

UCPath User Access Request DocuSign PowerForm
Campus Transactors

This form is a source document for user's KSAMS access request for UCPath online security.



Supervisors complete this form.

1. User Details:

User's UCInetID		Date	
User's Name		Working/Payroll Title	
Employee ID		User's Department (Primary Job)	IR

2. Previous Access:

Is this a transfer from another department in UCI ☐
In case of transfers, roles from previous job will be removed.

3. Roles Requested:

	Typical Titles	Function	KSAMS Role Name	Required?
Transactions for Workforce Administration (see training matrix at end of form)				
1	HR Analyst	Initiates new or updates existing employee information such as hires, positions assignments, PayPath, or Pay changes. Manages LOA.	UCP-Campus-HCM Initiator (Requires Training)	<input type="checkbox"/>
2	Approver of HR Analyst transactions.	Approves transactions for new or existing employee information such as hires, positions assignments, PayPath, LOA, or Pay changes.	UCP-Campus-HCM Approver 1-All (Requires Training)	<input type="checkbox"/>
3	HR Analyst assigning funding to positions	Initiates funding entries for employee's position funding sources.	UCP-Campus-Funding Initiator (Requires Training)	<input type="checkbox"/>
Inquiry access for Non-WFA Transactors Needing Specific Access (see training matrix at end of form)				
4	HR Inquiry only with access to sensitive data.	Inquire payroll, absence, workstudy, or job info related information of employees the transactor is authorized for, includes the WFA with PII and HealthCare Facilitator pages. Sensitive role justification required.	UCP-Campus-HCM Inquiry with PII (Requires Training)	<input type="checkbox"/>
5	HR Inquiry only with no access to sensitive data.	Inquire payroll, absence, workstudy, or job info related information of employees the transactor is authorized for, does not include sensitive information.	UCP-Campus-HCM Inquiry No PII (Requires Training)	<input type="checkbox"/>
7	Payroll or HR Analysts	Initiates Leave Requests, provides any additional information as needed and to Extend Leaves and Return Employees from Leave (role also included in HCM Initiator).	UCP-Campus-LOA (Requires Training)	<input type="checkbox"/>
8	Payroll/Benefits/HR Analysts for reporting	Functions as Health Care Facilitator (HCF) can view employee's benefits information (role also included in HCM Initiator).	UCP-Campus-HCF	<input type="checkbox"/>
9	Departmental support analysts for WFA requests	Ask UCPath. Submit a Salesforce ticket to UCPath for data change related to employee configuration (role also included in HCM Initiator).	UCP-Campus-Support Case Submitter	<input type="checkbox"/>
Transactions for Funding and General Ledger (see training matrix at end of form)				
10	HR Analysts or Financial Analysts	Initiates funding entries for employee's position funding sources.	UCP-Campus-Funding Initiator (Requires Training)	<input type="checkbox"/>
11	Financial Analysts who perform Salary Cost Transfer or Direct Retro.	Initiates transfer of costs of an employee from one funding source to another funding source. Also distributes or redistributes benefits costs over one or more funding sources.	UCP-Campus-Cost Transfers Initiator (Requires Training)	<input type="checkbox"/>
12	Department Budget or Financial Analysts	Maintains and initiates budget entries for budget distribution data.	UCP-Campus-Budget Entry (Requires Training)	<input type="checkbox"/>
13	Approvers of Financial Analysts' DR.	Approver of Funding entry, Benefits cost transfer, and direct retro transactions.	UCP-Campus-General Ledger Approver (Requires Training)	<input type="checkbox"/>
14	Financial Analysts reconciliation and reporting	Review GL information for position funding and cost transfer status.	UCP-Campus-GL Inquiry (Requires Training)	<input type="checkbox"/>
Other Roles Not in List Above				
15*	Add role not in list above			<input type="checkbox"/>
16*	Add role not in list above			<input type="checkbox"/>

For detailed description of authorizations, please review Roles Wiki available from <https://ucpath.uci.edu/security/>.
* For role not in list, enter the KSAMS role name and complete Section 7 below

UCPath User Access Request DocuSign PowerForm
Campus Transactors

4. Training Completion:

User has completed training for all the selected roles that require training ☐
We will not be able to grant access until required training is completed. See Training to Roles Matrix at the end of this form.

5. Department Access:

What departments does this user need access to?

KSAMS Role for Department Level Security	UCPath HR Department ID
UCP-Campus Department Level Security	
UCP-Campus Department Level Security	

Note: Review Cognos report HR Hierarchy Report [RUC1146](#) to determine appropriate level of department access.

6. Approvals:

Requesting Supervisor	Signature	Name		Date	
CPO/MAABO/HRBP	Signature	Name		Date	

7. Exception authorizer’s approval and justification.

Please complete this section only when Role 15 or 16, or both, have been entered. For exception approval, please print this form and obtain approval by email.

Authorizer Name		Signature	
Approval & Justification	<Example: * Why a role not in list is being requested? * If a role requested is meant for a Central department use, who has provided approval prior to this request? * If a higher access than the division level department is being requested, please specify reasons.		
	KSAMS Role Name	HR Dept (only for Dept Level Role)	End Date
		IR	
		IR	

This form and security access requests are governed by UCI UCPath Security policies.
UCI Security policies are at <https://www.security.uci.edu/program/policy/>
UCI UCPath System Access (Security) process is at: <https://ucpath.uci.edu/security/>

Training Pre-Requisites

Security Role	Online Pre-Requisite Training				
	UCP101: Intro to UCPath	POS101: Intro to Position Mgmt.	FIN101: Intro to Position Funding	TEM101: Intro to Smart HR Templates	PPA101: Intro to PayPath Actions
UCP – Campus HCM Initiator	R	R	R	R	R
UCP – Campus HR Approver	R	R	R	R	R
UCP – Campus HCM Inquiry	R	R	R	R	R
UCP - Campus Funding Initiator	R	R	R	R	R
UCP - Campus Budget Entry	R	R	R	O	O
UCP - Campus Cost Transfer Initiator	R	R	R	O	O
UCP – Campus GL Approver	R	R	R	R	R
UCP – Campus GL Inquiry	R	R	R	O	O

*NOTE: To gain access to UCPath, required training courses must be completed in UCLC.
Training materials on the UCPath website are for reference and review only.

R=Required
O=Optional
*UCLC

Recorded or Virtual Instructor Led Training

Security Role	Recorded or Virtual Instructor Led Training										
	*POS202 UCPath Nav & Position Control	*FIN202 Position Funding Entry	UCPath Lived Name ILT Recording	*TEM301 Template Trans Pt. I	*TEM302 Template Trans Pt. II	*PPA310 PayPath Actions Pt. I	*PPA320 PayPath Actions Pt. II	*PRQ301 Payroll Request	*ABM320 Absence Mgmt.	*DRD301 Direct Retro	*BDP100: Budget Distribution
UCP – Campus HCM Initiator	R	R	R	R	R	R	R	R	R	O	O
UCP – Campus HCM Approver	R	R	R	R	R	R	R	R	R	O	O
UCP – Campus HCM Inquiry	R	O	R	O	O	R	O	O	O	O	O
UCP - Campus Funding Initiator	R	R	O	O	O	R	O	R	O	O	R
UCP - Campus Budget Entry	O	R	O	O	O	O	O	O	O	O	R
UCP - Campus Cost Transfer Initiator	R	R	O	O	O	O	O	O	O	R	O
UCP – Campus GL Approver	R	R	O	O	O	R	O	R	O	R	R
UCP – Campus GL Inquiry	O	R	O	O	O	O	O	O	O	O	R