Academic Hire Templates

Selecting the Hire Template

**Transaction Type** remains “All”

Enter the **Effective Date** of the hire

**Select Template** – choose the appropriate Academic template

- **Academic Concurrent Hire** – used to add a new employee record # when the employee has a current active record.
- **Full Hire** – used to create a new employee record # when the employee does not have an existing record on the academic table at UCSB.
- **Rehire** – used to hire into a new job using an existing employee record #. Must pre-identify the record # that will be used.
- **Transfer** - used to hire into an existing active record, replacing the previous job. The previous department will no longer be able to view or act upon the job record.

Select **Create Transaction** button

*Note: AP does not recommend the Transfer template. Best Practice – use a Concurrent or Full Hire template with the correct Transfer Reason Code and a corresponding Termination template to end the job the employee is separating from.*

See the [Academic Hire Transaction Matrix](https://ap.ucsb.edu) on [ap.ucsb.edu](http://ap.ucsb.edu) for additional guidance on selecting the correct **Template** and **Reason Code**.
Transaction Details: Reason Codes & Employee ID

If the hire already has an existing record in UCPath (pre-identified using Person Org Summary), enter the Employee ID Number in the Employee ID field.

Select the Reason Code that best aligns with your hire scenario. Note that Reason Codes vary by template. Refer to the Job Aid: Template Transactions – Action Reason Codes and Descriptions for a list of all codes and descriptions of when they are appropriate for use.

Quick Tip:

If you enter the employee ID, and the system does not “recognize” the employee, make sure you selected the correct template.

Remember – Academic and Staff tables do not “talk” so a Full Hire template is required if the employee does not have a record on the Academic table.

The Address Format defaults to United States. For employees with an international address, the format can be changed to Global.
Transaction Details: Personal Data

Enter the hire’s **Legal** name information. If the employee has a preferred or lived name, this can be input in the **First**, **Last** and **Middle Name** fields; if no information is input in the Hire transaction, these fields will default to the **Legal Name** information on UCPath records upon fulfillment of the Hire.

**Date of Birth** entry is required.

**Highest Education** can be input, if applicable.

**Person Phone Number** should be marked as **Preferred**.

**Person Email Address** should be set to **Home** – this initiates the I9 process.

Enter the **Person Address** attributes.

Do not enter anything in the **UC External System ID** section.

**UC I-9 Information:** Refer to the I-9 training & materials provided by BFS for if/when the Tracker Profile ID & Remote I-9 Section 2 fields should be completed.

Add any comments relevant to the hire. **NOTE: UCPC only reviews this Comment box; they do not review Initiator or Approver comments.**

Click on the **Job Data** tab to navigate to the next section.
Transaction Details: Job Data

<table>
<thead>
<tr>
<th>Personal Data</th>
<th>Job Data</th>
<th>Eams Dist</th>
<th>Person Profile</th>
</tr>
</thead>
</table>

**Employee Information**

**Work Location - Position Data**
- Position Number: 40033404

**Work Location - Job Fields**
- Business Unit: SBCMP
- Department: CHEM
- Location Code: CONVERSION
- Establishment ID: UCSB

**Job Information - Job Code**
- Job Code: 003252

**Job Information - United States**
- FLSA Status: Exempt

**Job Labor - Union Code**
- Union Code: PX
- Union Seniority Date: __________

**Job Information - Reporting Information**
- Reports To Position Number: 40033797

**Job Information - Employee Classification**
- Employee Classification: 23
- LBNL Officer Code: None
- Classified/Unclassified: Academic

**Job Information - Standard Hours**
- Standard Hours: 16.25000
- FTE: 0.40640

**UC Job Data**
- Academic Duration of Appt
- Location Use End Date: __________
- Location Use Type
- Post Docs Anniversary Date: __________
- Cubicle

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**Quick Tip:**
If the position number is “invalid” – make sure you have the correct position number AND the correct template.

**Academic positions will not populate on a Staff template.**
Cancel and start a new template.

Enter the **Position Number**; this will auto-populate the attributes directly from the position:
- Business Unit
- Department
- Location
- Job Code
- FLSA Status
- Union Code
- Reports to
- Employee Classification
- FTE

If the above attributes are incorrect, cancel the template, and contact AP regarding the position corrections needed. Start a new template once the **Position** is updated.

If applicable, in the **UC Job Data** section:
- Populate the **Academic Duration of Appointment** (Term appointments, Unit 18, etc.)
- All Postdoc hires - enter the **Postdoc Anniversary Date**
- Add **Cubicle** information with physical work location detail. (Room, Office or Cubicle – required for all represented appointments.)
For Step based positions:

- Add the Step to populate the compensation fields
- Add the UCOFF1 Comp Rate Code and Compensation Rate for employee who are paid an offscale supplement (use the “+” to add a line when an offscale is applicable)

For non-Step based positions:

- Add the UCANNL and UCOFF1 or UCABVE Comp Rate Code(s) and Compensation Rate(s)
- Add the UCWOS for without salary positions, if applicable

The Compensation Frequency auto-populates based on the Job Code attributes.

Add the Expected Job End Date, if applicable.

If this is a temporary appointment (ASE, Visiting, Supplement, etc.), the End Job Automatically checkbox may be selected to auto-terminate the position. Note – this practice does not apply a Reason Code at the time of separation that aligns with the termination reason. All other populations must use a Termination or Retirement template and Reason Code that aligns with the separation reason.
Transaction Details: Earns Dist

The Earns Dist tab is left blank.

Exception – Summer Salary – please refer to the AP Additional Compensation training regarding Hire transaction processing of Summer Salary.

Transaction Details: Person Profile

The Degree and Effective Date fields are required in the JPM Degrees section for some Academic employees. All other field are optional.

The Oath Signature Date and Patent Acknowledgement Sign Date fields are typically managed as part of the onboarding process. If they have been completed at the time of the Hire Template initiation, the dates of signature can be included here.
Template Tips and Tricks!

**Hire templates vary:**
- The **Concurrent Hire** template does not include the **Person Profile** tab.
- The **Rehire** template requires you to select the Record Instance to use as the **Employee Record #** (pre-identify on **Person Org Summary**).
- The **Rehire/Reinstatement** template is used to reactivate a record that was erroneously terminated WITHOUT a break in service:
  - The effective date must match the termination date on the Job.
  - The template is one tab with minimal data entry.

Complete *all* of the necessary fields on each tab and review that all data points are correct to ensure a successful **Hire**.

The **Save and Submit** button will not appear as active until ALL tabs have been touched upon, regardless if data is changed on that tab.

An email is sent to the Initiator when a transaction has been fulfilled (or denied) by UCPC. Review the email (and transaction comments) to determine if additional action is needed; and review the Job Data record to ensure all data points are correct once the record is active.

**Hiring without a Social Security Number (SSN):**
If an employee does not have an SSN at the time of hire, the Hire transaction can still be processed. Include a note in the Comments box on the Personal Data Tab – “Employee SSN will be input into UCPath as soon as the employee receives notice that it has been assigned.”  Note: *this practice should only be used when an employee is awaiting an SSN to be assigned to them due to the downstream impacts to benefits and retirement enrollment when the system does not have an SSN included at the time of hire. Transactions missing a SSN AND corresponding comments will be denied.*

**Academic Year (AY) Employees – Pay vs Service:**
AY employees have Service and Pay dates associated with their employment. The effective date on a Hire transaction is the start date of the employees Pay. Please refer to the Pay and Service charts available on the [AP Website](https://app.ucsb.edu/).

*Example: A faculty member is hired and expected to start teaching during fall quarter. The start of their Service is 9/24/23. The start of their Pay is 7/1/23. The effective date of the Hire template is 7/1/23.*

**Approvers:**
Approvers play a critical role in ensuring all data points are entered and correct to reduce pay and benefit impacting errors that can take *months* to fix if they write to the system incorrectly due to a data entry error on a template.
- Click on the blue Employee Name link to open the transaction detail.
- Review each tab closely compared to the backup documentation.
- Work with initiator on any corrections needed on the Hire template. Approve only complete and correct transactions.
- Brief training videos on approving transactions are available in the UCPath section of [AP’s Training Materials web page](https://app.ucsb.edu/).