Position and Hire Transactions
Job Aid: Summer Research Additional Compensation

Getting Started

Departments are responsible for managing position update and hire transactions for Summer Research Additional Compensation.

- Positions are updated by the department via the Position Control Request prior to initiating the Hire transaction. Position updates do not route to UCPC for processing, and write directly to the UCPath system upon AP approval.
- Hire transactions are initiated in the Smart HR Transactions component. Hire transactions route through AP for approval and to UCPC for fulfillment.

Transactions should be reviewed thoroughly to ensure accuracy and avoid pay and benefit issues.

**NOTE:** Questions regarding these transactions should be addressed to ap-path@ucsb.edu.

Position Control Request

Re-use Summer Salary positions whenever possible. Identify existing positions in the Vacant Budgeted Positions component. (Note: if you do not have access to this component, please work with the person in your department with access.)

If needed, new positions can be requested via the AP Folio UCPath Certification.

Initiate a Position Control Request to update position FTE, as needed. Review all other position data points and make other changes or corrections.

Fluid Navigation: PeopleSoft Homepage > Workforce Administration tab > Position Management tile > Add/Update Position folder > Position Control Request

Step 1: Select “Update Vacant Position” and “Next>>”

Step 2: Enter the Effective Date and Position Number for the update and click the “Search” box. Effective dates on the position can only be used once, so the date utilized should precede the hire effective date. This allows for additional changes to occur prior to hire, if needed.
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Step 3: Chose the “Select” box next to the position from the list that you wish to update.

Step 4: Select the appropriate Reason, either TRT (reduction) or TIT (Increase) for FTE changes. For detailed descriptions of the Reason codes available, please see the Position section of the Job Aid: PayPath Transactions—Action Codes, Reason Codes and Descriptions (Academic).

Step 5: Navigate through each tab, review all position data attributes for correctness, and update all necessary fields.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Fields to Validate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Job Code, Union Code, Location, Reports To, Salary Admin Plan, Salary Grade, FLSA Status</td>
</tr>
<tr>
<td>Specific Information</td>
<td>FTE, Adds to FTE Actual Count checkbox</td>
</tr>
<tr>
<td>UC Position Data</td>
<td>HR Worksite (91), Employee Relations Code (All others, Not Confidential)</td>
</tr>
</tbody>
</table>

Step 6: Navigate to the Supporting Documents tab and select “Save and Submit.”

Step 7: Once the WFA request has been approved, review data points in Add/Update Position Info to ensure all information is correct prior to initiating the Hire transaction.
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Hire Transaction

The Concurrent Hire or Rehire template may be used, depending on the circumstance. Departments are responsible for reviewing the employee’s Person Org Summary, understanding the implications, and determining their internal best practice. Guidance is provided below:

- The Academic Concurrent Hire template with the Academic Concurrent Hire Reason Code creates a new Employee Record Number in the system, and should ALWAYS be used when the employee DOES NOT have an existing inactive job record in your department.
  - This template may be used when the employee HAS an existing inactive job record, however:
    - This will add a new employee record number.
    - As the number of records increase, this practice will make searchability in Job Data and Person Org Summary more cumbersome.

- The Rehire Academic template with the Concurrent Non-Dual Employment Reason Code uses an existing Employee Record Number.
  - Use IF the employee has an existing inactive job record in your department in UCPath.
  - An existing instance number (Employee Record #) must be selected within the template, so it is important to pre-identify which record number from your department to utilize.

Best Practice – rehire into the same Summer Salary employee records each year.

Fluid Navigation: PeopleSoft Homepage > Workforce Administration tab > HR Tasks tile > Template Based Hire folder > Smart HR Transactions

Step 1: Select the appropriate Hire template, following the corresponding User Productivity Kit for additional guidance on completing the Personal Data, Job Data and Person Profile (Rehire only) tabs.

- Initiate Rehire Template Transaction (Acad)
- Initiate Concurrent Hire Template Transaction (Acad)
Step 2: Complete the **Earns Dist** tab with the appropriate JED information (note: this tab is only completed on Summer Compensation Hire transactions).

- **Earnings Distribution Type** = “By Percent”
- **Earnings Code** = “ACR”
- **Percent of Distribution** = “100.00”

Step 3: Navigate to the **Person Profile** tab and “Save and Submit.”

Step 4: Upon notice of UCPC Hire fulfillment, validate all data points are correct in **Job Data**.

Note: **Job Earnings Distribution** can be viewed by following the **Earnings Distribution** link toward the bottom of the screen when viewing **Job Data**.

If the **Earnings Code** is incorrect, a **PayPath** transaction is necessary to correct the JED.

Refer to the **Summer Comp PayPath Component** for instructions on updating Job Data via PayPath.