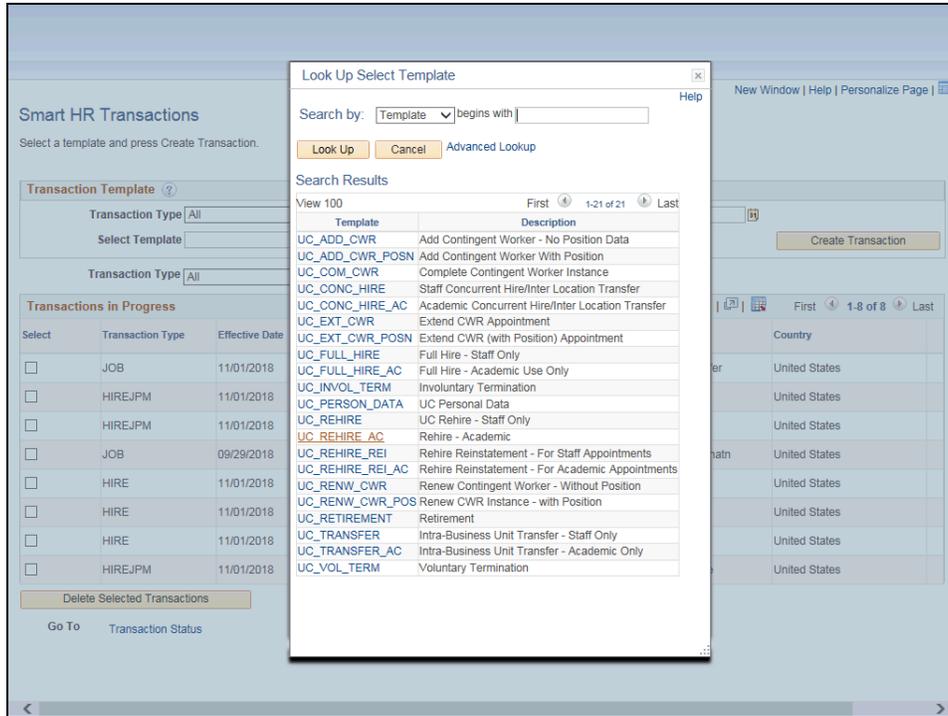


Use this task to initiate a rehire template transaction for an academic employee.

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 rehire template transaction.
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 rehire template. Notice there are two rehire templates, one for staff and one for academic employees.</p> <p>Click the UC_REHIRE_AC list item.</p> <p>UC REHIRE AC</p>
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> <p><input type="text"/></p>
5.	<p>Enter the desired information into the Effective Date field.</p> <p>For this example, enter 11/1/18.</p>
6.	<p>Click the Create Transaction button.</p> <p><input type="button" value="Create Transaction"/></p>

Smart HR Transactions New Window | Help | Personalize Page

Smart HR Transactions

Enter Transaction Details

The following transaction details are required.

Template: Rehire - Academic

Organizational Relationship: Employee

*Employee ID

*Effective Date: 11/01/2018

Action: Rehire

*Reason Code

*Address Format: United States

Step	Action
7.	<p>In the Employee ID field, enter the employee’s ID number or use the lookup to search for and select it. You have access to employee records only within your business unit.</p> <p>Click in the Employee ID field.</p> <div style="border: 1px solid gray; width: 100px; height: 15px; margin-left: 20px;"></div>
8.	<p>Enter the desired information into the Employee ID field.</p> <p>For this example, enter 10000098.</p>
9.	<p>The Effective Date is populated based on your entry on the previous page. Ensure that you entered the correct date on which employment begins.</p> <p>If necessary, click the Cancel button to return to the previous page and correct the Effective Date.</p>
10.	<p>Click the button to the right of the Reason Code field.</p> <div style="margin-left: 20px;"> <input type="button" value="v"/> </div>

Step	Action
11.	<p>Select the appropriate Reason Code. It is important to select an accurate reason as it may impact the employee’s benefits.</p> <p>For this example, click the Rehire, > or = 120 days break 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>Rehire, > or = 120 days break</p>

Smart HR Transactions New Window | Help | Personalize Page

Smart HR Transactions

Enter Transaction Details

The following transaction details are required.

Template: Rehire - Academic

Organizational Relationship: Employee

*Employee ID: Randy Sacks

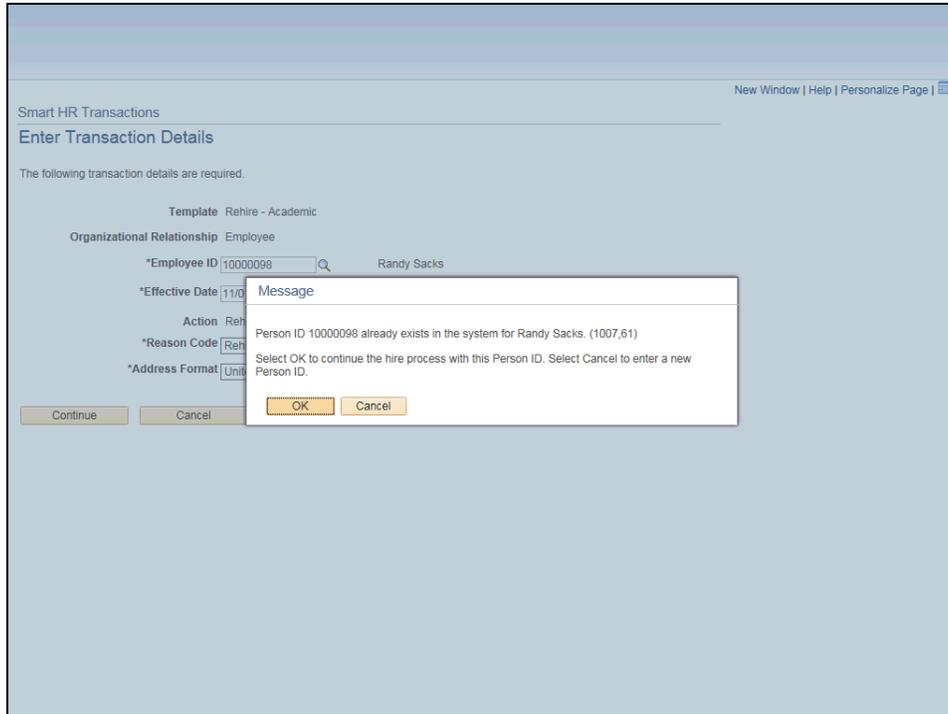
*Effective Date:

Action: Rehire

*Reason Code: ▼

*Address Format: ▼

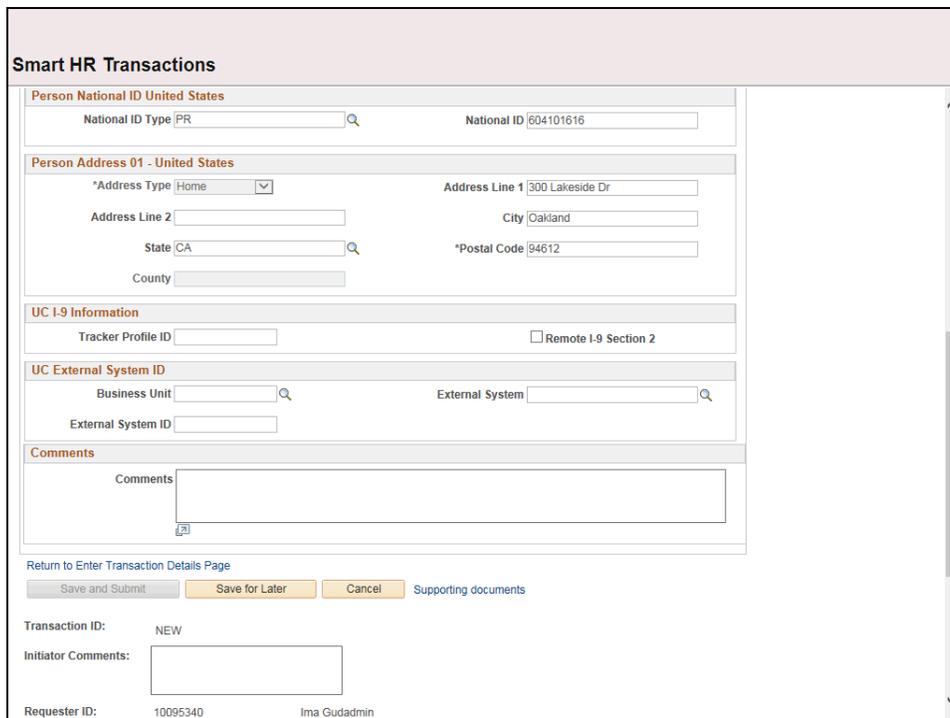
Step	Action
12.	<p>The Address Format field defaults to United States. If the employee has an international address, select the Global option.</p> <p>For this example, the Address Format of United States is selected.</p>
13.	<p>Click the Continue button.</p> <div style="text-align: center; margin-top: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



Step	Action
14.	<p>UCPath displays a message indicating the individual already exists in the system.</p> <p>Verify that the displayed employee ID and name correspond with the individual you are rehiring.</p> <p>Click the OK button.</p> 

Step	Action
15.	The rehire template appears. Five tabs are available on this template: Personal Data , Job Data , Earns Dist , Addl Pay and Person Profile .
16.	Header details appear above the tabs. You can show/hide the header information as needed.
17.	The employee's personal data automatically populates from the employee's existing personal data information. The Person Phone Number and Person Email Address sections do not display the employee's existing data. You must enter the information for these sections as necessary. Any new information entered in these sections will override the employee's existing personal data information.
18.	Click the button to the right of the Phone Type field. 
19.	For this example, click the Mobile - Personal list item. 
20.	Click in the Telephone field. 
21.	Enter the desired information into the Telephone field. For this example, enter 5097685766 .

Step	Action
22.	Click the Preferred option. <input type="checkbox"/>
23.	Click the button to the right of the Email Type field. <input type="button" value="v"/>
24.	For this example, click the Home list item. 
25.	Click in the Email Address field. <input type="text"/>
26.	Enter the desired information into the Email Address field. For this example, enter randy@gmail.com .
27.	Click the scroll bar.



Smart HR Transactions

Person National ID United States
National ID Type: PR National ID: 604101616

Person Address 01 - United States
*Address Type: Home Address Line 1: 300 Lakeside Dr
Address Line 2: City: Oakland
State: CA *Postal Code: 94612
County:

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
Save and Submit Save for Later Cancel Supporting documents

Transaction ID: NEW
Initiator Comments:

Requester ID: 10095340 Ima Gudadmin

Step	Action
28.	Confirm that the National ID field is populated with the employee's Social Security Number (SSN). If it is blank, be sure to include the SSN before submitting the template. Leaving the National ID field blank has downstream impacts.
29.	If the rehire has an existing tracker profile, then you can add their Tracker Profile ID .

Step	Action
30.	<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>You must enter values for all three fields in this section. 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>
31.	<p>Use the Comments field to enter specific details or an explanation regarding the transaction. For example, this field can be used to:</p> <ul style="list-style-type: none"> - Enter details about a contract pay transaction, such as contract begin date and contract end date. - Indicate that the employee lives and works outside the US. For these employees, UCPC WFA Production will add the NRA Working Outside the US citizenship status on the Identification Data page. <p>This field is referenced by UCPC WFA Production to assist with the processing of the transaction.</p>
32.	Click the scroll bar.

The screenshot shows the 'Smart HR Transactions' interface. At the top, there are navigation links for 'New Window', 'Help', and 'Personalize Page'. Below this is the title 'Enter Transaction Information' and a link to 'Click here to Hide Header Details'. The main content area shows transaction details: Template (UC_REHIRE_AC), Name (Randy Sacks), Effective Date (11/01/2018), Action/Action Reason (REH/REH (Rehire, > or = 120 days break)), Employee ID (10000098), and Employee Record. Below this are several tabs: 'Personal Data', 'Job Data', 'Earns Dist', and 'Person Profile'. The 'Job Data' tab is currently selected. The form fields include:

- Employee Information:** Name - Legal Name/Name with fields for Legal First Name (Randy), Legal Middle Name (K), Legal Last Name (Sacks), Legal Suffix, First Name (Randy), Middle Name (K), and Last Name (Sacks).
- Birthday Information:** Date of Birth (01/01/1979).
- Person Education Level:** Highest Education Level (G).
- Person Phone Number:** A table with columns for Phone Type, Telephone, and Preferred. One entry is shown: Mobile - Personal, 509/768-5766, Preferred.
- Person Email Address:** A table with columns for Email Type, Email Address, and Preferred. One entry is shown: Home, randy@gmail.com, Preferred.

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

Smart HR Transactions

Smart HR Transactions New Window | Help | Personalize Page

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_REHIRE_AC **Name:** Randy Sacks
Effective Date: 11/01/2018 **Action/Action Reason:** REH/REH (Rehire, > or = 120 days break)
Employee ID: 10000098 **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
34.	<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> <div style="border: 1px solid black; width: 200px; height: 20px; margin-left: 20px;"></div>
35.	<p>Enter the desired information into the Position Number field.</p> <p>For this example, enter 40004647.</p>
36.	<p>Press [Tab] to automatically populate the position-related fields.</p>

Smart HR Transactions New Window | Help | Personalize Page

Smart HR Transactions

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_REHIRE_AC **Name:** Randy Sacks
Effective Date: 11/01/2018 **Action/Action Reason:** REH/REH (Rehire, > or = 120 days break)
Employee ID: 10000098 **Employee Record:**

[Personal Data](#) | [Job Data](#) | [Earns Dist](#) | [Person Profile](#)

Employee Information

Work Location - Position Data

*Position Number 40004647

Work Location - Job Fields

Business Unit RVCMP Department D01030
 Location Code P5373 Establishment ID UCR

Job Information - Job Code

Job Code 001200

Job Information - United States

FLSA Status Exempt

Job Labor - Union Code

Union Code A5 Union Seniority Date

Job Information - Reporting Information

Reports To Position Number 40004825

Job Information - Employee Classification

Step	Action
37.	Click the scroll bar.

Smart HR Transactions

Job Information - Reporting Information

Reports To Position Number 40004825

Job Information - Employee Classification

Employee Classification

Job Information - Standard Hours

Standard Hours 40.000000 FTE 1.000000

UC Job Data

Trial Employment End Date Academic Duration of Appt
 Location Use End Date Location Use Type
 Post Docs Anniversary Date Cubicle

Job - Salary Plan

Salary Administration Plan T001 Salary Grade 2
 Step

Job Compensation - Pay Components Personalize | Find | View All | First 1 of 1 Last

Comp Rate Code	Compensation Rate	Compensation Frequency	Rate Code Source
1			

Work Location - Expected Job End Date

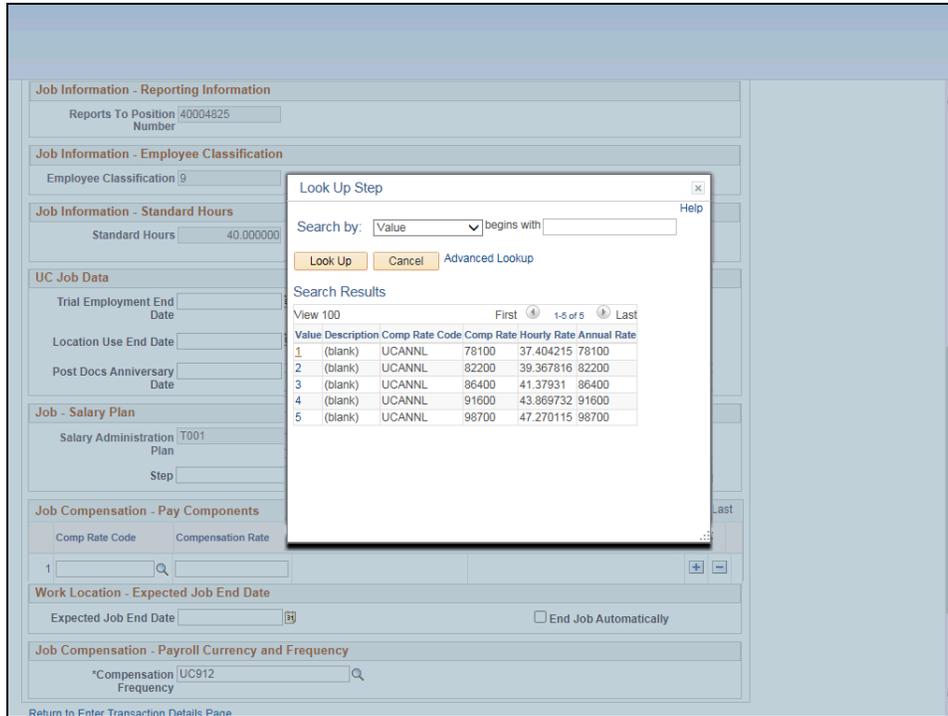
Expected Job End Date End Job Automatically

Job Compensation - Payroll Currency and Frequency

*Compensation Frequency UC912

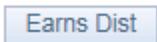
[Return to Enter Transaction Details Page](#)

Step	Action
38.	For academic hires, the Employee Classification field automatically populates based on the job code and cannot be changed.
39.	In the UC Job Data section, enter or select the appropriate values as applicable.
40.	<p>The Academic Duration of Appointment options allow Locations to track additional information relating to the Expected Job End Date field (when entered at the bottom of this page).</p> <p>Academic Duration of Appt options include:</p> <ul style="list-style-type: none"> • Continuing (Unit 18) • End Date (Academic Term Appts) • Indefinite • Potential Security • Security (LSOE) • Tenure Track (Ladder Rank) • Tenured
41.	Post Docs Anniversary Date is used to help maintain years of experience for Post Docs and assists with calculating accruals for vacation and sick leave for Post Docs.
42.	<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.</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 above scale component of pay, then step does not need to be selected. Enter applicable above scale comp rate codes in Job Compensation- Pay Components section.</p> <p>For contract-based pay hires, refer to the <i>Initiate Contract Pay Template Transaction</i> simulation for specific steps on contract pay entries.</p>
43.	<p>For this example, the job code is associated with steps.</p> <p>Click the Look up Step button.</p> 



Step	Action
44.	Use caution when selecting the appropriate step value. For some jobs, there are half steps, so be sure to review the Hourly Rate to ensure you are selecting the correct step value.
45.	Select the appropriate Step . For this example, click the 1 list item. 1
46.	The Comp Rate Code , Compensation Rate and Compensation Frequency fields are automatically populated based on the Step that was entered. If necessary, you can enter additional pay components, if the employee has multiple components of pay (MCOP). Certain employees have MCOP because they have either an off-scale or negotiated/incentive component.
47.	If the employment is a short term assignment or temporary, enter the date the position ends in the Expected Job End Date field. An expected end date is required for the following employee classes: 3 - Academic: Recall 11 - Academic: Academic Student 23 - Academic: Post Docs An expected end date is recommended but not required for the following employee class: 22 - Academic:Deans/Faculty Admin

Step	Action
48.	If the End Job Automatically check box is selected the UCPath Center will run a process to terminate the employee as of the Expected Job End Date .
49.	<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> <p>The payroll-related Compensation Frequency field automatically populates based on the job code. This field defines how the total compensation is paid out to the employee per paycheck.</p> <p>This field is changed only for specific exceptions, such as contract based pay. Any time this field is changed from the default enter a Comment (on the first tab) to explain why the field was changed.</p>
50.	Click the scroll bar.

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

Smart HR Transactions New Window | Help | Personalize Page

Smart HR Transactions

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_REHIRE_AC **Name:** Randy Sacks
Effective Date: 11/01/2018 **Action/Action Reason:** REH/REH (Rehire, > or = 120 days break)
Employee ID: 10000098 **Employee Record:**

[Personal Data](#) | [Job Data](#) | [Earns Dist](#) | [Person Profile](#)

Employee Information

Job Earnings Distribution Type

Earnings Distribution Type: Aggregate Comp Rate:

Job Earnings Distribution [Personalize](#) | [Find](#) | [View All](#) | [Print](#) 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: 10095340 Ima Gudadmin

Requested:

Step	Action
52.	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.
53.	<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%.
54.	For certain academic comp rate codes, such as Health Science Comp Plan, earnings codes are defaulted based on the Comp Rate Code entered in the Job Compensation - Pay Components section. Also in those cases, the earning distribution type is By Amount and amounts are automatically calculated.
55.	<p>Click the Person Profile tab.</p> <p style="text-align: center;"><input type="button" value="Person Profile"/></p>

Step	Action
56.	<p>Use the Person Profile page to enter the employee's Degrees, Oath Signature Date and Patent Acknowledgment signature date.</p> <p>The information entered in the JPM Degrees, UC Oath Date and UC Patent Acknowledgment sections is copied to the employee's Person Profile component after the template is processed by UCPC WFA Production.</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>
57.	Click the scroll bar.

Smart HR Transactions

Employee Information

JPM Degrees

Effective Date Degree

Education Field Country

State School Code

School Description Graduated

Year Acquired Terminal Degree for Discipline

UC Oath Date

Oath Signature Date

UC Patent Acknowledgment

Patent Acknowledgment Sign Dt Modified Patent Ackmnt Sign Dt

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:

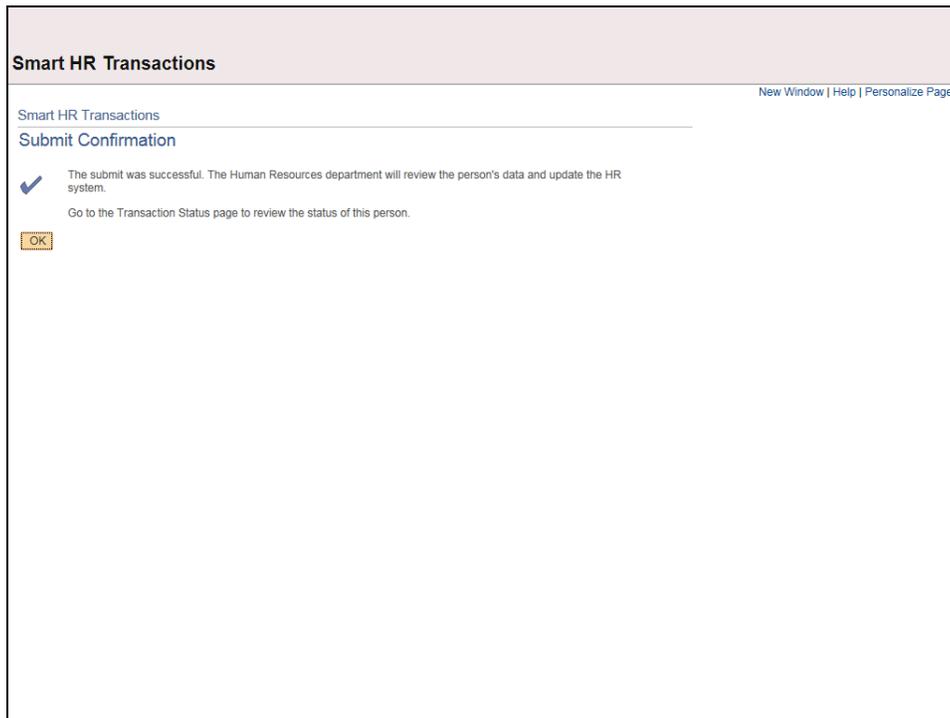
Step	Action
58.	<p>Enter the date the employee signed the UC oath agreement. This date cannot be later than today's date.</p> <p>Click in the Oath Signature Date field.</p> <input type="text"/>
59.	<p>Enter the desired information into the Oath Signature Date field.</p> <p>For this example, enter 11/1/18.</p>
60.	<p>Enter the date on which the individual signed the UC patent acknowledgement. This date cannot be later than today's date.</p> <p>Click in the Patent Acknowledgment Sign Dt field.</p> <input type="text"/>
61.	<p>Enter the desired information into the Patent Acknowledgment Sign Dt field.</p> <p>For this example, enter 11/1/18.</p>
62.	<p>For post docs, use the fields in the Employee Experience section to enter data related to the employee's prior work experience. Having this information is helpful in determining new compensation rates for the employee who is being rehired.</p>

Step	Action
63.	Use the Supporting documents link to attach supporting documents for the rehire. 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.
64.	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.
65.	The Save and Submit button is not available until all required fields on each tab are completed. Click the Save and Submit button. 

The screenshot shows the 'Smart HR Transactions' page. At the top, it says 'Smart HR Transactions' with links for 'New Window', 'Help', and 'Personalize Page'. Below this is a section titled 'Select an Action' for a person named 'Randy Sacks'. A yellow warning triangle icon is present with the text: 'This person already exists in the Human Resources system. You must decide what action should be used to hire this person into the system.' Below the warning, it says 'Search for Matching Persons found this person has one or more inactive Employee Instances in the system.' There is a link for 'Person Org Summary'. A 'Select an Action' dropdown menu is open, showing the option 'Select existing employee instance as a Rehire.' selected, with an 'Instance #' dropdown set to '0'. At the bottom, there are three buttons: 'Save and Submit', 'Save for Later', and 'Cancel'.

Step	Action
66.	Review the rehire warning message, which indicates this employee's record already exists in UCPath.

Step	Action
67.	<p>If the employee has only one inactive employee record within your business unit, then that number is defaulted. If the employee has more than one inactive employee record within your business unit, then the lowest number defaults. If needed, select the record to add rehire action.</p> <p>For this example, accept the default.</p>
68.	<p>Click the Save and Submit button.</p> 



Step	Action
69.	<p>Click the OK button.</p> 

Smart HR Transactions New Window | Help | Personalize Page

Smart HR Transactions
Select a template and press Create Transaction.

Transaction Template ?

Transaction Type: All Effective Date:

Select Template:

Transaction Type: All

Transactions in Progress Personalize | Find | | First 1 of 9 Last

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	JOB	11/01/2018	Claire Ramirez	10005571	Transfer	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Cassandra Perry	NEW	Hire	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Gus Gonzalez	NEW	Hire	United States
<input type="checkbox"/>	JOB	09/29/2018	Grisby, Elizabeth N	10000841	Terminatn	United States
<input type="checkbox"/>	HIRE	11/01/2018	Tam Triet Ngo Duc	10008356	Hire	United States
<input type="checkbox"/>	HIRE	11/01/2018	Cheong Yankura	10087236	Hire	United States
<input type="checkbox"/>	HIRE	11/01/2018	Kirstin Bright	10000008	Hire	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Maricar Sherck	10000023	Rehire	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Randy Sacks	10000098	Rehire	United States

Go To [Transaction Status](#)

Step	Action
70.	The template transaction is routed for approval and appears in the Transactions in Progress section until it is processed.
71.	You have initiated a rehire template transaction for an academic employee. End of Procedure.