



- In UCPATH, each position requires a unique #.
- The position # links the position data, the funding for the position, and the employee in the position.
- A position can be filled with an employee or be vacant.
- A filled position should have the Position Funding component completed prior to Employee Job Data being added.
- Both Position Funding and Employee Job Data require Position Data be complete first (as those components require the position #).
- The Position Data, Position Funding, and Employee Job Data components are managed separately/by different groups.

For those interacting with HR & Academic Personnel processes, this document summarizes when and how Position Data, Position Funding, and Employee Job Data are requested for initial hires/appointments (Section 1) and are later managed during the employee life-cycle (Section 2).

SECTION 1: INITIAL EMPLOYEE HIRES & NON-EMPLOYEE APPOINTMENTS

Position Data Data managed in UCPATH by SPH Dean’s Office	Position Funding Data managed in UCPATH by SPH Finance and BRS-ProS Research Administration	Employee Job Data Data managed in UCPATH by BRS-ProS HR/Academic Personnel Support
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Staff Hires	<i>When position # is requested</i>	Prior to Hiring Manager submitting “Staff Recruitment & Appointment” case in ServiceNow	<i>When funding approval is requested</i>	Upon Hiring Manager submitting “Staff Recruitment & Appointment” case in ServiceNow <i>As a best practice, the Hiring Manager should consult with their Fund Manager regarding availability of funding before initiating recruitment/appointment process.</i>	<i>When employee job data entry is requested</i>	After Candidate completes onboarding session (if applicable, otherwise after formal job offer is signed and returned by Candidate)
	<i>How position # is requested</i>	HR Partner requests from Dean’s Office on behalf of Hiring Manager via Smartsheet webform	<i>How funding approval is requested</i>	Hiring Manager selects Fund Manager as Approver 1 in ServiceNow case; Fund Manager provides in-system approval <i>Fund Manager proceeds to UCPATH to complete Position Funding template.</i>	<i>How employee job data entry is requested</i>	HR Partner assigns “task” in ServiceNow to job data entry team

	Position Data		Position Funding		Employee Job Data	
Specialist, Project Scientist, & Researcher Hires	<i>When position # is requested</i>	After Hiring Manager submits "Academic Non-Senate Position Request Form" via ServiceNow	<i>When funding approval is requested</i>	After Dean's Office approves position and provides position # in ServiceNow <i>As a best practice, the Hiring Manager should consult with their Fund Manager regarding availability of funding before initiating recruitment/appointment process.</i>	<i>When employee job data entry is requested</i>	After Candidate completes onboarding session (if applicable, otherwise after formal offer letter is issued)
	<i>How position # is requested</i>	AP Partner requests from Dean's Office via ServiceNow comment and adds to watchlist	<i>How funding approval is requested</i>	Dean's Office requests from Fund Manager via ServiceNow comment and adds to watchlist <i>Fund Manager proceeds to UCPATH to complete Position Funding template.</i>	<i>How employee job data entry is requested</i>	AP Partner assigns "task" in ServiceNow to job data entry team
Postdoctoral Scholar Hires	<i>When position # is requested</i>	After Hiring Manager submits "Postdoctoral Scholar Request Form" via ServiceNow	<i>When funding approval is requested</i>	After Dean's Office approves position and provides position # in ServiceNow <i>As a best practice, the Hiring Manager should consult with their Fund Manager regarding availability of funding before initiating recruitment/appointment process.</i>	<i>When employee job data entry is requested</i>	After Candidate completes onboarding session (if applicable, otherwise after formal offer letter is issued)
	<i>How position # is requested</i>	AP Partner requests from Dean's Office via ServiceNow comment and adds to watchlist	<i>How funding approval is requested</i>	Dean's Office requests from Fund Manager via ServiceNow comment and adds to watchlist <i>Fund Manager proceeds to UCPATH to complete Position Funding template.</i>	<i>How employee job data entry is requested</i>	AP Partner assigns "task" in ServiceNow to job data entry team
GSI, Reader, Tutor (ASE) & GSR Hires	<i>When position # is requested</i>	After "GSAO" enters and approves request on "Grad Hiring" Smartsheet	<i>When funding approval is requested</i>	After "GSAO" enters and approves request on "ASE/GSR Grad Hiring" Smartsheet and Position # is added by Dean's Office/Education Operations	<i>When employee job data entry is requested</i>	After Student completes onboarding session (if applicable, otherwise after funding is approved in Smartsheet)
	<i>How position # is requested</i>	Dean's Office/Education Operations monitors Smartsheet and adds Position # following "GSAO" approval	<i>How funding approval is requested</i>	Fund Manager monitors "ASE/GSR Grad Hiring" Smartsheet; reviews and approves following "GSAO" approval and Position # entry <i>Fund Manager proceeds to UCPATH to complete Position Funding template.</i>	<i>How employee job data entry is requested</i>	HR Generalist monitors Smartsheet and enters once ready

	Position Data		Position Funding		Employee Job Data	
Student Assistant Hires	<i>When position # is requested</i>	If work-study, prior to student being “referred” to position via Work-Study Program website If non-work-study, prior to submitting “Student Assistant Hire Form” in ServiceNow	<i>When funding approval is requested</i>	Prior to submitting “Student Assistant Hire Form” in ServiceNow <i>As a best practice, the Hiring Manager should consult with their Fund Manager regarding availability of funding before initiating recruitment/appointment process.</i>	<i>When employee job data entry is requested</i>	After Student completes onboarding session (if applicable, otherwise after “Student Assistant Hire Form” is submitted in ServiceNow)
	<i>How position # is requested</i>	Hiring Manager identifies from spreadsheet of vacant positions, or requests from Dean’s Office via Smartsheet webform	<i>How funding approval is requested</i>	Hiring Manager seeks Fund Manager approval on “Student Assistant Hire Form” <i>Fund Manager proceeds to UCPATH to complete Position Funding template.</i>	<i>How employee job data entry is requested</i>	HR Generalist assigns “task” in ServiceNow to job data entry team
Non-Employee Appointments: Visiting Scholar/Student Researcher	<i>When position # is requested</i>	Position #s are not needed for these appointments, unless visitor will be supervising others	<i>When funding approval is requested</i>	Visitors are not paid a salary, therefore funding approval is not needed for these appointments (no Position Funding action in UCPATH). Funding approval may be needed for associated visa processing fees; stipends may be provided via the VSPA Gateway.	<i>When employee job data entry is requested</i>	After Visitor completes onboarding session
	<i>How position # is requested</i>		<i>How funding approval is requested</i>		<i>How employee job data entry is requested</i>	HR Generalist assigns “task” in ServiceNow to job data entry team
Non-Employee Appointments: Volunteer, UC Affiliate, Consultant	<i>When position # is requested</i>	Position #s are not needed for these appointments, unless affiliate will be supervising others	<i>When funding approval is requested</i>	Volunteers, affiliates, etc. are not paid a salary, therefore funding approval is not needed for these appointments (no Position Funding action in UCPATH). Consultants may have corresponding Purchase Order in PO, for payment of services.	<i>When employee job data entry is requested</i>	If Volunteer, after onboarding session complete; if Affiliate or Consultant, after “Affiliate Form” is submitted in ServiceNow
	<i>How position # is requested</i>		<i>How funding approval is requested</i>		<i>How employee job data entry is requested</i>	HR Generalist assigns “task” in ServiceNow to job data entry team

Hires not yet included:

- Professorial hires (Ladder-rank, In Residence, Adjunct, Clinical)
- Instructional hires (Lecturer, Academic Coordinator, Coordinator of Public Program, Field Program Supervisor, Field Work Consultant)
- Recalls – staff, faculty, research
- Multi-location appointments (MLAs) – staff, academic

SECTION 2: ACTIONS POST-INITIAL HIRE/APPOINTMENT

Please note: For actions that involve an employee with multiple positions (e.g., Adjunct + Researcher; Adjunct + Lecturer; Researcher + Lecturer; etc.), please consult the appropriate AP Analyst in the Dean’s Office before taking any action.

Action	Description	How to Request	Who Processes	UCPath Module
Position Funding Change (formerly known as Earnings Distribution Change)	A proactive change is needed to a position’s funding (the chartstring(s) to which salary & benefits are charged) *No change to position’s total FTE*	Contact the relevant Fund Manager (Research Administrator in BRS-ProS or Financial Analyst in SPH Finance)	Fund Manager processes directly in UCPath	Position Funding
Direct Retro (formerly known as Payroll Expense Transfer)	A retroactive change is needed to the chartstring(s) where a position’s salary & benefits were charged	Contact the relevant Fund Manager (Research Administrator in BRS-ProS or Financial Analyst in SPH Finance)	Fund Manager processes directly in UCPath; for pay periods ending on or before 03/09/19, Fund Manager submits PET request in ServiceNow	Position Funding
Faculty Salary Research Exchange (FSREP) Participation	Allows eligible PIs to direct charge up to 50% of their academic year research effort to appropriate contracts and grants	PI contacts their Research Administrator to start the process	Following Dean’s Office approval of request form, Research Administrator processes directly in UCPath	Position Funding
FTE Change	A <u>filled</u> position’s full-time equivalent (FTE) is increased or decreased; this is a significant action with many considerations	Consult the relevant AP Analyst in Dean’s Office or HR/AP Partner in BRS-ProS to discuss	BRS-ProS HR/AP processes in UCPath (if vacant position, Dean’s Office can update)	Position Data (filled positions are updated via “PayPath”)
Supervisor Change	An update is needed to a <u>filled</u> position’s supervisor of record	Complete a “Job Change Form” and submit via ServiceNow “Other Data Changes” webform	BRS-ProS HR/AP processes in UCPath (if vacant position, Dean’s Office can update)	Position Data (filled positions are updated via “PayPath”)

Action	Description	How to Request	Who Processes	UCPath Module
Staff Position Renewal/Extension	Renew a contract staff position or extend a limited staff position (career positions have no end date)	Complete "Staff Extension Request" in ServiceNow	Upon Fund Manager and Dean's Office approval, BRS-ProS HR/AP processes in UCPath (and issues new contract, if applicable)	Employee Job Data
Student Assistant Position Extension	Extend the end date of a Student Assistant position (work-study students must be re-referred every program year)	Complete "Job Change Form" and submit via ServiceNow "Student Assistant: Recruitment & Appointments" webform	BRS-ProS HR/AP processes in UCPath	Employee Job Data
Volunteer, UC Affiliate, Consultant Extension	Extend the end date of a non-employee appointment	Complete "Job Change Form" and submit via ServiceNow "Affiliates & Volunteers" webform	BRS-ProS HR/AP processes in UCPath	Employee Job Data
Separations	An employee or affiliate ends one or all jobs held	Supervisor submits "Separation" webform in ServiceNow, with letter of resignation (if applicable)	BRS-ProS HR/AP processes in UCPath, issues final pay, etc.	Employee Job Data

Actions not yet included here:

- Specialist, Project Scientist, & Researcher reappointments/merits/promotions
- Postdoctoral Scholar reappointments
- Professorial reappointments/merits/promotions (Ladder-rank, In Residence, Adjunct, Clinical)
- Instructional reappointments/merits/promotions (Lecturer, Acad. Coordinator, Coordinator of Public Program, Field Prog. Supervisor, Field Work Consultant)
- Leaves of absence
- Staff reclassifications; academic change in series
- Faculty leadership stipends; endowed chair appointments
- Salary equity reviews; administrative stipends