

Job Aid: Complete the CSV File Templates for Mass Hires

Overview

Use this job aid to complete the **CSV File Templates for Mass Hires**.

Mass Hires is a custom process (E-346) in UCPath that enables Locations to process mass hires, minimum of **10** hires per file, for employees and contingent workers. The Mass Hires process is also referred to as the Batch Hires process.

The Mass Hires process uses a comma-separated values (CSV) file template that Locations populate with relevant hire data and submit for UCPath processing using the Managed File Transfer (MFT) process. The Load to Staging Table process, which runs nightly, selects the file and then processes and loads the CSV file data to a mass hires staging table.

UCPath Production validates the CSV file transaction data prior to loading it into UCPath. The CSV File Templates for Mass Hires are located on SharePoint.

 Download the most current version of the applicable CSV file template in SharePoint for each transaction, using this link: [UCPath Templates](#)

Contents

- [When to Use Mass Hires File Templates](#)
- [When Not to Use Mass Hires File Templates](#)
- [CSV File Template Guidelines](#)
- [CSV File Templates for Mass Hires](#)
 - [Example: With Position CSV File Template](#)
 - [Example: Without Position CSV File Template](#)
- [Fields on the With Position Template](#)
- [Fields on the Without Position Template](#)
- [CSV File Template Compensation Guidelines](#)
 - [Example Compensation Rows for Job Data Rows](#)
- [Person Profile Completion Matrix](#)
- [Mass Hire File Checklist](#)

Job Aid: Complete the CSV File Templates for Mass Hires

When to Use Mass Hires File Templates

Use the CSV File Templates for Mass Hires to:

- Process hires of **10** or more employees and/or contingent workers
 - Including employees or hires with Multiple Components of Pay (MCOP) and Job Earnings Distribution (JED)
- Create an additional employment or contingent worker instance for an existing Empl ID

When Not to Use Mass Hires File Templates

Do **not** use the CSV File Templates for Mass Hires to:

- Update existing personal data (Use a **Smart HR Template**)
- Rehire or transfer people into existing employee records (Use a **Smart HR Template**)
- Hire employees or Contingent Workers (CWR) with a global address (Use a **Smart HR Template**)
- Terminate employees (Use a **Smart HR Template**)
- Correct previously submitted and processed Mass Hires data (Use **PayPath**)
- Update/create Additional Pay (Use **PayPath**)
- Resolve Fair Labor Standards Act (FLSA) incompatibility issues (Use **PayPath**)
- Add a Person of Interest (Use **Person of Interest - Add**)
- Process pay group overrides or compensation overrides for hard-coded job codes (Use a **Smart HR Template**)

CSV File Template Guidelines

Go to the [UCPath Templates](#) page in SharePoint to obtain the most current version of the applicable CSV file template.

- Adhere to the following guidelines when entering data into the CSV File Templates for Mass Hires:
 - Do not change the CSV file template format
 - Do not change or delete the three existing CSV file template header rows
 - Only insert additional data rows under the three CSV file header rows
 - Note that rows are loaded into UCPath in the order specified on the CSV file
 - Do not delete any columns
 - Do not use commas or pipes (|) in the CSV file. These characters will create additional columns and cause the file to fail.
 - Only one special character is allowed in all Address fields: dashes/hyphen (-). Any other special characters used will cause a downstream impact within UCPath.
 - Only two special characters are allowed in Name fields: apostrophes (') and dashes (-)

Job Aid: Complete the CSV File Templates for Mass Hires

- Ensure proper case requirements for all fields. Refer to the [Fields on the With Position Template](#) or [Fields on the Without Position Template](#) sections below and the Data Dissemination Operational Data Store (DDODS) for formatting guidelines.
- National ID should be 9 digits; format as “000000000” to include any leading zeros.
- Do not use the drag-n-drop function for data ending in numerical digits unless absolutely intended. This will cause the data entered to change to sequential order.
- If data is copied and pasted into the template, it can cause formatting issues causing the file entry to fail
- The mass hire process is particular with spacing. Do not enter extra spaces before or after data is entered in the cell.
 - It is recommended to review the file in Notepad view (refer to [Mass Hire Check List](#) tasks 12 and 14 for guidance on using the Notepad view) to identify additional spacing that is not needed. Additional spacing will cause the file to fail.
- Use the correct effective date format throughout the file: **MM/DD/YYYY**. The file upload will fail with any other date format. (The file naming convention is the only place a different date format is used.)
- Delete blank rows. Blank rows may cause the file to fail. Validate if the file has blank rows by viewing the CSV file in Notepad.
- Save the file as .XLSX with all data and formatting applied, then save the file as a .CSV file type
- Name the file using the following file naming conventions:
 - **BU_E346_WPSN_SHORTDESCR_YYYYMMDD_IDOPRID.csv**
 - **BU_E346_WOPSN_SHORTDESCR_YYYYMMDD_IDOPRID.csv**
 - Replace **BU** with your Business Unit
 - Use **WPSN** to indicate your file is the with position template
 - Use **WOPSN** to indicate your file is the without position template
 - Replace **SHORTDESCR** with a short description for your file/hires. (Optional field)
 - Replace **IDOPRID** with the letters **ID** followed by your UCPATH **Empl ID** number. You can find your Empl ID in the upper left corner of the portal dashboard. The UCPATH **OPRID** on the filename is validated to ensure that the employee associated with the file cannot update their own data.
 - **Example 1:** (includes a short description)
 - LAMED_E346_WPSN_STDTS_20161101_ID12345678.csv
 - **Example 2:** (does not include a short description)
 - LACMP_E346_WOPSN_20161101_ID12345678.csv
- Effective date logic is enforced when the .CSV file is submitted for processing. Codes/values specified on the file must be active for the effective dates used.

Job Aid: Complete the CSV File Templates for Mass Hires

- Do not enter an Empl ID when creating a new employee or contingent worker (creating a new PERSON ID). UCPath assigns the new Empl ID.
- Confirm existing person's EMPLID is only listed once in the file. For Concurrent Hires, multiple jobs may not be requested for a single employee on a file. Each additional concurrent job must be requested on separate files or submitted via **SS Smart HR Transactions**.
- The load to staging process mimics the UCPath Search/Match functionality. If it appears that a duplicate record is being created, the file row is identified as a duplicate and the person is not processed.
- Use Notepad to validate formatting before submitting the file for processing
- Pay group overrides, nonexempt monthly, and trying to pay hourly on hard-coded job code that is monthly should be submitted via **SS Smart HR Transactions**

CSV File Templates for Mass Hires

There are two CSV File Templates for Mass Hires. Select the appropriate CSV File Template to use for each upload:

- Use the **With Position Template** to load employees and/or contingent workers with positions
 - All employees require an existing position
 - Contingent workers who are supervisors must have a position
- Use the **Without Position Template** to load contingent workers without positions

Each template has three header rows. Enter the mass hire data below the header rows. Do not delete or modify the template header rows. Refer to the following example images when reading the next three bullets.

- Header Row 1: Indicates the UCPath record for the related fields listed on header row 2
- Header Row 2: Indicates the UCPath field for the related records listed on header row 1
- Header Row 3: Indicates whether the cell is required, optional or conditional on the template
 - Conditional fields may rely on the input provided in associated fields

Job Aid: Complete the CSV File Templates for Mass Hires

UCPath uses the following Search/Match criteria to identify duplicate employees during CSV file upload processing:

- Social Security number (SSN) on the CSV file is in UCPath
- The first five characters of the person's first name, last name, and birthdate in UCPath
- All characters in a person's first and last name in UCPath
- First five characters of ADDRESS1, City, State, Postal, plus the first five characters of the person's first and last name, birthdate, and SSN in UCPath

Use UCPath Search/Match functionality when populating the CSV template to identify duplicates

- When you receive the .CSV file and 'duplicates' are found, submit on a subsequent mass hire file with the CONC and EMPLID entered, or hire via **Smart HR Templates**

⚠ If you use the **Search for People** page, refer to the topic [Search for People Using Search/Match](#) for help with search criteria field options.

- Any results returned, even if it is not an exact name match, are considered a positive Search/Match for this process, and the employee cannot be hired on the Mass Hire template as a new employee. A **Smart HR Template** needs to be submitted.

Refer to the [Fields on the With Position Template](#) and the [Fields on the Without Position Template](#) sections below for instructions regarding which fields to populate on each template.

Prior to file submission, use [Mass Hire File Checklist](#) at the end of this document to validate file formatting.

- Locations are responsible for auditing and submitting the CSV File Templates for Mass Hires using the MFT process. When you are ready to submit your files, perform a final review using the [Mass Hire File Checklist](#).
- The CSV File Templates load to the UCPath Mass Hires staging table when the next Mass Hires process runs
- UCPath Workforce Administration (WFA) Production runs the Batch Hires process
- UCPath WFA Production provides file results to Locations
- Locations determine if they want to correct the load error/issue and submit the corrected transaction on a new **Mass Hires CSV template** or process the transaction via UCPath **Smart HR Templates**.

The following sections explain the template fields (columns), when to use each field and the correct field format to use.

Job Aid: Complete the CSV File Templates for Mass Hires

Fields on the With Position Template

Use this template for employees and contingent workers with a position. Populate the **With Position Template** found in the [UCPath Templates Folder](#) with active values for historical, current and future effective dated rows. Do not use codes that are not active for the dates that you are entering. If a field is not required, it can be left blank.

Field	Record	Required	Field Format / Notes
TRANSACTION_TYPE	N/A	Y	This field identifies if the person on the row is a new person to UCPath. <ul style="list-style-type: none"> Enter NEW for a new person or enter CONC for an existing person in UCPath An error occurs if this field is blank, if CONC entered and EMPLID is blank, or if NEW entered and EMPLID is <u>not</u> blank
PER_ORG	PS_JOB	Y	Enter EMP to create an employee record or enter CWR to create a contingent worker record.
EMPLID	PS_JOB	Y = CONC N = NEW	This field is required when adding an additional instance for the person. <ul style="list-style-type: none"> If the TRANSACTION_TYPE is CONC, enter the UCPath employee ID If the TRANSACTION_TYPE is NEW, leave this field blank
LAST_NAME	PS_NAMES	Y = NEW N = CONC	This is a conditional field: <ul style="list-style-type: none"> If the TRANSACTION_TYPE is NEW, enter the last name using the proper case If the TRANSACTION_TYPE is CONC, leave this field blank
FIRST_NAME	PS_NAMES	Y = NEW N = CONC	This is a conditional field: <ul style="list-style-type: none"> If the TRANSACTION_TYPE is NEW, enter the first name using proper case If the TRANSACTION_TYPE is CONC, leave this field blank
MIDDLE_NAME	PS_NAMES	See Field Format/ Notes	This is an optional field. If used, enter using the proper case.
NAME_SUFFIX	PS_NAMES	See Field Format/ Notes	This is an optional field. If used, enter using the proper case.
PREF FIRST NAME	PS_NAMES	N	Reflects as the First Name in Modify a Person . <ul style="list-style-type: none"> If entered, use proper capitalization

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
SECOND LAST NAME	PS_NAMES	N	Reflects as the Middle Name in Modify a Person . <ul style="list-style-type: none"> If entered, use proper capitalization
PARTNER LAST NAME	PS_NAMES	N	Reflects as the Last Name in Modify a Person . <ul style="list-style-type: none"> If entered, use proper capitalization
BIRTHDATE	PS_PERSON	Y = NEW N = Contingent Worker	<ul style="list-style-type: none"> Enter the date as MM/DD/YYYY This data is ignored if an EMPLID is entered on the template for the person A warning message occurs if this field is populated and the TRANSACTION_TYPE is CONC
HIGHEST_EDUC_LVL	PS_PERS_DATA_EFFDT	N	<p>This data is ignored if an EMPLID is entered on the template for the person. A warning message occurs if this field is populated and the TRANSACTION_TYPE is CONC.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> A for Not Indicated C for High School graduate or equivalent D for Doctorate G for Bachelors-level degree H for High School Diploma or equivalent I for Masters-level degree K for Doctorate (Professional) L for Post-Doctorate N for No academic credentials O for Unique Nurse Diploma P for Prof degree (Term Masters) T for Trade or Craft Certificate Z for Associate degree
COUNTRY	PS_PERS_DATA_NID	N	<p>Leave blank to populate the system record with the default, USA.</p> <ul style="list-style-type: none"> Global records cannot be entered using the Mass Hires process. This data is ignored if an EMPLID is entered on the template for the person.

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
NATIONAL_ID_TYPE	PS_PERS_D ATA_NID	See Field Format/ Notes	<p>This field is required if the National_ID exists.</p> <ul style="list-style-type: none"> If the employee has a retroactive effective date of hire, the National ID is required If the employee is pending a Social Security Number (SSN), use the Smart HR Templates with comments indicating it is pending Enter PR if you have the person's SSN for the NATIONAL_ID cell. Otherwise, leave blank. <p>This data is ignored if an EMPLID is entered on the template for the person. A warning message occurs if this field is populated and the TRANSACTION_TYPE is CONC.</p>
NATIONAL_ID	PS_PERS_D ATA_NID	See Field Format/ Notes	<p>This field is not required for CWRs. This field is required if a value is entered in the NATIONAL_ID_TYPE column.</p> <ul style="list-style-type: none"> Enter the person's Social Security number (SSN). Otherwise, leave it blank. If this value already exists for the person, this value is ignored when uploaded into UCPath National ID must be 9-digits long (000000000). Ensure that the formatting includes leading zeros when necessary. <p>A warning message occurs if this field is populated and the TRANSACTION_TYPE is CONC.</p> <p>Note: ITIN numbers may not be used in the Mass Hire process</p>
PRIMARY_NID	PS_PERS_D ATA_NID	See Field Format/ Notes	<p>This field is required if the NATIONAL_ID column is populated.</p> <ul style="list-style-type: none"> Enter Y <u>only</u> if you entered the person's SSN. Otherwise, leave it blank. This data is ignored if an EMPLID is entered on the template for the person. A warning message occurs if this field is populated and the TRANSACTION_TYPE is CONC.

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
ADDRESS_ TYPE	PS_ADDRES SES	Y = NEW N = CONC	If applicable, enter the HOME address. <ul style="list-style-type: none"> You can enter <u>only</u> home addresses using the Mass Hires CSV file template Global addresses <u>cannot</u> be entered using the Mass Hires process This data is ignored if an EMPLID is entered on the template for the person. Leave this field blank if TRANSACTION_TYPE is CONC .
ADDRESS1	PS_ADDRES SES	Y = NEW N = CONC	Enter the street address using proper upper/lower case format. This data is ignored if an EMPLID is entered on the template for the person. Leave this field blank if TRANSACTION_TYPE is CONC . Note: A hyphen (-) is the only special character that may be used in the address field.
ADDRESS2	PS_ADDRES SES	Y = NEW N = CONC	This is an overflow address line for ADDRESS1 . <ul style="list-style-type: none"> Leave this field blank if the employee only has one line for the street address information Do not enter additional addresses for the person using the ADDRESS2 field This data is ignored if an EMPLID is entered on the template for the person. Leave this field blank if TRANSACTION_TYPE is CONC . Note: A hyphen (-) is the only special character that may be used in the address field.
CITY	PS_ADDRES SES	Y = NEW N = CONC	Enter the city name using the proper case format. <ul style="list-style-type: none"> Global addresses cannot be entered using the Mass Hires process This data is ignored if an EMPLID is entered on the template for the person. Leave this field blank if TRANSACTION_TYPE is CONC .
STATE	PS_ADDRES SES	Y = NEW N = CONC	Select the valid code. (Refer to DDODS for a list of valid codes.) <ul style="list-style-type: none"> Global addresses cannot be entered using the Mass Hires process This data is ignored if an EMPLID is entered on the template for the person. Leave this field blank if TRANSACTION_TYPE is CONC .

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
POSTAL	PS_ADDRESSES	Y = NEW N = CONC	Enter the 5-digit or 9-digit zip code (00000 or 000000000). <ul style="list-style-type: none"> Global addresses cannot be entered using the Mass Hires process This data is ignored if an EMPLID is entered on the template for the person. Leave this field blank if TRANSACTION_TYPE is CONC .
PHONE_TYPE	PS_PERSONAL_PHONE	See Field Format/Notes	This field is required if Phone field is used. <ul style="list-style-type: none"> Enter HOME, BUSN, WORK, CELL or CEL2
PHONE	PS_PERSONAL_PHONE	N	If used, enter the area code and the phone number. <ul style="list-style-type: none"> Phone numbers must be 10 digits, for example, 5559992222.
PREF_PHONE	PS_PERSONAL_PHONE	See Field Format/Notes	This field is required if the Phone field is used. <ul style="list-style-type: none"> Enter Y to indicate that the number on this row is the preferred phone number. If PHONE_TYPE is blank leave the PHONE field blank.
E_ADDR_TYPE	PS_EMAIL_ADDRESSES	Y = NEW N = CONC	This field is required if an email address is entered in the EMAIL_ADDR field. If not, this field is optional. <ul style="list-style-type: none"> Select the valid E_ADDR_TYPE code only if you enter an email address for the person in the next cell Valid codes are HOME, CAMP for Campus, DORM or OTHR. Do not use BUSN.
EMAIL_ADDR	PS_EMAIL_ADDRESSES	Y = NEW N = CONC	<ul style="list-style-type: none"> Enter the full email address, such as sally@gmail.com Be sure to select the E_ADDR_TYPE in the previous cell when entering an email address Ensure proper formatting of the email address Email addresses are updated for existing persons only when the updated email address differs from the existing email address in UCPath.
BUSINESS_UNIT	PS_UC_EXT_SYSTEM	See Field Format/Notes	This optional field is only required to populate a person's external system ID. <ul style="list-style-type: none"> Enter a valid UCPath Business Unit Leave blank if UC_EXT_SYSTEM is blank

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
UC_EXT_S YSTEM	PS_UC_EXT _SYSTEM	See Field Format/ Notes	This optional field is only required to populate a person's external system ID. <ul style="list-style-type: none"> If used, enter PPS_ID, UCNETID, UCLA_UID, PSFT_ID, UCR_STUDENT_ID, LGCY_POSN_NBR Leave blank if not used
EFFDT	PS_UC_EXT _SYSTEM	See Field Format/ Notes	This optional field is only required to populate a person's external system ID. <ul style="list-style-type: none"> If used, enter the effective date of the external system ID using the MM/DD/YYYY format Leave blank if UC_EXT_SYSTEM_ID is blank
EFF_STAT US	PS_UC_EXT _SYSTEM	See Field Format/ Notes	This optional field is only required to populate a person's external system ID. <ul style="list-style-type: none"> If used, enter A Leave blank if UC_EXT_SYSTEM_ID is blank
UC_EXT_S YSTEM_ID	PS_UC_EXT _SYSTEM	N	This optional field is only required to populate a person's external system ID. <ul style="list-style-type: none"> If used, enter the person's external system ID; Do not use commas, dashes or slashes. Ensure to include leading zeros if the external system ID has them Leave blank if not used
CITIZENSHI P_STATUS	PS_CITIZEN SHIP	See Field Format/ Notes	This is a conditional field. If used, the valid values are: <ul style="list-style-type: none"> 1 for US Citizen 2 for US Permanent Resident 3 for Alien-Authorized to Work in the US 4 for NRA Working Outside the US 5 for RA-Resident Tax Purposes If this data already exists for the person, this data is ignored when uploaded into UCPath.
UC_PROF_ DATA_REQ D	N/A	Y = NEW N = CONC	This is a conditional field: <ul style="list-style-type: none"> If the TRANSACTION_TYPE is NEW, enter Y If the TRANSACTION_TYPE is CONC, leave this field blank

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
JPM_CAT_TYPE	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, refer to the BU Codes Samples spreadsheet in the UCPath Templates Folder for acceptable values. <ul style="list-style-type: none"> • UC_OATH - Oath Signature • UC_PATENT - Patent Signature • UCI9_ID - Tracker Profile ID for I9 • DEG - Degree • LIC - License • HON - Honor and Award • LANG - Language Skills • UC_SPC - Recruiter SPC Category • UC_STDT_STAT - UC Student Status
EFFDT	PS_JPM_JP_ITEMS	See Field Format/ Notes	This field is required only if a value is entered in the JPM_CAT_TYPE column. The Effective Date of this item cannot be future-dated; this could be a signature date, certification/degree date awarded, etc. <ul style="list-style-type: none"> • Use the MM/DD/YYYY date format
JPM_CAT_ITEM_ID	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, acceptable values include but are not limited to: <ul style="list-style-type: none"> • PHD • ACLS • BLS • RN
JPM_CAT_ITEM_QUAL 2	PS_JPM_JP_ITEMS	See Field Format/ Notes	This field is available if an item needs multiple instances for a given effective date in a profile. <ul style="list-style-type: none"> • Example: If Catalog Type = Competency, there can be multiple instances for a particular Competency, each representing a different evaluation source (Self-Eval, Mgr. Eval, Approved/Official, Learning, Recruiting). For most Catalog Types , this is left blank.
EFF_STAT US	PS_JPM_JP_ITEMS	See Field Format/ Notes	Enter an A or I in this field to indicate if the Person Profile item being entered has a status of Active or Inactive .
COUNTRY	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter the Country where the item was acquired.

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
STATE	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter the State where the item was acquired.
SCHOOL_CODE	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter the School code.
SCHOOL_DESCRIPTOR	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter the name of the school.
MAJOR_DESCRIPTOR	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter the major for the degree.
JPM_YN_1	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter Y or N for the Renewal Required field.
JPM_YN_2	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter Y or N for the Renewal in Progress field.
JPM_INTEGER_2	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter the year degree received. Enter as YYYY.
JPM_YN_3	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter Y or N for the License Verified field.
JPM_DATE_3	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter the Expiration Date in MM/DD/YYYY format.
JPM_YN_4	PS_JPM_JP_ITEMS	See Field Format/ Notes	If JPM_CAT_TYPE is UC_SPC , enter Y or N to indicate if renewal is required.
JPM_TEXT2_54_1	PS_JPM_JP_ITEMS	See Field Format/ Notes	If JPM_CAT_TYPE is UCI9_ID , enter Tracker Profile ID number.
JPM_TEXT2_54_2	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter the License/Certification Number .

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
JPM_TEXT2 54_4	PS_JPM_JP _ITEMS	See Field Format/ Notes	If JPM_CAT_TYPE is LIC enter Issued By information. If JPM_CAT_TYPE is HON , enter comments for the Grantor field.
ACTION	PS_JOB	Y	UCPath enters HIR for employee instances or ADD for contingent worker instances.
ACTION_R EASON	PS_JOB	Y	Enter the applicable HIR action reason code for employee instances. (Refer to DDODS for a list of valid HIR action reason codes.) <ul style="list-style-type: none"> • <u>Only</u> use the HIR reason code when the new hire does not have a UCPath employee ID (EMPLID). Do not use the CNV or the DEE action reason codes. ACA, DEE and RET action reason codes will cause an error. • Always enter ADD for contingent worker instances <p>Mass Hires cannot be used for Multiple Location Agreements (MLA) or for Inter-Location Transfers.</p>
EFFDT	PS_JOB	Y	Enter as MM/DD/YYYY . This date must be equal to or greater than the PERSON Effective Date .
EFF_SEQ	PS_JOB	Y	This field is required but defaults to 0 . Enter 0 .
POSITION_ NBR	PS_JOB	Y	The position must be active as of the JOB Effective Date and as of the date of the file being processed. <ul style="list-style-type: none"> • All employees and contingent workers who are supervisors must have a position number • An error will occur if the person already has the <u>same position number</u> on an active job <p>Positions that are over-allocated will fail out of the file. These positions need to have the headcount updated or need to be entered via the Smart HR Template.</p>
EMPL_ CLASS	PS_JOB	Y	Refer to the BU Codes Samples in the UCPath Templates Folder spreadsheet for acceptable values.
STEP	PS_JOB	See Field Format/ Notes	This field is required if the position has steps. <ul style="list-style-type: none"> • Enter the Step

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
EXPECTED_END_DATE	PS_JOB	See Field Format/ Notes	This field is required when EMPL_CLASS is 1, 3, 5, 8, 11, 15 or 23 . <ul style="list-style-type: none"> Enter as MM/DD/YYYY Date cannot be prior to the Job Effective Date A warning occurs when EMPL_CLASS is 4, 6 or 22 Refer to the BU Codes Samples spreadsheet for acceptable values
AUTO_END_FLG	PS_JOB	See Field Format/ Notes	This field is conditional. <ul style="list-style-type: none"> If the End Job Automatically flag is to be checked in Job Data, then put Y for Yes. If the End Job Automatically flag is not to be checked, Enter N or the field may remain blank.
COMP_FREQUENCY	PS_JOB	See Field Format/ Notes	This field is required if the employee has compensation. Valid values are: <ul style="list-style-type: none"> H for Hourly M for Monthly UC912 for UC 9/12 Academic Year UC_10 for UC 1/10th Rate UC_11 for UC 1/11th Rate UC_12 for UC 1/12th Rate UC_9M for UC 1/9th Rate UC_FY for UC 12/12 Fiscal Year
COMP_EFFECT_SEQ	PS_COMPENSATION	See Field Format/ Notes	Defaults to 0. Enter 0.
COMP_RATE_CODE	PS_COMPENSATION	See Field Format/ Notes	This field is required if the employee has compensation. <ul style="list-style-type: none"> Refer to DDODS for a list of valid codes Be sure to populate a Comp Rate if you enter a Comp Rate Code

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
COMPRATE	PS_COMPE NSATION	See Field Format/ Notes	<p>If Applicable, enter the UCPath COMPRATE if you are inserting a Comp Rate Code, using the format 9999999.000000. Do not use commas in the COMPRATE field.</p> <ul style="list-style-type: none"> • Make sure to populate a Comp Rate Code if you enter a value in the COMPRATE field • Additionally, make sure to enter the correct COMPRATE based on the Comp Rate Code selected • For example, if you use the Comp Rate Code of UCANNL, a Comp Rate Code to record the employee's annual salary, enter the annual salary for COMPRATE on the template. Do not enter the bi-weekly or monthly salary on the template. Entering the incorrect COMPRATE on the template results in an incorrect COMPRATE in UCPath. • If a record is being added without compensation, the COMP_FREQUENCY, COMP_EFFSEQ, COMP_RATECD and COMPRATE fields are not required and should remain blank.
EARNES_DIST_TYPE	PS_JOB	See Field Format/ Notes	<p>If applicable, this field indicates if JED is set up as By Percent or By Amount. As applicable, valid values are:</p> <ul style="list-style-type: none"> • A for Amount • P for Percent <p>If By Amount is entered, the amount should be entered under COMPRATE. If By Percent is entered, the percent should be entered under DIST_PCT.</p> <p>If there is no EARNES_DIST_TYPE, leave this field blank. The distribution type defaults as "N" (None).</p> <p>See the CSV File Template Compensation Guidelines section below for additional information and examples.</p>
ERNCD	PS_JOB_EA RNS_DIST	See Field Format/ Notes	<p>If EARNES_DIST_TYPE is entered as A or P, enter the JED Earnings Code associated with the amount or percent.</p>
COMPRATE	PS_JOB_EA RNS_DIST	See Field Format/ Notes	<p>If EARNES_DIST_TYPE is entered as A, enter the COMPRATE using the format 999999.000000, corresponding amount to the Job Earnings Code.</p>

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
DIST_PCT	PS_JOB_EARNINGS_DIST	See Field Format/ Notes	If EARNES_DIST_TYPE is entered as P , enter the corresponding percentage amount to the Earnings Code , using format 99.000 .
UC_PROBATION_CODE	PS_UC_EMPLOYEE_PRB_DTL	Y	If applicable to this person, select the valid code. Enter N if this field is not applicable for the person.
UC_PROB_END_DT	PS_UC_EMPLOYEE_PRB_DTL	See Field Format/ Notes	This field is required if the UC PROBATION CODE value is not C , O or N . Enter the date as MM/DD/YYYY .
UC_ACAD_DUR_APPT	PS_UC_EMPLOYEE_PRB_DTL	See Field Format/ Notes	If applicable to this person, the valid values are: <ul style="list-style-type: none"> • C is Continuing (Unit 198) • I is Indefinite • P is Potential Security • R is Tenure Track (Ladder Rank) • S is Security (LSOE) • T is Tenured • W is End Date (Academic Term Appointments)
UC_PY_CAREER_DUR	PS_UC_EMPLOYEE_PRB_DTL	See Field Format/ Notes	If applicable to this person, the valid values are: <ul style="list-style-type: none"> • 09 is 09 months • 10 is 10 months • 11 is 11 months
UC_POSTDOC_ANVS_DT	PS_UC_EMPLOYEE_PRB_DTL	See Field Format/ Notes	If applicable to this person, enter the date as MM/DD/YYYY . This date is used to determine leave accrual awards, merit and equity increases per Collective Bargaining Agreements (CBAs) for Post Docs.
UC_TRIAL_EMP_END_DT	PS_UC_EMPLOYEE_PRB_DTL	See Field Format/ Notes	Enter only if applicable to this person. <ul style="list-style-type: none"> • Enter the date as MM/DD/YYYY
UC_CUBICLE	UC_EMPL_PRB_DTL	See Field Format/ Notes	If applicable, enter the Cubicle number. The Cubicle ID cannot contain any special characters, including spaces.
ORIG_HIRE_DT	PS_PER_ORG_INST	See Field Format/ Notes	Required if ORIG_HIRE_DT is different from the Job effective date. <ul style="list-style-type: none"> • Enter the date as MM/DD/YYYY

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
ORIG_HIRE_OVR	PS_PER_OR G_INST	See Field Format/ Notes	Required if ORIG_HIRE_DT is different from Job effective date. <ul style="list-style-type: none"> Enter Y if you are populating the ORIG_HIRE_DT field Enter N if you are <u>not</u> populating the ORIG_HIRE_DT field and leave blank
EMPLOYER_NAME	PS_UC_E07 4B_EXP	See Field Format/ Notes	If applicable, enter the prior work experience Employer name.
START_DT	PS_UC_E07 4B_EXP	See Field Format/ Notes	If applicable, enter the prior work experience Start Date . <ul style="list-style-type: none"> Enter the date as MM/DD/YYYY
END_DT	PS_UC_E07 4B_EXP	See Field Format/ Notes	If applicable, enter the prior work experience End Date . <ul style="list-style-type: none"> Enter date as MM/DD/YYYY
JOBTITLE	PS_UC_E07 4B_EXP	See Field Format/ Notes	If applicable, enter the prior work experience Ending Job Title .
UC_RELEVANT_EXP	PS_UC_E07 4B_EXP	See Field Format/ Notes	If applicable, enter Y or N to indicate if this is Relevant Work Experience .
UC_RELEVANT_SVC	PS_UC_E07 4B_EXP	See Field Format/ Notes	If applicable, enter Y or N to indicate if this is Relevant Service .

Fields on the Without Position Template

Use this template for contingent workers without a position. Populate the **Without Position CSV File Template** from the [UCPath Templates Folder](#) with active values for historical, current and future effective dated rows. Do not use codes that are not active for the dates that you are entering. If a field is not required, it can be left blank.

UCPath uses the following **Search/Match** criteria to identify duplicate contingent workers during CSV file upload processing:

- Social Security number (SSN) on the CSV file is in UCPath
- The first five characters of the person's first name, last name, and birthdate are in UCPath
- All characters in a person's first and last name are in UCPath
- First five characters of ADDRESS1, City, State, and Postal, plus the first five characters of the person's first and last name, birthdate, and SSN, are in UCPath

Job Aid: Complete the CSV File Templates for Mass Hires

Use UCPath [Search/Match](#) functionality when populating the CSV template to identify duplicates.

- When you receive the CSV file and true 'duplicates' are found, submit on a subsequent mass hire file with the **CONC** and **EMPLID** entered, or hire via [Smart HR Templates](#).

Field	Record	Required	Field Format / Notes
TRANSACTION_TYPE	N/A	Y	This field identifies if the person on the row is a new person to UCPath. Enter NEW for a new person or enter CONC for an existing person in UCPath. An error occurs if this field is blank, if CONC entered and EMPLID is blank, or if NEW entered and EMPLID is <u>not</u> blank.
PER_ORG	PS_JOB	Y	Enter CWR to create a contingent worker record.
EMPLID	PS_JOB	N = NEW Y = CONC	This field is required when adding an additional instance for the person. This is a conditional field: <ul style="list-style-type: none"> If the TRANSACTION_TYPE is CONC, enter the UCPath employee ID If the TRANSACTION_TYPE is NEW, leave this field blank
LAST_NAME	PS_NAMES	Y = NEW N = CONC	This is a conditional field: <ul style="list-style-type: none"> If the TRANSACTION_TYPE is NEW, enter the last name using proper case If the TRANSACTION_TYPE is CONC, leave this field blank
FIRST_NAME	PS_NAMES	Y = NEW N = CONC	This is a conditional field: <ul style="list-style-type: none"> If the TRANSACTION_TYPE is NEW, enter the first name using proper case If the TRANSACTION_TYPE is CONC, leave this field blank
MIDDLE_NAME	PS_NAMES	See Field Format/ Notes	This is an optional field. If used, enter using proper case.
NAME_SUFFIX	PS_NAMES	See Field Format/ Notes	This is an optional field. If used, enter using proper case.
PREF FIRST NAME	PS_NAMES	N	Reflects as the First Name in Modify a Person . If entered, use proper capitalization.
SECOND LAST NAME	PS_NAMES	N	Reflects as the Middle Name in Modify a Person . If entered, use proper capitalization.

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
PARTNER LAST NAME	PS_NAMES	N	Reflects as the Last Name in Modify a Person. <ul style="list-style-type: none"> If entered, use proper capitalization.
BIRTHDATE	PS_PERSON	See Field Format/ Notes	This is not a requirement for Contingent Workers. If applicable, enter the date as MM/DD/YYYY . <ul style="list-style-type: none"> This data is ignored if an EMPLID is entered on the template for the person A warning message occurs if this field is populated and the TRANSACTION_TYPE is CONC.
ADDRESS_TY PE	PS_ADDRESSES	Y = NEW N = CONC	Enter the HOME address. <ul style="list-style-type: none"> You can enter <u>only</u> home addresses using the Mass Hires CSV file template Global addresses <u>cannot</u> be entered using the Mass Hires process This field defaults to HOME This data is ignored if an EMPLID is entered on the template for the person. Leave this field blank if TRANSACTION_TYPE is CONC .
ADDRESS1	PS_ADDRESSES	Y = NEW N = CONC	Enter the street address using proper upper/lower case format. <ul style="list-style-type: none"> This data is ignored if an EMPLID is entered on the template for the person. Leave this field blank if TRANSACTION_TYPE is CONC. Note , a hyphen (-) is the only special character that may be used in the address field.
ADDRESS2	PS_ADDRESSES	Y = NEW N = CONC	This is an overflow address line for ADDRESS1 . <ul style="list-style-type: none"> Leave this field blank if the employee only has one line for the street address information Do not enter additional addresses for the person using the ADDRESS2 field This data is ignored if an EMPLID is entered on the template for the person. Leave this field blank if TRANSACTION_TYPE is CONC . Note , a hyphen (-) is the only special character that may be used in the address field and commas (,) should not be used.

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
CITY	PS_ADDRESSES	Y = NEW N = CONC	Enter the city name using the proper case format. <ul style="list-style-type: none"> Global addresses cannot be entered using the Mass Hires process This data is ignored if an EMPLID is entered on the template for the person. Leave this field blank if TRANSACTION_TYPE is CONC .
STATE	PS_ADDRESSES	Y = NEW N = CONC	Select the valid code. (Refer to DDODS for a list of valid codes.) <ul style="list-style-type: none"> Global addresses cannot be entered using the Mass Hires process This data is ignored if an EMPLID is entered on the template for the person. Leave this field blank if TRANSACTION_TYPE is CONC .
POSTAL	PS_ADDRESSES	Y = NEW N = CONC	Enter the 5-digit or 9-digit zip code (00000 or 000000000). <ul style="list-style-type: none"> Global addresses cannot be entered using the Mass Hires process This data is ignored if an EMPLID is entered on the template for the person. Leave this field blank if TRANSACTION_TYPE is CONC .
COUNTRY	PS_PERSON_ID	N	Leave blank to populate the system record with the default, USA . <ul style="list-style-type: none"> Global records cannot be entered using the Mass Hires process. This data is ignored if an EMPLID is entered on the template for the person.
NATIONAL_ID_TYPE	PS_PERSON_ID	See Field Format/Notes	National ID is not required for CWRs. This field is required if the National_ID exists. <ul style="list-style-type: none"> Enter PR if you have the person's Social Security Number (SSN) for the NATIONAL_ID cell. Otherwise, leave blank. This data is ignored if an EMPLID is entered on the template for the person. A warning message occurs if this field is populated and the TRANSACTION_TYPE is CONC .

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
NATIONAL_ID	PS_PERS_D ATA_NID	See Field Format/ Notes	<p>This field is required <u>only</u> if a value is entered in the NATIONAL_ID_TYPE column.</p> <ul style="list-style-type: none"> Enter the person's SSN. Otherwise, leave it blank. If this value already exists for the person, this value is ignored when uploaded into UCPath National ID should be 9 digits, format as "000000000" so that leading zeros are included <p>A warning message occurs if this field is populated and the TRANSACTION_TYPE is CONC.</p> <p>Note: ITIN numbers may not be used in the Mass Hire Process</p>
PRIMARY_NID	PS_PERS_D ATA_NID	See Field Format/ Notes	<p>This field is required if the NATIONAL_ID column is populated.</p> <ul style="list-style-type: none"> Enter Y <u>only</u> if you entered the person's Social Security number. Otherwise, leave it blank. <p>This data is ignored if an EMPLID is entered on the template for the person. A warning message occurs if this field is populated and the TRANSACTION_TYPE is CONC.</p>
PHONE_TYPE	PS_PERSON AL_PHONE	See Field Format/ Notes	Enter HOME , BUSN , WORK , CELL or CEL2 .
PHONE	PS_PERSON AL_PHONE	N	If used, enter the area code and the phone number. Phone numbers must be 10 digits, for example, 559992222.
PREF_PHONE	PS_PERSON AL_PHONE	See Field Format/ Notes	If used, enter Y to indicate that the number on this row is the preferred phone number.
E_ADDR_TYP E	PS_EMAIL_ ADDRESSE S	Y = NEW N = CONC	<p>This field is required if an email address is entered. If not, this field is optional.</p> <ul style="list-style-type: none"> Select the valid E_ADDR_TYPE code only if you enter an email address for the person in the next cell Valid codes are HOME, CAMP for Campus, DORM or OTHR. Do <u>not</u> use BUSN.

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
EMAIL_ADDR	PS_EMAIL_ADDRESSES	Y = NEW N = CONC	<ul style="list-style-type: none"> Enter the full email address, such as sally@gmail.com Be sure to select the E_ADDR_TYPE in the previous cell when entering an email address. Ensure proper formatting of email address <p>Email addresses are updated for existing persons only when the updated email address differs from the existing email address in UCPath.</p>
BUSINESS_UNIT	UC_EXT_SYSTEM	See Field Format/Notes	<p>This optional field is only required to populate a person's external system ID.</p> <ul style="list-style-type: none"> Enter a valid UCPath Business Unit Leave this field blank if UC_EXT_SYSTEM_ID is blank.
UC_EXT_SYSTEM	UC_EXT_SYSTEM	See Field Format/Notes	<p>This optional field is only required to populate a person's external system ID.</p> <ul style="list-style-type: none"> If used, enter PPS_ID, UCNETID, UCLA_UID, PSFT_ID, UCR_STUDENT_ID or LGCY_POSN_NBR Leave blank if not used
EFFDT	UC_EXT_SYSTEM	See Field Format/Notes	<p>This optional field is only required to populate a person's external system ID.</p> <ul style="list-style-type: none"> If used, enter the effective date of the external system ID using the MM/DD/YYYY format Leave this field blank if UC_EXT_SYSTEM_ID is blank
EFF_STATUS	UC_EXT_SYSTEM	See Field Format/Notes	<p>This optional field is only required to populate a person's external system ID.</p> <ul style="list-style-type: none"> If used, enter A Leave this field blank if UC_EXT_SYSTEM_ID is blank

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
UC_EXT_SYSTM_ID	UC_EXT_SYSTEM	N	This optional field is only required to populate a person's external system ID. <ul style="list-style-type: none"> If used, enter the person's external system ID; Do not use commas, dashes or slashes Leave this field blank if UC_EXT_SYSTEM_ID is blank Ensure to include leading zeros if your external system ID has them
UC_PROF_DATA_REQD	N/A	Y = NEW N = CONC	This field is required if TRANSACTION_TYPE is NEW
JPM_CAT_TYPE	JPM_JP_ITEMS	See Field Format/ Notes	If applicable, refer to the BU Codes Samples Spreadsheet in the UCPath Templates Folder for acceptable values: <ul style="list-style-type: none"> UC_OATH - Oath Signature UC_PATENT - Patent Signature UCI9_ID - Tracker Profile ID for I9 DEG - Degree LIC - License HON - Honor and Award LANG - Language Skills UC_SPC - Recruiter SPC Category UC_STDT_STAT - UC Student Status
EFFDT	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, the Effective Date of the item; this could be a signature date, certification/degree date awarded, etc. <ul style="list-style-type: none"> Use the MM/DD/YYYY date format
JPM_CAT_ITEM_ID	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, acceptable values include but are not limited to: <ul style="list-style-type: none"> PHD ACLS BLS RN

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
JPM_CAT_ITEM_QUAL2	PS_JPM_JP_ITEMS	See Field Format/ Notes	<p>This field is available if an Item needs to have multiple instances for a given effective date in a profile.</p> <ul style="list-style-type: none"> Example: If Catalog Type = Competency, there can be multiple instances for a particular Competency, each representing a different evaluation source (Self-Eval, Mgr Eval, Approved/Official, Learning, Recruiting). <p>For most Catalog Types, this is left blank.</p>
EFF_STATUS	PS_JPM_JP_ITEMS	See Field Format/ Notes	Enter an A or I in this field to indicate if the Person Profile item being entered has a status of Active or Inactive .
COUNTRY	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter the Country where the item was acquired.
STATE	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter the State where the item was acquired.
SCHOOL_CODE	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter the School code.
SCHOOL_DESCRIPTOR	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter the name of the school.
MAJOR_DESCRIPTOR	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter the major for the degree.
JPM_YN_1	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter Y or N for the Renewal Required field.
JPM_YN_2	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter Y or N for the Renewal in Progress field.
JPM_INTEGER_2	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter year degree received. Enter as YYYY.
JPM_YN_3	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter Y or N for the License Verified field.

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
JPM_DATE_3	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter the Expiration Date in MM/DD/YYYY format.
JPM_YN_4	PS_JPM_JP_ITEMS	See Field Format/ Notes	If JPM_CAT_TYPE is UC_SPC , enter Y or N to indicate if renewal is required.
JPM_TEXT254_1	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter the Tracker Profile ID number.
JPM_TEXT254_2	PS_JPM_JP_ITEMS	See Field Format/ Notes	If applicable, enter the License/Certification Number .
JPM_TEXT254_4	PS_JPM_JP_ITEMS	See Field Format/ Notes	If JPM_CAT_TYPE is LIC enter Issued By information. If JPM_CAT_TYPE is HON , enter Grantor information.
ACTION	PS_JOB	Y	Enter ADD for contingent worker instances.
ACTION_REASON	PS_JOB	Y	Enter ADD for contingent worker instances.
EFFDT	PS_JOB	Y	Enter as MM/DD/YYYY . This date must be equal to or greater than the PERSON Effective Date .
EFF_SEQ	PS_JOB	Y	This field is required but defaults to 0 . Enter 0 .
BUSINESS_UNIT	PS_JOB	Y	Select the valid code. (Refer to DDODS for a list of valid codes.)
DEPTID	PS_JOB	Y	Select the valid code. (Refer to DDODS for a list of valid codes.)
LOCATION	PS_JOB	Y	Select the valid code. (Refer to DDODS for a list of valid codes.)
JOBCODE	PS_JOB	Y	The job code must start with CWR .
REPORTS_TO	PS_JOB	Y	Enter the Reports To Position Number for the person.
EMPL_CLASS	PS_JOB	Y	Valid values are 13 or 14 .
EXPECTED_END_DATE	PS_JOB	See Field Format/ Notes	This is an optional field and must be entered as MM/DD/YYYY .

Job Aid: Complete the CSV File Templates for Mass Hires

Field	Record	Required	Field Format / Notes
AUTO_END_F LG	PS_JOB	See Field Format/ Notes	This field is conditional. Only use when EXPECTED_END_DATE is populated. <ul style="list-style-type: none"> Enter Y to End Job Automatically. UCPath will insert a Termination/Job Record End Date- Auto Term” row to a CWR with an expired job.
UC_CUBICLE	UC_EMPL_ PRB_DTL	See Field Format/ Notes	If applicable, enter the Cubicle number. The Cubicle ID cannot contain any special characters, including spaces
ORIG_HIRE_D T	PS_PER_O RG_INST	See Field Format/ Notes	This field is required if ORIG_HIRE_DT is different from the Job effective date. <ul style="list-style-type: none"> Enter the date as MM/DD/YYYY
ORIG_HIRE_O VR	PS_PER_O RG_INST	See Field Format/ Notes	This field is required if ORIG_HIRE_DT is different from the Job effective date. <ul style="list-style-type: none"> Enter Y if you are populating the ORIG_HIRE_DT field Enter N if you are <u>not</u> populating the ORIG_HIRE_DT field and leave blank

CSV File Template Compensation Guidelines

Use the following compensation guidelines:

- The **COMP_FREQUENCY** field contains values like **H** for Hourly, **M** for Monthly, and **UC_9M** for UC 1/9th Rate. The Job Comp Frequency is derived from the job code. Hardcoded job codes may not be overridden via Mass Hire template processing and should be submitted via **SS Smart HR Template Transactions** here or above
- The **COMP_EFFSEQ (Seq)** field equals **0**
- Job Earnings Distribution (JED) can only be added through the Mass Hires process on the **With Position** template. Use **Smart HR Templates** to process **Without Position** employees with JED.
- Only enter **By Amount** or **By Percent** values on the CSV File Template for Mass Hires, as on a **Smart HR Template**. If both an amount and a percent are entered on the same row of the Mass Hires file, the line will error out.
- If **By Percent** is used, the **Comp Rate** amounts are automatically calculated from the **Percent of Dist**.
- Percentages can be entered as whole numbers adding up to 100% or as decimals adding up to 100

Job Aid: Complete the CSV File Templates for Mass Hires

Example Compensation Rows for Job Data Rows

Empl	Step	Job Comp Freq	Comp Eff Seq	Comp Rate Code	Comp Rate	Earn Dist Type	Earn Dist Code	Comp Rate	Percent Of Dist	Comments
A		UC_FY		UCANNL	25000.00					Employee without a Step but with a Comp Rate .
B	1	H		UHRLY	14.50					Employee with Step - based compensation.
C		M		UCANNL	70000.00					Employee without a Step with multiple components of pay.
		M		UCOFF1	15000.00					
D	2	UC_FY		UCHSP	30699.999999	A	HSP	2558.333333		Employee with a Step -Based compensation (MCOP) with a JED set up By Amount . JED Comp Rates should be calculated based on their annual salaries, Comp Freq and FTE .
	2	UC_FY		UCHSX	76700.000004	A	HSR	6391.66667		
	2	UC_FY		UCHSY	87600.00	A	HSN	7300.000000		
E		M		UCANNL	70000.00	P	ACR		60	Employee without a Step with JED set up By Percent .
		M		UCANNL	70000.00	P	GAP		40	
F	1	M		UCANNL	65000.00	P	ACR		100	Employee with Step - based compensation and JED BY Percent .
G		H		UHRLY	95.00	P	SPR		56.333	Employee with an Hourly Compensation with JED set up By Percent .
		H		UHRLY	95.00	P	REG		43.667	
		H		UHRLY	95.00					
H	1	M		UCANNL	75000.00					Employee with Step-based compensation, negotiated compensation, and multiple Person Profile items. Compensation should be blank on any remaining rows for the employee.
		M		UCOFF1	10000.00					

- **Employee A:** The employee does not have a **Step** but does have a **Comp Rate**
- **Employee B:** The employee has a Step-based compensation
 - Include compensation associated with the **Step** in this file. The employee's compensation data is **not** derived from the **Salary Grade** table within the Mass Hires process.
- **Employee C:** The employee does not have a Step and has MCOP
- **Employee D:** The employee has Step-based compensation (MCOP) with **JED** set up By Amount
 - The **Comp Rate/Codes** are entered as they are tied to the **Step** and are **Default Pay Components**
- The **Comp Rate/Code**, UCHSY, is entered as it is a negotiated additional pay component that is not tied to the Step
 - Both Step-based and non Step-based pay components must be entered on the file
 - **JED Earn Dist Code** and **Comp Rate** must be entered for each **Earn Code** as appropriate
- **Employee E:** The employee does not have a **Step** or **MCOP**. The **Comp Rate** is set up on both data rows and **JED** is set up **By Percent**.
- **Employee F:** The employee has a Step-based compensation with **JED** set up **By Percent**
- **Employee G:** The employee has non Step-based compensation with **JED** set up **By Percent**
 - The **Comp Rate Code** and **Comp Rate** must be entered on each data row
 - **JED** is entered by percent as **SPR** and **REG** with corresponding percentages

Job Aid: Complete the CSV File Templates for Mass Hires

- Enter only one row of **JED** information per **Earn Code**. Any additional data rows for the employee should not contain duplicate **JED** information.
- **Employee H:** The employee has a Step-based compensation, negotiated compensation, and multiple rows due to multiple Person Profile items.
 - Include compensation associated with the Step in this file. The employee's compensation data is not derived from the **Salary Grade** table within the Mass Hires process.
 - Do not include the Step for negotiated compensation rows
 - Do not duplicate compensation to account for any additional rows. If all compensation is entered for the employee, then compensation fields on any remaining rows for the employee should remain blank.

Person Profile Completion Matrix

This section explains what to enter for **Oath**, **Patent**, **I9** and **I9 Remote**. Each person ID can have up to four rows of **Person Profile** data with each set of data on its own row.

⚠ Note: The effective dates of the Person Profile fields should correspond to the exact date when the form was signed or when the item was completed by the employee. Any future dated signatures will not be accepted.

Person Profile Data	Fields	Required (Y/N)	Field Format / Notes
Oath	JPM_CAT_TYPE	N	Value equals UC_OATH . The UC_OATH requirement is determined by a combination of the following: <ul style="list-style-type: none"> ● PER_ORG equals EMP (employee) and, ● EMPLID is blank (new employee) and, ● CITIZENSHIP_STATUS equals 1 (U.S. Citizen) and ● Job Effective Date is before the date that the Mass Hire process runs
	EFFDT	Y if Oath entered	Enter the date that the Oath was administered. This date only appears on the With Position template. <ul style="list-style-type: none"> ● Enter the date as MM/DD/YYYY This date may be entered when the employee has a future effective dated job. However, this date may not be future effective dated.

Job Aid: Complete the CSV File Templates for Mass Hires

Person Profile Data	Fields	Required (Y/N)	Field Format / Notes
Patent	JPM_CAT_TYPE	N	Value equals UC_PATENT The UC_PATENT requirement is determined by a combination of the following: <ul style="list-style-type: none"> • When PER_ORG is EMP (employee) <ul style="list-style-type: none"> ◦ UC_PROF_DATA_REQD equals Y and, ◦ EMPLID is blank (new employee) and, ◦ Job Effective Date is before the date that the Mass Hire process runs. • When PER_ORG is CWR (contingent worker) <ul style="list-style-type: none"> ◦ UC_PROF_DATA_REQD is Y and, ◦ EMPLID is blank (new CWR) and, ◦ Job Effective Date is before the date that the Mass Hire process runs.
	EFFDT	Y if Patent entered	The date that the Patent Acknowledgement was completed. This date appears on the With Position and Without Position template. <ul style="list-style-type: none"> • Enter the date as MM/DD/YYYY This date may be entered when the employee has a future effective dated job. However, this date may not be future effective dated.
UCI9_ID	JPM_CAT_TYPE	N	Value equals UCI9_ID .
	EFFDT	Y if UCI9_ID entered	This is the Tracker Profile ID effective date. This date appears only on the With Position template. <ul style="list-style-type: none"> • Enter the date as MM/DD/YYYY This date may be entered when the employee has a future effective-dated job. However, this date may not be future effective dated.
	JPM_VALUE	Y if UCI9_ID entered	This is the Tracker Profile ID .
UCI9_REMOTE	JPM_CAT_TYPE	N	Value equals UCI9_REMOTE .

Job Aid: Complete the CSV File Templates for Mass Hires

Person Profile Data	Fields	Required (Y/N)	Field Format / Notes
	EFFDT	Y if UCI9_REMOTE entered	<p>This is the Remote effective date. This date appears only on the With Position template.</p> <ul style="list-style-type: none"> Enter the date as MM/DD/YYYY <p>This date may be entered when the employee has a future effective-dated job. However, this date may not be future effective dated.</p>

Mass Hire File Checklist

Complete the following checklist while completing your Mass Hire Template and prior to submitting it for processing. Use Notepad to validate formatting before submitting the file for processing.

Task #	Task	Explanation / Notes	Complete
1	Confirm that you meet the minimum records in the file	Mass hire files require a minimum of 10 people. There is no maximum number.	
2	Confirm that the CSV columns use codes, not code descriptions	Codes should be in all UPPERCASE letters. <ul style="list-style-type: none"> Refer to the BU E346 Codes Samples spreadsheet (located in the UCPath Location Support SharePoint >Templates folder) for a list of valid codes acceptable for the CSV file. 	
3	Confirm that all required fields on the template are populated	Refer to the With Position Template / Without Position Template sections in this document for instructions regarding which fields to populate on each template	
4	Confirm that all required fields on the template are formatted correctly	Refer to the With Position Template / Without Position Template sections in this document for instructions regarding how fields should be populated on the template. Some fields are case-sensitive or have character count limits.	
5	Determine if the person exists in UCPath or not using the UCPath Search/Match functionality	Do this task before submitting the file to reduce/eliminate processing errors and potential re-submissions.	

Job Aid: Complete the CSV File Templates for Mass Hires

Task #	Task	Explanation / Notes	Complete
6	Confirm proper capitalization	<p>Names and addresses should not be in all uppercase or lowercase. The name and address should only have the first letter of each word capitalized.</p> <ul style="list-style-type: none"> The only acceptable special characters allowed in the name fields are apostrophes (') and dashes (-). Any other special characters will cause downstream impacts. Only one special character is allowed in all address fields: dashes/hyphen (-). Any other special characters used will cause a downstream impact within UCPath. 	
7	Confirm position fields complete	<p>Review the position numbers on the file and confirm that all required fields of the positions are completed.</p> <p>Confirm the Update Incumbents checkbox on the Specific Information tab is checked on the Position Row with reason code NEW. This is required if the effective date of the Hire is on or after the effective date of this Position row.</p> <p>If the row is not NEW and this box is unchecked, it will cause the entry to fail.</p>	
8	Confirm position Business Unit	Confirm that the position numbers listed on the file belong to the same business unit.	
9	Confirm correct data is included when creating new instances for existing people	Confirm that EMPLID is not blank and that TRANSACTION_TYPE is correct.	
10	Confirm EMPLID is entered once on a single file	Concurrent hire employees should only be entered once on a single file request. Any additional concurrent jobs may be submitted via another file or Smart HR Template Transaction .	

Job Aid: Complete the CSV File Templates for Mass Hires

Task #	Task	Explanation / Notes	Complete
11	Confirm Mass Hire file name is correct	<p>Confirm that the Mass Hire file name follows the correct file name convention.</p> <p>Here is a description of how the CSV file should be saved:</p> <ul style="list-style-type: none"> • Replace BU with your business unit. • Enter WPSN to indicate your file is the with position template or select WOPSN to indicate your file is the without position template. • Replace SHORTDESCR with a short description for your file/hires. This portion of the naming convention is not required. • Replace IDOPRID with the letters ID and then your UCPath employee ID. You can find your ID in the upper left corner of the portal dashboard. The UCPath OPRID on the file name is validated to ensure the employee associated with the file cannot update their own data. • Confirm that the person submitting the Mass Hire file name has the correct security for the Mass Hires process. <ul style="list-style-type: none"> ○ Example 1: LAMED_E346_WPSN_STDTS_20161101_ID 10955555.csv. This example includes a short description. ○ Example 2: SDCMP_E346_WOPSN_20161101_ID 10955555.csv. This example does not include a short description. 	

Job Aid: Complete the CSV File Templates for Mass Hires

Task #	Task	Explanation / Notes	Complete
12	Save the template as a CSV file	<p>Save the Excel template in the .csv format. To save an Excel spreadsheet as a CSV file in your Excel spreadsheet:</p> <ul style="list-style-type: none"> • Save data and formatting as .XLSX file • Click File • Click Save As • Click Browse to choose where you want to save your file • Select .CSV from the Save as type drop-down menu • Click Save • Right-click .CSV file saved, select Open with and choose Notepad to review and ensure formatting is saved 	
13	Confirm dates are formatted correctly	<p>Confirm that all the dates listed in the Mass Hires CSV file are MM/DD/YYYY (for example, 07/01/2017, not 7/1/17 or 7/1/2017).</p> <p>Use Notepad to confirm.</p>	
14	Confirm that there are no leading or trailing (extra) spaces in columns	<p>Review all cells in the Mass Hires file to ensure there are no leading or trailing spaces (extra spaces).</p> <p>Use Notepad to confirm:</p> <ul style="list-style-type: none"> • Right-click on .CSV Excel file • Select Open With • Select Notepad • Check for additional spacing: Click on the first employee's name > Ctrl+F, enter a space, click Find Next 	
15	Confirm that there are no blank rows on the file	<p>Blank rows may cause the file to fail. Use Notepad to confirm.</p> <ul style="list-style-type: none"> • Right-click on .CSV Excel file • Select Open With • Select Notepad • Check for blank rows/cleared cells. This visually reads in Notepad as a full line of commas (,,,,,,,,,,,,,,,,,,,,) 	

Job Aid: Complete the CSV File Templates for Mass Hires

Task #	Task	Explanation / Notes	Complete
16	Confirm file upload to BOX	<p>Send an email to UCPath Mass Hires team confirming the file upload to BOX.</p> <p>Email Sample:</p> <p>Hello,</p> <p>We have uploaded another file to load for mass hiring into the box folder. Please let us know if you have any other questions or issues.</p> <p>File Name: <insert your file name> BU_CEMPLID_WPSN_SHORTDESCR_YYY YMMDD_IDOPRID.csv /</p> <p>Count: (# HIR / # CON)</p>	