

Job Aid: HR Primary Job Derivation Logic Workflow

Overview

The HR Primary Job is considered an employee's main job. This designation is important when an employee has multiple **Empl Records**.

The HR Primary Job Indicator drives Location reporting and is used to track the **Primary Job** for HR purposes. The HR Primary Job information can be found on the first tab of **Job Data**.

The Benefits Primary Job sets an employee's Benefits Eligibility and drives benefit deductions and elections. Please refer to [Job Aid: Benefit Eligibility & Triggers](#) for more information. The HR Primary Job (E-024) and the Benefit Primary Job (E-042) are independent and derived by different processes. The criteria and derivation logic in the process step table below determine how UCPath derives each employee's HR Primary Job.

Contents

- [Overrides](#)
- [Process Timing](#)
- [Selection Criteria](#)
- [Exclusion Rules](#)
- [Exclusion Decisions](#)
- [Hierarchy Rules Flow](#)
- [Hierarchy Rules](#)
- [Logged Errors](#)
- [Log Output](#)
- [Output Reporting](#)
- [HR Primary Job Derivation Flow Chart](#)

Job Aid: HR Primary Job Derivation Logic Workflow

Overrides

Locations are responsible for managing HR Primary Job overrides for their employees. In the event that an override is required, Location Initiators can submit an inquiry through Ask UCPath and attach a [Job Data Update Form](#), found in UCPath > Forms Library. On the Submit An Inquiry form, select **Workforce Administration** for the **Topic** and select **Submit Form - Workforce Administration** for the **Category**.

The termination of an EMPL Record does not automatically remove an existing override. Upon termination, a new case inquiry must be submitted to UCPath requesting that the override be removed.

An override example: Multi-Location Agreement (MLA) where HR Primary Job Workflow would derive the Host Location position as the HR Primary Job. The Home Location must request an override to reinstate the home position as the HR Primary Job.

⚠ An override to make the **Primary Job** a **Without Salary (WOS)** position results in the employee being placed in a **WOS Pay Group**, preventing any pay from being issued to the employee.

Process Timing

The HR Primary Job process (E-024) runs every evening and is based on the **Effective Date**. For example, if the **Effective Date** for a new hire or transfer is 9/1, the **Primary Job** will be assigned after 5:00pm on 9/1.

Job Aid: HR Primary Job Derivation Logic Workflow

Process Section	Process Description
Selection Criteria	<p>Evaluates any and all Job Data changes for active employees with:</p> <ul style="list-style-type: none"> • More than one appointment • No active HR Primary Job (in case of terminations) from the last process run • Effective dates between the current and the last run dates
Exclusion Rules	<p>The following <u>active</u> appointments <u>are excluded</u> from evaluation for HR Primary Job:</p> <ul style="list-style-type: none"> • Contingent worker instances (CWR) <ul style="list-style-type: none"> ○ Job Indicator will be set to Not Applicable • Status = Short Work Break • Status = Unpaid Leave of Absence • Status = Reserve or Faculty Abeyance • Without Salary (Pay Group = WOS) • Zero FTE • JED with Earnings Code of ACR or AFR • Post Doc – Paid Directs Job Codes: <ul style="list-style-type: none"> ○ 003254 for UC Locations ○ R32.4 and 100.B for LBNL • LBNL Academic Faculty appointments • Inactive or Terminated appointments <p>The following are always excluded from evaluation: Inactive, Terminated, CWR and LBNL Academic Faculty appointments.</p>
Exclusion Decisions	<p>If all active jobs are excluded, the system will use the existing Hierarchy Rules to determine the HR Primary Job.</p>
Hierarchy Rules Flow	<p>UCPath evaluates all active Empl Records that are not exclusions moving down through the hierarchy. Active Empl Records which do not satisfy the criteria for each rule will be filtered out.</p>

Job Aid: HR Primary Job Derivation Logic Workflow

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Hierarchy Rules	<p>The following Hierarchy Rules will be used to determine the HR Primary Job:</p> <ol style="list-style-type: none">1. HR Primary Job Override2. Senior Management Group (SMG) Multiple SMG appointments are logged as an error3. Academic Senate Does the employee have multiple Academic Senate appointments?<ul style="list-style-type: none">UCPath determines the record with lowest CTO code is set as the HR Primary Job:<ul style="list-style-type: none">• 010 • 211• 011 • 214• 012 • 216• 016 • 311• 114 • 316• 210 • 3174. Highest FTE Do multiple active jobs have the same FTE?<ul style="list-style-type: none">The Class Indicator is reviewed to determine the HR Primary Job5. Class Indicator<ul style="list-style-type: none">• Academic• MSP• PSS• PSS APS• LBNL Staff• LBNL Academic

Job Aid: HR Primary Job Derivation Logic Workflow

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	<p>6. Employee Class</p> <p>If multiple active jobs have the same Class Indicator, the Employee Class is used to determine the HR Primary Job in the following order:</p> <table data-bbox="630 500 1260 893"> <tr> <td>AC:</td> <td>Staff:</td> </tr> <tr> <td>1. Post Docs</td> <td>9. Career</td> </tr> <tr> <td>2. Faculty</td> <td>10. Partial Year</td> </tr> <tr> <td>3. Dean/Fac Admin</td> <td>11. Contract</td> </tr> <tr> <td>4. Medical Resident</td> <td>12. Limited</td> </tr> <tr> <td>5. Non Faculty</td> <td>13. Per Diem</td> </tr> <tr> <td>6. Recall</td> <td>14. Floater</td> </tr> <tr> <td>7. Emeritus</td> <td>15. Cas/Res</td> </tr> <tr> <td>8. Student</td> <td></td> </tr> </table> <p>7. Earliest Appointment</p> <p>If multiple active jobs have the same Employee Class, the Empl Record with the earliest Effective Date (start date) becomes the HR Primary Job</p> <p>8. Highest Compensation Rate</p> <p>If multiple active jobs have the same Effective Date (start date), the Empl Record with the highest compensation becomes the HR Primary Job</p> <p>9. Lowest Empl Record</p> <p>If multiple active jobs have the same Compensation Rate, the lowest Empl Record is becomes the HR Primary Job</p>	AC:	Staff:	1. Post Docs	9. Career	2. Faculty	10. Partial Year	3. Dean/Fac Admin	11. Contract	4. Medical Resident	12. Limited	5. Non Faculty	13. Per Diem	6. Recall	14. Floater	7. Emeritus	15. Cas/Res	8. Student	
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Job Aid: HR Primary Job Derivation Logic Workflow

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<p>Logged Errors – **UCPath only**</p>	<p>The E-024 process evaluates all records with job data changes. However, the system is unable to update Empl Records with an expired Expected Job End date.</p> <p>Records that cannot be updated during the nightly batch run will be logged in the E-024 error report. Locations should regularly run the Jobs with Approaching End Dates (R-103) report and closely monitor Expected Job End dates to avoid impacting an employee HR Primary Job update.</p>
<p>Log Output – **UCPath only**</p>	<p>The Log Output will display:</p> <ul style="list-style-type: none"> • Total Successful Records • Total Error Records • Total HR Primary Job Overrides evaluated • Total CWR Records updated
<p>Output Reporting – **UCPath only**</p>	<p>UCPath creates output reports and reaches out to locations on any issues or updates as needed. The report format is *.xlsx.</p> <ul style="list-style-type: none"> • Report information includes: <ul style="list-style-type: none"> ○ Totals Tab – Summary of data processed <ul style="list-style-type: none"> ○ Run Date/Time ○ Last Run Date/Time ○ Total Number of Records Processed ○ Total HR Primary Job Overrides Evaluated ○ Total Records Updated Successfully ○ Total Records in Error ○ Total CWR Records Updated ○ Overrides Tab <ul style="list-style-type: none"> ○ Details of records evaluated ○ Success Tab <ul style="list-style-type: none"> ○ Details of records processed successfully ○ Error Tab <ul style="list-style-type: none"> ○ Details of records processed with errors ○ CWR Tab <ul style="list-style-type: none"> ○ Details of records of CWR updated

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HR Primary Job Derivation Flow Chart

