Academic Hire Template- Decision Guide

This decision guide provides general Hire template and Reason Code guidance -some situations may warrant a different Template/Reason combination to to align with a specific business reason (e.g. Rehire, but opt to use the Full Hire template with Rehire reason to create a new Employee Record #/maintain prior history on separate record).

Review *Person Org Summary* to determine existing employee set up in UCPath, then follow the questions below:

Does the incumbent have an <u>employee</u> record in UCPath?

- **No** – Use the **Full Hire_AC** template:
    - If never worked for UCSB, use the <u>Hire – No Prior UC Affiliation</u> *Reason Code*
    - If has a Contingent Worker record (only), use the <u>With Prior UC Affiliation</u> *Reason Code*
    - If worked for any UC campus pre-UCPath conversion, use the <u>Rehire, >= 120 days break</u> *Reason Code*
- **Yes** – Does the employee have an existing record in UCPath from UCSB?
    - **No** (record is from another campus):
        - If records are inactive, use the **Full Hire_AC** template with appropriate *Reason Code*, based on the length of inactivity:
            - <u>Rehire, < 120 days break</u>[1]
            - <u>Rehire, >= 120 days break</u>
        - If records are active, Use the **Concurrent Hire_AC** template with appropriate *Reason Code*:
            - <u>Academic Inter BU Transfer</u> – if the employee is transferring to our campus. (Requires coordination with other campus to process **Termination** with <u>Inter BU Transfer reason</u>.)
            - <u>Academic Concurrent Hire</u> – if the employee will remain active in their other UC campus position (requires MLA – see <u>AP website</u> for process guidance.)
    - **Yes** – Are any of the existing UCSB records academic?
        - **No** (all records are staff) – Use the **Full Hire_AC** template with appropriate *Reason Code*:
            - If records are inactive, select *Reason Code* based on the length of inactivity:
                - <u>Rehire, < 120 days break</u>[1]
                - <u>Rehire, >= 120 days break</u>
            - If records are active, select the <u>Academic Concurrent Hire</u> *Reason Code*; follow up with a Termination transaction to end the other position, if applicable.
        - **Yes** – Are any of the existing records active?
            - **No** – Are any of the existing records from your department?
                - **No** - Use the **Full Hire_AC** template (to create a new Employee Record #) with appropriate *Reason Code*:
                    - <u>Rehire, < 120 days break</u>[1]
                    - <u>Rehire, >= 120 days break</u>
                - **Yes** - Use the **Rehire_AC** template (to use an existing Employee Record #) with appropriate *Reason Code*:
                    - <u>Rehire, < 120 days break</u>[1]
                    - <u>Rehire, >= 120 days break</u>
            - **Yes** – Will the employee continue to work in the existing active position?
                - **No** – Use the **Conc Hire_AC** template with the <u>Transfer – Intra Location</u> *Reason Code*; follow up with a Termination transaction to end the other position.[2]
                - **Yes** - *(continued on next page)*

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[1] The <u>Rehire, <120 days break</u> *Reason Code* may be used all existing records are inactive, and the Hire Date of the new job aligns with the Termination Date of an inactive employee record – no actual break in service.

[2] APO does not recommend the use of the **Transfer_AC** template when an employee is transferring between positions as it stacks records, and limits prior department access to records & corrective SCT actions.

- o **Yes** – Does the employee have another inactive Employee Record in the system?
  - **No** – Use the **Conc Hire_AC** template with the <u>Academic Concurrent Hire</u> *Reason Code* to create a new Employee Record #.
  - **Yes** – If the record is from your department, use the **Rehire_AC** template with the <u>Academic Concurrent Hire</u> *Reason Code* to use an existing Employee Record #. (Could also use the **Conc Hire_AC** template if the intent is to create a new instance.)

Recall or Emeritus Appointments

Use the **Full Hire_AC** template with the <u>Academic Recall</u> or <u>Emeritus</u> *Reason Code*. This creates a new employee record (brand new instance) and leaves the prior appointment on a separate record number.

Rehire/Reinstatements

Rehire an employee back into the existing record (continuing with the same data attributes: Job Code, FTE, pay, etc.) without a break in service due to an erroneous termination.

- Initiate the **Rehire REI_AC** template.
- The effective date must match the termination date in *Job Data*.
- Enter the *Expected Job End Date*, if applicable.
- Examples:
  - o Lecturer reappointment approvals were not in place and record auto-terminated
  - o TA appointment auto-terminated, but is now needed to cover a class in the new quarter

  Note: if a position is reinstated and job attributes need to change, the reinstatement is processed, followed by a PayPath action to update Job Data attributes.

Academic Transfer (Intra – On Campus) Process:

The **Transfer** template "stacks" the new appointment on the existing employee record. The prior appointment information is no longer available in *Person Org Summary* and the former department can no longer view or take corrective action on their historical appointment for that employee. To avoid these issues, departments should coordinate the Hire and Termination templates:

- Hiring department initiates the **Concurrent Hire** template with the <u>Transfer – Intra Location</u> *Reason Code*
- Ending department initiates the **Voluntary Termination** template with the <u>Transfer – Intra Location</u> *Reason Code*

Contingent Workers

A contingent worker is an affiliated employee (Without Salary Visitors *RB-III-25* and Research Associate/Research Fellow *RB-III-20*) who has a need to use the UCPath system, or other downstream systems that requires entry into UCPath. These are not UC paid employees. Policy guidance on contingent workers can be found in the [AP Website FAQ's for Contingent Workers](#).

UCPath transaction walk-throughs can be found in the User Productivity Kits:

- To add a brand-new contingent worker: [Initiate Add Contingent Worker (No Position) Template Transaction](#)
- To extend an existing contingent worker: [Initiate Extend Contingent Worker (No Position) Template Transaction](#)
- To update physical work location: [Initiate Update Contingent Worker (No Position) Template Transaction](#)
- To renew and existing contingent worker: [Initiate Renew Contingent Worker (No Position) Template Transaction](#)
- To end an existing contingent worker: [Initiate Complete Contingent Worker Instance Template Transaction](#)