

Use this task to initiate a full hire template transaction for a staff employee. Prior to initiating a full hire template, perform a search to ensure the person does not already exist in UCPath. Refer to simulation *Search for Person Using Search/Match*.

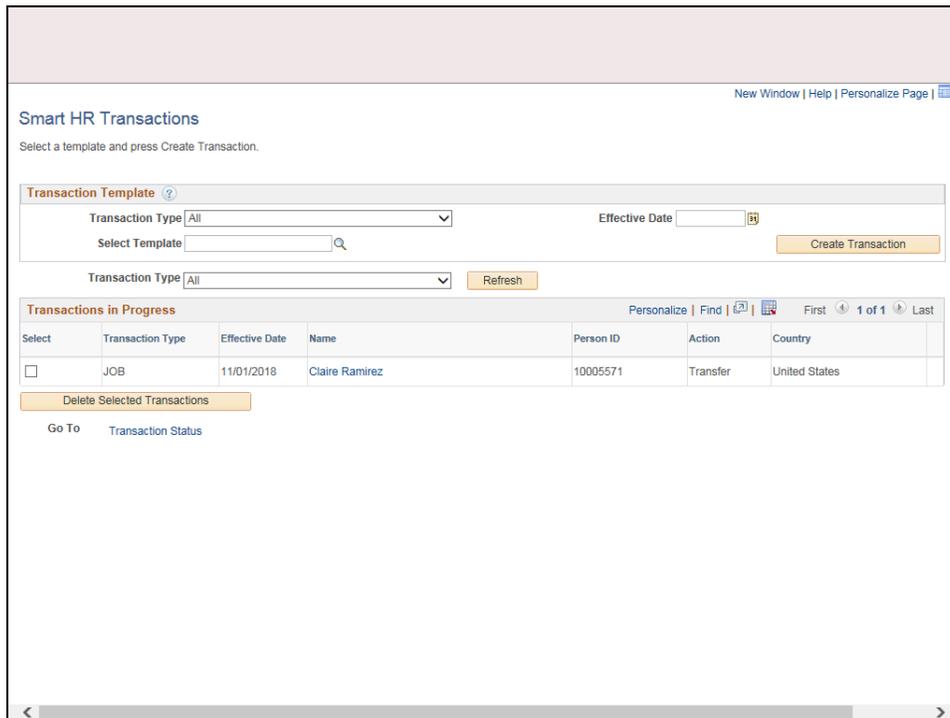
Navigation:

Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

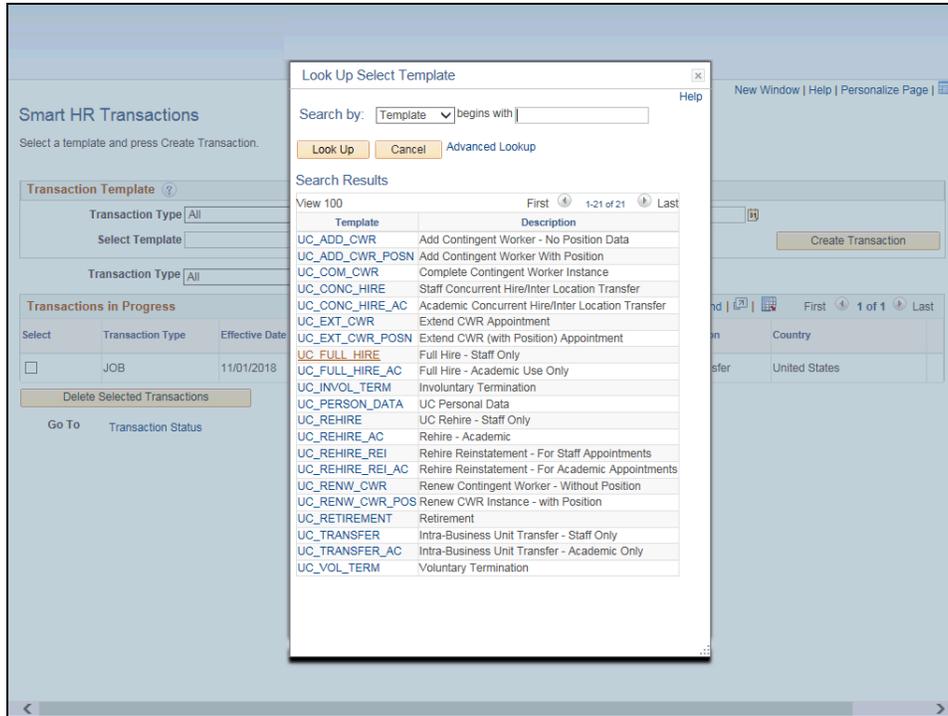
OR

Workforce Administration (Homepage) > HR Tasks (Tile) > Smart HR Templates > **Smart HR Transactions**

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



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



Step	Action
3.	<p>Select the appropriate full hire template. Notice there are two full hire templates, one for staff and one for academic.</p> <p>Click the UC_FULL_HIRE list item.</p> <p>UC FULL HIRE</p>

Step	Action
4.	<p>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.</p> <p>Click in the Effective Date field.</p> <input type="text"/>
5.	<p>Enter the desired information into the Effective Date field.</p> <p>For this example, enter 11/1/2018.</p>
6.	<p>Click the Create Transaction button.</p> <input type="button" value="Create Transaction"/>

Smart HR Transactions New Window | Help | Personalize Page |

Enter Transaction Details

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
7.	<p>In the Employee ID field, accept the default value of NEW.</p> <p>After UCPC WFA Production processes the full hire template, the system automatically generates the next sequential UC Employee ID number for the employee.</p>
8.	<p>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.</p> <p>If necessary, click the Cancel button to return to the previous page and correct the Effective Date.</p>
9.	<p>Click the button to the right of the Reason Code field.</p> <p><input type="text"/></p>

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Enter Transaction Details

The following transaction details are required.

Template: Full Hire - Staff Only

Organizational Relationship: Employee

*Employee ID: NEW

*Effective Date: 11/01/2018

Action: Hire

*Reason Code:

- Concurrent Hire - Dual Empl
- Concurrent Hire - Non Dual Emp
- Hire - No Prior UC Affiliation**
- Rehire, < 120 days break
- Rehire, >= 120 Days Break
- Rehire, fr Layoff-No Pref <120
- Rehire, fr Layoff-NoPref >=120
- Rehire, from Layoff-Pref < 120
- Rehire, from Layoff-Pref >=120
- Rehire: Rehired Retiree
- Rehire: Reinstatement
- Rehire: Retirement Suspended
- Rehire: Staff Recall < 120
- Rehire: Staff Recall >= 120
- Transfer-Inter BU, Demotion
- Transfer-Inter BU, Lateral
- Transfer-Inter BU, Promotion
- Transfer-Inter BU, Undefined
- With Prior UC Affiliation

*Address Format:

Step	Action
10.	<p>Select the appropriate Reason Code.</p> <p>For this example, click the Hire - No Prior UC Affiliation list item.</p> <p>For a description of Reason Codes refer to <i>Job Aid: Template Transactions - Action Reason Codes and Descriptions</i>.</p> <p>Hire - No Prior UC Affiliation</p>

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

*Effective Date

Action Hire

*Reason Code

*Address Format

Step	Action
11.	<p>The Address Format field defaults to United States. If the employee has an international address, select the Global option.</p> <p>For this example, the Address Format of United States is selected.</p>
12.	<p>Click the Continue button.</p> <div style="text-align: center; margin-top: 10px;"> <input type="button" value="Continue"/> </div>

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Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_FULL_HIRE **Name:**
Effective Date: 11/01/2018 **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

Birthday Information

Date of Birth

Person Education Level

Highest Education Level

Person National ID United States

National ID Type National ID

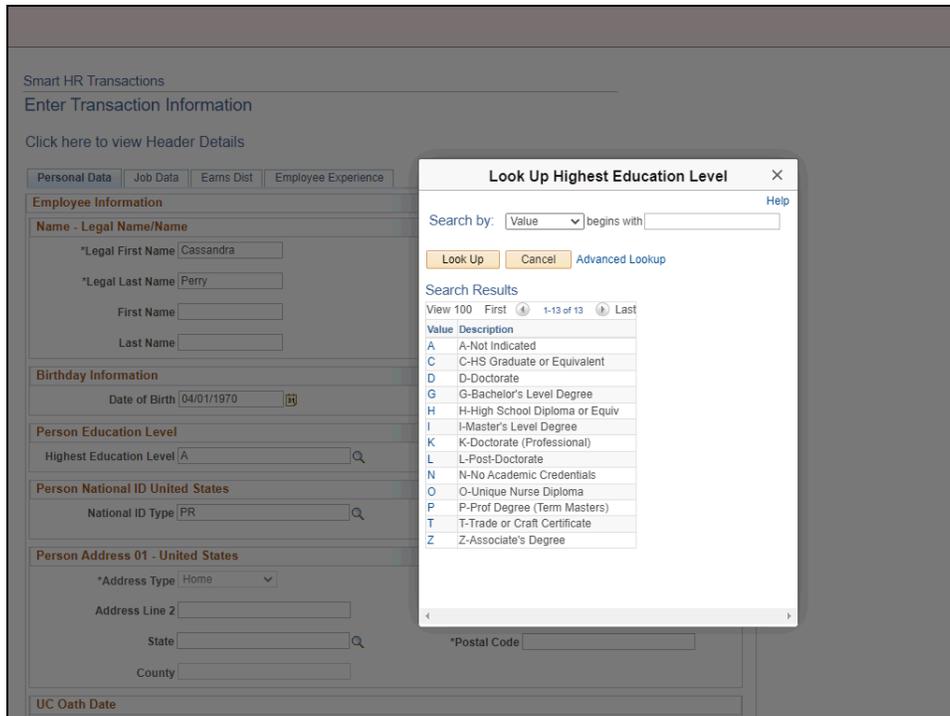
Person Address 01 - United States

*Address Type Address Line 1
Address Line 2 City

Step	Action
13.	<p>The full hire template appears. There are five tabs 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>
14.	<p>For this example, click the Click here to Hide Header Details link to hide the header details.</p> <p>Click here to Hide Header Details</p>

Step	Action
15.	<p>Legal Name identifies a person for legal or certain official purposes. In UCPath, Legal Name is always labeled as “Legal Name”. Its presentation and use are restricted to protect confidentiality.</p> <p>The Name field is a self-chosen or personal and/or preferred professional name used instead of a Legal Name. This name is used for university business and education whenever possible. It is the typical UCPath name field used and presented on pages and reports throughout the system.</p> <p>If no Name is specified, it is populated from the Legal Name.</p>
16.	<p>Click in the Legal First Name field.</p> <input type="text"/>
17.	<p>Enter the desired information into the Legal First Name field.</p> <p>For this example, enter Cassandra.</p>
18.	<p>Click in the Legal Last Name field.</p> <input type="text"/>
19.	<p>Enter the desired information into the Legal Last Name field.</p> <p>For this example, enter Perry.</p>

Step	Action
20.	<p>The Date of Birth is required if the Effective Date of the template is <u>prior</u> to the current date.</p> <p>The Date of Birth is not required if the Effective Date of the template is <u>on or after</u> the current date.</p> <p>Click in the Date of Birth field.</p> <input type="text"/>
21.	<p>Enter the desired information into the Date of Birth field.</p> <p>For this example, enter 4/1/1970.</p>
22.	<p>Select the new hire's Highest Education Level, if known, or accept the default of A (Not Indicated).</p> <p>Click the Look up Highest Education Level button.</p> 



Step	Action
23.	<p>For this example, click the I list item.</p> <input type="text" value="I"/>
24.	<p>In the National ID Type field, accept the default of PR for Social Security Number (SSN).</p>

Step	Action
25.	<p>The National ID (SSN) is required.</p> <p>Exceptions are Non-Resident Alien (NRA) or pre-hires where the template transaction approval date is before the effective date of the hire.</p> <p>UCPC WFA Production will cancel those that do not meet the standards.</p> <p>Leaving the National ID field blank has downstream impacts. For example, it impacts the employee's ability to enroll in benefits plans (including retirement).</p>
26.	<p>Click in the National ID field.</p> <div style="border: 1px solid gray; width: 150px; height: 15px; margin: 5px 0;"></div>
27.	<p>Enter the Social Security number into the National ID field.</p> <p>For this example, enter 548906567.</p>

Step	Action
28.	<p>Based on the Address Format you selected when initiating the template transaction, this section will display as either Person Address 01 - United States or Person Address 01 - Global.</p>

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Enter Transaction Information

[Click here to view Header Details](#)

Personal Data | Job Data | Earns Dist | 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

Birthday Information

Date of Birth

Person Education Level

Highest Education Level

Person National ID United States

National ID Type National ID

Person Address 01 - Global

Country *Address Type

Address Line 1 Address Line 2

City Postal Code

County

Step	Action
29.	Note: If the Address Format selected was Global (for employees that have an international address), this section would display as Person Address 01 - Global .

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Enter Transaction Information

[Click here to view Header Details](#)

Personal Data | Job Data | Earns Dist | 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

Birthday 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

Address Line 2 City

State *Postal Code

County

Step	Action
30.	<p>For this example, the Address Format selected was United States. Complete the Person Address 01 - United States section.</p> <p>Click in the Address Line 1 field.</p> <input data-bbox="391 415 758 453" type="text"/>
31.	<p>Enter the desired information into the Address Line 1 field.</p> <p>For this example, enter 5634 Oak Drive.</p>
32.	<p>Click in the City field.</p> <input data-bbox="391 636 758 674" type="text"/>
33.	<p>Enter the desired information into the City field.</p> <p>For this example, enter Riverside.</p>
34.	<p>Click in the State field.</p> <input data-bbox="391 854 758 892" type="text"/>
35.	<p>Enter the desired information into the State field.</p> <p>For this example, enter CA.</p>
36.	<p>Click in the Postal Code field.</p> <input data-bbox="391 1073 758 1110" type="text"/>
37.	<p>Enter the desired information into the Postal Code field.</p> <p>For this example, enter 92501.</p>
38.	<p>Click the scroll bar.</p>
39.	<p>Enter the date the new hire signed the UC oath agreement. This date cannot be later than the current date.</p> <p>Click in the Oath Signature Date field.</p> <input data-bbox="391 1398 605 1436" type="text"/> <input data-bbox="391 1436 605 1474" type="text"/>
40.	<p>Enter the desired information into the Oath Signature Date field.</p> <p>For this example, enter 11/1/2018.</p>
41.	<p>Click the button to the right of the Phone Type field.</p> <input data-bbox="391 1623 431 1661" type="button"/>

Step	Action
42.	Select the appropriate phone type. For this example, click the Mobile - Personal list item. Mobile - Personal
43.	Click in the Telephone field. <input type="text"/>
44.	Enter the desired information into the Telephone field. For this example, enter 5902348787 .
45.	A Preferred phone number must be identified by selecting the check box. Click the Preferred option. <input type="checkbox"/>
46.	Click the button to the right of the Email Type field. <input type="button" value="v"/>

Step	Action
47.	Select the appropriate email type. For this example, click the Home list item. 
48.	Click in the Email Address field. 
49.	Enter the desired information into the Email Address field. For this example, enter cperry@gmail.com .
50.	Enter the date on which the individual signed the UC patent acknowledgment. This date cannot be later than the current date. Click in the Patent Acknowledgment Sign Dt field. 
51.	Enter the desired information into the Patent Acknowledgment Sign Dt field. For this example, enter 11/1/2018 .
52.	Select the Modified Patent Ackmnt Sign Dt check box to indicate the employee did not originally sign the standard Patent Acknowledgment form.

Step	Action
53.	<p>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.</p> <p>This information is copied to the employee's Person Profile component.</p>
54.	<p>Click in the Tracker Profile ID field.</p> <input type="text"/>
55.	<p>Enter the desired information into the Tracker Profile ID field.</p> <p>For this example, enter 1234567.</p>
56.	<p>If applicable, use the UC External System ID section to enter external system information to facilitate matching of IDs with IDM systems.</p> <p>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).</p>
57.	<p>Use the Comments field to enter specific details or an explanation regarding the transaction.</p> <p>For example, this field can be used to indicate that the employee lives and works outside the US. For these employees, UCPC WFA Production will add the NRA Working Outside the US citizenship status on the Identification Data page.</p> <p>This field is referenced by UCPC WFA Production to assist with the processing of the transaction.</p>
58.	<p>Click the scroll bar.</p>

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Enter Transaction Information

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Employee Information

Primary Name - English

*First Name Middle Name

*Last Name x Name Suffix

Birthday Information

Date of Birth [M]

Person Education Level

Highest Education Level x [Q]

Person National ID United States

National ID Type [Q] National ID

Person Address 01 - United States

*Address Type [v] Address Line 1

Address Line 2 City

State [Q] *Postal Code x

County

Step	Action
59.	<p>Click the Job Data tab.</p> <p><input type="button" value="Job Data"/></p>

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Enter Transaction Information

[Click here to view Header Details](#)

Employee Information

Work Location - Position Data

*Position Number [Q]

Work Location - Job Fields

Business Unit Department

Location Code Establishment ID [Q]

Job Information - Job Code

Job Code

Job Information - United States

FLSA Status [v]

Job Labor - Union Code

Union Code Union Seniority Date [M]

Job Information - Reporting Information

Reports To Position Number

Job Information - Employee Classification

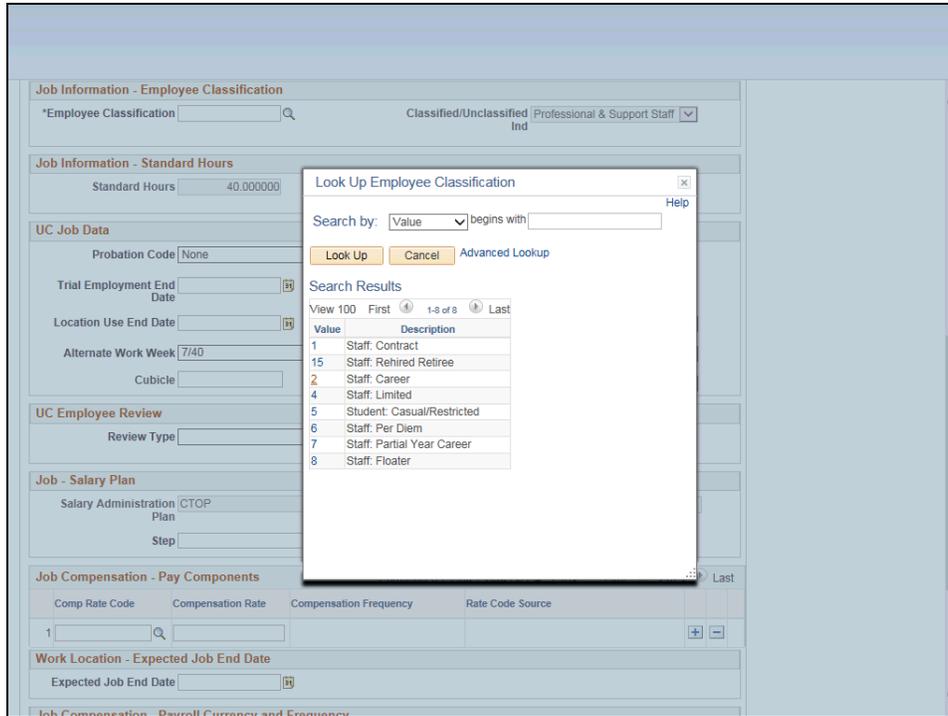
*Employee Classification [Q] Classified/Unclassified Ind [v]

Step	Action
60.	<p>Concurrent jobs require FLSA alignment. If FLSA conflicts are identified, UCPath sends the template transaction back to the Location for review, alignment and resubmission.</p> <p>Enter the position number of the concurrent job or search for it using the look up. You only have access to position numbers within your business unit or related business unit.</p> <p>Click in the Position Number field.</p> <input type="text"/>
61.	<p>Enter the desired information into the Position Number field.</p> <p>For this example, enter 4000043.</p>
62.	<p>Press [Tab] to automatically populate the position-related fields.</p>

Step	Action
63.	<p>Click the scroll bar.</p>

Job Information - Employee Classification	
*Employee Classification <input type="text"/> 	Classified/Unclassified Ind Professional & Support Staff <input type="button" value="v"/>
Job Information - Standard Hours	
Standard Hours <input type="text" value="40.000000"/>	FTE <input type="text" value="1.000000"/>
UC Job Data	
Probation Code <input type="button" value="v"/> None	Probation End Date <input type="text"/> 
Trial Employment End Date <input type="text"/> 	ERIT/Phased Retirement End Dt <input type="text"/> 
Location Use End Date <input type="text"/> 	Location Use Type <input type="button" value="v"/>
Alternate Work Week <input type="button" value="v"/> 7/40	PY Career Duration <input type="button" value="v"/>
Cubicle <input type="text"/>	
UC Employee Review	
Review Type <input type="button" value="v"/>	Next Review Date <input type="text"/> 
Job - Salary Plan	
Salary Administration Plan <input type="text" value="CTOP"/>	Salary Grade <input type="text" value="23"/>
Step <input type="text"/> 	
Job Compensation - Pay Components Personalize Find View All  First 1 of 1 Last	
Comp Rate Code <input type="text" value="1"/> 	Compensation Rate <input type="text"/>
Compensation Frequency <input type="text"/>	Rate Code Source <input type="text"/>
Work Location - Expected Job End Date	
Expected Job End Date <input type="text"/> 	
Job Compensation - Payroll Currency and Frequency	

Step	Action
64.	<p>For staff hires, the Employee Classification field must be entered.</p> <p>Click the Look up Employee Classification button.</p> 



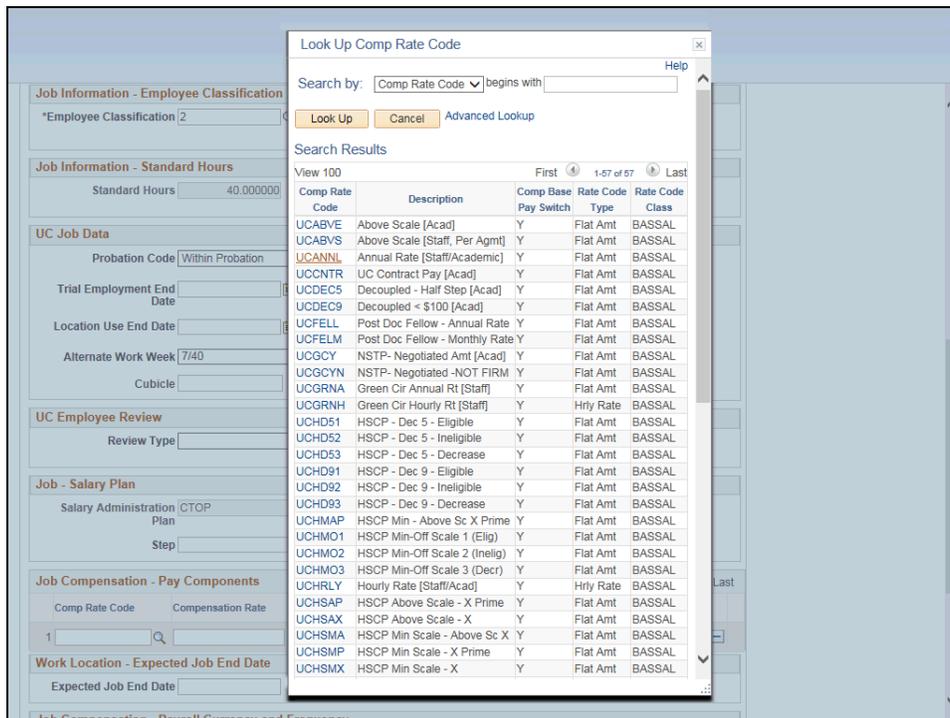
Step	Action
65.	<p>Select the appropriate Employee Classification.</p> <p>For this example, click the 2 (Staff: Career) list item.</p> <p><u>2</u></p>
66.	<p>In the UC Job Data section, enter or select the appropriate values as applicable.</p>
67.	<p>The Probation Code field is required if:</p> <ul style="list-style-type: none"> the Classified/Unclassified Ind field is Professional and Support Staff, and the Employee Class is Career or Partial Year Career. <p>The Probation End Date field is required if the Probation Code value is something other than Completed or Probation Completed, Other Job.</p>
68.	<p>Click the button to the right of the Probation Code field.</p> <p>▼</p>

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

- Job Information - Employee Classification:** Includes fields for Employee Classification (with a search icon), Classified/Unclassified Ind (set to Professional & Support Staff), and Standard Hours (40.000000) and FTE (1.000000).
- UC Job Data:** Contains dropdown menus for Probation Code (set to None), Probation End Date, Trial Employment End Date (with options like Probation Complete, Other Job Probation Completed), Location Use End Date (with options like Within Prob. Ext-Chg of Spvr, Head, Transfer, LOA, Lack of Train, Sig Chg in Dty), Alternate Work Week, Cubicle, ERIT/Phased Retirement End Dt, Location Use Type, and PY Career Duration.
- UC Employee Review:** Includes Review Type (set to Within Probation) and Next Review Date.
- Job - Salary Plan:** Shows Salary Administration Plan (CTOP) and Salary Grade (23).
- Job Compensation - Pay Components:** A table with columns for Comp Rate Code, Compensation Rate, Compensation Frequency, and Rate Code Source. It includes navigation buttons like Personalize, Find, View All, First, and Last.
- Work Location - Expected Job End Date:** Includes a field for Expected Job End Date.

Step	Action
69.	Select the appropriate Probation Code . For this example, click the Within Probation list item. Within Probation
70.	Click in the Probation End Date field. <input type="text"/>
71.	Enter the desired information into the Probation End Date field. For this example, enter 5/1/2019 .
72.	Location Use Type and the associated Location Use End Date are used for reporting purposes. If a Location Use Type is selected you should select a Location Use End Date . Location Use Type options include: <ul style="list-style-type: none"> - 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
73.	Enter UC Employee Review information, if applicable.

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



Step	Action
76.	<p>Select the appropriate Rate Code.</p> <p>For this example, click the UCANNL list item.</p> <p><u>UCANNL</u></p>

Step	Action
77.	Click in the Compensation Rate field. <input type="text"/>
78.	Enter the desired information into the Compensation Rate field. For this example, enter 75000 .
79.	If the employment is a short term assignment or temporary hire, enter the date the job ends in the Expected Job End Date field. UCPC runs a process to automatically terminate the employee on the date entered in this field. An Expected Job End Date is required for the following employee classes: 1 - Staff: Contract 5 - Student: Casual/Restricted 8 - Staff: Floater 15 - Staff: Rehired Retiree An Expected Job End Date is recommended but not required for the following employee classes: 4 - Staff: Limited 6 - Staff: Per Diem
80.	Click the scroll bar.

The screenshot shows the 'Enter Transaction Details' page in UCPath. The page is divided into several sections:

- Location Use:** Includes fields for Location Use End Date, Location Use Type, Alternate Work Week (7740), and PY Career Duration.
- UC Employee Review:** Includes Review Type and Next Review Date.
- Job - Salary Plan:** Includes Salary Administration Plan (CTOP), Salary Grade (23), and Step.
- Job Compensation - Pay Components:** A table with columns for Comp Rate Code, Compensation Rate, Compensation Frequency, and Rate Code Source. The first row shows: 1 UCANNL, 75000, A, Manual.
- Work Location - Expected Job End Date:** Includes the Expected Job End Date field.
- Job Compensation - Payroll Currency and Frequency:** Includes the *Compensation Frequency field.

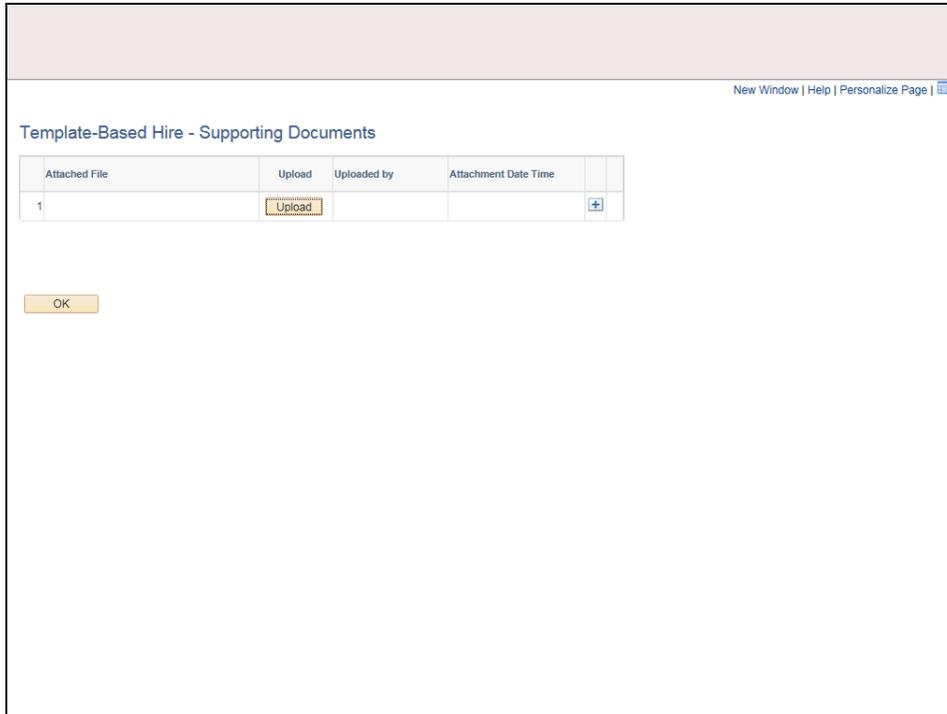
At the bottom of the page, there are buttons for 'Save and Submit', 'Save for Later', and 'Cancel', along with a 'Supporting documents' link. Below these are fields for Transaction ID (NEW), Initiator Comments, and Requester ID (10095340, Ima Gudadmin).

Step	Action
81.	<p>The payroll-related Compensation Frequency field automatically populates based on the job code.</p> <p>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:</p> <p>B, M, UC912, UC_10, UC_11, UC_12, UC_9M or UC_FY.</p> <p>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.</p>
82.	<p>Concurrent jobs require Compensation Frequency alignment. If Compensation Frequency conflicts are identified, UCPath sends the template transaction back to the Location for review, alignment and resubmission.</p>
83.	<p>Click the scroll bar.</p>

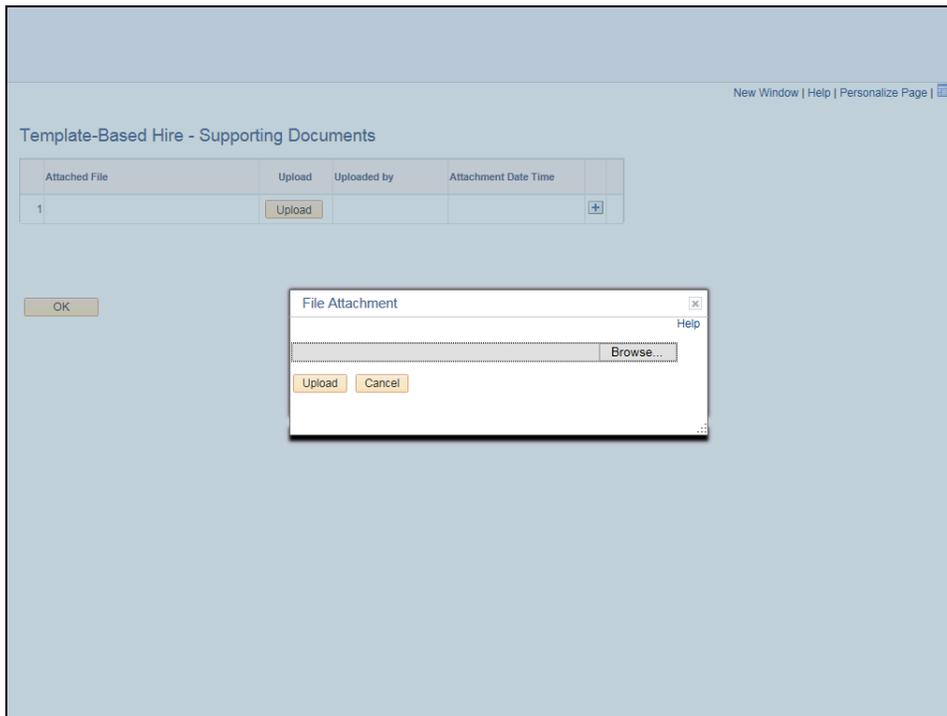
Step	Action
84.	<p>Click the Earns Dist tab.</p> <p>Earns Dist</p>

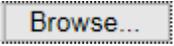
Step	Action
85.	In most cases, the Job Earnings Distribution section is automated. If the Comp Rate code entered on the Job Data tab has a mapped Earnings Code , the Job Earnings Distribution section is updated automatically.
86.	<p>The Job Earnings Distribution section also can be used to manually enter 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.</p> <ul style="list-style-type: none"> • 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%.
87.	<p>Click the Employee Experience tab.</p> <p>Employee Experience</p>

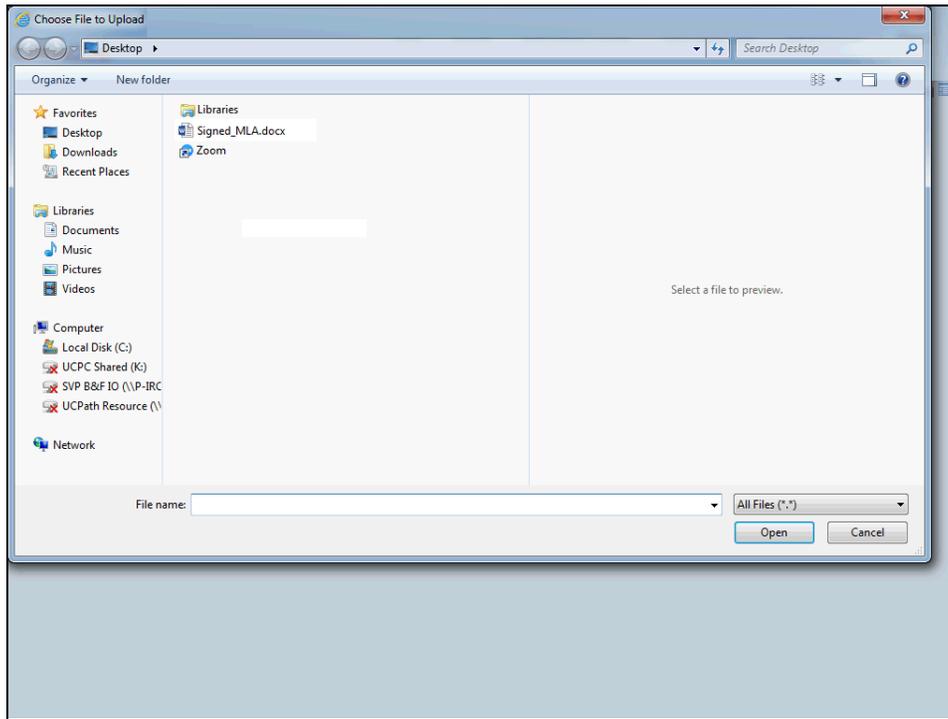
Step	Action
88.	<p>For represented staff, use the fields on this page to enter data related to the employee's prior work experience. Having this information is helpful in determining new compensation rates for the new hire.</p> <p>The information entered in the Employee Experience section is copied to the employee's UC Employee Experience page after the template is fully processed by UCPC WFA Production.</p>
89.	<p>Use the Supporting documents link to attach supporting documents for the new hire.</p> <p>Note: 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 to the Location for review and resubmission.</p> <p>Click the Supporting documents link.</p> <p>Supporting documents</p>

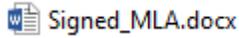


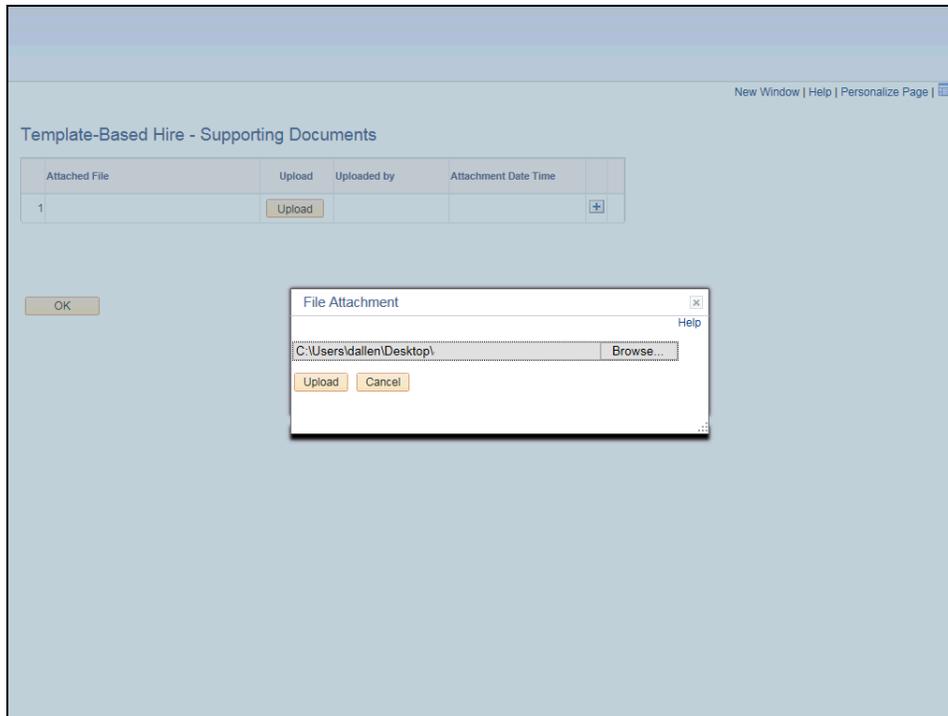
Step	Action
90.	Click the Upload button.



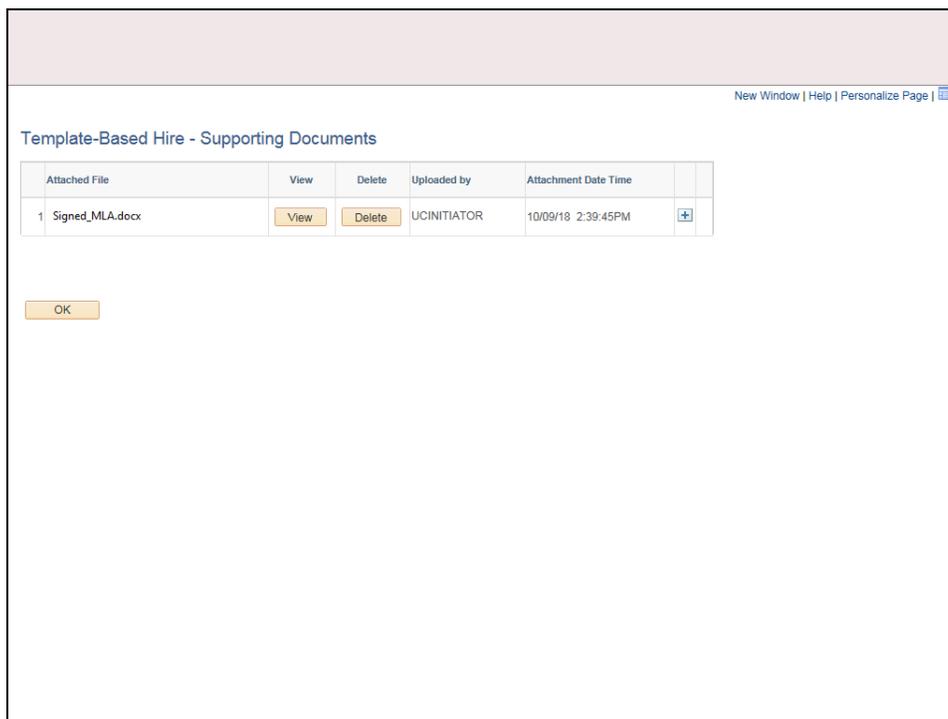
Step	Action
91.	Click the Browse... button. 

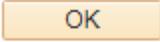


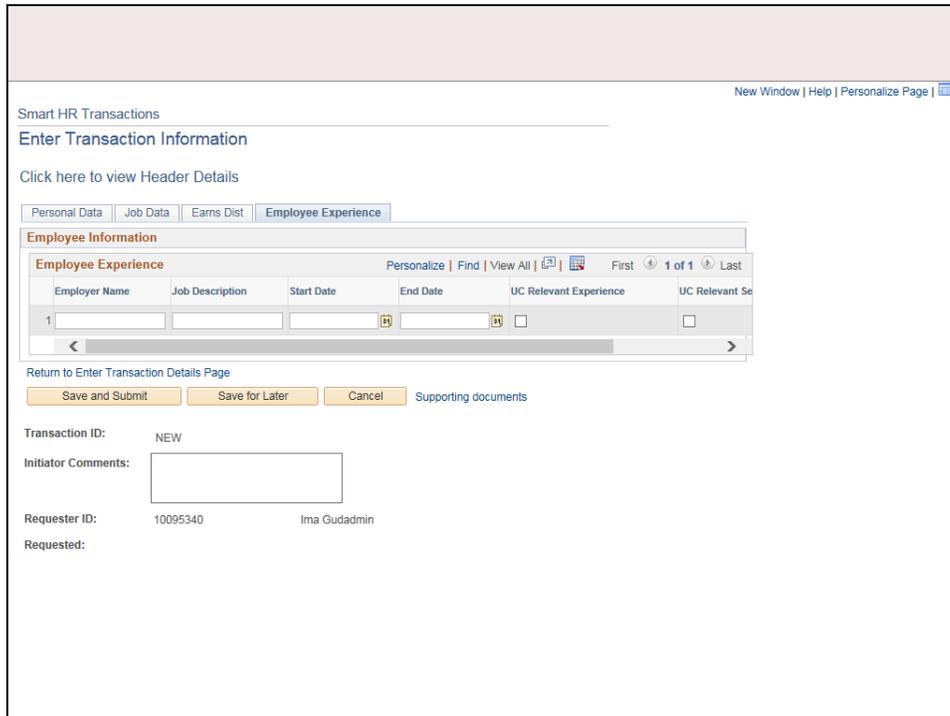
Step	Action
92.	Select the appropriate document to attach. For this example, double-click the Signed_MLA list item. 



Step	Action
93.	Click the Upload button. 



Step	Action
94.	You also can view and delete the attachments from this page.
95.	Click the OK button. 



Smart HR Transactions New Window | Help | Personalize Page |

Enter Transaction Information

[Click here to view Header Details](#)

Personal Data | Job Data | Earnings Dist | **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](#)

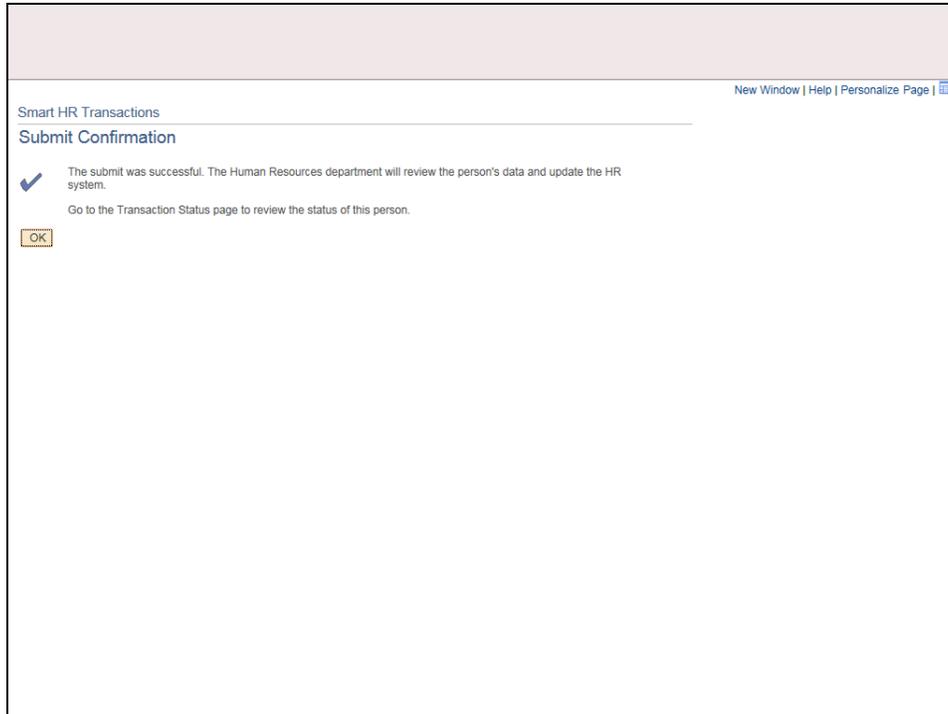
Transaction ID: NEW

Initiator Comments:

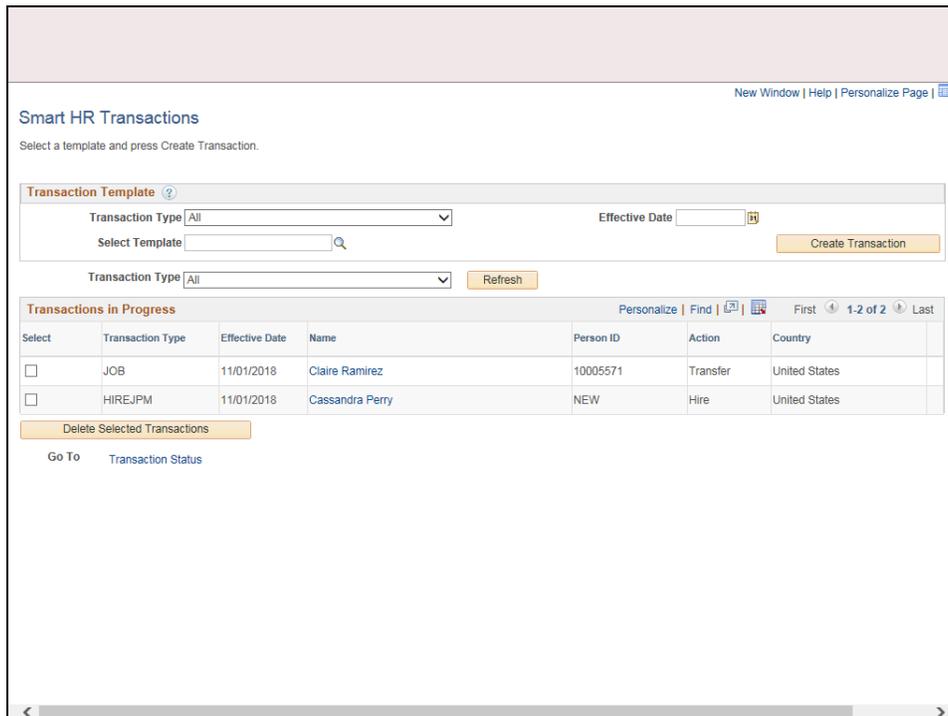
Requester ID: 10095340 Ima Gudadmin

Requested:

Step	Action
96.	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.
97.	The Save and Submit button is not available until all required fields on each tab are completed. Click the Save and Submit button. 



Step	Action
98.	Click the OK button. 



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