

| Initiating a ServiceLink New Hire Request for AP |

Navigation: https://ucrsupport.service-now.com/ucr_portal/

ServiceLink Form (Staff – New Hire)

Human Resources & Academic Personnel
Welcome to the HR and AP ServiceLink request page. These requests will route to your Shared Service provider for fulfillment in UCPath

Onboarding - New Hire
Hire a new UC employee/contingent worker

Onboarding - Rehire
Rehire an employee/contingent worker previously employed at a UC Location

Onboarding - Transfer
Transfer in a current employee from another UC location or within UCR

Onboarding - Concurrent
Add a job to an existing employee

The same ServiceLink Form – Onboarding – New Hire is used to hire Staff, Academic Appointees, and Contingent Workers. Employees who have not been on pay status at UC and who do not have a UCPath Employee Job Record, are considered New Hires.

Onboarding – New Hire (AP)

HIR - Hire No Prior UC Affiliation
Usage: Use to hire a new employee. Employee has never been on pay status with UC.
Example: New hire has never been employed at a UC location in the past and does not have an employee record in UCPath.

Employee Information (AP)

Employee Information

Incumbent's First Name

Incumbent's Last Name. All other fields are optional (Middle Name, Suffix, and Phone Number).

First Name: Wilson

Middle Name: []

Last Name: Tate

Suffix: --None--

Phone Number: []

Personal Email: drwtate@gmail.com

A personal email is needed for all Onboarding transactions. This email address will be used to send the incumbent the Onboarding packet via DocuSign. This same email will also be used by the UCPath Center to communicate with the employee regarding benefits and benefit eligibility.

Employee Relationship Information (AP)

Organizational Relationship Type is "Employee" Employee Type is "Academic"

Employee Relationship Information

*: Organizational Relationship Type: Employee

*: Employee Type: Academic

*: Job Effective Date: 07/30/18

On a Visa Remote Hire

Onboarding Reason: HIR - Hire No Prior UC Affiliation

Job Effective Date is the first day an employee is on pay status at UCR

Onboarding Reason in ServiceLink is equivalent to Reason Code in UCPath. For a new staff hire, the onboarding reason is HIR – Hire no prior UC affiliation.

Academic Appointees on Visa/Remote Hires

On a Visa Remote Hire

If the incumbent is on a Visa, check the "On a Visa" box in the Employee Relationship Information section. Checking this box will prompt the system to send an email notification to International Students and Scholars Office. This email is for informational purposes only. When the SSC Fulfiller verifies documents and files paperwork, they will send an email notification to payroll Glacier.

If the incumbent is a Remote Hire, or will not be able to attend an in-person Onboarding session, check the "Remote Hire" box. Checking this box will NOT prompt any ServiceLink tasks or automatic email notification. It is the responsibility of the SSC Fulfiller to make alternate arrangements, such as securing a notary, if the incumbent is unable to attend their Onboarding session.

Employee Work Information (AP)

Position Number can be entered directly or searched by clicking on the magnifying glass icon

Enter FTE for the Job. This can be < or = the position FTE. The position FTE will default, but can be changed.

If the Position is stepped, select the appropriate Step

Employee Work Information

*: Position Number: 40010806

*: FTE: 0

Step: 4

Job Code: 003268

Job Description: ASSOC ADJ PROF-AY

Organization: ORG12

Organization Description: Coll of Hum, Arts & Social Sci

Division Code: DIV107

Division Description: Social Sciences

Department Code: D01025

Department Description: Anthropology

Based on the Position Number selected, Job Code, Job Description, Organization, Organization Description, Division Code, Division Descriptions, Department Code, and Department Description populate based on Position Data.

Compensation Information (AP)

Compensation Information

* Compensation Frequency
UC 9/12 - AY

Input maximum rows for Components of Pay
2

Choose how many rows for Components of Pay you would like to display (1-6). Row 1 is for stepped academic appointees and will automatically default once a step is selected. Row 2 will default for HSCP members with both X and X' components. If the academic appointee has additional components of pay that do not default (e.g. off-scale amounts, Y payments) or if the appointee is not stepped (e.g. BYA appointments, above-scale faculty), enter compensation on Rows 3-6. Keep in mind that data cannot be manually entered on the first two compensation rows.

Choose a pay frequency from the dropdown. Select from the following:

- Monthly
- Hourly
- Contract
- UC 9/12 FY
- UC 1/9th Rate
- UC 1/10th Rate
- UC 1/11th Rate
- UC 1/12th Rate
- UC 12/12 FY

Components of Pay (AP)

Components of Pay

▼ Note:
Compensation row(s) for stepped academic appointees will automatically default once a step is selected. For most academic appointees, one row will default. For HSCP members, both the X and X' components will default. If the academic appointee has additional components of pay that do not default (e.g., off-scale amounts, Y Payments) or if the appointee is not stepped (e.g., BYA appointments, above-scale faculty), please enter their compensation on the third or fourth compensation row after selecting the correct Comp Rate Code. Data cannot be manually entered on the first two compensation rows.

Comp Rate Code Comp Rate Job Compensation Frequency

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Add Recurring Additional Compensation? To add Recurring Additional Compensation, check this box.

Add Job Earnings Distribution for Summer Salary? To add Job Earnings Distribution (JED) for Summer Salary, check this box (can also be paid under additional pay).

Compensation Row 1 is for stepped academic appointees. It will automatically default once a step is selected. Data cannot be manually entered in this compensation row.

Compensation Row 2 is for HSCP members. Both the X and X' components will default. Data cannot be manually entered in this compensation row.

If the academic appointee has additional components of pay that do not default (e.g., off-scale amounts, Y Payments) or if the appointee is not stepped (e.g., BYA appointments, above-scale faculty), enter their compensation on Rows 3-6 after selecting the correct Comp Rate Code and Comp Rate.

Recurring Additional Compensation (AP)

Add Recurring Additional Compensation? When "Add Recurring Additional Compensation?" box is checked, the "Recurring Additional Compensation" section appears.

Recurring Additional Compensation

Input maximum rows for Recurring Additional Compensation
1 Enter the maximum number of rows (1-4) needed to enter the academic appointee's Recurring Additional Compensation.

* Earnings Code * Pay Amount * Effective Date * End Date

HSG 8000.00 07/01/18 09/01/18

Enter appropriate Earnings Code for academic appointee's Recurring Additional Compensation. Up to 4 Earnings Codes can be entered on 4 different rows.

Enter the Pay Amount (in dollars) of the Recurring Additional Compensation for the entered Earnings Code.

Enter the first day of the academic appointee's Recurring Additional Compensation.

Enter the last day of the academic appointee's Recurring Additional Compensation.

JED for Summer Salary (AP)

When "Add Job Earnings Distribution for Summer Salary?" box is checked, the "Distribution" section appears.

Add Job Earnings Distribution for Summer Salary?

Distribution

▼ More Information
Enter the appropriate Summer Salary Earnings code and associated percentage. In most cases it will be ACR or AFR at 100%.

Input maximum rows for summer salary distribution
1

Earnings Code: ACR % of Distribution: 100 Comp Rate: 6000.00

Total Distribution %: 100

Enter appropriate Earnings Code for academic appointee's JED for Summer Salary. Up to 2 Earnings Codes can be entered on 2 different rows.

Enter the maximum number of rows (1-2) needed to enter the academic appointee's JED for Summer Salary.

Enter the percentage of distribution.

Total Distribution Percentage will default from % of Distribution field for Row 1 & 2 (if used).

Enter the Comp Rate (in dollars) of the JED for Summer Salary for the entered Earnings Code.

Duration Information (AP)

Duration Information

Academic Duration of Employment

Expected Job End Date

Post Docs Anniversary Date

End Job Automatically?

Select appropriate Academic Duration of Employment. Choose from:

- Continuing (Unit 18)
- Indefinite
- Potential Security
- Tenure Track (Ladder Rank)
- Security (LSOE)
- Tenured
- End Date (Academic Term Appts)

If the academic appointee is in one of the following Appointee Classes or Academic Duration of Employment, an Expected Job End Date is required:

- Academic – Post Docs
- Academic – Recall
- Academic – Academic Student
- Potential Security
- Tenure Track
- Academic Term Appts.

If the incumbent is in the Academic Post Doc EMPL Class, the Post Doc Anniversary Date is required. It reflects their first year anniversary as a Post Doc (e.g., if hired 1/1/18, the anniversary date would be 1/1/19).

The "End Job Automatically" checkbox is initially unchecked for all Academic New Hires. If checked, the academic appointee's job will automatically end in UCPath once the End Date has been reached.

Onboarding Tasks (AP)

Onboarding Tasks (select all that apply)

▼ Note
If "Create a single task for all Task listed below" is left checked, then only a single task for this transaction will be created.
If "Create a single task for all Task listed below" is unchecked, At least one task has to be selected to submit request and for each task selected an individual task will be created.

Accountability Structure

Create a single task for all Task Listed Below

- Order Required Equipment
- Grant System Access
- Update Enterprise Directory
- Monitor Completion of Background Check
- Issue Equipment and Assets
- Confirm FAU is Correct
- Building Access (keys, alarms, key cards)
- Background Check (HireRight)
- Assign Space
- Phone/Phone Line Request
- Remote Worker (Travel Arrangements)

You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept__Onboarding Accountability Structure Fulfiller). Clicking on the "Create a single task for all Task Listed Below" will create one task that will need to be closed once completed. Individual tasks can also be selected. All selected tasks will be generated at once. Tasks assigned to the Shared Services Center will also be generated simultaneously.

Shared Services

- Complete UCPath Template Based Hire
- Schedule Day 1 In-Person Session
- Complete Onboarding Packet
- Conduct Day 1 In-person Session
- Verify Documents and File Paperwork
- Update Required UCPath Checklist Items (Oath and Patent/Patent Waiver)

All SSC tasks are required and cannot be modified. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.

Comments & Attachment (AP)

Comments

Attachment

Note

Appointment/Offer Letter must be attached

Add Attachment

Comments can be added to ensure that all needed data to complete a UCPATH Onboarding transaction is included.

ServiceLink Onboarding requests require that the Initiator attach an Appointment/Offer Letter.

ServiceLink Initiator

UCRIVERSIDE | ServiceLink

Thank you, your request has been submitted

Request Number: REQ0019962

Number	Description	Stage
RITM0019995	Onboarding - New Hire	▶ ● ○

Once a ServiceLink form is successfully submitted, the Initiator will be directed to this confirmation page.

Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

Clicking on the RITM Number and Description will take you to a view-only of the ServiceLink Fulfiller of the submitted Onboarding Transaction.

This "Stage" icon allows you to track a transactions' progress through fulfillment. Three green checks means that all tasks are closed and the submitted transaction is complete.

ServiceLink Initiator

Requested Item: RITM0019995

Manage Attachments (1) 175x175-75 (1) png [rename] [view]

Number: RITM0019995

Item: Onboarding - New Hire

Opened: 07/05/18 13:12:47

Requested for: Shannon Minter

State: Open

Assignment group: []

Assigned to: []

Request: REQ0019962

Stage: Fulfillment in Progress

Initiator: Kathleen Cool

Request Date: 07/05/18

Employee Information

Clicking on the RITM (from previous screen) will take you to your request. This page has information that will tell you the stage of the ticket as well as who is working on your request.

The Stage field gives information pertaining to the status of your request. Once all tasks associated with this request are closed, the stage will update automatically to "Closed Complete." This means that your request has been successfully completed and transacted in UCPATH.

ServiceLink Fulfiller

Remember that we requested that only one task be assigned to the Accountability Structure Fulfiller. Once all tasks relating to the Onboarding have been completed, the designated Onboarding Accountability Structure fulfiller should change the state of the task from "Open" to "Closed." This can be done by selecting the task and clicking on the Actions on selected rows button highlighted below in yellow.

Scroll down to the bottom of the RITM to the Catalog Task. In this area, you will see all the related tasks for the request.

The Shared Services Center will similarly be assigned one composite tasks (except for R'SSC who will be assigned all tasks, per their request.). The SSC fulfiller will change the state of the task from "Open" to "Closed" when completed. When all tasks reflect a "Closed" state, the RITM stage will automatically change to "closed complete."

Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0035436	All Tasks Completed for this Transaction	UCPath_D01010_Onboarding_Accountability...		Open	Open
SCTASK0035437	Shared Services Onboarding New Hire Tasks	UCPath_Harvest_Onboarding_Shared_Service...		Open	Open

Data Required for UCPATH Onboarding Transactions

Key Data Point	Definition
Employee ID	Employee ID (or Empl ID) is generated by UCPATH after a New Hire has been successfully processed.
Effective Date	The JOB Effective Date (different from the Position Effective Date) is the first day a given employee should be paid or the first day a contingent worker is performing services for UCR.
Action	Actions in UCPATH include Hire, Rehire, Transfer, Add Contingent Worker, and Contingent Worker Extension.
Reason Code	Reason Codes are the reason why the Onboarding is taking place (i.e. Action – Rehire, Reason Code – Rehire, <120 days break).
Employee Record Number	An employee can have one or more Empl. Records.

Additional Data Required for UCPATH Transaction (AP) – New Hire

Personal Data

Data Point	Data Location on UCR Forms
First & Last Names	ServiceLink Form – Employee Information & UCR Personal Data Form
Date of Birth	UCR Personal Data Form
Highest Education Level	UCR Personal Data Form
Gender	UCR Personal Data Form
National ID Type & National ID	UCR Personal Data Form, in-person, via phone
Address Line 1, City, State, Postal Code	UCR Personal Data Form
Email Address	ServiceLink Form – Employee Information & UCR Personal Data Form
Phone	UCR Personal Data Form



Job Data

Data Point	Data Location on UCR Forms
Position Number	ServiceLink Form – Employee Work Information
Establishment ID	Defaults from Position data, but is editable
Standard Hours	Defaults from Position data, but is editable
FTE	ServiceLink Form – Employee Work Information
Step (for step-based positions only)	ServiceLink Form – Employee Work Information
Expected Job End Date (for Post Docs, Academic Recall, Academic Student)	ServiceLink Form – Duration Information
Academic Duration of Appointment (if Job Record End Date exists)	ServiceLink Form – Duration Information

Job Data – Job Compensation & Pay Components

Data Point	Data Location on UCR Forms
Compensation Frequency	ServiceLink Form – Compensation Information
Comp Rate Code	ServiceLink Form – Components of Pay
Compensation Rate	ServiceLink Form – Components of Pay
Pay Components Frequency	ServiceLink Form – Components of Pay

UCR Personal Data Form

UCR Personal Data Form

Please complete this form to the best of your ability. Data collected through this form will be used to establish you as a new employee at UCR.

The most current version of the UCR Personal Data Form is available as a template in DocuSign. Please make sure that you are capturing all required information if you are not using this version of the form.

Required data points are highlighted in red and listed in the slides above.

First Name Middle Name Last Name Suffix
 Date of Birth Highest Education Level
 Gender (Male selected) Personal Phone Number
 Address Line 1

Address Line 2 Personal Email Address
 City
 State
 Zip Code

Note on Social Security Number
 You have several options for providing your social security number. You may:
 1. Provide it electronically using this form
 2. Come to campus before your first day to provide your Social Security Number
 3. Call your Shared Service Center prior to your first day to provide your Social Security Number verbally

I consent to electronically provide and transmit my Social Security Number or ITIN:

Social Security Number or ITIN Check if you have an ITIN instead of a Social Security Number

The most current version of the UCR Personal Data Form is available as a template in DocuSign. Please make sure that you are capturing all required information if you are not using this version of the form.

Required data points are highlighted in red and listed in the slides above.