

Let's understand how to sequence the tasks from recruitment to paycheck review and all the major steps between.

WFA Process Guide

HR/APO

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Contents

The WFA Big 10	3
Staff	<u>5</u>
Academic non-students	11
Academic Students	<u>15</u>

The WFA Big 10

		Key Things to Know
01 – Recruitment		The recruitment processes that exist today remain the same. UCPATH has not changed the existing approval or internal steps required to initiate a recruitment.
02 - Position Management		Requests for NEW Positions that do not already exist in the UCPATH system are submitted via the Position Control Request in UCPATH. Updates to Vacant Positions are also submitted via the Position Control Request in UCPATH. Updates to single headcount Positions are submitted via PayPATH Transactions. <i>(Position Management workflow processes differ between staff and academic Positions. More information is contained in the details of this document.)</i>
03 - Funding Entry		Funding entry should be updated as soon as possible after the Position Number is assigned to the new Position.
04 - Candidate Selection		Hiring departments are responsible for confirming whether the candidate has existing employment with UC. The hiring department should use the Person Organizational summary page in UCPATH to confirm if the candidate already has an Employee ID in the UCPATH system.
05 - Hire Entry & Follow Up		Hiring departments need to collect key information in order to submit the Full Hire Template Transaction, including the date of birth. The SSN can be updated on the employee's first day of work if the hiring department prefers to wait for the employee to be onsite to collect the SSN information.
06 - Work Authorization		The new hire will receive an automatic email notification from the Tracker I-9 system to complete Section 1 of the I-9 form so long as the hiring department has included a personal email address on the Full Hire Template and the HR Worksite ID field is populated on the Position with "91," indicating that the new hire will need to report to the BFS office to present original employment eligibility documents.
07 - Identity Management		The Identity Management system creates an identity record for the new hire as soon as the employee job data is saved in the UCPATH system. The new hire can activate their UCSBnetID before their first day of work.
08 - Timekeeping Setup		The Kronos system is populated with the new employee information after the job data is available in the Operational Data Store (ADS) AND the UCSBnetID is activated by the employee. There is typically a 1 day lag before the data is available in the ODS, after the Full Hire Template Transaction is approved by the UCPATH Center.
09 - Employee Onboarding		The hiring department must ensure that the Oath of Allegiance is completed (when applicable) using a new form.

	<p>Some of the paper forms previously used as part of the new hire packet will now be completed in the Employee Self Service UCPATH Portal (i.e., W-4 forms, Patent Acknowledgement, Direct Deposit, Voluntary Self Identification of Race, Ethnicity, and Veteran Status” and “Voluntary Self Identification of Disability” (i.e., U5605 form and Form CC 305-OMB), employee disclosures, and emergency contact information.)</p>
<p>10 - Paycheck Review</p>	<p>Although reports are still under development to facilitate paycheck reviews at the departmental level, UCPATH Initiators can review an employee’s paycheck in the UCPATH system using the following navigation path PeopleSoft Menu>Payroll for North America>Payroll Processing USA>Produce Payroll>Review Paycheck</p>



01 - Recruitment



02 - Position Management



03 - Funding Entry



04 - Candidate Selection



05 - Hire Entry & Follow Up



06 - Work Authorization



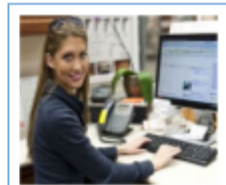
07 - Identity Management



08 - Timekeeping Setup



09 - Employee Onboarding



10 - Paycheck Review

Staff

UCPath Staff New Hire Process for Career, Contract, Limited, and Per Diem Appointment Types

<i>Category</i>	Department Action Items	Campus HR Action Items	New Employee Action Items
<i>01 - Recruitment</i>	1. Obtain appropriate approval via internal divisional processes to create a new staff position		
<i>01 - Recruitment</i>	2. Prepare and submit the JD for classification review by HR via OACIS[1]	3. HR reviews and approves the classification of the JD in OACIS. Department is notified by email	
<i>02 - Position Management</i>	4. If a Position already exists for the hire, skip to step 10. If a new Position is required, Department submits the Position Control Request to "Add New Position" in UCPath. View the Job Aid to Initiate a New Position Control Request at https://sp.ucop.edu/sites/ucpathhelp/Pilot_Location/LOCplayer/data/toc.html (Ensure that the "HR Worksite ID" field is populated with "91" for BFS on the Position Control Request form in order to trigger the Tracker I-9 email notification to the new hire upon issuance of the UCPath employee ID. For further instructions, please see the Job Aid, "Entering HR Worksite ID in UCPath" available on our website here: https://www.bfs.ucsb.edu/payroll/ucpath/resources)	5. HR reviews the Position Control Request to "Add New Position" submitted via UCPath. HR validates the Position Control Request against the JD saved in OACIS. Discrepancies are communicated back to the department for correction	

¹ **All policy-covered (non-represented) limited appointment job descriptions require classification review and approval by HR**, including By Agreement (BYA) appointments*. The hiring department is responsible for entering the job description into OACIS and submitting it for review and approval by HR. **Represented limited appointment job descriptions at the equivalent of grade 18 or below** (comparing midpoints and mid-steps) do NOT require review and approval by HR, but job descriptions must be submitted and approved in OACIS by the hiring department. <https://www.hr.ucsb.edu/compensation/classification/job-description-actions>

02 - Position Management		6. HR approves the Position Control Request to "Add New Position."	
02 - Position Management	7. Department Initiator receives email confirmation of Position approval and the Position Number via email from the UCPath system	8. HR updates JD in OACIS with the Position Number	
03 - Funding Entry	9. Department enters funding for the new position via the Funding Entry page in UCPath. The funding is routed for approval via UCPath AWE		
04 - Candidate Selection	10. Department initiates recruitment. Upon candidate's acceptance of job offer, Department submits background check request to Employment via ServiceNow (for positions designated as critical only). Department verifies that the candidate has no other UCSB employment using the Person Organizational Summary page in UCPath. (The UCPC will reject the Full Hire Template if a current job is active in the UCPath system.) If the candidate is already employed by UCSB, and the department is hiring the candidate into an <i>additional concurrent job</i> at UCSB, please see the notes at the end of this document*	11. Upon candidate's acceptance of job offer, HR forwards Authorization to Release Information – Form C to the candidate along with the appointment letter (applicable only to recruitments housed in OACIS). Upon receipt of Form C, HR sends Request for Live Scan Service form to candidate. HR informs the department of background check results when received	12. Candidate arranges for Live Scan fingerprint and returns the Request for Live Scan Service form to HR
04 - Candidate Selection	13. Department collects the candidate's personal data to initiate the Full Hire Template Transaction. Data collection can occur remotely or in-person. ² Department advises the new hire to expect an email notification to complete the online I-9 form. The email sender is employment.authorization@universityofcalifornia.edu , and the subject line		14. Candidate communicates with department by phone, email, or ground mail to exchange information

² New hires may be asked to provide required information in advance of the hire date by phone, email, or mail. Travel to the campus to provide the information or complete forms in advance of the hire date should be voluntary and optional for the new hire and should not be mandated. Required fields for advance submission of Full Hire Template: First name, Last name, Date of birth, Gender, Home address and personal email address. The email address should be a personal email address so that the Tracker I-9 notification can be sent prior to the set up of the new hire's UCSB email account.

	appears as <i>Form I-9 for New Hire: Must Complete Prior to Work</i>		
<i>05 - Hire Entry & Follow Up</i>	15. Department initiates Full Hire Template Transaction and submits transaction in UCPATH. The Full Hire Template can be submitted prior to the employee's start date without the SSN so long as the department explains the reason for not including it in the template's comment box. The comment should explain that the SSN will be updated via the Personal Data Change Template on the employee's start date. (Turnaround time has averaged ~ 5 to 7 business days.) Please see the notes concerning the handling of SSNs at the end of this document*		
<i>05 - Hire Entry & Follow Up</i>	16. Department receives notification of Full Hire Template Transaction approval from the UCPATH Center and the UCPATH employee ID number is now available. (Department should validate the employee job data in the UCPATH system immediately after the UCPATH notification is received.)		
<i>06 - Work Authorization</i>	17. Work Authorization takes place via Tracker I-9. The Tracker I-9 system automatically sends an email notification to the new employee with a link to complete Section 1 of the I-9 form online. (The new employee's email address must be populated in the Full Hire Template for the email to be sent automatically. The email address should be a personal email address so that the Tracker I-9 notification can be sent prior to the set-up of the new hire's UCSB email account.) In cases of remote hires, please see the notes at the end of this document*		18. New employee completes Section 1 of the I-9 form online in Tracker (UCSBnetID not required)
<i>07 - Identity Management</i>	19. UCSB Identity Management (IDM) automatically creates Identity record for the new hire once the employee job data and employee ID number are available in the UCPATH system. The Department should validate that the UCSBnetID has been created. The department notifies the new hire to activate the UCSBnetID		

	<p>via this website link https://im.ucsb.edu/idm/manage</p> <p>The new employee must activate the UCSBnetID in order to log-in to UCPATH Portal and for the employee information to be exported into Kronos (see step 23)</p>		
08 - Timekeeping Setup	<p>20. Department updates the Timekeeping Management Assignment Application (TMAA) associating the employee and Position with the manager's access control number. The Position Number and the UCPATH employee ID number are both required. This step should be completed before the Kronos import step 23</p>		
09 - Employee Onboarding	<p>21. New Employee's First Day: Department enters SSN if this data was not previously submitted on the Full Hire Template. (Department enters the update via the <i>Initiate Personal Data Change Template</i>, and should include an explanation in the Template's comment box that this update completes the personal data requirements for the Full Hire Template.) Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions</p> <p>Search for the Job Aid to <i>Initiate Personal Data Change Template</i> at https://sp.ucop.edu/sites/ucpathhelp/Pilot_Location/LOCplayer/data/toc.html#</p> <p>Department enters Oath date if this data was not previously submitted on the Full Hire Template. (Department enters update via the Update Person Profiles page. Navigation: PeopleSoft Menu > Workforce Development > Profile Management > Profiles > Person Profiles)</p> <p>Department ensures that the following actions/paperwork/online forms are completed by the new employee on the first day</p>		<p>22. New employee activates their UCSBnetID, logs into UCPATH Portal to complete required forms online, and visits BFS office to present employment eligibility documents for Section 2 (Section 1 of the online I-9 Form must have already been completed online before visiting the BFS office to complete Section 2. Section 2 must be completed no later than the third day of work.)</p>

<ul style="list-style-type: none"> a. Oath of Allegiance (paper form) b. Tracker I-9 Section 1 (if not already completed) and schedules visit to BFS office to present employment eligibility documents for Section 2 c. UCSBnetID account activated d. Patent Acknowledgement (UCPath Portal) e. W-4 / DE-4 forms (UCPath Portal) f. Direct Deposit (UCPath Portal) g. Emergency contacts (UCPath Portal) h. Other personal information updates such as employee disclosures (UCPath Portal) i. Additional department paperwork as required for special circumstances (e.g., Form UCRS 419 Statement Concerning Your Employment in a University Position Not Covered by Social Security) <p>The new employee will be guided to complete the required forms housed in the UCPath Portal when they log into the UCPath Portal for the first time. The new employee will not receive an email communication from the UCPath Center concerning the completion of the onboarding forms listed above.</p>		
<p><i>09 - Employee Onboarding</i></p> <p>23. Kronos is populated with the new employee information only after the job data is available in the Operational Data Store (ODS) AND the UCSBnetID is activated by the new employee. (There will typically be a 1 day lag at step 16 before the employee job data is available in the ODS.) Department follows procedures to set up/configure new employee in Kronos.</p> <ul style="list-style-type: none"> a. It is important for the department to validate in Kronos, and update if needed, the defaulted pay rule, defaulted accrual profile, and email address. The pay rule must align with the assigned UCPath pay 	<p>24. Department should contact HR to consult in cases of concurrent hires where the two jobs have conflicting FLSA/pay cycles. An employee can only have a single FLSA status and pay cycle in the UCPath system.</p>	

	<p>group (i.e., monthly-salaried, biweekly-hourly, monthly-hourly). (In instances of concurrent hires where FLSA/pay cycles conflict between the two jobs, the FLSA and pay group for the second job must be resolved quickly, otherwise the pay associated with the secondary job will be stopped until the conflict is resolved. Please see the notes at the end of this document*)</p>		
09 - Employee Onboarding	<p>25. Department registers employee for New Employee Benefits Orientation via HR ServiceNow, in cases where the employee is hired outside of the OACIS system and is benefits eligible (i.e., limited appointments that are benefits eligible) https://ucsb.service-now.com/global</p> <p>The UCPath Center automatically sends an email notification (on the job/hire effective date) about benefits enrollment to all UCSB new hires that are determined to be benefits eligible</p>	<p>26. HR offers new employee orientation every first and third Tuesday of the month. The appointment letter sent by HR to the candidate includes the date/time of the upcoming in-person New Employee Orientation (morning session) and New Employee Benefits Orientation (afternoon session) https://www.hr.ucsb.edu/training/new-employee-orientation</p>	<p>27. Employee attends New Employee Orientation on scheduled date</p> <p>Employees who are benefits eligible receive an email communication with enrollment instructions</p>
10 - Paycheck Review	<p>28. Department confirms accuracy of employee's first paycheck within UCPath, in accordance with the UCPath Production Processing Schedule</p> <p>PeopleSoft Menu>Payroll for North America>Payroll Processing USA>Produce Payroll>Review Paycheck</p> <p>View the Review Paycheck Job Aid at https://sp.ucop.edu/sites/ucpathhelp/Pilot_Location/LOCjobaids/UCPC_PHCMPA_YL200JA_ReviewPaycheck_Rev01.pdf</p>		

Academic non-students

Category	Department Action Items	Campus Academic Personnel Action Items	New Employee Action Items
<i>Recruitment</i>	1. Conduct an open search as required by campus and UC policy	2. Final approval of search report	
<i>Position Management</i>	3. Submit appointment request according to Red Binder policy. Include information regarding position: request a new position or modification of an existing position.	4. Manages approval process of appointment. Upon approval, creates or modifies position. Notifies department of approval and position number or completion of modifications.	
<i>Funding Entry</i>	5. Receives confirmation of appointment approval and position information. Enters funding for the position. The funding is also routed for separate approvals via UCPath AWE		
<i>Candidate Selection</i>	6. Upon acceptance of job offer, verifies if candidate has other current UC employment. If the candidate is a current employee see notes below*		

<i>Candidate Selection</i>	<p>7. Department collects the candidate’s personal data to initiate the Full Hire Template Transaction. Data collection can occur remotely or in-person.^[3]</p> <p>Department advises the new hire to expect an email notification to complete the online I-9 form. The email sender is employment.authorization@universityofcalifornia.edu, and the subject line appears as <i>Form I-9 for New Hire: Must Complete Prior to Work</i></p>		<p>8. Communicates with department by phone, email, or ground mail to exchange information</p>
<i>Hire Entry</i>	<p>9. Department initiates Full Hire Template Transaction and submits transaction in UCPATH. The Full Hire Template can be submitted prior to the employee’s start date without the SSN so long as the department explains the reason for not including it in the template’s comment box. The comment should explain that the SSN will be updated via the Personal Data Change Template on the employee’s start date. (Turnaround time has averaged ~ 5 to 7 business days.) Please see the notes concerning the handling of SSNs at the end of this document*</p>	<p>10. Serves as second step approver for Full Hire Template Transaction</p>	
<i>Hire Entry</i>	<p>11. Receives notification of Full Hire Template Transaction approval from the UCPATH Center and the UCPATH employee ID number is now available. (Department should validate the employee job data in the UCPATH system after the UCPATH notification is received.)</p>		

³ New hires may be asked to provide required information in advance of the hire date by phone, email, or mail. Travel to the campus to provide the information or complete forms in advance of the hire date should be voluntary and optional for the new hire and should not be mandated. Required fields for advance submission of Full Hire Template: First name, Last name, Date of birth, Gender, Home address and personal email address. The email address should be a personal email address so that the Tracker I-9 notification can be sent prior to the set up of the new hire’s UCSB email account.

<i>Work Authorization</i>	12. Work Authorization takes place via Tracker I-9. The Tracker I-9 system automatically sends an email notification to the new employee with a link to complete Section 1 of the I-9 form online. (The new employee's email address must be populated in the Full Hire Template for the email to be sent automatically. The email address should be a personal email address so that the Tracker I-9 notification can be sent prior to the set-up of the new hire's UCSB email account.) In cases of remote hires, please see the notes at the end of this document*		13. Completes Section 1 of the I-9 form online in Tracker (UCSBnetID not required)
<i>Identity Management</i>	14. Validates that the UCSBnetID has been created. UCSB Identity Management automatically creates Identity record for the new hire once the employee job data and employee ID number are available in the UCPATH system. The department notifies the new hire to activate the UCSBnetID.		15. Activates UCSBnetID to log-in to UCPATH Portal https://im.ucsb.edu/idm/manage
<i>Timekeeping Management</i>	16. For employees who accrue vacation and sick leave or report hourly time, the Department updates the Timekeeping Management Assignment Application (TMAA) associating the employee and Position with the manager's access control number. The Position Number and the UCPATH employee ID number are both required. This step should be completed before the Kronos import step 17.		
<i>Timekeeping Management</i>	17. Kronos is populated with the new employee information once the job data is available in the Operational Data Store (ODS) AND the UCSBnetID is active. (There will typically be a 1 day lag at step 16 before the employee job data is available in the ODS.) Department follows procedures to set		

Employee Onboarding

up/configure new employee in Kronos.		
<p>18. New Employee's First Day: Department enters SSN and Self-Identification of Race, Ethnicity, and Veteran Status from new employee paperwork if this data was not previously submitted on the Hire Template. Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions</p> <p>Search for the Job Aid to <i>Initiate Personal Data Change Template</i> at https://sp.ucop.edu/sites/ucpathhelp/Pilot_Location/LOCplayer/data/to.c.html#</p> <p>Department enters Oath date if this data was not previously submitted on the Full Hire Template. (Department enters update via the Update Person Profiles page. Navigation: PeopleSoft Menu > Workforce Development > Profile Management > Profiles > Person Profiles</p> <p>Department ensures that the following actions/paperwork are completed by the new employee</p> <ol style="list-style-type: none"> Oath of Allegiance (paper form) Tracker I-9 Section 1 (if not already completed) and schedules visit to BFS office to present employment eligibility documents for Section 2 UCSBnetID account activated Patent Acknowledgement (UCPath Portal) W-4 / DE-4 forms (UCPath Portal) Direct Deposit (UCPath Portal) Emergency contacts (UCPath Portal) Other personal information updates such as employee 		<p>19. New employee activates their UCSBnetID, logs into UCPath Portal to complete required forms online, and visits BFS office to present employment eligibility documents for Section 2 (Section 1 of the online I-9 Form must have already been completed online before visiting the BFS office to complete Section 2. Section 2 must be completed no later than the third day of work.)</p>

	<p>disclosures (UCPath Portal)</p> <p>i. Additional department paperwork as required</p> <p>The new employee will be guided to complete the required forms housed in the UCPath Portal when they log into the UCPath Portal for the first time. The new employee will not receive an email communication from the UCPath Center concerning the completion of the onboarding forms listed above.</p>		
<i>Benefit Enrollment</i>	<p>20. Registers employee for New Employee Benefits Orientation via HR ServiceNow https://ucsb.service-now.com/global</p> <p>The UCPath Center automatically sends an email notification (on the job/hire effective date) about benefits enrollment to all UCSB new hires that are determined to be benefits eligible</p>		<p>21. Attends New Employee Orientation on scheduled date</p> <p>Employees who are benefits eligible receive an email communication with enrollment instructions</p>
<i>Paycheck Review</i>	<p>22. Department confirms accuracy of employee's first paycheck within UCPath, in accordance with the UCPath Production Processing Schedule</p> <p>PeopleSoft Menu>Payroll for North America>Payroll Processing USA>Produce Payroll>Review Paycheck</p> <p>View the Review Paycheck Job Aid at https://sp.ucop.edu/sites/ucpathhelp/Pilot_Location/LOCjobaids/UCPC_PHCMPAYL200JA_ReviewPaycheck_Rev01.pdf</p>		

Academic Students

Category	Department Action Items	Campus Academic Personnel Action Items	New Employee Action Items
<i>Recruitment</i>	1. Follows appropriate campus (Red Binder) and/or departmental processes for selecting appointee.		
<i>Position Management</i>	2. If a new Position is required or modifications must be made to an existing position, submits the Position Control Request to “Add New Position” via UCPATH AWE. Department should use the “comment” field to provide relevant supporting information concerning the request to help expedite approval	3. Creates new position or modifies existing position and notifies department of fulfillment	
<i>Funding Entry</i>	4. Receives confirmation position information. Enters funding for the position. The funding is also routed for separate approvals via UCPATH AWE.		
<i>Candidate Selection</i>	5. Upon acceptance of job offer, verifies if candidate has other current UC employment. If the candidate is a current employee see notes below*. Many academic student employees hold multiple jobs.		

Candidate Selection	<p>6. Department collects the candidate's personal data to initiate the Full Hire Template Transaction. Data collection can occur remotely or in-person.^[4]</p> <p>Department advises the new hire to expect an email notification to complete the online I-9 form. The email sender is employment.authorization@universityofcalifornia.edu, and the subject line appears as <i>Form I-9 for New Hire: Must Complete Prior to Work</i></p>		7. Communicates with department by phone, email, or ground mail to exchange information
Hire Entry	<p>8. Department initiates Full Hire Template Transaction and submits transaction in UCPATH. The Full Hire Template can be submitted prior to the employee's start date without the SSN so long as the department explains the reason for not including it in the template's comment box. The comment should explain that the SSN will be updated via the Personal Data Change Template on the employee's start date. (Turnaround time has averaged ~ 5 to 7 business days.) Please see the notes concerning the handling of SSNs at the end of this document*</p>		
Hire Entry	<p>9. Receives notification of Full Hire Template Transaction approval from the UCPATH Center and the UCPATH employee ID number is now available. (Department should validate the employee job data in the UCPATH system after the UCPATH notification is received.)</p>		

⁴ New hires may be asked to provide required information in advance of the hire date by phone, email, or mail. Travel to the campus to provide the information or complete forms in advance of the hire date should be voluntary and optional for the new hire and should not be mandated. Required fields for advance submission of Full Hire Template: First name, Last name, Date of birth, Gender, Home address and personal email address. The email address should be a personal email address so that the Tracker I-9 notification can be sent prior to the set up of the new hire's UCSB email account.

<i>Work Authorization</i>	<p>10. Work Authorization takes place via Tracker I-9. The Tracker I-9 system automatically sends an email notification to the new employee with a link to complete Section 1 of the I-9 form online. (The new employee's email address must be populated in the Full Hire Template for the email to be sent automatically. The email address should be a personal email address so that the Tracker I-9 notification can be sent prior to the set-up of the new hire's UCSB email account.) In cases of remote hires, please see the notes at the end of this document*</p>		<p>11. Completes Section 1 of the I-9 form online in Tracker (UCSBnetID not required)</p>
<i>Identity Management</i>	<p>12. Validates that the UCSBnetID has been created. UCSB Identity Management automatically creates Identity record for the new hire once the employee job data and employee ID number are available in the UCPATH system. The department notifies the new hire to activate the UCSBnetID.</p>		<p>13. Activates UCSBnetID to log-in to UCPATH Portal https://im.ucsb.edu/idm/manage</p>
<i>Timekeeping Setup</i>	<p>14. For employees who report hourly time (Readers and Remedial Tutors), the Department updates the Timekeeping Management Assignment Application (TMAA) associating the employee and Position with the manager's access control number. The Position Number and the UCPATH employee ID number are both required. This step should be completed before the Kronos import step 17.</p>		
<i>Timekeeping Setup</i>	<p>15. Kronos is populated with the new employee information once the job data is available in the Operational Data Store (ODS) AND the UCSBnetID is active. (There will typically be a 1 day lag at step 16 before the employee job data is available in the ODS.) Department follows procedures to set up/configure new employee in Kronos.</p>		

Employee Onboarding

16. New Employee's First Day: Department enters SSN and Self-Identification of Race, Ethnicity, and Veteran Status from new employee paperwork if this data was not previously submitted on the Hire Template. **Navigation:** PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Search for the Job Aid to *Initiate Personal Data Change Template* at https://sp.ucop.edu/sites/ucpathhelp/Pilot_Location/LOCplayer/data/to.c.html#

Department enters Oath date if this data was not previously submitted on the Full Hire Template.

(Department enters update via the Update Person Profiles page.

Navigation: PeopleSoft Menu > Workforce Development > Profile Management > Profiles > **Person Profiles**

Department ensures that the following actions/paperwork are completed by the new employee

- a. [Oath of Allegiance](#) (paper form)
- b. Tracker I-9 Section 1 (if not already completed) and schedules visit to BFS office to present employment eligibility documents for Section 2
- c. UCSBnetID account activated
- d. Patent Acknowledgement (UCPath Portal)
- e. W-4 / DE-4 forms (UCPath Portal)
- f. Direct Deposit (UCPath Portal)
- g. Emergency contacts (UCPath Portal)
- h. Other personal information updates such as employee disclosures (UCPath Portal)
- i. Additional department

17. New employee activates their UCSBnetID, logs into UCPath Portal to complete required forms online, and visits BFS office to present employment eligibility documents for Section 2 (Section 1 of the online I-9 Form must have already been completed online before visiting the BFS office to complete Section 2. Section 2 must be completed no later than the third day of work.)

<p>paperwork as required for special circumstances (e.g., Form UCRS 419 Statement Concerning Your Employment in a University Position Not Covered by Social Security)</p> <p>The new employee will be guided to complete the required forms housed in the UCPATH Portal when they log into the UCPATH Portal for the first time. The new employee will not receive an email communication from the UCPATH Center concerning the completion of the onboarding forms listed above.</p>		
<p><i>Paycheck Review</i></p> <p>18. Department confirms accuracy of employee's first paycheck within UCPATH, in accordance with the UCPATH Production Processing Schedule</p> <p>PeopleSoft Menu>Payroll for North America>Payroll Processing USA>Produce Payroll>Review Paycheck</p> <p>View the Review Paycheck Job Aid at https://sp.ucop.edu/sites/ucpathhelp/Pilot_Location/LOCjobaids/UCPC_PHCMPAYL200JA_ReviewPaycheck_Rev01.pdf</p>		

Special notes in cases of concurrent hires
<p>A. Concurrent hires do not need to complete a new I-9 form, other common new hire paperwork, nor create a new UCSBnetID. The hiring department does not need to re-enter personal data information into UCPATH.</p>
<p>B. The hiring department initiates the Concurrent Hire Template Transaction to hire the individual into the additional job.</p>

PeopleSoft Menu>Workforce Administration>Smart HR Template>Smart HR Transactions. Select template titled UC_CONC_HIRE

View the Concurrent Hire Job Aid at <https://ucsb.box.com/s/uyxikwvbk388bd8mvyl1srpumc9esj4w>

- C. The hiring department should contact the Compensation unit in Human Resources to consult in cases where the additional staff job will create a conflict with the FLSA/pay cycle for the existing job(s). An employee can only have a single FLSA status and pay cycle in the UCPATH system. Human Resources may need to consult with the Academic Personnel Office in cases where the existing job(s) are academic appointments.
- D. It is important for the hiring department to validate the default configuration in Kronos for the employee, and update if needed, the pay rule and accrual profile in order to avoid any FLSA or pay cycle conflicts. The pay rule must align with the assigned UCPATH pay group (i.e., monthly-salaried, biweekly-hourly, monthly-hourly).

Special notes concerning the collection of Social Security Numbers (SSN)

When the SSN is requested of the new employee, it should be requested in a manner in which the information is updated in the UCPATH system in a timely and secure manner. If SSNs are recorded on a paper form for data entry purposes, the data entry should be completed on the employee's first day, and destroyed once the SSN is uploaded into UCPATH and the transaction is approved. Copies of the SSN card should not be retained in the employee's file.

Special notes for completing the I-9 form for remote hires

For remote hires, the following steps should be taken to complete the online I-9 Form. Contact Shannon Jackson in BFS (email: shannon.jackson@bfs.ucsb.edu) to coordinate the arrangements for a remote reviewer. Provide the following information to BFS:

1. the new employee's name, ID number, and email address
2. a contact name, email address, and title of the person at a college or university local to the new employee who will be reviewing the employment eligibility documents. If one is not available a Notary is also an option. If a notary is used, the Notary's commission # will need to be provided

The remote reviewer will need to upload a picture of the documents into Tracker. Once the remote I-9 is completed, BFS will be notified and will check for any errors and then accept or reject the completed I-9 Form.