


Job Aid

UCPath Campus User Access Form

Section	Instructions	Screenshot
Setting Up Workflow in DocuSign	<ol style="list-style-type: none"> 1. The first is the requesting supervisor to sign. 2. The second is the approving CPO or MAABO as appropriate. If most are GL roles, perhaps MAABO signs. 3. The third to get the form is your HR DSA who doesn't sign but executes the requests in this form 4. UCPath Service routing or addressing does not need any changes in the form as the form is routed automatically. 5. If Section 6 needs to be completed, please print the form after completing the content required and email for approval to the exception authorizer. 	
Header	<ol style="list-style-type: none"> 1. This form is only for campus user's access in UCPath, not for Central teams or Medical Center. 2. The access is in addition to what employee is granted automatically as self-service. 3. The form needs to be completed by user's supervisor in direct reporting relationship 4. The approval workflow is defined 5. All sections must be completed. 	<p>This form is a source document for <u>campus</u> department user's higher level access request to UCPath. Supervisor completes this form and submits in DocuSign for approvals. <i>Routing: Supervisor>CPO/MAABO>DSA>UCPath Security Admin</i></p> <p>All sections of this form must be completed.</p>
1	User's primary HR Department or the department assigned-to if temporary	
2	This is critical information to enforce control over excessive & cumulative access. The previous access needs to be removed as it was approved by previous supervisor and is no longer valid.	<ol style="list-style-type: none"> 2. Previous Access: <ol style="list-style-type: none"> a. In case of transfers, have previous roles been removed in KSAMS <input type="checkbox"/> b. No previous access in KSAMS or UCPath <input type="checkbox"/>

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3	<p>Make selections appropriate to user's responsibilities without providing excessive or inappropriate access. Details of training curriculum are located in Roles Wiki.</p> <p>If a role being added to the list that is not in this form, supervisor needs to get approval <i>before</i> the form is sent to HR DSA for processing in KSAMS.</p>	<p>3. Roles Requested:</p> <p>For detailed description of authorizations in the roles, please review UCPath Campus Roles page in Roles Wiki</p> <table border="1"> <thead> <tr> <th>Function</th> <th>KSAMS Role Name</th> <th>Yes?</th> <th>Training Completed?</th> </tr> </thead> <tbody> <tr> <td colspan="4" style="text-align: center;">UCPath Workforce Administration</td> </tr> <tr> <td>1</td> <td>initiates new or updates existing employee information such as hires, positions assignments, Pay/Earn, or Pay changes. Manages LCA</td> <td>UCP-Campus-HCM Initiator (Requires Training)</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>2</td> <td>Approves transactions for new or existing employee information such as hires, positions assignments, Pay/Earn, LCA, or Pay changes</td> <td>UCP-Campus-HCM Approver 1-All (Requires Training)</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>3</td> <td>initiates new, or updates existing, vacant positions for approval, view budget distribution data</td> <td>UCP-Campus-Position Initiator</td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>4</td> <td>Approves position change transactions for new and vacant positions for the departments they wish to approve</td> <td>UCP-Campus-Position Control Approver</td> <td><input type="checkbox"/></td> <td></td> </tr> </tbody> </table>	Function	KSAMS Role Name	Yes?	Training Completed?	UCPath Workforce Administration				1	initiates new or updates existing employee information such as hires, positions assignments, Pay/Earn, or Pay changes. Manages LCA	UCP-Campus-HCM Initiator (Requires Training)	<input type="checkbox"/>	<input type="checkbox"/>	2	Approves transactions for new or existing employee information such as hires, positions assignments, Pay/Earn, LCA, or Pay changes	UCP-Campus-HCM Approver 1-All (Requires Training)	<input type="checkbox"/>	<input type="checkbox"/>	3	initiates new, or updates existing, vacant positions for approval, view budget distribution data	UCP-Campus-Position Initiator	<input type="checkbox"/>		4	Approves position change transactions for new and vacant positions for the departments they wish to approve	UCP-Campus-Position Control Approver	<input type="checkbox"/>	
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4	<p>List the department whose employees the user needs access to see or process. HR Hierarchy report is available here.</p>	<p>4. Department Access: To which department's employees does this user needs access? <i>Review Cognos report HR Hierarchy RUCI146 to determine appropriate level of department access.</i></p> <table border="1"> <thead> <tr> <th>KSAMS Role for Department Level Security</th> <th>UCPath HR Department ID Qualifier (IRnnnn)</th> </tr> </thead> <tbody> <tr> <td>UCP-Campus Department Level Security</td> <td></td> </tr> <tr> <td>UCP-Campus Department Level Security</td> <td></td> </tr> </tbody> </table>	KSAMS Role for Department Level Security	UCPath HR Department ID Qualifier (IRnnnn)	UCP-Campus Department Level Security		UCP-Campus Department Level Security																							
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6	<p>Exception request justification.</p> <p>1. If a role outside of the list is being requested. It is expected that the approval from relevant central group has been obtained ahead of submitting the form. For instance if a TAM</p>	<p>6. Exception authorizer's approval and justification. <i>Please complete this section only when Role 18 or Role 19, or both, have been entered. For exception approval, please print this form and obtain approval by email.</i></p> <table border="1"> <thead> <tr> <th>Authorizer Name</th> <th>Signature</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> </tr> </tbody> </table> <p><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.</p> <table border="1"> <thead> <tr> <th>KSAMS Role Name</th> <th>HR Dept (only for Dept Level Role)</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td></td> <td>IR</td> <td></td> </tr> <tr> <td></td> <td>IR</td> <td></td> </tr> </tbody> </table> <p>Approval & Justification</p>	Authorizer Name	Signature			KSAMS Role Name	HR Dept (only for Dept Level Role)	End Date		IR			IR																
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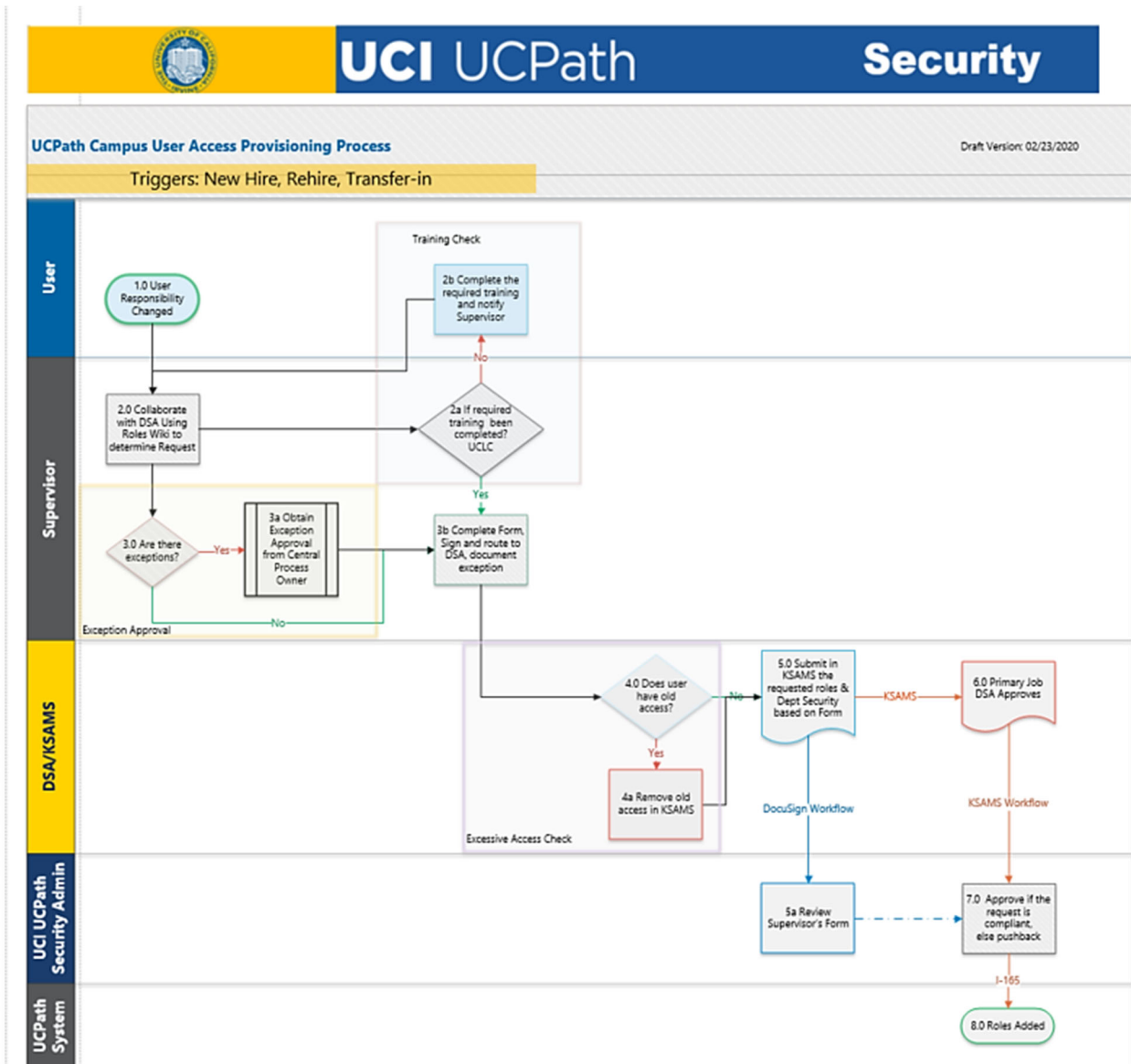
UCPath Campus User Access Form

Section	Instructions	Screenshot
	<p>recruiting role is being requested.</p> <ol style="list-style-type: none"><li data-bbox="347 533 662 743">2. If department access being requested outside of employee's division, approval justification needs to be noted.<li data-bbox="347 743 662 995">3. Note that requesting access to department outside the division or school will be approved by DSA of the other division or school.<li data-bbox="347 995 662 1098">4. End dates of the exceptions are required.	

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Process Flow



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Sample of the Form

This form is a source document for campus department user's higher level access request to UCPath.

Supervisor completes this form and submits in DocuSign for approvals.

Routing: Supervisor>CPO/MAABO>DSA>UCPath Security Admin

All sections of this form must be completed.

1. User Details:

User's UCINetID		Date	
User's Name		Working Title/Jobcode	
UCPath Employee ID (optional)		User's Primary Job's Department	IR

2. Previous Access:

- a. In case of transfers, have previous roles been removed in KSAMS
- b. No previous access in KSAMS or UCPath

3. Roles Requested:

For detailed description of authorizations, please review [Roles Wiki](https://ucpath.uci.edu/security/) available from <https://ucpath.uci.edu/security/>

	Function	KSAMS Role Name	Yes?	Training Completed?
UCPath Workforce Administration				
1	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"/>	<input type="checkbox"/>
2	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"/>	<input type="checkbox"/>
3	Initiates new, or updates existing, vacant positions for approval, view budget distribution data	UCP-Campus-Position Initiator	<input type="checkbox"/>	
4	Approves position change transactions for new and vacant positions for the departments they own to approve	UCP-Campus-Position Control Approver	<input type="checkbox"/>	
5	Lookup but not change any employee job or personal info they are authorized for except for sensitive or confidential information	UCP-Campus-WFA No PII	<input type="checkbox"/>	
6	Lookup but not change any employee job or personal info they are authorized for including sensitive or confidential information. Includes ability to view PII information.	UCP-Campus-WFA with PII	<input type="checkbox"/>	
7	Inquire payroll, absence, workstudy, or job info related information of employees the user is authorized for, includes the WFA with PII.	UCP-Campus-HCM Inquiry (Requires Training)	<input type="checkbox"/>	<input type="checkbox"/>

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UCPath Absences & Benefits				
8	Initiates Leave Requests, provides any additional information as needed and also to Extend Leaves and Return Employees from Leave(role also included in HCM Initiator)	UCP-Campus-LOA (Requires Training)	<input type="checkbox"/>	<input type="checkbox"/>
9	Functions as Health Care Facilitator (HCF) can view employee's benefits information(role also included in HCM Initiator)	UCP-Campus-HCF	<input type="checkbox"/>	
10	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"/>	
UCPath Payroll				
11	Initiates additional pay, one time or recurring and payroll requests, final pay. Initiates PayPath transactions. Includes WFA Inquiry roles	UCP-Campus-Payroll Initiator (Requires Training)	<input type="checkbox"/>	<input type="checkbox"/>
12	Approves additional pay one time or recurring and payroll request and final pay	UCP-Campus-Payroll Approver 1-All (Requires Training)	<input type="checkbox"/>	<input type="checkbox"/>
UCPath General Ledger				
13	Initiates funding or budget entries for employees funding sources	UCP-Campus-Funding Initiator (Requires Training)	<input type="checkbox"/>	<input type="checkbox"/>
14	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"/>	<input type="checkbox"/>
15	Maintains and initiates budget entries for budget distribution data	UCP-Campus-Budget Entry (Requires Training)	<input type="checkbox"/>	<input type="checkbox"/>
16	Approver of Funding entry, Benefits cost transfer, and direct retro transactions	UCP-Campus-General Ledger Approver (Requires Training)	<input type="checkbox"/>	<input type="checkbox"/>
17	Review GL or commitment accounting information for position funding and cost transfer status.	UCP-Campus-GL Inquiry (Requires Training)	<input type="checkbox"/>	<input type="checkbox"/>
Other Roles Not in List Above				
18*	Add role not in list above		<input type="checkbox"/>	<input type="checkbox"/>
19*	Add role not in list above		<input type="checkbox"/>	<input type="checkbox"/>

* For role not in list, enter the KSAMS Rolename and complete Section 6 below.

4. Department Access:
To which department's employees does this user needs access?

Review Cognos report *HR Hierarchy RUCI146* to determine appropriate level of department access.

KSAMS Role for Department Level Security	UCPath HR Department ID Qualifier (IRnnnn)
UCP-Campus Department Level Security	
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5. Approvals:

a. Requesting Supervisor	Signature	Name	Date
b. CPO or MAABO	Signature	Name	Date

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6. Exception authorizer's approval and justification.

Please complete this section only when Role 18 or Role 19, or both, have been entered. For exception approval, please print this form and obtain approval by email.

Authorizer Name		Signature	
Approval & Justification	<i><Example:</i> * 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	
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For more information UCPATH System Access please refer to UCPATH Access page <https://ucpath.uci.edu/security/>.

This form and security access requests granted as a result are governed by a variety of UCI Security Policies. Please review: <https://security.uci.edu/security-plan/plan-policies.html>