

Academic Hire Templates

Selecting the Hire Template

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

You do not have any transactions in progress.

Go To Transa

Look Up Select Template

Search by: Template begins with

Search Results

View 100 First 1-21 of 21 Last

Template	Description
UC_ADD_CWR	Add Contingent Worker - No Position Data
UC_ADD_CWR_POSN	Add Contingent Worker With Position
UC_COM_CWR	Complete Contingent Worker Instance
UC_CONC_HIRE	Staff Concurrent Hire/Inter Location Transfer
UC_CONC_HIRE_AC	Academic Concurrent Hire/Inter Location Transfer
UC_EXT_CWR	Update/Extend CWR Appointment
UC_EXT_CWR_POSN	Extend CWR (with Position) Appointment
UC_FULL_HIRE	Full Hire - Staff Only
UC_FULL_HIRE_AC	Full Hire - Academic Use Only
UC_INVOL_TERM	Involuntary Termination
UC_PERSON_DATA	UC Personal Data
UC_REHIRE	UC Rehire - Staff Only
UC_REHIRE_AC	Rehire - Academic
UC_REHIRE_REI	Rehire Reinstatement - For Staff Appointments
UC_REHIRE_REI_AC	Rehire Reinstatement - For Academic Appointments
UC_RENW_CWR	Renew Contingent Worker - Without Position
UC_RENW_CWR_POS	Renew CWR Instance - with Position
UC_RETIREMENT	Retirement
UC_TRANSFER	Intra-Business Unit Transfer - Staff Only
UC_TRANSFER_AC	Intra-Business Unit Transfer - Academic Only
UC_VOL_TERM	Voluntary Termination

See the [Academic Hire Transaction Matrix](#) on ap.ucsb.edu for additional guidance on selecting the correct **Template** and **Reason Code**.

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.

Transaction Details: Reason Codes & Employee ID

Enter Transaction Details

The following transaction details are required.

Template Full Hire - Academic Use Only

Organizational Relationship Employee

*Employee ID

*Effective Date

*Action

*Reason Code

*Address Format

- Academic Concurrent Hire
- Academic Hire w/ Contract Pay
- Academic Inter BU Transfer
- 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: Academic Recall
- Rehire: Emeritus Faculty
- Rehire: Retired Retiree
- Rehire: Reinstatement
- Rehire: Retirement Suspended
- Transfer-Inter BU, Demotion
- Transfer-Inter BU, Lateral
- Transfer-Inter BU, Promotion
- Transfer-Inter BU, Undefined
- With Prior UC Affiliation

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.

*Address Format

Global

United States

The **Address Format** defaults to *United States*. For employees with an international address, the format can be changed to *Global*.

Transaction Details: Personal Data

Smart HR Transactions
 Enter Transaction Information
[Click here to Hide Header Details](#)

Template: UC_FULL_HIRE_AC Name:
 Effective Date: 07/01/2023 Action/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation)
 Employee ID: NEW Employee Record:

Personal Data Job Data Earns Dist Person Profile

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 Phone Number

Phone Type	Telephone	Preferred
1 Home	805/555-1212	<input checked="" type="checkbox"/>

Person Email Address

Email Type	Email Address
1 Home	dudley@doright.com

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

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.

UC External System ID

Business Unit External System

External System ID

UC I-9 Information

Tracker Profile ID Remote I-9 Section 2

Comments

Comments

Transaction Details: Job Data

Personal Data	Job Data	Earns Dist	Person Profile
Employee Information			
Work Location - Position Data			
*Position Number <input type="text" value="40033404"/>			
Work Location - Job Fields			
Business Unit	<input type="text" value="SBCMP"/>	Department	<input type="text" value="CHEM"/>
Location Code	<input type="text" value="CONVERSION"/>	Establishment ID	<input type="text" value="UCSB"/>
Job Information - Job Code			
Job Code <input type="text" value="003252"/>			
Job Information - United States			
FLSA Status <input type="text" value="Exempt"/>			
Job Labor - Union Code			
Union Code	<input type="text" value="PX"/>	Union Seniority Date	<input type="text"/>
Job Information - Reporting Information			
Reports To Position Number <input type="text" value="40035797"/>			
Job Information - Employee Classification			
Employee Classification	<input type="text" value="23"/>	LBNL Officer Code	<input type="text" value="None"/>
Classified/Unclassified Ind	<input type="text" value="Academic"/>		
Job Information - Standard Hours			
Standard Hours	<input type="text" value="16.260000"/>	FTE	<input type="text" value="0.406400"/>
UC Job Data			
Academic Duration of Appt	<input type="text"/>	Location Use End Date	<input type="text"/>
Location Use Type	<input type="text"/>	Post Docs Anniversary Date	<input type="text"/>
Cubicle	<input type="text"/>		

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.)

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.

Job - Salary Plan

Salary Administration Plan Salary Grade

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	<input type="text" value="UCANNL"/>	<input type="text" value="60000.000000"/>	A	Manual + -

Job Compensation - Payroll Currency and Frequency

*Compensation Frequency

Work Location - Expected Job End Date

Expected Job End Date End Job Automatically

[Return to Enter Transaction Details Page](#)

Save and Submit
Save for Later

Transaction ID:

Initiator Comments:

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

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 | First

Earnings Code	Compensation Rate	Percent of Distribution
1		

[Return to Enter Transaction Details Page](#)

[Supporting documents](#)

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

Personal Data | Job Data | Earns Dist | **Person Profile**

Employee Information

JPM Degrees

*Effective Date: *Degree:

Education Field: Country:

State: School:

School Description: Graduated Terminal Degree for

Year Acquired:

UC Oath Date

Oath Signature Date:

UC Patent Acknowledgment

Patent Acknowledgment Sign Dt: Modified Patent Ack

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

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

[Return to Enter Transaction Details Page](#)

[Supporting documents](#)

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 Acknowledgment 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](#).

*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](#).