

# DIRECT HIRE

11/13/2023

UCR Campus Support Center

# AGENDA

Welcome & Introductions (5 min)

Overview: Phase I Direct Hire (5 min)

★ How to Add New Employee (20 min)

★ How to Add Contingent Worker (CWR) (20 min)

Reporting and Auditing (10 min)

Testing your Competency (10 min)

Questions & Wrap-Up (10 min)

# KEY CONCEPTS OVERVIEW: DIRECT HIRE PHASE I

Moving away from customized modules toward delivered Oracle functionality. This process will allow locations to submit new hires via PeopleSoft pages rather than templates to reduce the lead time in hiring, streamline the entry process and mitigate any errors.

## TYPES OF TRANSACTIONS

- Hire No Prior UC Affiliation and Add Contingent Workers (CWR)
- Coming In Phase II (Nov '24): Direct Hire Enhancements

## AWE & AUDIT REPORTING

- AWE is not available until Phase II November '24
- Reports (available next day):
  - NO\_JOB\_ROW
  - NEWHIRE\_PERSNL
  - NEWHIRE\_JOB
- COGNOS R-419 New Hire Transactions

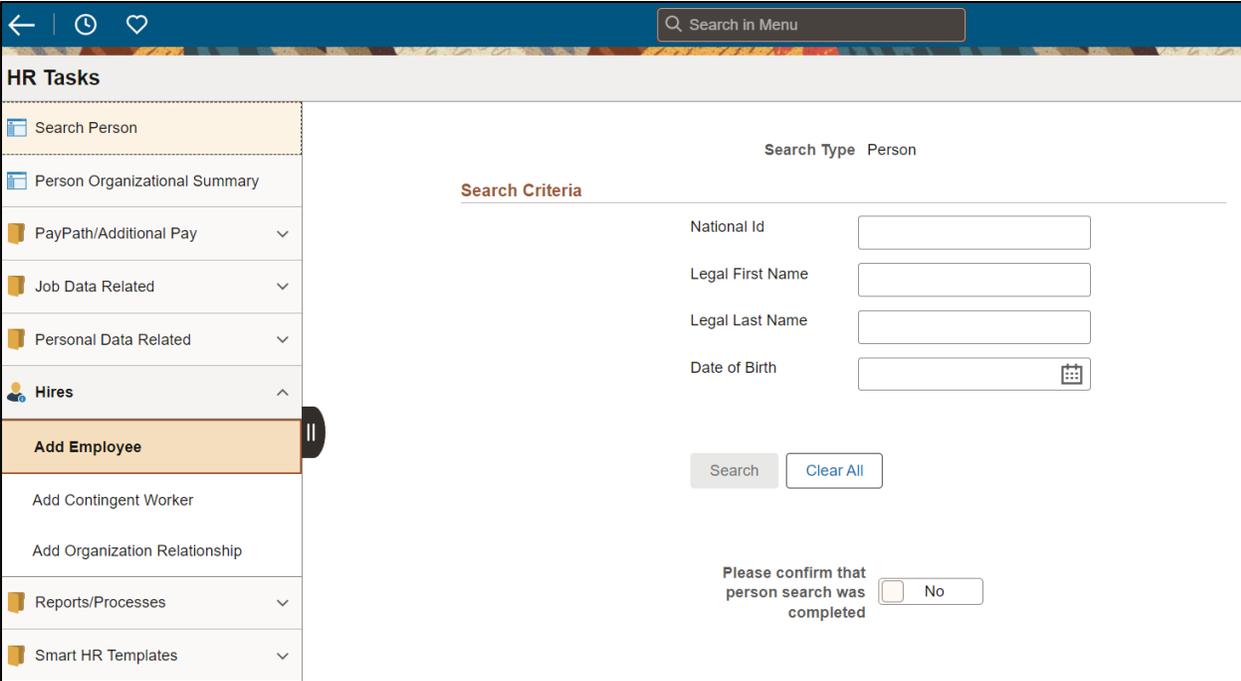
## PERSON DATA v. JOB DATA

- Effective Dates
  - Person Data is entered using current or retroactive date
  - Job Data can be retro, current or future-dated\*
  - Retroactive effective date can't be greater than 30 days

\*Job Data cannot pre-date person data

# KEY CONCEPT: PERSON SEARCH

- **Person Search shows all jobs systemwide (Inactive, Active, Future)**
  - UCPATH has submitted a CR to Oracle for **Person ORG Summary** to include future dated jobs
  - UCR submitted a CR to UCPATH to add BU, Dept, Effective Dt to **Person Search** via Activity Guide



The screenshot displays the HR Tasks interface. On the left is a navigation menu with items: Search Person, Person Organizational Summary, PayPath/Additional Pay, Job Data Related, Personal Data Related, Hires, Add Employee, Add Contingent Worker, Add Organization Relationship, Reports/Processes, and Smart HR Templates. The main area is titled 'Search Type Person' and contains a 'Search Criteria' section with the following fields: National Id, Legal First Name, Legal Last Name, and Date of Birth. Below these fields are 'Search' and 'Clear All' buttons. At the bottom, there is a confirmation checkbox labeled 'Please confirm that person search was completed' with a 'No' option.



# DIRECT HIRE

*Add Employee - Person Data*

# HR TASKS

UNIVERSITY OF CALIFORNIA UCPATH | Menu ▾ Search in Menu

Workforce Administration ▾

<p>Manage Job</p>	<p>HR Tasks</p>	<p>Position Management</p>
<p>Approvals</p>	<p>Payroll Tasks</p>	<p>Mass Upload</p>

# HR TASKS > HIRES

New Collection for Direct Hire Transactors

The screenshot shows the HR Tasks interface. On the left is a navigation menu with items: Search Person, Person Organizational Summary, PayPath/Additional Pay, Job Data Related, Personal Data Related, Hires, Add Employee, Add Contingent Worker, and Add Organization Relationship. The 'Hires' item is highlighted with a red box. An arrow points from this box to a larger, detailed view of the 'Hires' menu on the right, also highlighted with a red box. This detailed view shows the 'Hires' header, followed by 'Add Employee', 'Add Contingent Worker', and 'Add Organization Relationship'. The main content area of the interface is titled 'Search/Match' and contains a search form with fields for Search Type, Search Parameter, and Ad Hoc Search, along with buttons for Search and Clear.

# HR TASKS > HIRES > ADD EMPLOYEE > SEARCH PAGE

HR Tasks

- Search Person
- Person Organizational Summary
- PayPath/Additional Pay
- Job Data Related
- Personal Data Related
- Hires
- Add Employee**
- Add Contingent Worker
- Add Organization Relationship
- Reports/Processes
- Smart HR Templates

Search in Menu

Search Type Person

**Search Criteria**

National Id

Legal First Name

Legal Last Name

Date of Birth

Please confirm that person search was completed  No

# HR TASKS > HIRES > ADD EMPLOYEE > SEARCH

## HR Tasks

- Search Person
- Person Organizational Summary
- PayPath/Additional Pay
- Job Data Related
- Personal Data Related
- Hires**
- Add Employee**
- Add Contingent Worker
- Add Organization Relationship
- Reports/Processes
- Smart HR Templates

Search Type Person

### Search Criteria

National Id

Legal First Name

Legal Last Name

Date of Birth

Please confirm that person search was completed  Yes

# ACTIVITY GUIDE (AG) ADD EMPLOYEE – BIOGRAPHICAL DETAILS

7 ✕ Exit

## Add Employee

Person ID NEW 6 Next >

**1** Personal Details Visited

**2** Contact Information Not Started 6

**3** Add Relationship Not Started

**Legal Name/Name**

\*Effective Date  1

\*Format Type

Name

Add Legal Name/Name 2

**Biographic Information**

Date of Birth  3

**Additional Biographical Information**

Effective Date

Highest Education Level  4

**National ID**

Country	National ID Type	National ID	Primary ID
USA	Social Security Number	<input type="text"/> <span>5</span>	Yes <input type="checkbox"/>

**1** Effective Date: Defaults to 'today,' can be retroactive <30 days

**2** Legal Name/Lived Name

**3** Date of Birth

**4** Highest Education Level

**5** National ID = Social Security Number (SSN)

**6** 'Next' section of the Activity Guide or select #2 Contact Information

**7** 'Exit' If you exit this screen, you're data will not be saved

# ACTIVITY GUIDE (AG) ADD EMPLOYEE BIOGRAPHICAL DETAILS

5 ✕ Exit

## Add Employee 6

< Previous Next >

Person ID NEW

**1** Personal Details  
Visited

**2** Contact Information  
Visited 1

**3** Add Relationship  
Visited

**2** Current Addresses

Address Type	As Of Date	Status	Address
Home	11/06/2023	A	

Add Address Detail + -

**3** Phone Information

*Phone Type	Telephone	Extension	Preferred
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> No

**4** Email Addresses

*Email Type	*Email Address	Preferred
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> No

1 Activity Guide Contact Information

2 Add home address

3 Add phone information

4 Add personal email

5 'Exit' If you exit this screen, you're data will not be saved

6 'Next' section of the Activity Guide or select #3 Add Relationship

# AG - ADD EMPLOYEE – ADD RELATIONSHIP

2 ✕ Exit

## Add Employee

< Previous Save Person

Person ID NEW 1

**Organizational Relationship**

Employee  Yes

Employee Record

Select Checklist Code  ⓘ

Add Relationship 3

1 Personal Details Visited

2 Contact Information Visited

3 Add Relationship Visited

- 1 Go to 'Previous' or Save Person  
Save Person will create the EMPLID
- 2 'Exit' Biographical or Person Data screen
- 3 Add Relationship  
To Complete the Direct Hire transaction

\*UC New Hire Checklist not used at UCR

# ADD ORG RELATIONSHIP VIEW

The screenshot shows a web application interface for adding an employee. At the top left is an 'Exit' button. The main title is 'Add Employee'. On the right side, there are 'Previous' and 'Save Person' buttons. A sidebar on the left contains three steps: '1 Personal Details Visited', '2 Contact Information Visited', and '3 Add Relationship Visited'. The 'Add Relationship' step is highlighted. The main content area is titled 'Organizational Relationship' and includes the following fields: 'Person ID' with the value 'NEW', 'Employee' with a 'Yes' radio button, 'Employee Record' with the value '0', and 'Select Checklist Code' with a dropdown menu showing 'UC New Hire Checklist'. Below these fields is an 'Add Relationship' button. A white warning dialog box is overlaid on the form, containing the text: 'Warning -- No Relationship was created. An Unknown Person of Interest Type will be created. If the Save is continued, then a Person of Interest Type of Unknown will be created for this person.' The dialog has 'OK' and 'Cancel' buttons.



Word of Caution: 'Save Person' will generate EMPLID and store Personal Details in a staging table. At this point, you cannot go back to review and update Person Data. EMPLID and Name will be the only search criteria.

# KEY CONCEPT: ADDING ORG RELATIONSHIP

- To resume transacting after Person Data:
  - Search via Add Organization Relationship
  - All incomplete hires are displayed across organization.

The screenshot shows the HR Tasks interface. The sidebar on the left has 'Add Organization Relationship' highlighted. The main area contains an 'Empl ID' field with a search icon (2), an 'Employee Record' field with the value '0', and an 'Add Organization Relationship' button (5). A 'Lookup' dialog box is open, showing a search for 'Empl ID' and a list of search results (4). The search results table is as follows:

Empl ID ↑↓	Name ↑↓	Organizational Relationship ↑↓
10664443	Fernando Alonso	Employee
10664476	Hoss Rodriguez	Employee
10664567	Jeff Dahmer	Employee

- 1 Add Organizational Relationship
- 2 Click Look up Empl ID
- 3 Lookup Screen
- 4 List of Incomplete Hires  
Select Incomplete Hire
- 5 Add Organization Relationship  
To Complete the Direct Hire transaction



# DIRECT HIRE

*Add Employee – Job Data*

# AG – JOB DATA > WORK LOCATION

6 ✕ Exit

**Hire / Hire - No Prior UC Affiliation**

**BART SIMPSON**  
10669768 - 0 - Employee 5 Next >

1 **Work Location** Visited

2 **Job Information** Visited

3 **Labor Information** Visited

4 **Salary Plan** Visited

5 **Compensation** Visited

6 **Job Earnings Distribution** Visited

7 **UC Job Data** Not Started

2 \*Effective Date 10/07/2023   Effective Sequence 0

HR Status Active Payroll Status Active

\*Job Indicator Primary Job

3 Position Number   Override Position Data  No

\*Regulatory Region USA   \*Company   
United States

\*Business Unit RVCMP   
UC Riverside Campus

\*Department

Location  Establishment ID

4 Date Created 10/25/2023

Expected Job End Date   End Job Automatically  No

1 Activity Guide starts with Work Location

2 Effective Date: Defaults to 'today,' can be retroactive <30 days, or future-dated

3 Position Number

4 Type in Expected Job End Date  
If needed, check of End Job Automatically

5 'Next' section of the AG or select #2 Job Information

6 Exit Job Data

# AG – JOB DATA > JOB INFORMATION

× Exit

Hire / Hire - No Prior UC Affiliation

BART SIMPSON  
10669768 - 0 - Employee

Effective Date 10/07/2023 Effective Sequence 0

1 Work Location Visited

2 Job Information Visited

3 Labor Information Visited

4 Salary Plan Visited

5 Compensation Visited

6 Job Earnings Distribution Visited

7 UC Job Data Not Started

\*Job Code

Reports To

\*Employee Class

\*Officer Code None

Standard Hours

Standard Hours 40.00 Work Period Weekly

FTE 0.000000

> USA

1

1

Continue the Activity Guide by filling in Job Information

2

Enter Job Code

3

Select Employee Class

4

'Next' section of the AG or select #3 Labor Information.

# AG – JOB DATA > LABOR INFORMATION

4 ✕ Exit

**Hire / Hire - No Prior UC Affiliation**

**BART SIMPSON**  
10669768 - 0 - Employee

3 < Previous Next >

1

1 Work Location Visited	Effective Date 10/07/2023	Effective Sequence 0
2 Job Information Visited	2 Union Code <input type="text"/>	Union Seniority Date <input type="text" value=""/>
3 Labor Information Visited		
4 Salary Plan Visited		
5 Compensation Visited		
6 Job Earnings Distribution Visited		
7 UC Job Data Not Started		

1 Proceed with Activity Guide Labor Information

2 Union Code as specified in Position

3 'Next' section of the Activity Guide or select #4 Salary Plan.

4 Exit Job Data

# AG – JOB DATA > SALARY PLAN

4 ✕ Exit

Hire / Hire - No Prior UC Affiliation

BART SIMPSON  
10669768 - 0 - Employee

3 < Previous Next >

1 **Work Location**  
Visited

2 **Job Information**  
Visited

3 **Labor Information**  
Visited

1 **4 Salary Plan**  
Visited

5 **Compensation**  
Visited

6 **Job Earnings Distribution**  
Visited

7 **UC Job Data**  
Not Started

2 **Effective Date** 10/07/2023 **Effective Sequence** 0

**Salary Plan**

Salary Admin Plan

Grade

Step

UC Step

1 Proceed with Activity Guide Salary Plan

2 If required, Select UC Step

3 'Next' section of the Activity Guide or select #5 Compensation.

4 Exit Job Data

# AG – JOB DATA > COMPENSATION

5 ✕ Exit

**Hire / Hire - No Prior UC Affiliation**

**BART SIMPSON**  
10669768 - 0 - Employee

4 < Previous Next >

1 **Work Location** Visited

2 **Job Information** Visited

3 **Labor Information** Visited

4 **Salary Plan** Visited

**1** 5 **Compensation** Visited

6 **Job Earnings Distribution** Visited

7 **UC Job Data** Not Started

Effective Date 10/07/2023

Effective Sequence 0

Compensation Rate 0.00 \*Currency Code USD 2 \*Frequency Monthly

> Pay Rates

Default Pay Components

3 Pay Components

1 row

*Rate Code	Seq	Compensation Rate	Currency	Frequency
<input type="text"/>	0	<input type="text"/>		

Calculate Compensation

1 Continue Activity Guide Compensation

2 View Pay Rate per EMPL Class

3 Select Rate Code and Compensation Rate

4 'Next' section of the Activity Guide or select #6 Job Earning Distribution.

5 Exit Job Data

# AG – JOB DATA > JOB EARNINGS DISTRIBUTION

5 ✕ Exit

**Hire / Hire - No Prior UC Affiliation**

**BART SIMPSON**  
10669768 - 0 - Employee

4 < Previous Next >

1 **Work Location** Visited

2 **Effective Date** 10/07/2023 **Effective Sequence** 0

2 **Job Information** Visited

**Earnings Distribution**

**Compensation Rate** **Currency Code** USD **Work Period** Weekly

**Standard Hours** 40.00 **Compensation Period** Monthly

3 **\*Earnings Distribution Type** None

**Job Earnings Distribution**

1 row

Position Number	Business Unit	Department	Job Code	*Earnings Code	General Ledger Pay Type	Compensation Rate	Standard Hours	Percent of Distribution
DEF								

5 **Compensation** Visited

6 **Job Earnings Distribution** Visited

7 **UC Job Data** Not Started

1 Proceed with Activity Guide Job Earning Distribution

2 View Earning Distribution

3 JED will be used according to EMPL Class

4 'Next' section of the Activity Guide or select #7 UC Job Data

5 Exit Job Data

# AG – JOB DATA > UC JOB DATA

6 ✕ Exit

**Hire / Hire - No Prior UC Affiliation**

**BART SIMPSON**  
10669768 - 0 - Employee

5 < Previous Submit

1 Work Location Visited	2 Effective Date 10/07/2023 Effective Sequence 0
2 Job Information Visited	<b>Probation Details</b>
3 Labor Information Visited	*Probation Code <input type="text" value="None"/>
4 Salary Plan Visited	Probation End Date <input type="text"/>
5 Compensation Visited	Academic Duration of Appt <input type="text"/>
6 Job Earnings Distribution Visited	Location Use End Date <input type="text"/>
7 UC Job Data Visited	Location Use Type <input type="text"/>
	Post Docs Anniversary Date <input type="text"/>
	PY Career Duration <input type="text"/>
	Cubicle <input type="text"/>
	<b>3 UC I-9 Information</b>
	4 Tracker Profile ID <input type="text"/>
	Remote I-9 Section 2 <input type="checkbox"/> No
	<b>4 UC External System ID</b>
	External System <input type="text"/>
	External System ID <input type="text"/>

1 Continue Activity Guide UC Job Data

2 Select Probation Details

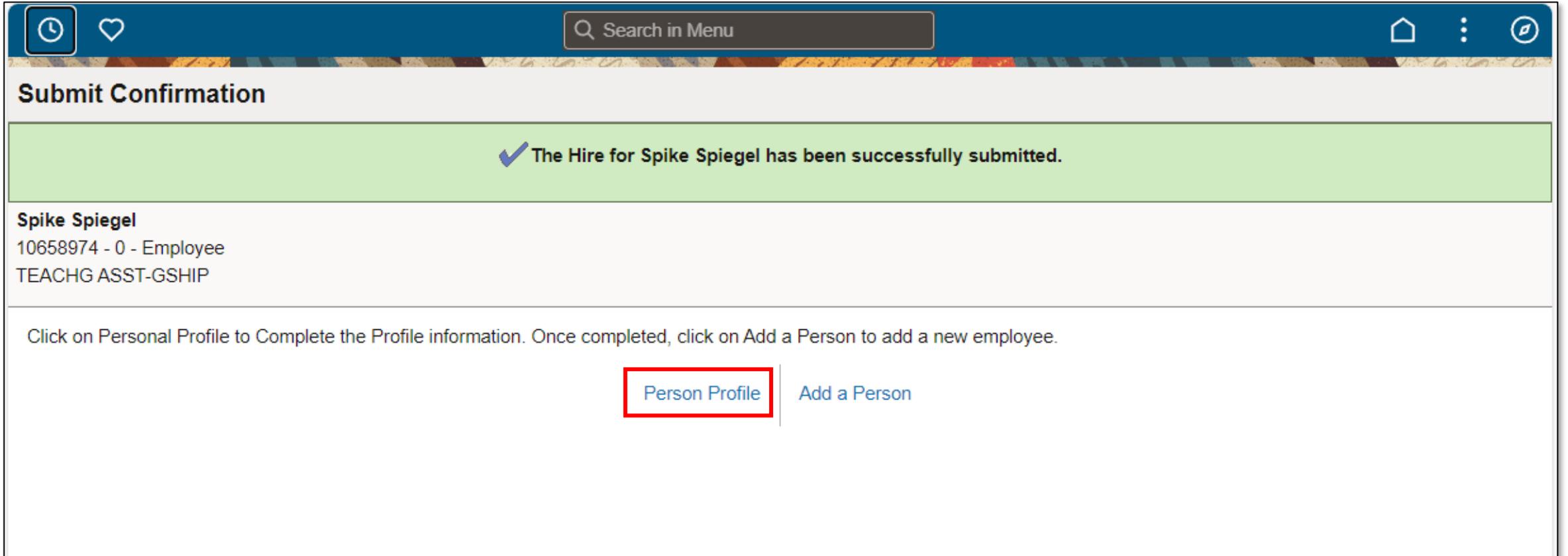
3 Provide UC I-9 Information

4 Select External System and Provide External System ID

5 Before submitting, review all pages, then click **Submit**.

6 Exit Job Data

# SUBMIT CONFIRMATION



The screenshot shows a web application interface with a dark blue header. On the left, there are icons for a clock and a heart. In the center, there is a search bar labeled 'Search in Menu'. On the right, there are icons for a home page, a menu, and a refresh button. Below the header, the page title is 'Submit Confirmation'. A green banner contains a checkmark and the text 'The Hire for Spike Spiegel has been successfully submitted.' Below this, the employee's name 'Spike Spiegel' is listed, followed by '10658974 - 0 - Employee' and 'TEACHG ASST-GSHIP'. A paragraph of text reads: 'Click on Personal Profile to Complete the Profile information. Once completed, click on Add a Person to add a new employee.' Below this text are two buttons: 'Person Profile' (highlighted with a red box) and 'Add a Person'.



Word of Caution: At this point, the hire has been committed to the database. Transactors need to go to 'Person Profile' and enter the Patent and Oath signature dates. If this step is missed, a Personal Data Change template transaction will need to be submitted.

# SUBMIT CONFIRMATION (PERSON PROFILE)

Person Profile

Empl ID 10659046      **HARRY POTTER**

Profile Type PERSON      UC Person

\*Profile Status Active

Print    Comments      Profile Actions [Select Action]

Qualifications    Education    **Oath / Patent Signature Date**    Multi-Location Appointments    UC Student Status

**Oath Signature Date**

There are currently no Oath Signature Date for this profile. Please add one if required.

**+ Add New Oath Signature Date**

**Patent Acknowledgment Date**

There are currently no Patent Acknowledgment Date for this profile. Please add one if required.

**+ Add New Patent Acknowledgment Date**

**Patent Amendment Date**

There are currently no Patent Amendment Date for this profile. Please add one if required.

**+ Add New Patent Amendment Date**

Save

Return to Search

Add New Oath Signature Date

Person Profile

Empl ID 10659046      HARRY POTTER

Profile Type PERSON      UC Person

Add item details. Select OK to apply changes and return. Select Cancel to return without making any changes. Select Apply and Add Another to continue adding additional items.

Details Find | View All First 1 of 1 Last

\*Oath Signature Date 11/03/2023

Last Updated On 11/03/2023 1:54:07PM

Last Updated By 10305460

OK    Cancel    Apply and Add Another

Add New Patent Acknowledgment Date

Person Profile

Empl ID 10659046      HARRY POTTER

Profile Type PERSON      UC Person

Add item details. Select OK to apply changes and return. Select Cancel to return without making any changes. Select Apply and Add Another to continue adding additional items.

Details Find | View All First 1 of 1 Last

\*Patent Acknowledgment Sign DT 11/03/2023

Modified Patent Ackmnt

Entered through Self Service

Last Updated On 11/03/2023 1:55:21PM

Last Updated By 10305460

OK    Cancel    Apply and Add Another

# KEY CONCEPT: JOB EARNINGS DISTRIBUTION

- Review Direct Hire Job Data :

- Earnings distribution will show as NO PAY until the overnight batch job (E-019) has run

The screenshot displays two panels from an HR system. The left panel, titled 'Job Earnings Distribution', shows details for Jeff Dahmer (Empl ID 10664567). It lists 'Earnings Distribution Type' as 'None' and 'Default Earnings Code - NO PAY' in a red box. The right panel, titled 'Job Data', shows 'Earnings Distribution Type: None' and a 'Pay Components' table with one entry: '1 UCANNL' at a 'Comp Rate' of '127,900.000000'. A red box highlights this table, and an arrow points from the 'Default Earnings Code - NO PAY' box to it.

Rate Code	Comp Rate
1 UCANNL	127,900.000000



**DEMONSTRATION**

*Add Employee*



# DIRECT HIRE

*Add Contingent Worker (CWR) - Person Data*

# HR TASK > HIRES

The screenshot shows the HR Tasks interface. On the left is a vertical menu with items: Search Person, Person Organizational Summary, PayPath/Additional Pay, Job Data Related, Personal Data Related, Hires, Add Employee, Add Contingent Worker, and Add Organization Relationship. The 'Hires' item is highlighted with a red box. An arrow points from this box to a larger, detailed view of the 'Hires' sub-menu on the right. This sub-menu also has a red border and contains the following options: Add Employee, Add Contingent Worker (highlighted in orange), and Add Organization Relationship. The background shows a search interface with fields for Search Type, Search Parameter, and Ad Hoc Search, along with Search and Clear buttons.

# HR TASKS

UNIVERSITY OF CALIFORNIA UCPATH |   Menu  

Workforce Administration 

Manage Job



HR Tasks



Position Management



Approvals



Payroll Tasks



Mass Upload



# HR TASKS > HIRES > ADD CWR > SEARCH PAGE

HR Tasks

- Search Person
- Person Organizational Summary
- PayPath/Additional Pay
- Job Data Related
- Personal Data Related
- Hires**
  - Add Employee
  - Add Contingent Worker**
  - Add Organization Relationship
- Reports/Processes
- Smart HR Templates

Search in Menu

Search Type Person

**Search Criteria**

National Id

Legal First Name

Legal Last Name

Date of Birth

Please confirm that person search was completed  No

# HR TASKS > HIRES > ADD CWR > SEARCH

**HR Tasks**

- Search Person
- Person Organizational Summary
- PayPath/Additional Pay
- Job Data Related
- Personal Data Related
- Hires**
- Add Employee
- Add Contingent Worker**
- Add Organization Relationship
- Reports/Processes
- Smart HR Templates

**Search Type** Person

**Search Criteria**

National Id

Legal First Name

Legal Last Name

Date of Birth

Please confirm that person search was completed  Yes

# ACTIVITY GUIDE (AG) - ADD CWR – PERSONAL DETAILS

**2** X Exit

**1** Add Employee **7** Next >

**1** Personal Details Visited

Person ID NEW

**2** Contact Information Not Started

**3** Add Relationship Not Started

**3** \*Effective Date 10/11/2023

\*Format Type Legal Name/Name - v

Name

**4** Add Legal Name/Name

**5** Date of Birth

**6** Highest Education Level A-Not Indicated

Effective Date 10/11/2023

**7** National ID

Country	National ID Type	National ID	Primary ID
USA	Social Security Number		Yes <input type="checkbox"/>

- 1** Start the Activity Guide Personal Details
- 2** 'Exit' Biographical screen
- 3** Effective Date: Defaults to 'today,' can be retroactive <30 days
- 4** Legal Name / Lived Name
- 5** Date of Birth
- 6** Highest Education Level
- 7** 'Next' section of the Activity Guide or select #2 Contact Information.

# ACTIVITY GUIDE (AG) - ADD CWR – CONTACT INFORMATION

2 X Exit

## Add Contingent Worker

6 < Previous Next >

1 **Personal Details**  
Visited

2 **Contact Information**  
Visited

3 **Add Relationship**  
Not Started

Person ID NEW

3 **Current Addresses**

Address Type	As Of Date	Status	Address
Home	10/25/2023	A	

[Add Address Detail](#) + -

4 **Phone Information**

*Phone Type	Telephone	Extension	Preferred
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> No

5 **Email Addresses**

*Email Type	*Email Address	Preferred
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> No

- 1 Continue Activity Guide Contact Information
- 2 'Exit' Biographical or Person Data screen
- 3 Enter Current Addresses
- 4 Enter Phone Information
- 5 Enter Email
- 6 'Next' section of the Activity Guide or select #3 Add Relationship

# AG - ADD CWR – ADD RELATIONSHIP

The screenshot shows a web form titled "Add Contingent Worker". At the top left is an "Exit" button. The form has a left-hand navigation menu with three items: "Personal Details" (visited), "Contact Information" (visited), and "Add Relationship" (visited). The "Add Relationship" item is highlighted with a blue circle 1. The main content area is titled "Organizational Relationship" and contains the following fields: "Person ID NEW" (with a blue circle 3), "Contingent Worker" (a toggle switch set to "Yes"), "Employee Record" (a text input field with "0"), and "Select Checklist Code" (a dropdown menu showing "UC Contingent Worker Checklist" with a blue circle 4). Below these fields is an "Add Relationship" button. At the top right of the form are two buttons: "< Previous" and "Save Person", with a blue circle 5 positioned above them.

1 Continue Activity Guide Add Relationship

2 'Exit' Biographical or Person Data screen

3 View Organizational Relationship

4 Add Relationship To Complete the CWR transaction

5 Go to 'Previous' or Save Person Save Person will create the EMPLID

# KEY CONCEPT: ADDING ORG RELATIONSHIP

- To resume transacting after Person Data:
  - Search via Add Organization Relationship
  - All incomplete hires are displayed across organization.

The screenshot shows the HR Tasks interface. The sidebar on the left has 'Add Organization Relationship' highlighted. The main area contains an 'Empl ID' field with a search icon (2), an 'Employee Record' field with the value '0', and an 'Add Organization Relationship' button (5). A 'Lookup' dialog box is open, showing search criteria and results. The dialog box has a 'Cancel' button and a 'Search for: Empl ID' field. Below the search criteria is a 'Search Results' section with a table of 3 rows.

Empl ID ↑↓	Name ↑↓	Organizational Relationship ↑↓
10664443	Fernando Alonso	Employee
10664476	Hoss Rodriguez	Employee
10664567	Jeff Dahmer	Employee

- 1 Add Organizational Relationship
- 2 Click Look up Empl ID
- 3 Lookup Screen
- 4 List of Incomplete Hires  
Select Incomplete Hire
- 5 Add Organization Relationship  
To Complete the Direct Hire transaction

# ADD ORG RELATIONSHIP VIEW

The screenshot shows a web application interface for adding an employee. At the top left is an 'Exit' button. The main title is 'Add Employee'. On the right side, there are 'Previous' and 'Save Person' buttons. A sidebar on the left contains three steps: '1 Personal Details Visited', '2 Contact Information Visited', and '3 Add Relationship Visited'. The 'Add Relationship' step is highlighted. The main content area is titled 'Organizational Relationship' and includes the following fields: 'Person ID NEW', 'Employee' with a 'Yes' radio button, 'Employee Record' with a text input containing '0', and 'Select Checklist Code' with a dropdown menu showing 'UC New Hire Checklist' and a right-pointing arrow button. Below these fields is an 'Add Relationship' button. A white warning dialog box is overlaid on the form, containing the text: 'Warning -- No Relationship was created. An Unknown Person of Interest Type will be created. If the Save is continued, then a Person of Interest Type of Unknown will be created for this person.' The dialog has 'OK' and 'Cancel' buttons.



Word of Caution: 'Save Person' will generate EMPLID and store Personal Details in a staging table. At this point, you cannot go back to review and update Person Data. EMPLID and Name will be the only search criteria.



# DIRECT HIRE

*Add Contingent Worker (CWR) - Job Data*

# AG – ADD CWR – JOB DATA > WORK LOCATION

The screenshot shows a web form titled "Add Contingent Worker / Add Contingent Worker" for a user named "HARRY POTTER" (ID: 10669795 - 0 - Contingent Worker). The form is divided into sections: "Work Location Visited" (highlighted with callout 1), "Job Information Not Started" (callout 2), and "UC Job Data Not Started" (callout 3). The main form area contains the following fields and controls:

- Effective Date:** 10/25/2023 (callout 3)
- Effective Sequence:** 0 (callout 8)
- HR Status:** Active
- Payroll Status:** Active
- \*Job Indicator:** Primary Job
- Position Number:** (callout 4)
- Override Position Data:** No
- \*Regulatory Region:** USA (United States)
- \*Company:** (callout 5)
- \*Business Unit:** RVCMP (UC Riverside Campus)
- \*Department:** (callout 5)
- \*Location:** (callout 5)
- Establishment ID:** (callout 5)
- Date Created:** 10/25/2023 (callout 6)
- Expected Job End Date:** (callout 6)
- End Job Automatically:** No (callout 6)

Navigation buttons include "Exit" (callout 2) and "Next >" (callout 7).

1 Start the Activity Guide Work Location

2 'Exit' Organizational Relationship (Job Data) screen

3 Effective Date: Defaults to 'today,' can be retroactive <30 days

4 Position Number

5 Department and Location

6 Expected Job End Date (local requirement) End Job Automatically (if applicable)

7 'Next' section of the Activity Guide or select #2 Job Information.

# AG – ADD CWR – JOB DATA – JOB INFORMATION

2 X Exit

### Add Contingent Worker / Add Contingent Worker

HARRY POTTER  
10669795 - 0 - Contingent Worker

4 < Previous Next >

1 Work Location Visited

2 Job Information Visited

3 UC Job Data Not Started

Effective Date 10/25/2023 Effective Sequence 0

3 \*Job Code

Reports To

\*Employee Class  \*Officer Code None

Standard Hours

Standard Hours 40.00 Work Period Weekly

FTE 0.000000

> USA

1 Start the Activity Guide Job Information

2 'Exit' Organizational Relationship (Job Data) screen

3 Job Code  
Standard Hours (Prefilled)

4 'Next' section of the Activity Guide or select #3 UC Job Data. 'Previous' takes you to #1.

# AG – ADD CWR – JOB DATA – UC JOB DATA

The screenshot shows a web form titled "Add Contingent Worker / Add Contingent Worker" for a worker named HARRY POTTER. The form is divided into sections: "Work Location", "Job Information", and "UC Job Data". The "UC Job Data" section is highlighted with a blue border and contains a "Visited" status. The form includes fields for "Effective Date" (10/25/2023), "Effective Sequence" (0), "Cubicle", "UC External System ID", "External System" (with a search icon), and "External System ID". Navigation buttons for "Previous" and "Submit" are visible. A blue header bar at the top contains an "Exit" button and a menu icon. Numbered callouts (1-5) are placed over the form to indicate key steps: 1 points to the "UC Job Data" section, 2 to the "Exit" button, 3 to the "Effective Date" field, 4 to the "Cubicle" field, and 5 to the "Submit" button.

1 Start the Activity Guide UC Job Data

2 'Exit' Organizational Relationship (Job Data) screen

3 Probation Details (Cubicle)

4 UC External System ID  
External System & External System ID

5 Before submitting, review all pages, then click **Submit**.



# DEMONSTRATION

*Add Contingent Worker (CWR)*



# REPORTING AND AUDITING

*R-419 Hire Transaction Report*

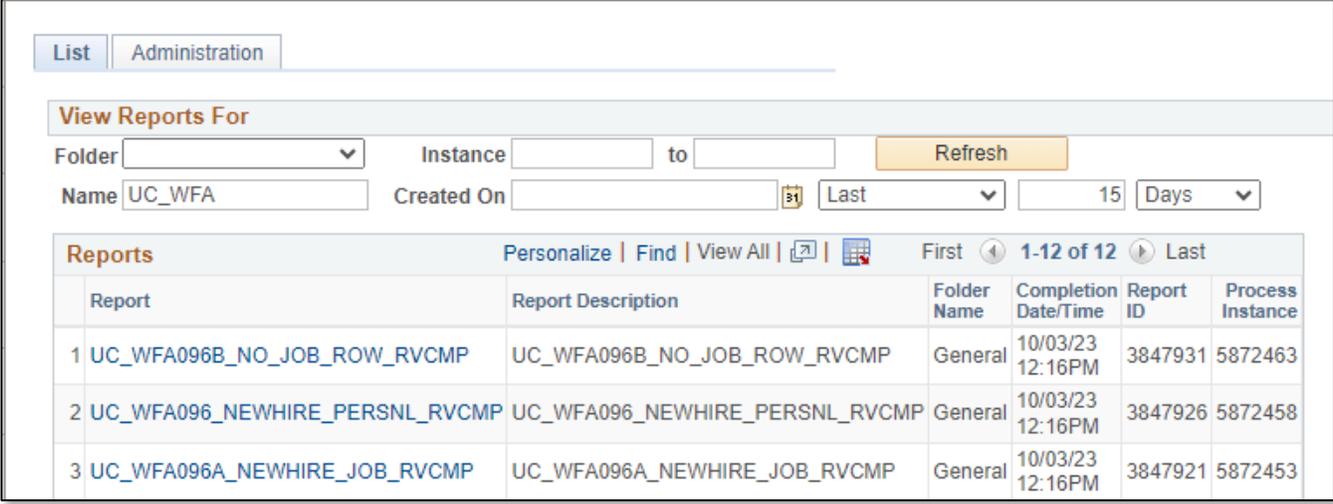
# KEY CONCEPT: *AUDIT REPORTING*

- **No AWE approval routing in Phase I**
  - Phase II - November 2024 with other enhancements
- **Approvers to review Audit reports**
- **When to request corrections via UCPath case:**
  - Don't add a new row, ask the data be overwritten so it is not part of the Person historical record (historical data could end up on reports)
    - i.e. Name, Date of Birth, or SSN
  - Wrong Position
  - Any Job or Position Data that needs to be correct on the initial hire row
    - i.e. Compensation, Job Code, etc.
    - The initial hire row is referenced throughout an employee's career → needs to be correct!
- **When to correct locally:**
  - If it can be corrected at a later effective date or sequence

# AUDIT REPORTING PEOPLESOFT

- **PeopleSoft Audit Reports:**

- Three reports are generated and posted to Report Manager:  
Report Manager is a limited role. CSC will distribute the reports to the SSCs until alt solutions are developed



The screenshot displays the 'View Reports For' section of the PeopleSoft Report Manager. It includes search filters for Folder, Instance, Name (set to UC\_WFA), and Created On (set to Last 15 Days). Below the filters is a table of reports with columns for Report, Report Description, Folder Name, Completion Date/Time, Report ID, and Process Instance.

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 UC_WFA096B_NO_JOB_ROW_RVCMP	UC_WFA096B_NO_JOB_ROW_RVCMP	General	10/03/23 12:16PM	3847931	5872463
2 UC_WFA096_NEWHIRE_PERSNL_RVCMP	UC_WFA096_NEWHIRE_PERSNL_RVCMP	General	10/03/23 12:16PM	3847926	5872458
3 UC_WFA096A_NEWHIRE_JOB_RVCMP	UC_WFA096A_NEWHIRE_JOB_RVCMP	General	10/03/23 12:16PM	3847921	5872453

- NO\_JOB\_ROW: Used when Job Data has not been entered
- NEWHIRE\_PERSNL: Used to review Person Data (Legal Name)
- NEWHIRE\_JOB: Used to review Job Data (Lived Name)

# AUDIT REPORTING COGNOS

- **(WFA) R-419 Hire Transaction Report:**

- 1 Cognos report that contains Person and Job data for all hires: Direct Hire, Template, Mass Upload, TAM Prepare for Hire

Business Unit	Employee ID	Employee Record	Employee Legal Name	Birthdate	Highest Education Level	Highest Education Level Description	Address Type	Country	Address 1	Address 2	Address 3	Address 4	City
RVCMP	10640488	0	Aasi,Aref	May 14, 1990 12:00:00 AM	Z	Assoc Deg	HOME	USA	123 Main S				Riverside
RVCMP	10640511	0	Helle,Dina	Jan 1, 2000 12:00:00 AM	G	Bachelor's	HOME	USA	1515 Empi				New York
RVCMP	10640502	0	Bean,JaLind	Jul 4, 1976 12:00:00 AM	G	Bachelor's	HOME	USA	1515 Mock				Riverside
RVCMP	10640513	0	Whitney,Sai	Oct 26, 1988 12:00:00 AM	I	Master's	HOME	USA	4897 Elsin				Riverside
RVCMP	10640516	0	Massc,Hirec	Jan 13, 1999 12:00:00 AM	A	Not Indic	HOME	USA	12345 Univ	Apt 1			Riverside
RVCMP	10640520	0	Massh.Hiref	Feb 2, 1999 12:00:00 AM	A	Not Indic	HOME	USA	12350 Univ	Apt 6			Riverside

- Data source indicator: Direct Entry, Template, Other(Mass Hire)
- NO\_JOB\_ROW: equivalent in Cognos
- Missing data in Cognos: Transactor, Transactor EMPLID, Timestamp, Notes, Ext Sys ID, TrackerID

- **Report Criteria:**

- Job Effective Date - Job effective date within the selected date range
- Transaction Date - Direct Entry (Hires via Activity guide) that were **entered** within the date range



# TESTING YOUR COMPETENCY

# TESTING YOUR COMPETENCY

**Transactor Instructions:** Save this template to your local drive. Review all *Hire* and *Add CWR* scenarios. Select a minimum of 4 exercises and record the applicable data input for the test scenario. You may do more than 4, but you must complete and pass a minimum of 6 value points (Column A). Complete the Hire and/or CWR transactions as if you would in a production setting: all required fields have data etc., When you have completed your transactions and have recorded all your input in the template under the Direct Hire tab, you will return your work to the CSC Training Team so that your Reviewers (Approvers) can review the input. Additional information will be provided during the training on where you will save the template after you have completed your exercises.

**Auditor Instructions:** You will receive daily PeopleSoft reports with hands-on exercise transactions submitted by your SSC team. As a Reviewer, you must review the Audit report data and determine if any corrections need to be made. Reference the training slide that specifies what can be corrected by the location and which correction types requires a UCPATH case. Enter comments in this template in column AO (Approver) for the Transactor. Return to CSC when your review is complete.

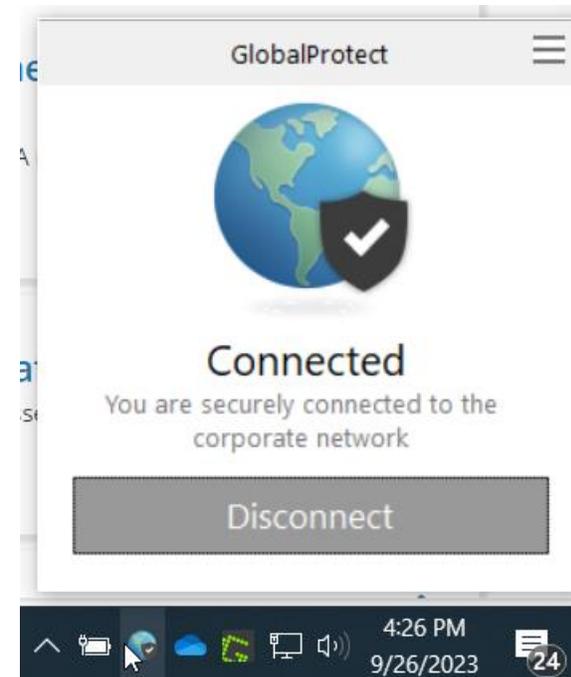
Master Direct Hire Hands-on Template can be found in the Meeting Invite  
Upload Direct Hire Hands-On Template to OneDrive (link [here](#))

\*Link can also be found in the meeting invite

# CONNECTING TO TEST ENVIRONMENT (PUAT)

**NOTE:** This test system has production data, but the names have been scrambled and private data has been masked. Today, we'll be using this environment to conduct a search and familiarize ourselves with the UCPATH environment

1. Using your UCR MFA credentials, connect to **Global Connect** (UCR's local VPN Connection)
2. Go to PUAT Test Environment:  
<https://drppuat.universityofcalifornia.edu/home>





# WRAP-UP

# SUMMARY

- **What you learned...**
  - Person Search
    - Inactive, Active, Future dated job record systemwide search
  - Hiring a new employee (Faculty, Staff, Student)
    - Person Data & Job Data
    - Effective Dates
  - Add a new CWR record (With or without position)
  - How to find a Biographical record without a job
  - How to add an Organizational Relationship to an existing Biographical record
  - How to read Hire Transaction audit report
  - When to open a correction request



# QUESTIONS



**THANK YOU**

# TERMS

- **AG** – Activity Guide
- **SSC** – Shared Service Center
- **Accountability Structure**
- **Biographical Data** – Person Data
- **Organizational Relationship** – Job Data