data related to the employee's prior work experience. Having this information is helpful in determining new compensation rates for the new hire.</p> <p>The information entered in the Employee Experience section is copied to the employee's UC Employee Experience page after the template is fully processed by UCPC WFA Production.</p>
35.	The Supporting documents link can be used to attach documents to the new hire transaction, if needed.
36.	<p>Click the Save and Submit button.</p> 



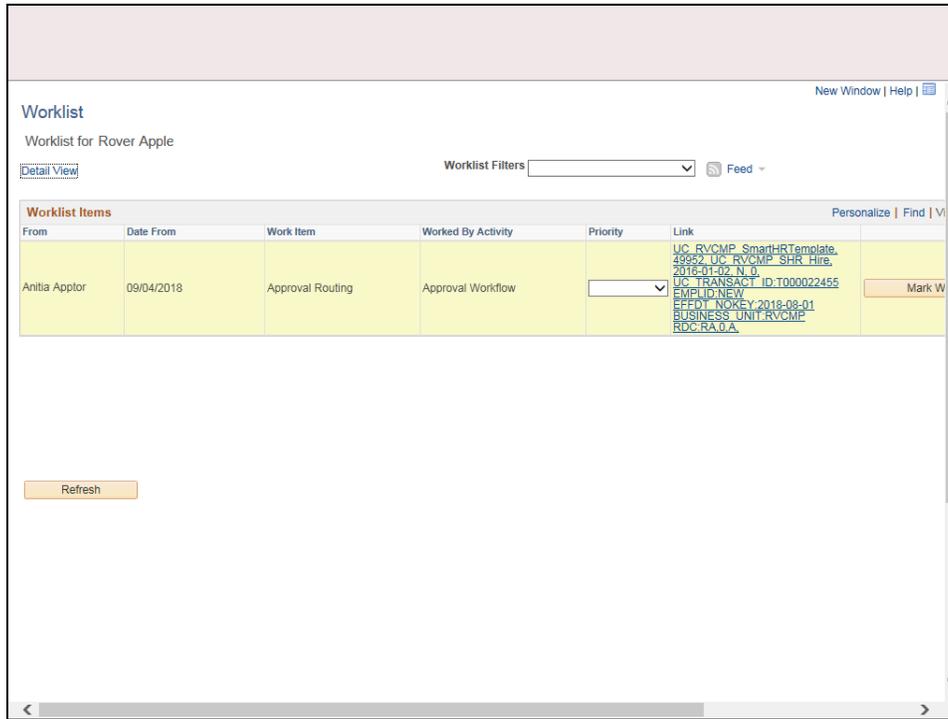
Step	Action
37.	Click the OK button. 



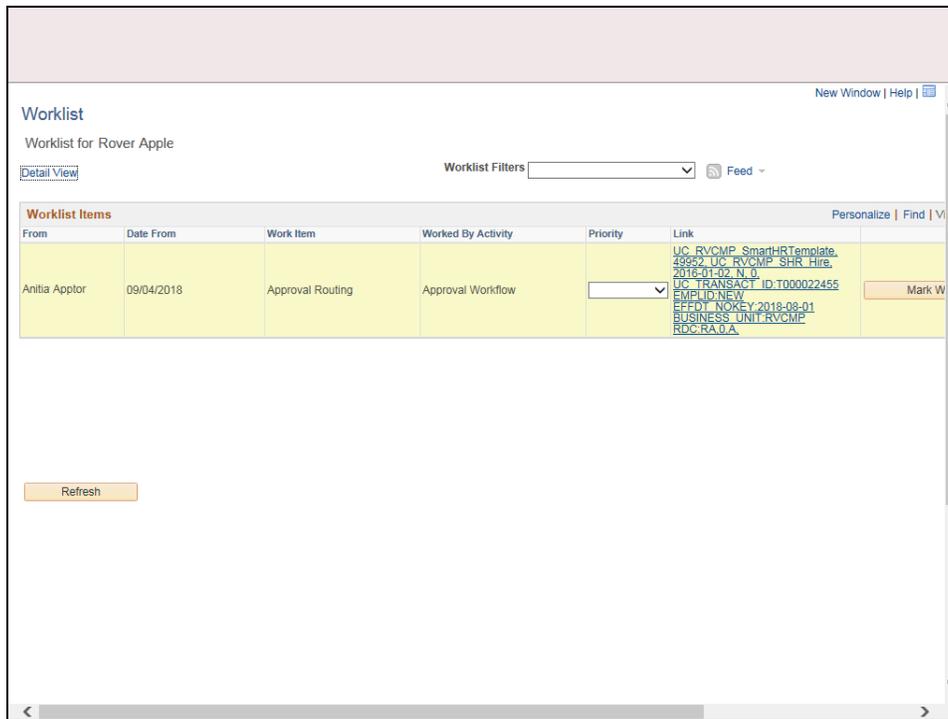
Step	Action
38.	The template transaction is routed for approval and appears in the Transactions in Progress section until it is approved.



Step	Action
39.	The next task demonstrates how a Location Template Approver reviews and approves the new hire template transaction.



Step	Action
40.	<p>The Location Template Approver can access transactions that need approval from the email notification or by navigating to their Worklist.</p> <p>Worklist can be accessed from the dashboard or from a Homepage.</p> <p>Workforce Administration (Homepage) > Approvals (Tile) > My Worklist - Summary View</p> <p>For this example, the template transaction is accessed from the Workforce Administration Homepage.</p>



Step	Action
41.	The Worklist page displays all transactions that require action.
42.	<p>Click the appropriate worklist item.</p> <p>For this example, click the UC_RVCMP_SmartHRTemplate, 49952, UC_RVCMP_SHR_Hire link.</p> <p>UC_RVCMP_SmartHRTemplate, 49952, UC_RVCMP_SHR_Hire, 2016-01-02, N, 0, UC_TRANSACT_ID:T000022455, EMPLID:NEW, EFFDT:NOKEY:2018-08-01, BUSINESS_UNIT:RVCMP, RDC:RA,0,A</p>

Step	Action
43.	<p>For template transactions that require approval, the SS Smart HR Transactions page appears.</p> <p>This page displays some Hire Details, as well as a link to the hire template transaction so the transaction can be reviewed in detail before approving.</p>
44.	<p>Click the Jose Merced link to review the template transaction details.</p> <p>Jose Merced</p>

Smart HR Transactions New Window | Help |

Enter Transaction Details

Name Jose Merced

The following transaction details are required.

Template Full Hire - Staff Only

Organizational Relationship Employee

*Employee ID x | Q

*Effective Date |

Action Hire

*Reason Code

*Address Format

Step	Action
45.	Review the Transaction Details page, which identifies the new hire's Name , the type of Template , the Organizational Relationship , the Effective Date and the Reason Code for the hire.
46.	Click the Continue button. 

Smart HR Transactions New Window | Help | Personalize Page

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_FULL_HIRE **Name:**
Effective Date: 08/01/2018 **Action/Action Reason:** HIR/HR (Hire - No Prior UC Affiliation)
Employee ID: NEW **Employee Record:**

Employee Information

Name - Legal Name/Name

*Legal First Name Legal Middle Name

*Legal Last Name Legal Suffix

First Name

Last Name

Middle Name

Birth Information

Date of Birth

Person Education Level

Highest Education Level

Person National ID United States

National ID Type National ID

Person Address 01 - United States

*Address Type Address Line 1

Step	Action
47.	<p>The Location Approver reviews the information on each tab of the template transaction to ensure it is complete and accurate.</p> <p>Date of Birth and National ID fields are masked for the Location Approver.</p>
48.	Click the scroll bar.

UC External System ID

Business Unit External System

External System ID

Comments

Comments

[Return to Enter Transaction Details Page](#)

[Supporting documents](#)

Transaction ID: T000022455

Initiator Comments:

Requester ID: 10173879 Anita Apptor

Requested: 09/04/18 12:54:17.000000PM

HIRE

Transaction: T000022455, ID: NEW, Effdt: 2018-08-01, Unit: RVCMP:Pending [View/Hide Comments](#)

HIRE

Pending

Multiple Approvers

Approver 1 - Hire

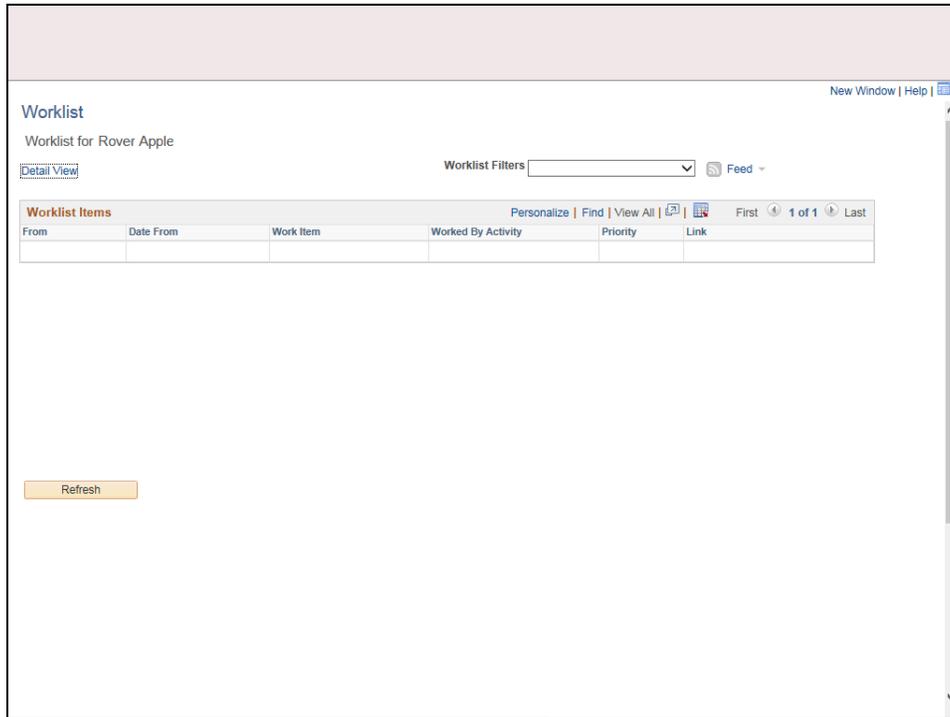
Comments

100%

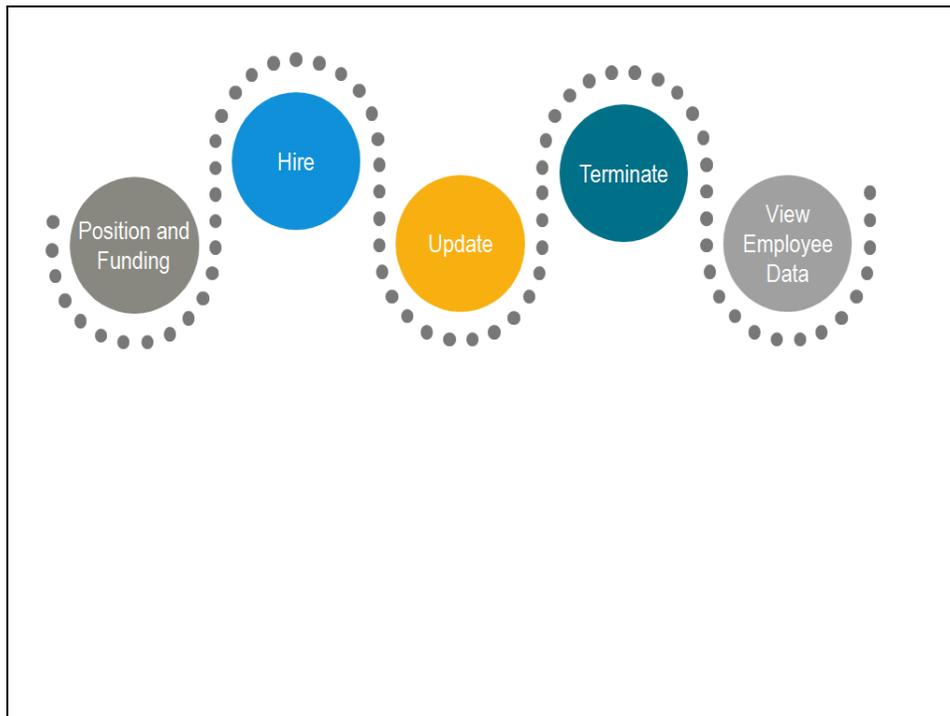
Step	Action
49.	When the review is complete, click the Cancel button to return to the approval page. <div style="text-align: center; margin-top: 10px;"> <input type="button" value="Cancel"/> </div>

The screenshot displays the UCPath interface for a pending hire transaction. At the top, it shows 'SS Smart HR Transactions' and 'Transaction ID T000022455' with a status of 'Pending'. Below this is a 'Hire Details' table with one entry: 'Lose Mercedes', Employee, Start Date 08/01/2018, Action HIR, Country USA. The interface includes fields for 'Initiator Comment', 'Requester ID 10173879 Anitia Apptor', 'Requested 09/04/18 12:54:17.000000PM', and 'Approver Comment'. There are 'Approve' and 'Deny' buttons. A 'HIRE' section shows a 'Pending' status with a 'Multiple Approvers' list containing 'Approver 1 - Hire'. At the bottom, there are 'Return to Search' and 'Notify' buttons.

Step	Action
50.	If the hire template is completed accurately, click the Approve button. 
51.	If there are multiple approvers, the transaction moves to the Worklist of the next approver.



Step	Action
52.	After the template transaction is approved, it is removed from the approver's Worklist .



Step	Action
53.	The next task demonstrates how UCPC WFA Production processes the new hire template transaction.

Manage Transactions New Window | Help |

The following people have transactions ready to be processed.

*Transaction Type: All Business Unit:

*Transaction Status: All Empl ID:

Effective Date From: 08/01/2018 To: 09/30/2018 First Name:

Last Name:

Processor ID:

Cancel	Update	Send	Processor Name	Template Description	Effective Date	First Name	Last Name
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Full Hire - Staff Only	08/01/2018	Jose	Merced
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Academic Concurrent Hire/Inter Location Transfer	08/01/2018	Theodore	Jacques
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Involuntary Termination	08/01/2018	Kara	Mccloskey
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Voluntary Termination	08/02/2018	Ernest	Garcia
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Kimberlee Serman	Add Contingent Worker With Position	08/06/2018	Cory	Franz
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Add Contingent Worker With Position	08/06/2018	Cory	Franz
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Full Hire - Academic Use Only	08/13/2018	Cody	Simons
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Involuntary Termination	08/14/2018	Selasie	De Souza

Step	Action
54.	UCPC WFA Production uses the Manage Transactions page to access template transactions that have completed the Location AWE process. WFA Production reviews the template transaction, reviews each of the employee data components and saves the data to UCPath.
55.	To access the template transaction, click the employee's first name. For this example, click the Jose link. Jose

New Window | Help |

Manage Transactions

Manage Transaction Details

Name Jose Merced

Template UC_FULL_HIRE - Full Hire - Staff Only

Transaction Type Hire/Rehire and Profile Data

Status Requested

Organizational Relationship Employee

Effective Date 08/01/2018

Action Hire

Action Reason Hire - No Prior UC Affiliation

Person Information

Employee ID NEW [Search for Matching Persons](#)

Complete Transaction

Select this button to open the original template to complete the transaction.

Personal Data

Select this button to upload Personal Data. You may view/update the data before saving it to the system.

[Return to Manage Transactions](#)

Step	Action
56.	Review the details of the transaction, including Template , Effective Date and Action Reason .
57.	Perform a search to ensure the person does not already exist in UCPath. Click the Search for Matching Persons link. Search for Matching Persons

Step	Action
58.	Click the OK button. 
59.	Next, the new hire template is reviewed. Click the Open Template button. 

Manage Transactions New Window | Help |

Manage Transaction Details

Name Jose Merced

The following transaction details are required.

Template Full Hire - Staff Only

Organizational Relationship Employee

***Employee ID** NEW x | Q

Effective Date 08/01/2018

Action Hire

Reason Code Hire - No Prior UC Affiliation

Address Format United States

Step	Action
60.	Review the Manage Transaction Details page, which includes the new hire's Name , the type of Template , the Organizational Relationship , the Effective Date and the Reason Code for the hire.
61.	Click the Continue button. 

Smart HR Transactions New Window | Help | Personalize Page

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_FULL_HIRE **Name:**
Effective Date: 08/01/2018 **Action/Action Reason:** HIR/HR (Hire - No Prior UC Affiliation)
Employee ID: NEW **Employee Record:**

[Personal Data](#) | [Job Data](#) | [Earns Dist](#) | [Addl Pay](#) | [Employee Experience](#)

Employee Information

Name - Legal Name/Name

*Legal First Name Legal Middle Name

*Legal Last Name Legal Suffix

First Name Middle Name

Last Name

Birth Information

Date of Birth

Person Education Level

Highest Education Level

Person National ID United States

National ID Type National ID

Person Address 01 - United States

*Address Type Address Line 1

Step	Action
62.	This page displays the template in view-only format. UCPC WFA Production reviews each tab of the template.
63.	Click the scroll bar.

Person Education Level

Highest Education Level

Person Gender

UC Oath Date

Oath Signature Date 08/01/2018

Person Phone Number Personalize | Find | View All | First 1 of 1 Last

Phone Type Telephone Preferred

1 Mobile - Personal 503/234-7676

Person Email Address Personalize | Find | View All | First 1 of 1 Last

Email Type Email Address

1 Home jmerced@yahoo.com

UC Patent Acknowledgment

Patent Acknowledgment Sign Dt 08/01/2018 Modified Patent Ackmnt Sign Dt

UC I-9 Information

Tracker Profile ID Remote I-9 Section 2

UC External System ID

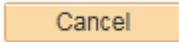
Business Unit External System

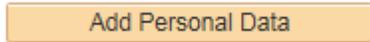
External System ID

Comments

Comments

[Return to Enter Transaction Details Page](#)

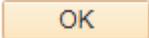
Step	Action
64.	Click the scroll bar.
65.	<p>When the review of all tabs on the template is complete, return to the Transaction Details page to begin processing the transaction.</p> <p>Click the Cancel button.</p> 

Step	Action
66.	<p>Next, review the staged employee information and save the data to the UCPath tables in the following order:</p> <ol style="list-style-type: none"> 1. Personal Data 2. Job Data 3. Profile Data
67.	<p>Click the Add Personal Data button.</p> 

The screenshot displays the 'UC Personal Data' tab for an employee named Jose Merced. The interface includes several sections:

- Name:** *Effective Date 08/01/2018, Name Jose Merced, and an 'Edit Legal Name/Name' button.
- Biographic Information:** Date of Birth 04/01/1945 (73 Years, 5 Months), Birth Country USA (United States), Birth State, Birth Location, and a 'Waive Data Protection' checkbox.
- Biographical History:** *Effective Date 08/01/2018, *Gender Male, *Highest Education Level [I-Master's Level Degree], *Marital Status [Not Used at UC], Language Code, Alternate ID, and a 'Full-Time Student' checkbox.
- National ID:** A table with columns for *Country (USA), *National ID Type (Social Security Number), National ID (545-73-8798), and Primary ID (checked).

 Navigation buttons like 'OK', 'Cancel', 'Apply', and 'Refresh' are visible at the bottom.

Step	Action
68.	The employee information is pulled from the template staging tables. Review each tab of the employee's Personal Data before saving the information to the component tables. When the Personal Data is saved, the employee ID is assigned and the personal information becomes available for other users (who have the appropriate security access) to view in UCPath.
69.	Click the OK button. 

New Window | Help |

Manage Transactions

Manage Transaction Details

Name Jose Merced

Template UC_FULL_HIRE - Full Hire - Staff Only

Transaction Type Hire/Rehire and Profile Data [View Template](#)

Status Requested

Organizational Relationship Employee

Effective Date 08/01/2018

Action Hire

Action Reason Hire - No Prior UC Affiliation

Person Information

Employee ID 10033264

Create new Org Instance Instance Nbr 0

Personal Data

Select this link to view Personal Data that was successfully uploaded to the system. [View/Edit Personal Data](#)

Job Data

Select this button to upload Job Data. You may view/update the data before saving it to the system. [Add Job Data](#)

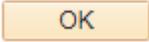
[Return to Manage Transactions](#)

Step	Action
70.	At this point the employee's Personal Data is saved, and the Employee ID appears.
71.	<p>Next, review and save the employee's Job Data.</p> <p>Click the Add Job Data button.</p> <div style="text-align: center; margin-top: 10px;"> </div>

The screenshot shows the 'Work Location' tab for employee Jose Merced. The form includes the following fields and values:

- Employee:** Jose Merced, Empl ID: 10033264, Empl Record: 0
- Effective Date:** 08/01/2018
- Effective Sequence:** 0
- HR Status:** Active
- Payroll Status:** Active
- Position Number:** 40005608 (PROCUREMENT ANL 4)
- Position Entry Date:** 08/01/2018
- Regulatory Region:** USA (United States)
- Company:** UCS (University of California)
- Business Unit:** RVCMP (UC Riverside Campus)
- Department:** D01200 (Plant Administration)
- Department Entry Date:** 08/01/2018
- Location:** P5487 (CORP A)
- Establishment ID:** UCR (UC Riverside)
- Date Created:** 09/04/2018
- Last Start Date:** 08/01/2018
- Expected Job End Date:** (empty)
- Action:** Hire
- Reason:** Hire - No Prior UC Affiliation
- *Job Indicator:** Primary Job

At the bottom of the form, there are buttons for 'OK', 'Cancel', and 'Apply', and a 'Refresh' button.

Step	Action
72.	The job information is pulled from the template staging tables. Review each tab of the employee's Job Data before saving the information to the component tables.
73.	Click the OK button. 

Manage Transactions New Window | Help |

Manage Transaction Details

Name Jose Merced

Template UC_FULL_HIRE - Full Hire - Staff Only

Transaction Type Hire/Rehire and Profile Data [View Template](#)

Status Requested

Organizational Relationship Employee

Effective Date 08/01/2018

Action Hire

Action Reason Hire - No Prior UC Affiliation

Person Information

Employee ID 10033264

HR Status Active [Person Organizational Summary](#)

Create new Org Instance Instance Nbr 0

Use existing Org Instance

Personal Data

Select this link to view Personal Data that was successfully uploaded to the system. [View/Edit Personal Data](#)

Job Data

Select this link to view Job Data that was successfully uploaded to the system. [View/Edit Job Data](#)

Profile Data

Select this button to upload Person Profile Data. You may view/update the data before saving it to the system.

Step	Action
74.	Click the scroll bar.

Name Jose Merced

Template UC_FULL_HIRE - Full Hire - Staff Only

Transaction Type Hire/Rehire and Profile Data [View Template](#)

Status Requested

Organizational Relationship Employee

Effective Date 08/01/2018

Action Hire

Action Reason Hire - No Prior UC Affiliation

Person Information

Employee ID 10033264

HR Status Active [Person Organizational Summary](#)

Create new Org Instance Instance Nbr 0

Use existing Org Instance

Personal Data

Select this link to view Personal Data that was successfully uploaded to the system. [View/Edit Personal Data](#)

Job Data

Select this link to view Job Data that was successfully uploaded to the system. [View/Edit Job Data](#)

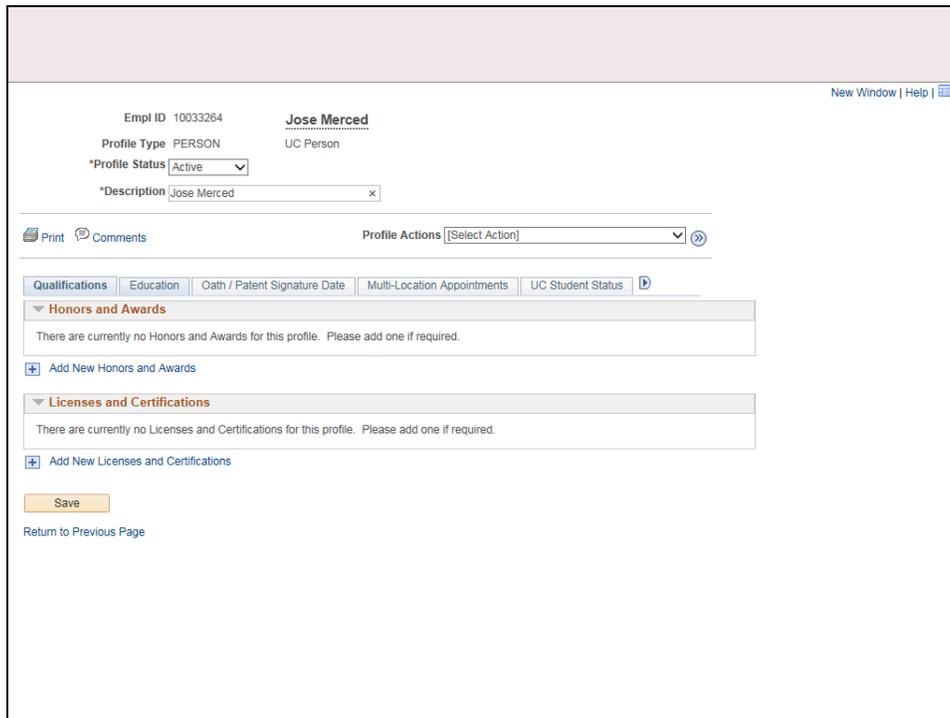
Profile Data

Select this button to upload Person Profile Data. You may view/update the data before saving it to the system.

[Add Profile Data](#)

[Return to Manage Transactions](#)

Step	Action
75.	<p>Finally, review and save the employee's Profile Data.</p> <p>Click the Add Profile Data button.</p> 



Empl ID 10033264 **Jose Merced**
Profile Type PERSON UC Person
*Profile Status Active
*Description Jose Merced

Print Comments Profile Actions [Select Action]

Qualifications Education Oath / Patent Signature Date Multi-Location Appointments UC Student Status

Honors and Awards
There are currently no Honors and Awards for this profile. Please add one if required.
+ Add New Honors and Awards

Licenses and Certifications
There are currently no Licenses and Certifications for this profile. Please add one if required.
+ Add New Licenses and Certifications

Save
Return to Previous Page

Step	Action
76.	Review each tab of the employee's Profile Information before saving the information to the component tables.
77.	<p>Click the Save button.</p> 

New Window | Help |

Manage Transactions

Manage Transaction Details

Name Jose Merced

Template UC_FULL_HIRE - Full Hire - Staff Only

Transaction Type Hire/Rehire and Profile Data [View Template](#)

Status Completed

Organizational Relationship Employee

Effective Date 08/01/2018

Action Hire

Action Reason Hire - No Prior UC Affiliation

Person Information

Employee ID 10033264

HR Status Active [Person Organizational Summary](#)

Personal Data

Select this link to view Personal Data that was successfully uploaded to the system. [View/Edit Personal Data](#)

Job Data

Select this link to view Job Data that was successfully uploaded to the system. [View/Edit Job Data](#)

Profile Data

Select this link to view Person Profile Data that was successfully uploaded to the system. [View/Edit Profile Items](#)

[Return to Manage Transactions](#)

Step	Action
78.	The new hire has been processed into UCPath.
79.	You have viewed a simulation of how to initiate, approve and process a new hire template transaction in UCPath. End of Procedure.