UC RIVERSIDE
UNIVERSITY OF CALIFORNIA

FOM|UCPath Training

Advanced FOM ServiceLink Onboarding – v2

Trainer Introduction

Kathleen Cool

Title: Principal Trainer

Department: HR | UCPath

Years @ UC: 1 year

Previous Experience: 10+ years of experience in instructional design and training in higher education. Taught Information System Management at the undergraduate and graduate levels.

Your Questions and Input

https://tinyurl.com/ucrtraining

Housekeeping

Cell Phones

Breaks

Restrooms

Learning Topics

- ServiceLink Roles
- New Hire – Staff
- New Hire – AP
- New Hire – Contingent Worker (CWR)
- Rehire – Staff
- Rehire – AP
- Rehire – CWR
- Intra Business Unit Transfer – Staff
- Intra Business Unit Transfer – AP
- Inter Business Unit Transfer – Staff
- Inter Business Unit Transfer – AP

Learning Topics (continued)

ServiceLink Roles

Onboarding Process

Essential Roles

1: Onboarding Initiator → ServiceLink

2: Onboarding Accountability Structure Fulfiller → ServiceLink

3: Onboarding Shared Services Center Fulfiller* → ServiceLink

4: Onboarding Shared Services Center AWE Approver* → UCPath

5: UCPath Center WFA Production → UCPath

Onboarding Process

Essential Roles

1: Onboarding Initiator → ServiceLink

2: Onboarding Accountability Structure Fulfiller → ServiceLink

3: Onboarding Shared Services Center Fulfiller* → UCPath

4: Onboarding Shared Services Center AWE Approver* → UCPath

5: UCPath Center WFA Production → UCPath

Onboarding Initiator

The Onboarding Initiator role initiates an Onboarding request using ServiceLink.
This is a required role.

Can be assigned to:

- HR Business Partner (HR)
- HR Generalist (HR)
- AP Business Partner (AP)

In some orgs, the AP Business Partner sends out new hire packet to Academic Appointee.

The process is flexible and the system accommodates for such variations.

The Onboarding Initiator is the individual responsible for correctness of transaction.

- Enters the transaction in ServiceLink

Onboarding Process
Essential Roles

1: Onboarding Initiator → ServiceLink

2: Onboarding Accountability Structure Fulfiller → ServiceLink

3: Onboarding Shared Services Center Fulfiller* → UCPath

4: Onboarding Shared Services Center AWE Approver* → UCPath

5: UCPath Center WFA Production → UCPath

Onboarding Accountability Structure Fulfiller

The Onboarding Accountability Structure Fulfiller is assigned tasks in ServiceLink as part of the Onboarding request.

This is a required role.

- Responsible for completing tasks assigned to the ServiceLink task queue
- Orders equipment, creates/reactivates NetID, etc.
- Department or Org. gets assigned tasks by a SSC Fulfiller

Onboarding Process
Essential Roles

1: Onboarding Initiator → ServiceLink

2: Onboarding Accountability Structure Fulfiller → ServiceLink

3: Onboarding Shared Services Center Fulfiller* → UCPath

4: Onboarding Shared Services Center AWE Approver* → UCPath

5: UCPath Center WFA Production → UCPath

Onboarding Shared Services Center Fulfiller*

The Onboarding Shared Services Center Fulfiller:

- Receives Onboarding transaction from Initiator through ServiceLink
- Initiates transactions in UCPath
- Consults with Initiator as necessary to complete transactions
- Is assigned tasks in ServiceLink task queue

*In UCPath documentation this role may be called Location Template Initiator.

Onboarding Process

Essential Roles

1: Onboarding Initiator → ServiceLink

2: Onboarding Accountability Structure Fulfiller → ServiceLink

3: Onboarding Shared Services Center Fulfiller* → UCPath

4: Onboarding Shared Services Center AWE Approver* → UCPath

5: UCPath Center WFA Production → UCPath

Onboarding Shared Services Center AWE Approver*

Once the Onboarding Shared Services Center Fulfiller submits the Onboarding transaction, the transaction is forwarded to the designated AWE approver in the Shared Services Center through UCPath AWE.

The Onboarding Shared Services Center AWE Approver cannot be the same person as the Onboarding Shared Services Center Fulfiller.

The Onboarding Shared Services Center AWE Approver serves as Quality Assurance by reviewing and approving the transaction.

*In UCPath documentation this role may be called Location Template Approver.

Onboarding FOM Process
Essential Roles

1: Onboarding Initiator → ServiceLink

2: Onboarding Accountability Structure Fulfiller → ServiceLink

3: Onboarding Shared Services Center Fulfiller* → UCPath

4: Onboarding Shared Services Center AWE Approver* → UCPath

5: UCPath Center WFA Production → UCPath

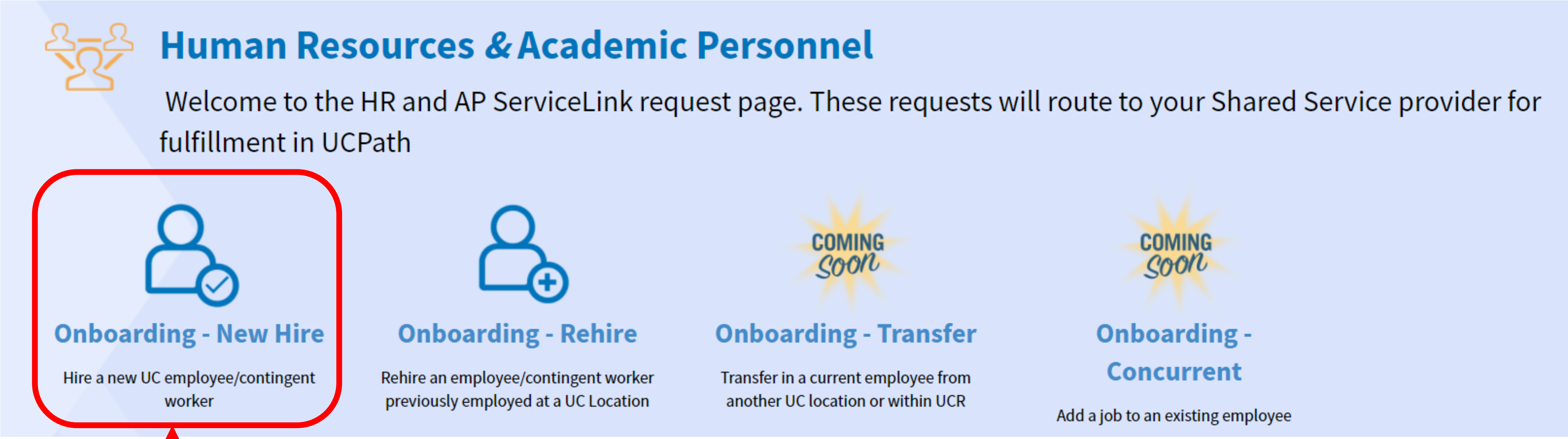
UCPath Center WFA Production

After the Onboarding Shared Services Center AWE Approver approves the transaction at the Location level (UCR), the Onboarding transaction is routed to UCPath Center WFA Production.

UCPath Center WFA Production reviews and either approves, pushes back, cancels, and/or denies the transaction. When the Onboarding transaction is approved, the new hire is assigned an Employee ID by UCPath Center WFA Production

New Hire - Staff

ServiceLink Form (Staff – New Hire)



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 (Staff)

HIR - Hire No Prior UC Affiliation

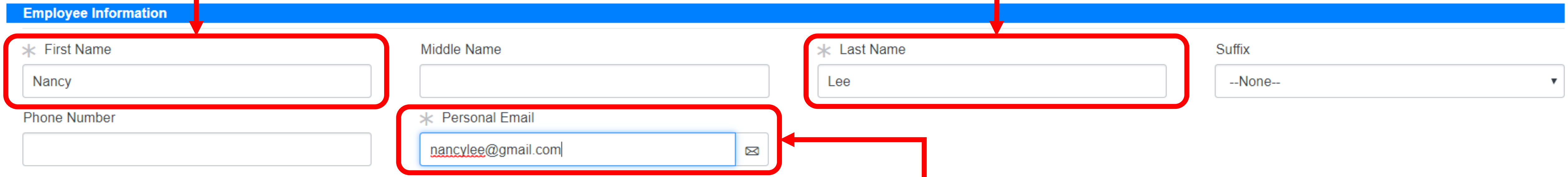
Usage: Use to hire a new employee. Employee has never been on pay status with UC.

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 (Staff)

Incumbent’s First Name

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



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 (Staff)

Organizational Relationship Type is “Employee”

Employee Type is “Staff”

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

Employee Relationship Information

* Organizational Relationship Type: Employee
* Employee Type: Staff
* Job Effective Date: 07/30/18
* Expected Job End Date: 12/31/18
* Probation Code:
* Probation End Date: 01/30/19
* On a Visa
* Remote Hire
* Onboarding Reason: HIR - Hire No Prior UC Affiliation

Enter the incumbent’s expected job end date, if they have one. The following employee classes are required to have an expected job end date:

- Student – Casual/Restricted
- Per Diem
- Floater
- Contract
- Limited
- Staff Rehired Retiree

Their expected job end date will need to be carefully monitored as they will be automatically offboarded on that date.

Select the appropriate Probation Code for the employee. The Probation End Date will default to 6 months after the Job Effective Date. The field can be modified if needed. The system will automatically convert the employee to a non probationary status on this date. A Job Data change will need to be submitted if the Probation End Date changes.

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.

Employees on Visa/Remote Hires

☐ On a Visa

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.

☐ Remote Hire

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 (Staff)

Employee Work Information

* Position Number: 40014161

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

Job Code	Job Description	Organization	Organization Description
004722	BLANK AST 3	ORG12	Coll of Hum, Arts & Social Sci

Division Code	Division Description	Department Code	Department Description
DIV104	CHA&SS - General	D01010	CHA&SS Student Affairs

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.

Onboarding Tasks (Staff)

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

- [x] 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)

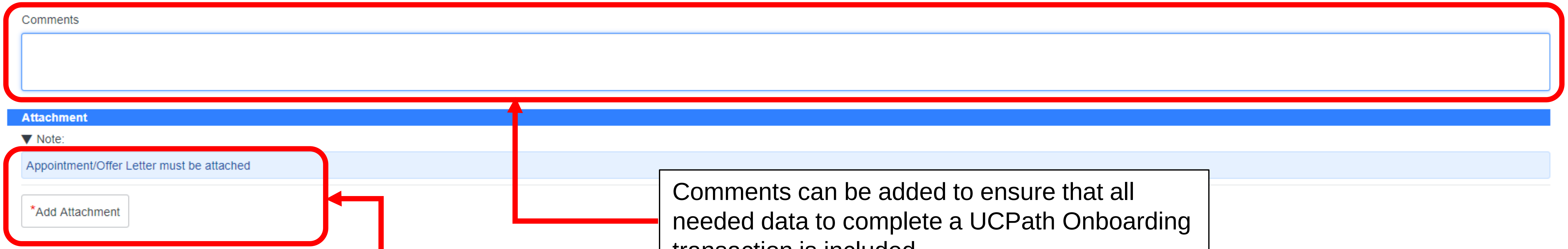
You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the "Create a single task for all Task Listed Below" will create one task that will need to be closed once completed. Individual 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

- [x] Complete UCPath Template Based Hire
- [x] Schedule Day 1 In-Person Session
- [x] Complete Onboarding Packet
- [x] Conduct Day 1 In-person Session
- [x] Verify Documents and File Paperwork
- [x] 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 (Staff)



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 Offer Letter. For Staff, the Offer Letter contains additional information required for the SSC Fulfiller to transact in UCPath.

ServiceLink Initiator

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

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Kathleen Cool | Logout

Thank you, your request has been submitted

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

Request Number: REQ0019962

Number	Description	Stage
RITM0019995	Onboarding – New Hire	

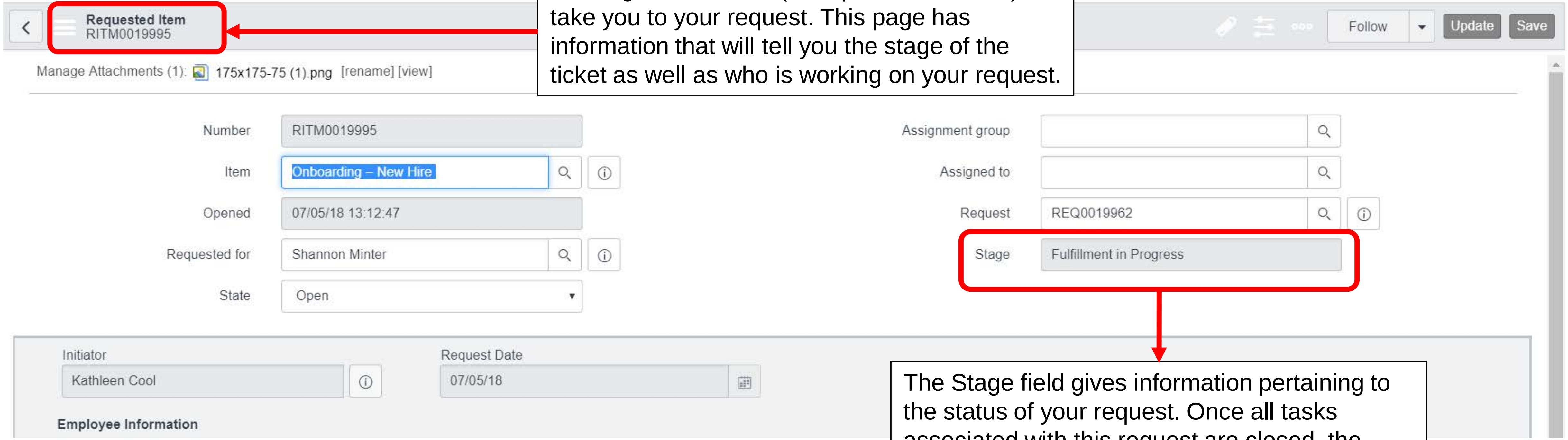
Response time(ms): 8548, Network: 7973, server: 336, browser: 239

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

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.

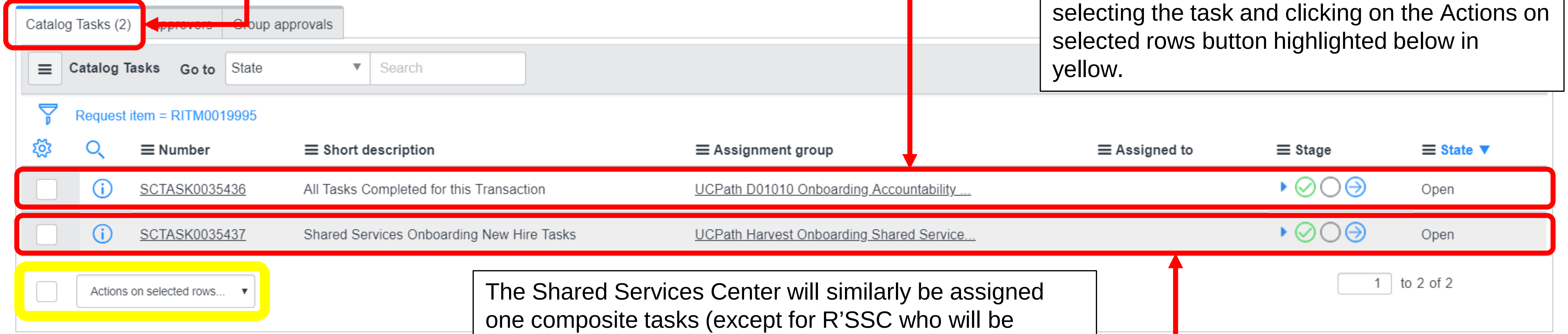


The Stage field gives information pertaining to the status of your request. Once all tasks associated with this request are closed, the stage will update automatically to “Closed Complete.” This means that your request has been successfully completed and transacted in UCPath.

ServiceLink Fulfiller

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.

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.



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.”

New Automated Processes

End Probation

In UCPath, once the employee's end date is reached, an automatic program clears their Probation End Date and sets their Probation Code to Probation completed.

To modify an end probation date after hire, a Job Date Change request will need to be submitted.

Limited to Career

In UCPath, if an employee crosses the 1000 hour threshold, the system will automatically convert the employee to a career employee.

As a result, Departments must carefully monitor the Limited to Career report to identify who are reaching 1000 hours and Adjust their schedule, Terminate, or Open a recruitment to bring them on full-time.

End Job Automatically

In UCPath, employees with an Expected Job End Date where the 'End Job Automatically' checkbox is checked will be automatically terminated on their Expected Job End Date.

To modify end job automatically, a Job Date Change request will need to be submitted.

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 (Staff) – 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

Onboarding – New Hire (Staff)

Job Data

Data Point	Data Location on UCR Forms
Position Number	ServiceLink Form – Employee Work Information
Employee Classification	Offer Letter (Attached to ServiceLink form)
Establishment ID	Defaults from Position data, but is editable
Standard Hours	Defaults from Position data, but is editable
FTE	Offer Letter (Attached to ServiceLink form)
Step (for step-based positions only)	Offer Letter (Attached to ServiceLink form)
Probation Code	ServiceLink Form – Employee Relationship Information
Probation End Date	ServiceLink Form – Employee Relationship Information
PY Career Duration (partial-year Empl Classes only)	Offer Letter (Attached to ServiceLink form)
Expected Job End Date (for Contract, Casual/Restricted, Floater, Per Diem, Limited and Staff Rehired Retiree)	ServiceLink Form – Employee Relationship Information

Onboarding – New Hire (Staff)

Job Data – Job Compensation & Pay Components

Data Point	Data Location on UCR Forms
Compensation Frequency	Offer Letter (Attached to ServiceLink form)
Comp Rate Code	Offer Letter (Attached to ServiceLink form)
Compensation Rate	Offer Letter (Attached to ServiceLink form)
Pay Components Frequency	Offer Letter (Attached to ServiceLink form)

UCR Personal Data Form

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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.

First Name | Middle Name | Last Name | Suffix

Date of Birth

Highest Education Level: Not Indicated/Prefer Not To Answer

Gender: Male

Address Line 1

Personal Phone 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.

UCR Personal Data Form (continued)

Address Line 2

City

State

Zip Code

Personal Email Address

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

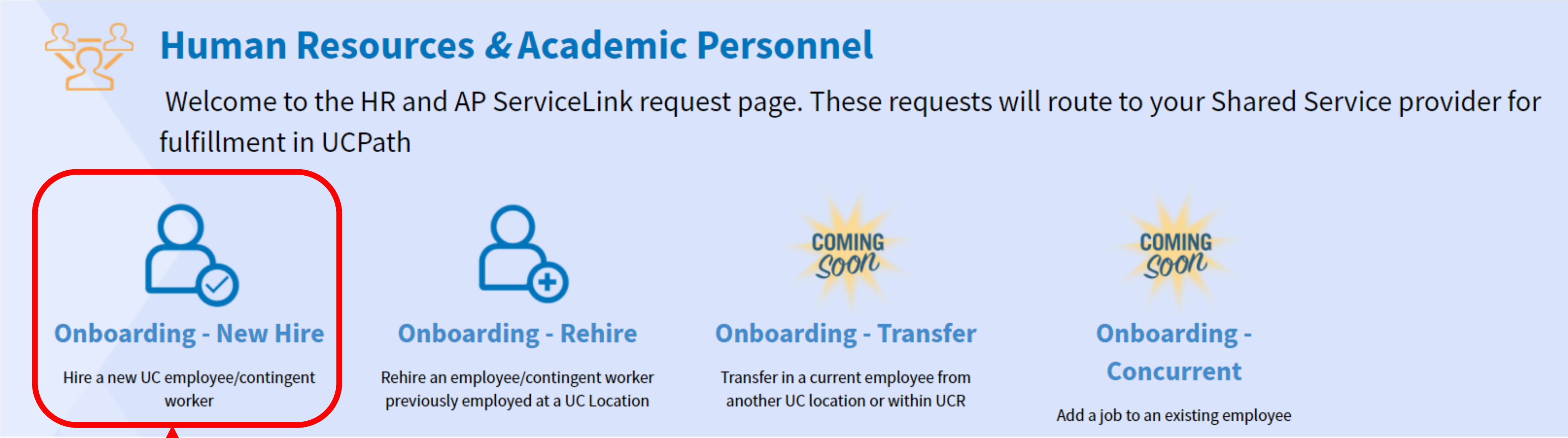
Check if you have an ITIN instead of a Social Security Number ☐

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.

New Hire - AP

ServiceLink Form (Staff – New Hire)



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

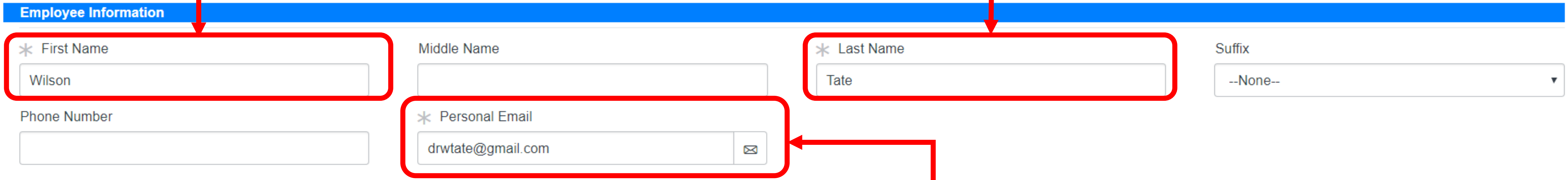
Usage: Use to hire a new employee. Employee has never been on pay status with UC.

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)

Incumbent’s First Name

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



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.

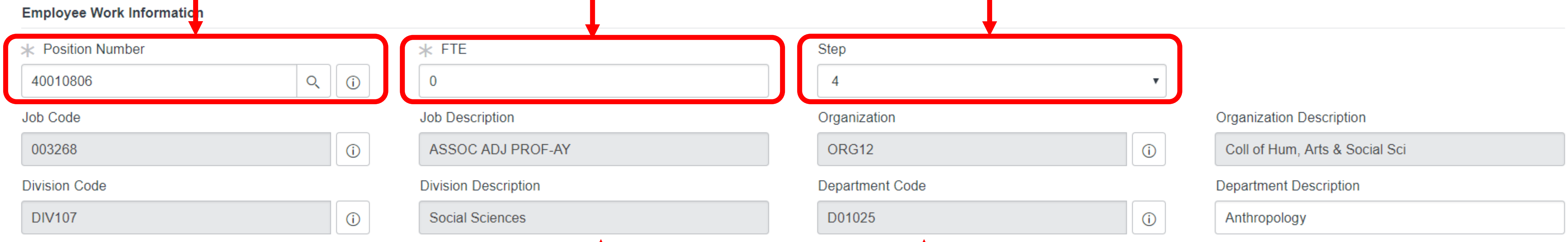
If the incumbent is a Remote Hire, or will not be able to attend an in-person Onboarding session, check the “Remote Hire” box. Checking this box will NOT prompt any ServiceLink tasks or automatic email notification.
It is the responsibility of the SSC Fulfiller to make alternate arrangements, such as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

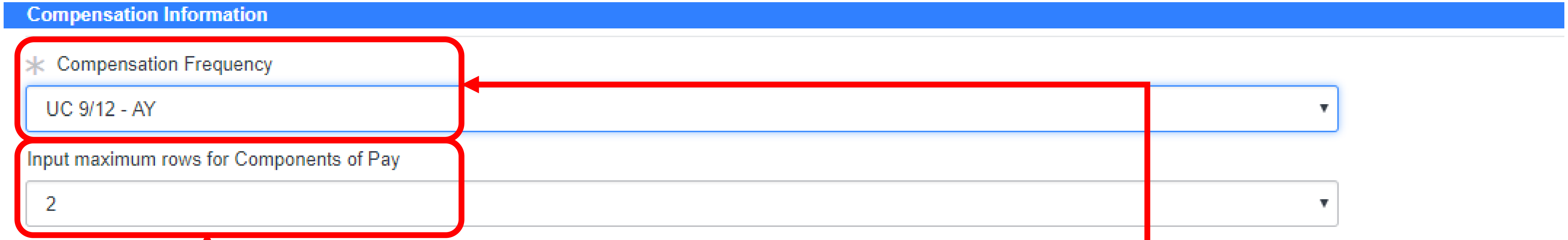
Enter FTE for the Job. This can be < or = the position FTE.
The position FTE will default, but can be changed.

If the Position is stepped, select the appropriate Step



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)



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

Comp Rate Code	Comp Rate	Job Compensation Frequency

Comp Rate Code	Comp Rate	Job Compensation Frequency

☐ Add Recurring Additional Compensation?

☐ Add Job Earnings Distribution for Summer Salary?

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.

To add Recurring Additional Compensation, check this box.

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

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)

Add Job Earnings Distribution for Summer Salary?

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

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

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

Earnings Code	% of Distribution	Comp Rate
ACR	100	8000.00

Enter the percentage of distribution.

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

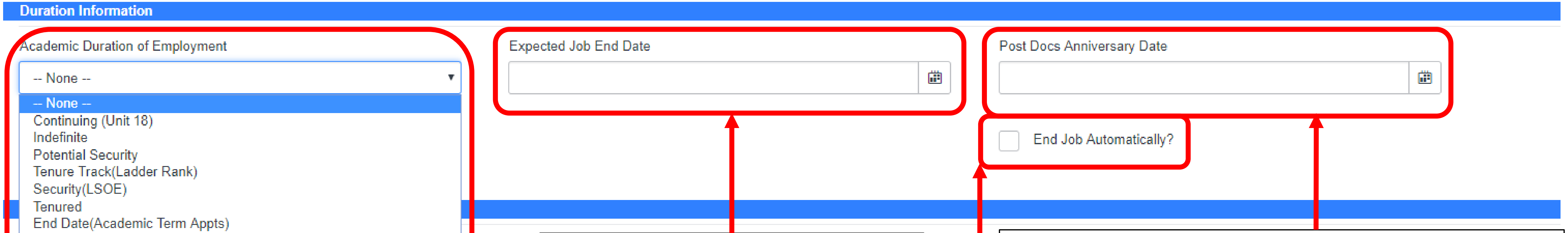
Total Distribution %

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.

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

Duration Information (AP)



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

- [x] 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)

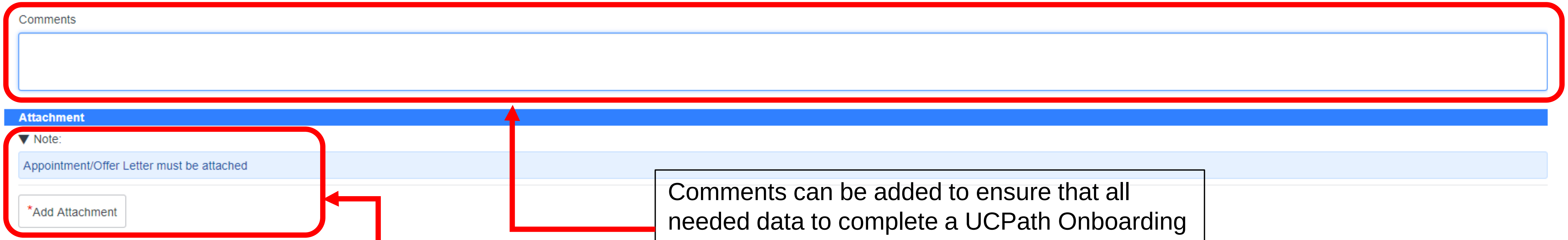
You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the "Create a single task for all Task Listed Below" will create one task that will need to be closed once completed. Individual 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

- [x] Complete UCPath Template Based Hire
- [x] Schedule Day 1 In-Person Session
- [x] Complete Onboarding Packet
- [x] Conduct Day 1 In-person Session
- [x] Verify Documents and File Paperwork
- [x] 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)

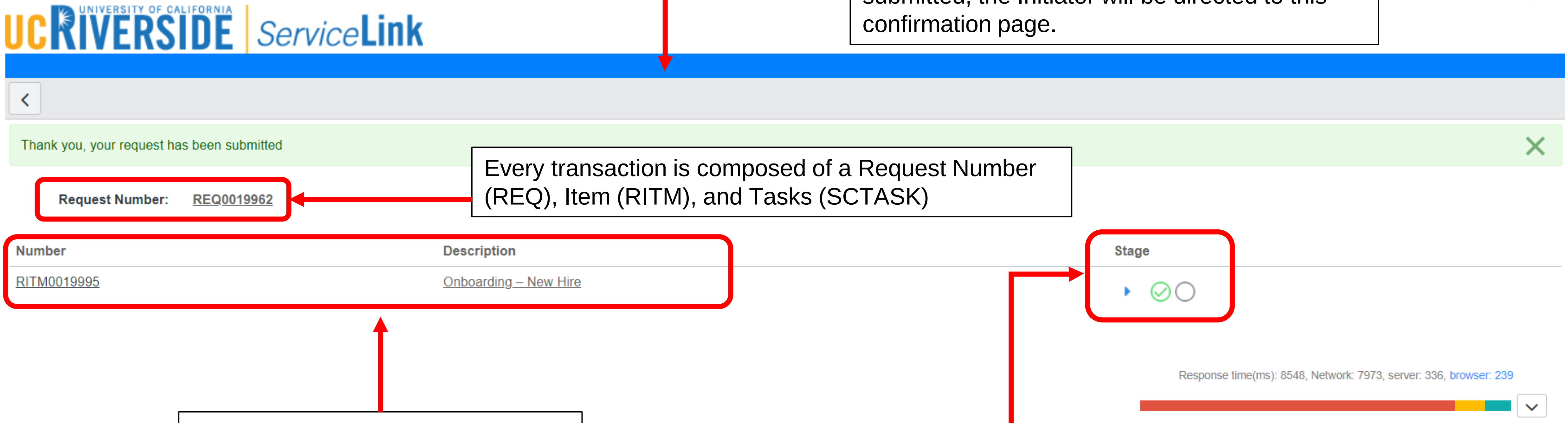


Comments can be added to ensure that all needed data to complete a UCPath Onboarding transaction is included.

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

ServiceLink Initiator

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



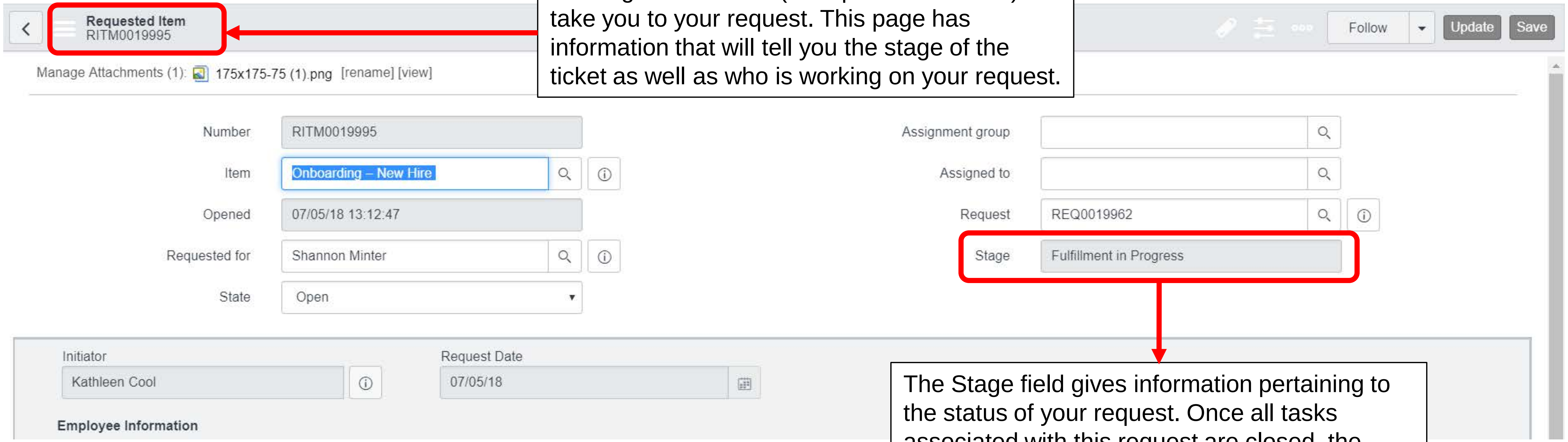
Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

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

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.

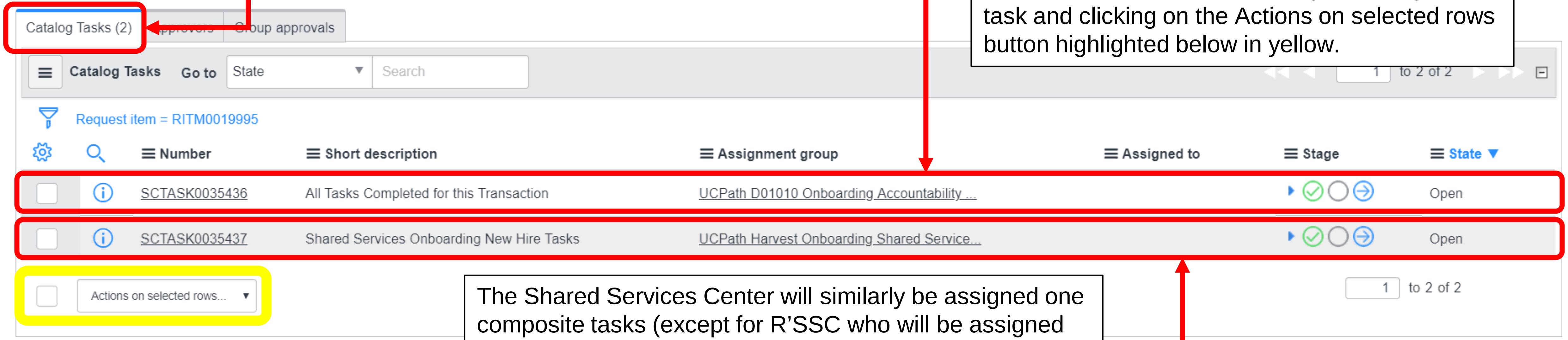


The Stage field gives information pertaining to the status of your request. Once all tasks associated with this request are closed, the stage will update automatically to "Closed Complete." This means that your request has been successfully completed and transacted in UCPath.

ServiceLink Fulfiller

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.

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.



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.”

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

Onboarding – New Hire (AP)

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

Onboarding – New Hire (AP)

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

UNIVERSITY OF CALIFORNIA
UCRIVERSIDE

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.

First Name | Middle Name | Last Name | Suffix

Date of Birth

Highest Education Level
Not Indicated/Prefer Not To Answer

Gender
Male

Address Line 1

Personal Phone 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.

UCR Personal Data Form (continued)

Address Line 2

City

State

Zip Code

Personal Email Address

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

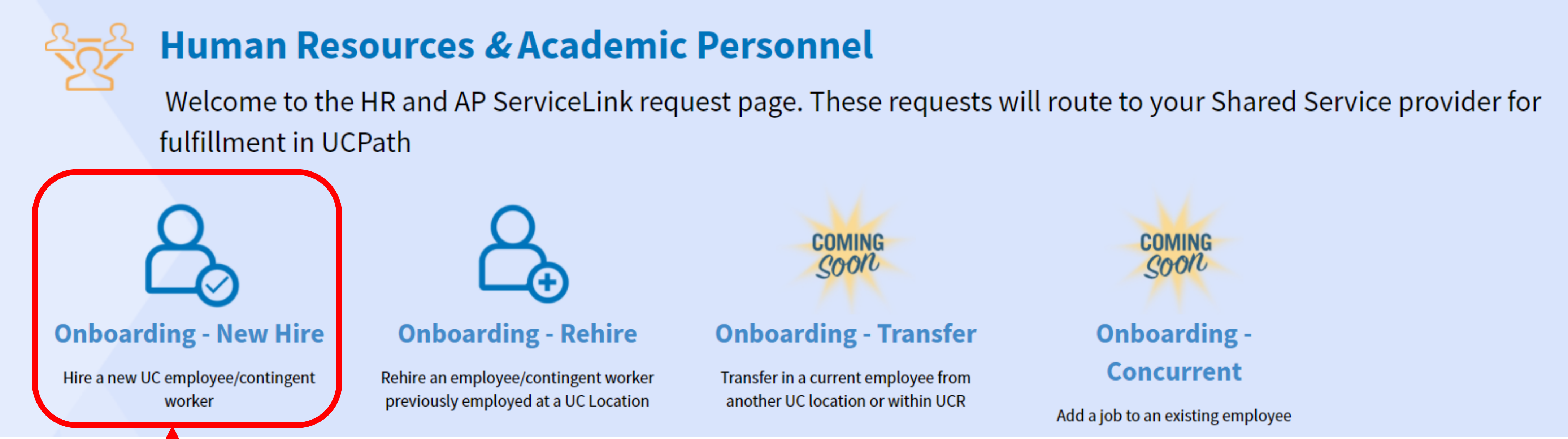
Check if you have an ITIN instead of a Social Security Number

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.

New Hire – Contingent Worker (CWR)

ServiceLink Form (Staff – New Hire)



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 (CWR)

Add Contingent Worker (with Position)

Usage: Use to add a Contingent Worker (CWR) with position.

Example: Contractor supervises a group of three UCR employees, but is paid by the contracting company, not UCPC.

Add Contingent Worker (without Position)

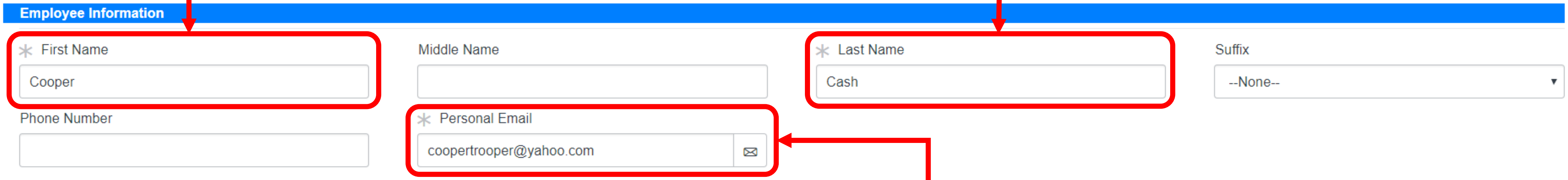
Usage: Use to add a Contingent Worker (CWR) without position.

Example: Student volunteer needs to be tracked in the system and performs job-related duties for UCR, but is not paid by UCPC.

Employee Information (CWR)

Incumbent's First Name

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



A personal email is needed for all Onboarding transactions. This email address will be used to send the incumbent the Onboarding packet via DocuSign.

Employee Relationship Information (CWR)

Organizational Relationship Type is "Contingent Worker"

When Contingent Worker is selected, Employee Type defaults to "N/A"

Job Effective Date is the Contingent Worker's first day on the job

Employee Relationship Information

* Organizational Relationship Type: Contingent Worker

* Employee Type: N/A

* Job Effective Date: 07/30/18

Expected Job End Date: 12/31/18

* Will Contingent Worker Supervise Employees?: No

* Reports to Incumbent's Name: Rao, A

Contingent workers should have an expected job end date.

On a Visa

Remote

Will the contingent worker supervise any employees? Select "yes" or "no."

Enter the name of the employee who will supervise the Contingent Worker. This field will only appear if you responded "no" to the previous questions. The reports to data is part of position data, and is therefore not necessary if the CWR holds a position.

Onboarding Reason: ADD - Add Contingent Worker

Onboarding Reason for CWR in ServiceLink is NOT equivalent to Reason Code in UCPath. Regardless of whether or not the CWR supervises employees, select ADD – Add Contingent Worker. Your SSC will determine the correct UCPath code based on your answer to the question – Will contingent worker supervise employees?

Contingent Workers on Visa/Remote Hires

☐ On a Visa

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.

☐ Remote Hire

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 Information (CWR)

Employee Information

First Name	Middle Name	Last Name	Suffix
Cooper		Price	-- None --

Phone Number	Personal Email
	Cooper.Price@gmail.com

Contingent Worker First & Last Names

CWR Email Address

Organizational Relationship type is Contingent Worker

Employee Type defaults to N/A

Employee Relationship Information

Organizational Relationship Type	Employee Type	Job Effective Date	Expected Job End Date
Contingent Worker	N/A	02/26/18	07/01/18

Will Contingent Worker Supervise Employees?

Yes

Yes

No

On a Visa

Remote Hire

Onboarding Reason

ADD - Add Contingent Worker

Select if CWR will supervise UCR Employee(s)

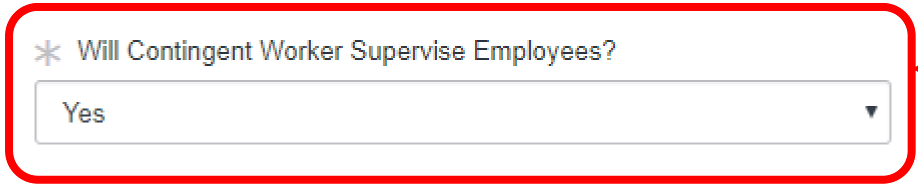
Job Effective Date for CWR is first day access is needed (CWR are not paid through UCPath)

Include an Expected Job End Date. This is not a required field in ServiceLink, but it is in UCPath

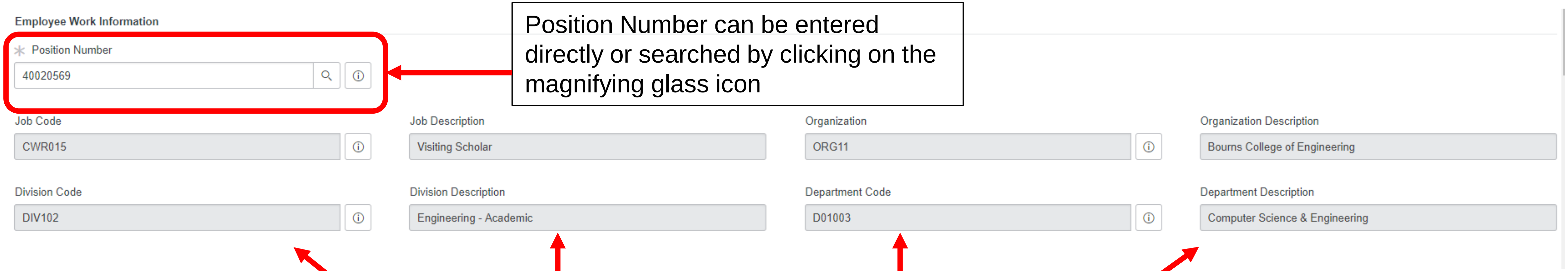
UCPath Reason Code for "hiring" a CWR is ADD - Add Contingent Worker

Employee Work Information (CWR)

With a Position



If a contingent worker supervises UCR Employee(s), they will need to be Onboarded with a Position. When asked “Will Contingent Worker Supervise Employees,” select “Yes” from the dropdown.



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

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.

Employee Work Information (CWR)

Without a Position

* Will Contingent Worker Supervise Employees?

No

If a contingent worker does NOT supervise UCR Employee(s), they can be Onboarded without a Position. When asked “Will Contingent Worker Supervise Employees,” select “No” from the dropdown.

Employee Work Information

* Job Code	Job Description	Organization	Organization Description
CWR015	Visiting Scholar	ORG11	Bourns College of Engineering
Division Code	Division Description	* Department Code	Department Description
DIV102	Engineering - Academic	D01003	Computer Science & Engineering

Instead of entering a Position Number, enter the appropriate Job Code. Job Codes for Contingent Workers (with and without a Position) start with “CWR.” This was done during Conversion on UCR Job Codes designated as being appropriate for Contingent Workers.

The Job Description will default based on the Job Code selected. Organization Description will populate based on the Organization selected. The Division Description will populate based on the chosen Division Code. Department Code (required) will generate the corresponding Department Description.

Even if Organization and Division Code are not required for a ServiceLink request, it is highly recommended that this information (if known) be added to the request. Location, Empl Class (Staff/AP) and Supervisor Position Number are all required data points for the UCPath transaction.

Onboarding Tasks (CWR)

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

- [x] 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)

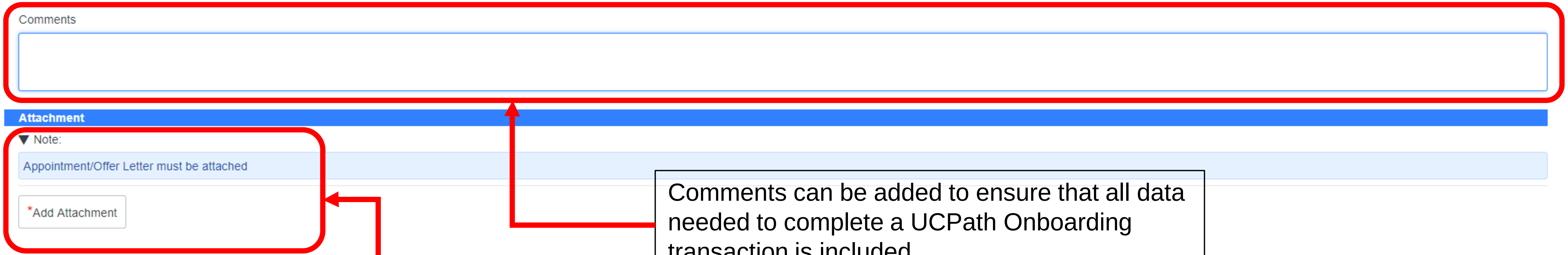
You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the “Create a single task for all Task Listed Below” will create one task that will need to be closed once completed. Individual 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

- [x] Complete UCPath Template Based Hire
- [x] Schedule Day 1 In-Person Session
- [x] Complete Onboarding Packet
- [x] Conduct Day 1 In-person Session
- [x] Verify Documents and File Paperwork
- [x] 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 (CWR)

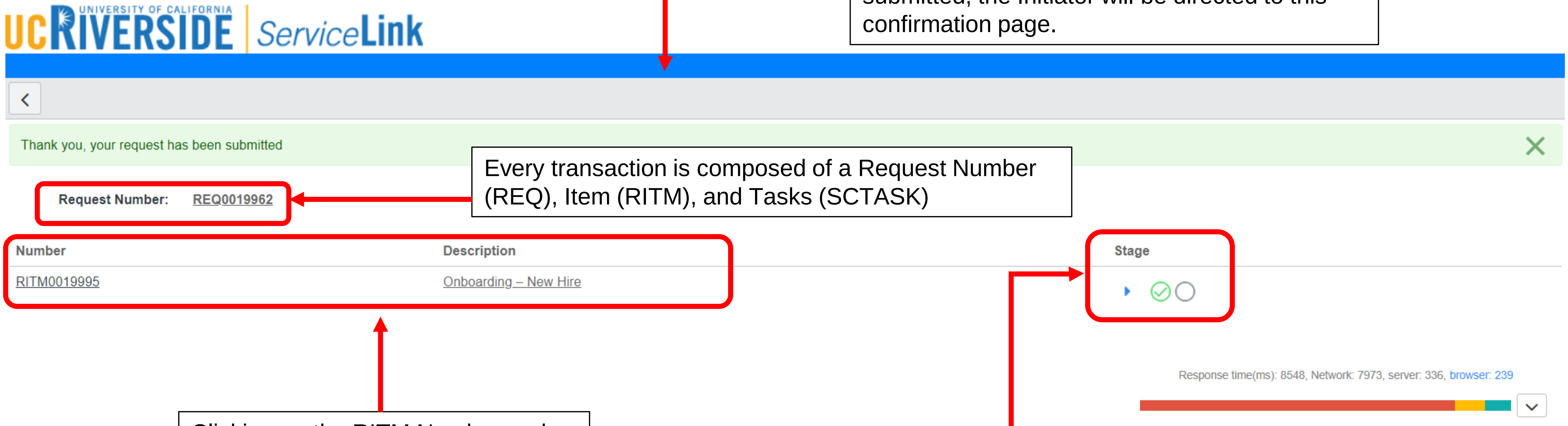


Comments can be added to ensure that all data needed to complete a UCPath Onboarding transaction is included.

ServiceLink Onboarding requests require that the Initiator attach an Offer Letter. In some instances (such as Student Volunteers), this can be an email or other informal notification of the "hire."

ServiceLink Initiator

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



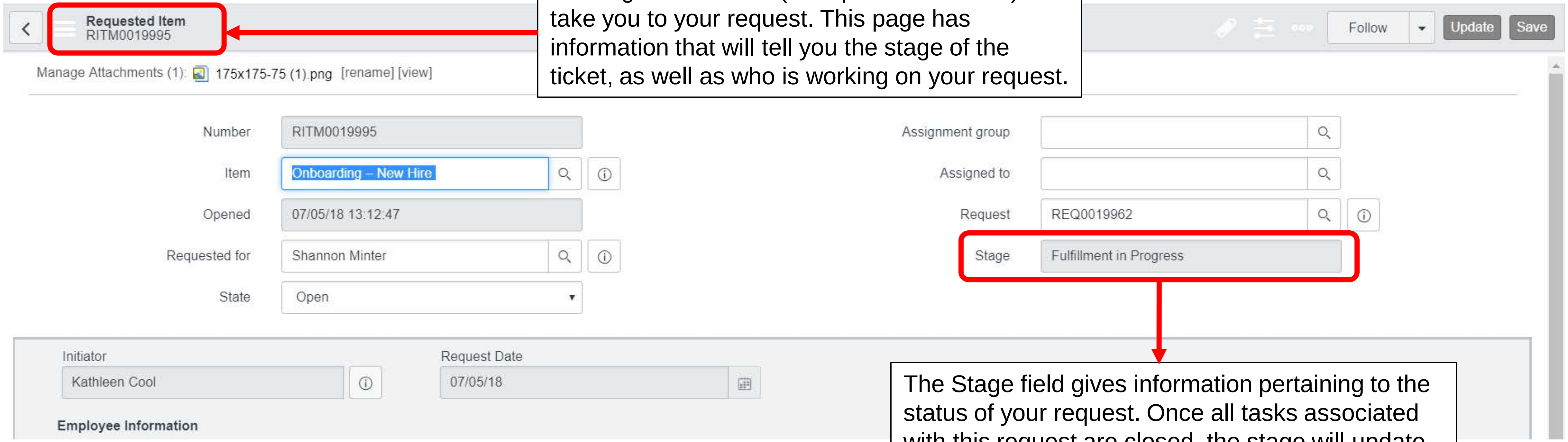
Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

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

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.

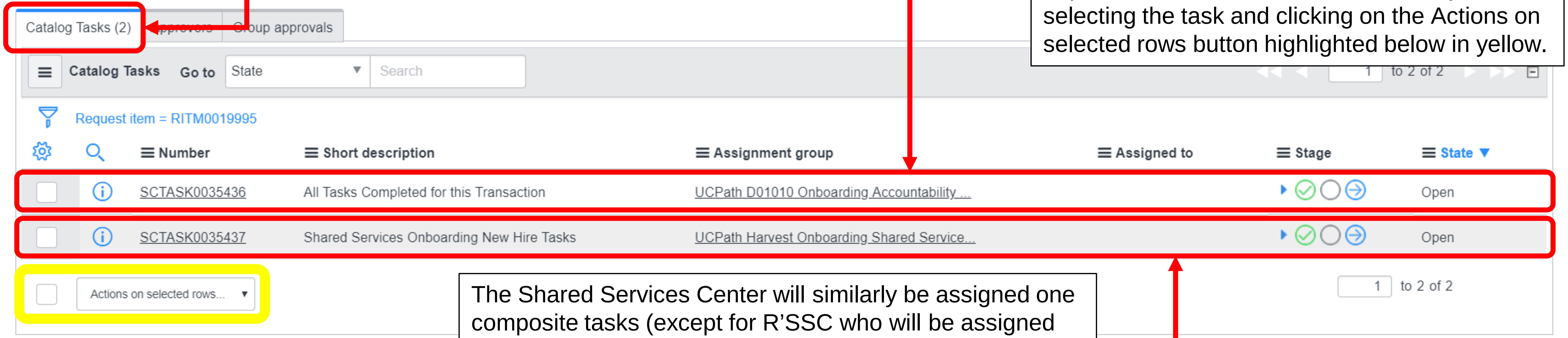


The Stage field gives information pertaining to the status of your request. Once all tasks associated with this request are closed, the stage will update automatically to “Closed Complete.”
This means that your request has been successfully completed and transacted in UCPath.

ServiceLink Fulfiller

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.

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.



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.”

Additional Data Required for UCPath Transaction (CWR) – New Hire

Personal Data

Data Point	Data Location on UCR Forms
First & Last Names	ServiceLink Form – Employee Information & UCR Personal Data Form
Address Line 1, City, State, Postal Code	UCR Personal Data Form

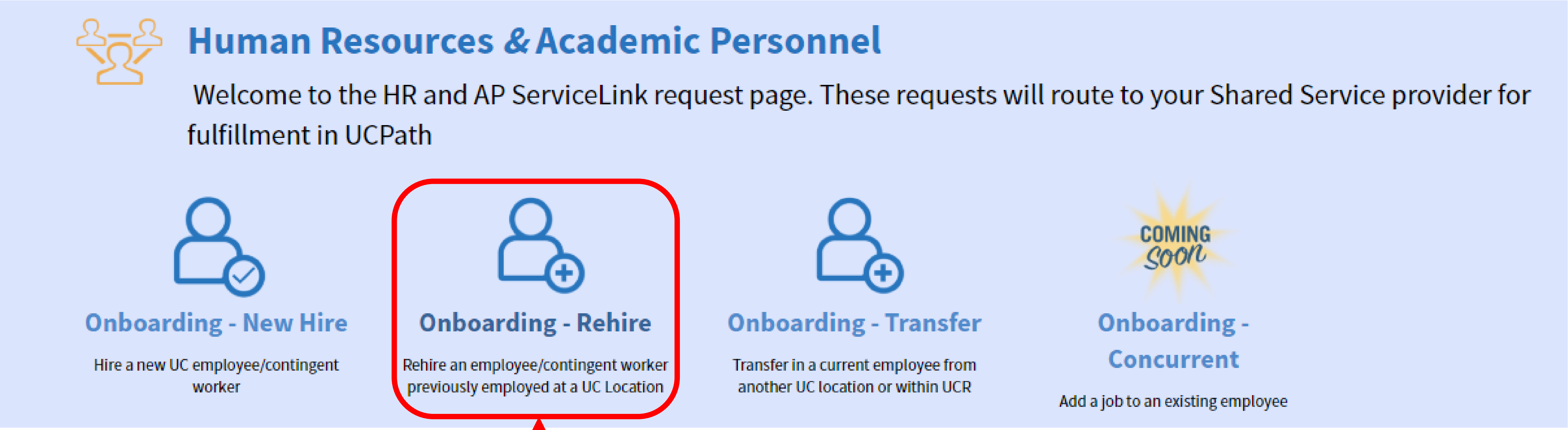
Onboarding – New Hire (CWR)

Job Data

Data Point	Data Location on UCR Forms
Business Unit	Populates Automatically – Riverside Campus
Department	ServiceLink Form – Employee Work Information
Location Code	Populates from Job Code
Job Code	ServiceLink Form – Employee Work Information
Employee class	Populated from Job Code
Supervisor ID	ServiceLink Form – Employee Relationship Information
Expected Job End Date	ServiceLink Form – Employee Relationship Information

Rehire – Staff

ServiceLink Form (Staff – Rehire)



The same ServiceLink Form – Onboarding – Rehire is used to rehire Staff, Academic Appointees, and Contingent Workers. Rehired employees must have an existing Job Record in UCPath.

Onboarding – Rehire (Staff)

Rehire fr. Layoff – Pref, < 120

Usage: Use for rehires from the same business unit (UCR). Use to rehire following a layoff and secured through the preferential rehire process within 120 day of separation.

Example: UCR staff employee was laid off from position in December 2017.
They secure re-employment through the preferential rehire process in February 2018.

Rehire fr. Layoff – Pref, >= 120

Usage: Use for rehires from the same business unit (UCR). Use to rehire following a layoff and secured through the preferential rehire process where there is greater or equal to 120 days of separation.

Example: UCR staff employee was laid off from position in December 2017.
They secure re-employment through the preferential rehire process in August 2018.

Onboarding – Rehire (Staff) (continued)

Rehire, >= 120 days break

Usage: Use for rehires from the same business unit (UCR). Use for a regular rehire to return to pay status where there is greater or equal to 120 days of separation.

Example: UCR employee is voluntarily terminated in December 2017. They are rehired into a new position at UCR in August 2018.

Rehire, < 120 days break

Usage: Use for rehires from the same business unit (UCR). Use for a regular rehire to return to pay status following less than 120 days of break in service.

Example: UCR employee is voluntarily terminated in December 2017. They are rehired into a new position at UCR in February 2018.

Onboarding – Rehire (Staff) (continued)

Reinstatement

Usage: Use for rehires from the same business unit (UCR). Use to return to pay status following an involuntary break in service that was not a layoff.

Example: An error was made during conversion and an employee was avertedly terminated.

Rehired Retiree

Usage: Use for rehires from the same business unit (UCR). Use to return to pay status, in accordance with the Policy on Reemployment of UC Retired Employees, following a retirement, and the employee continues to draw retirement benefits.

Example: A UCR employee of 30 years retires in June 2018. They are rehired to work on a special project part-time from August to December 2018.

Onboarding – Rehire (Staff) (continued)

Rehire fr. Layoff – No Pref, < 120

Usage: Use for rehires from the same business unit (UCR). Use to rehire following a layoff and not secured through the preferential rehire process within 120 days of separation.

Example: UCR staff employee was laid off from position in December 2017. They are rehired into a new position in February 2018, but not through the preferential rehire process.

Rehire fr. Layoff – No Pref, >= 120

Usage: Use for rehires from the same business unit (UCR). Use to rehire following a layoff and not secured through the preferential rehire process where there is greater or equal to 120 days of separation.

Example: UCR staff employee was laid off from position in December 2017. They are rehired into a new position in August 2018, but not through the preferential rehire process.

Onboarding – Rehire (Staff) (continued)

Staff Recall, < 120

Usage: Use for rehires from the same business unit (UCR). Use to rehire a former UC employee eligible under layoff recall policies within 120 days of separation.

Example: UCR staff employee is laid off in December 2017. They are rehired into a new position at UCR in February 2018 under layoff recall policies.

Staff Recall, >= 120

Usage: Use for rehires from the same business unit (UCR). Use to rehire a former UC employee eligible under layoff recall policies greater or equal to 120 days of separation.

Example: UCR staff employee is laid off in December 2017. They are rehired into a new position at UCR in August 2018 under layoff recall policies.

Onboarding – Rehire (Staff) (continued)

Rehire – Retirement Suspended

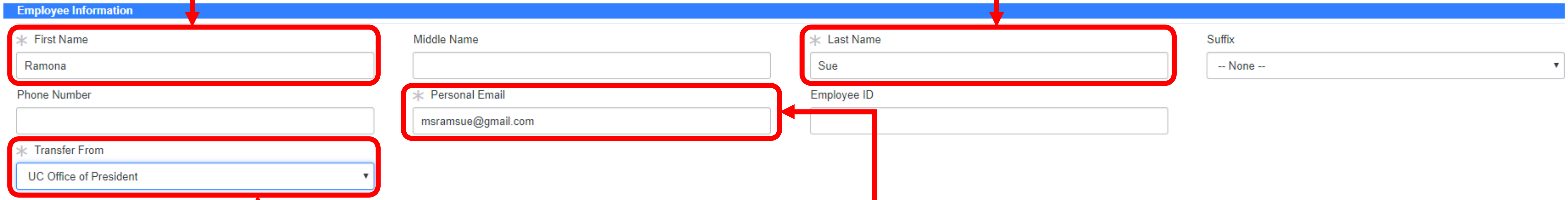
Usage: Use for rehires from the same business unit (UCR). Use to return to pay status following a retirement suspended and employee become an active UCR member again.

Example: UCR staff employee retires in December 2017. Their retirement is suspended and they are rehired into a new full-time position at UCR.

Employee Information (Staff)

Incumbent’s First Name

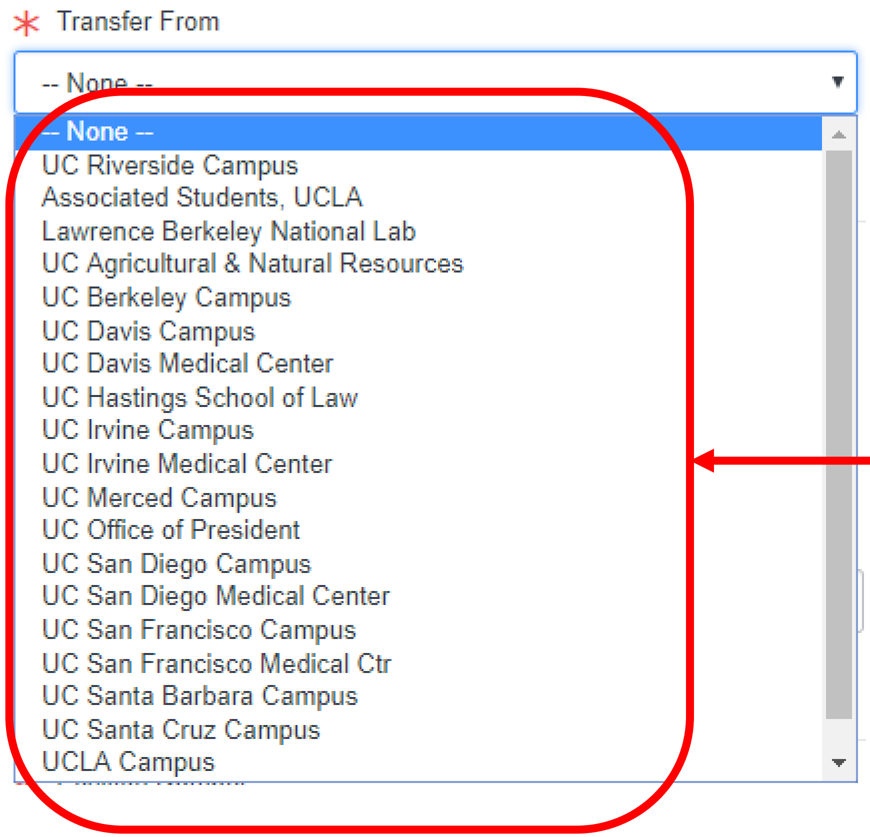
Incumbent’s Last Name. All other fields are optional (Middle Name, Suffix, Phone Number, and UCPath Employee ID).



As a rehired employee, the incumbent once worked at a UC Campus. Select the correct UC Campus from the “Transfer From” dropdown.

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.

Transfer From (Staff)



From the dropdown, select the UC Campus where the incumbent was previously employed. You can choose from:

- UC Riverside Campus
- Associated Students, UCLA
- Lawrence Berkeley National Lab
- UC Agricultural & Natural Resources
- UC Berkeley Campus
- UC Davis Campus
- UC Davis Medical Center
- UC Hastings School of Law
- UC Irvine Campus
- UC Irvine Medical Center
- UC Merced Campus
- UC Office of President
- UC San Diego Campus
- UC Medical Center
- UC San Francisco Campus
- UC San Francisco Medical Center
- UC Santa Barbara Campus
- UC Santa Cruz Campus
- UCLA Campus

Employee Relationship Information (Staff)

Employee Relationship Information

* Organizational Relationship Type

Employee

Organizational Relationship Information is "Employee"

* Employee Type

Staff

On a Visa

Employee Type is "Staff"

* Job Effective Date

07/30/18

Remote Hire

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

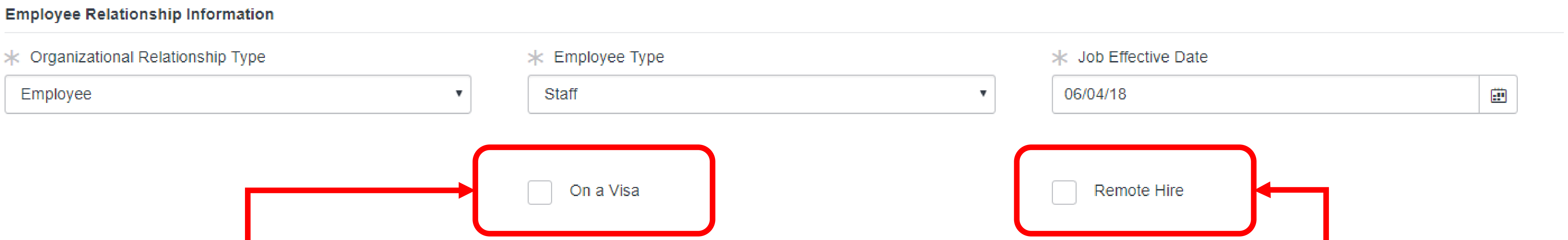
Onboarding Reason

-- None --

- -- None --
- REH - Rehire - Break in Service
- PR2 - Rehire fr Layoff-Pref, < 120
- PRF - Rehire fr Layoff-Pref, >=120
- RE2 - Rehire, < 120 days break
- REH - Rehire, > or = 120 days break
- REI - Reinstatement
- RET - Rehired Retiree
- RL2 - Rehire fr Layoff-No Pref, <120
- RLO - Rehire fr Layoff-No Pref,>=120
- RSR - Rehire - Retirement Suspended
- RC2 - Staff Recall, <120
- REC - Staff Recall, >=120

Onboarding Reason in ServiceLink is equivalent to Reason Code in UCPath

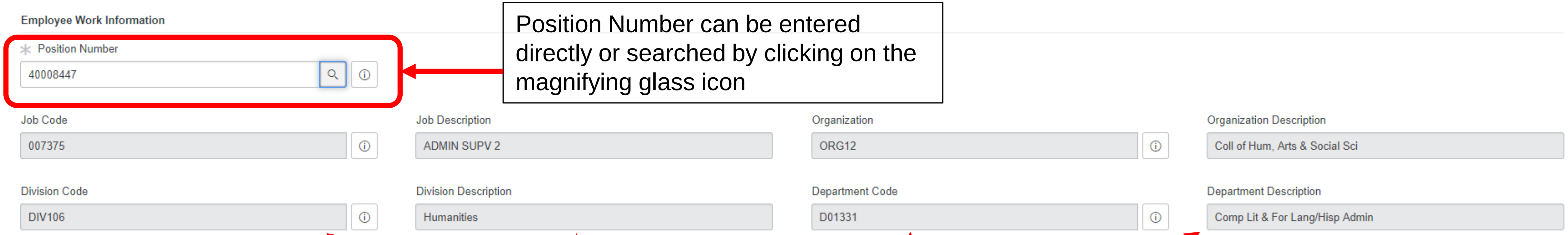
Employees on Visa/Remote Hires



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 (Staff)



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

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.

Onboarding Tasks (Staff)

Onboarding Tasks (select all that apply)

Accountability Structure

- [ ] Order Required Equipment
- [x] Create or Reactivate NetID
- [x] Send NetID to Employee
- [ ] Grant System Access
- [x] Update Enterprise Directory
- [x] Monitor Completion of Background Check
- [ ] Issue Equipment and Assets
- [x] Confirm FAU is Correct

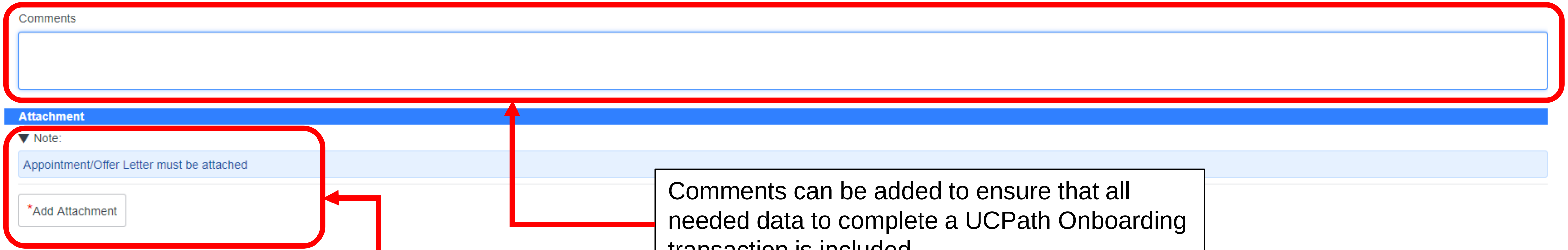
Shared Services

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

Gray checked boxes are required tasks assigned to the ServiceLink Assignment Group Accountability Structure_Onboarding Accountability Fulfiller. Additional tasks can be manually added, if needed. All checked tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.

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 (Staff)

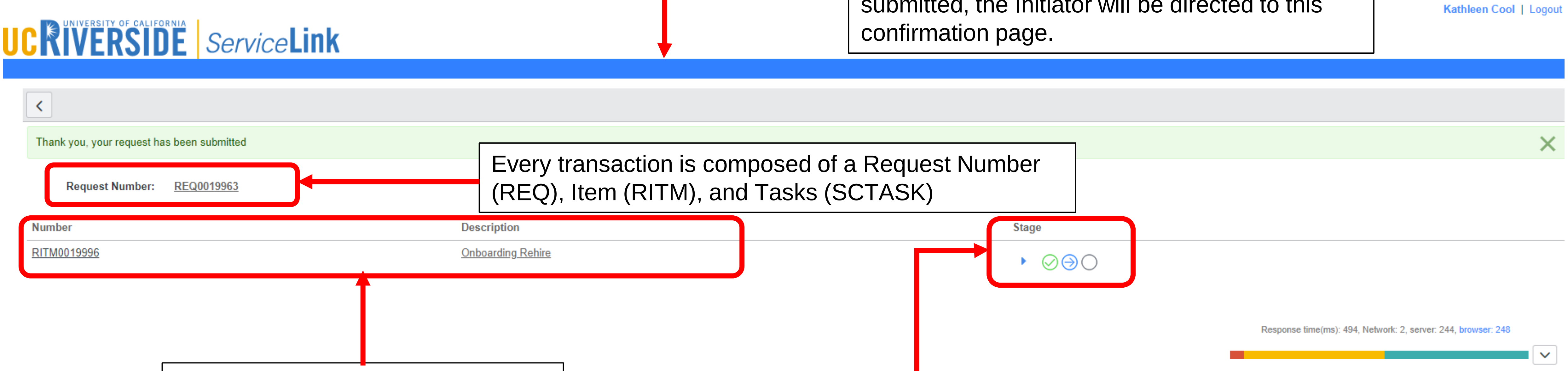


Comments can be added to ensure that all needed data to complete a UCPath Onboarding transaction is included.

ServiceLink Onboarding requests require that the Initiator attach an Offer Letter. For Staff, the Offer Letter contains additional information required for the SSC Fulfiller to transact in UCPath.

ServiceLink Initiator

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



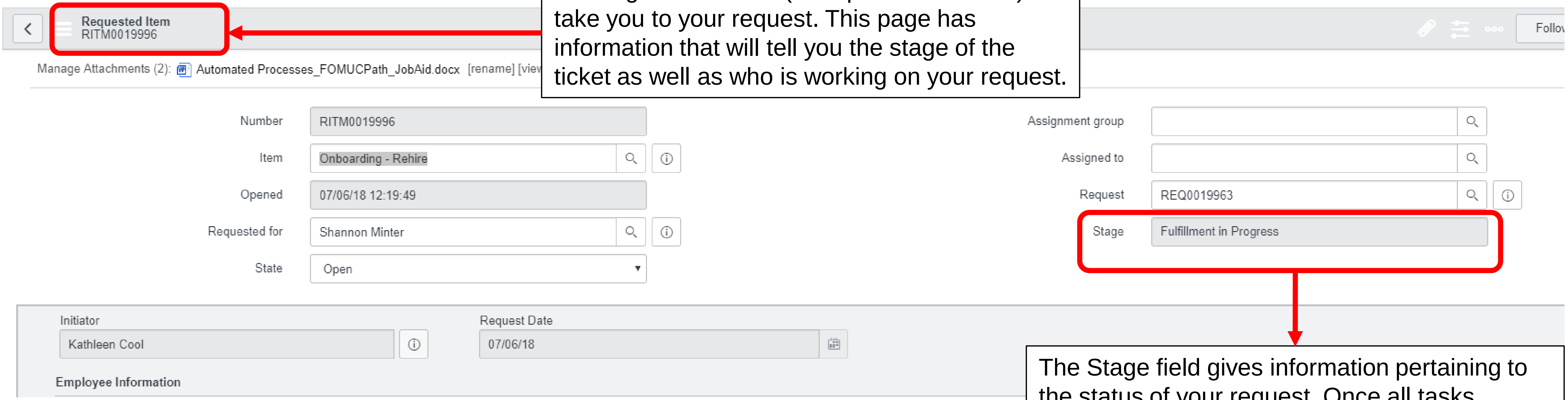
Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

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

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

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.

For a rehire, two tasks will be created simultaneously – to confirm the FAU and create/reactivate NetID. 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.

Catalog Tasks (5) | Approvers | Group approvals

Catalog Tasks | State | Search

Request item = RITM0019996

Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0035439	Create or Reactivate NetID	UCPath ORG12 Onboarding Accountability S...			Open
SCTASK0035441	Schedule Day 1 In-Person Session	UCPath Harvest Onboarding Shared Service...			Open
SCTASK0035438	Complete Onboarding Packet	UCPath Harvest Onboarding Shared Service...			Open
SCTASK0035440	Complete UCPath Template Based Hire	UCPath Harvest Onboarding Shared Service...			Open
SCTASK0035442	Confirm FAU is Correct	UCPath ORG12 Onboarding Accountability S...			Open

Actions on selected rows...

1 to 5 of 5

The Shared Services Center will similarly be assigned three tasks as part of the rehire request. The SSC fulfiller will change the state of the tasks from "Open" to "Closed" when completed. When all tasks reflect a "Closed" state, the RITM stage will automatically change to "closed complete."

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 (Staff) – Rehire

Job Data

Data Point	Data Location on UCR Forms
Position Number	ServiceLink Form – Employee Work Information
Employee Classification	Offer Letter (Attached to ServiceLink form)
Establishment ID	Defaults from Position data, but is editable
Standard Hours	Defaults from Position data, but is editable
FTE	Offer Letter (Attached to ServiceLink form)
Step (for step-based positions only)	Offer Letter (Attached to ServiceLink form)

Onboarding – Rehire (Staff)

Job Data (continued)

Data Point	Data Location on UCR Forms
Step (for step-based positions only)	Offer Letter (Attached to ServiceLink form)
Probation Code	Offer Letter (Attached to ServiceLink form)
Probation End Date	Offer Letter (Attached to ServiceLink form)
PY Career Duration (partial-year Empl Classes only)	Offer Letter (Attached to ServiceLink form)
Expected Job End Date (for Contract, Casual/Restricted, Floater, and Staff Rehired Retiree)	Offer Letter (Attached to ServiceLink form)

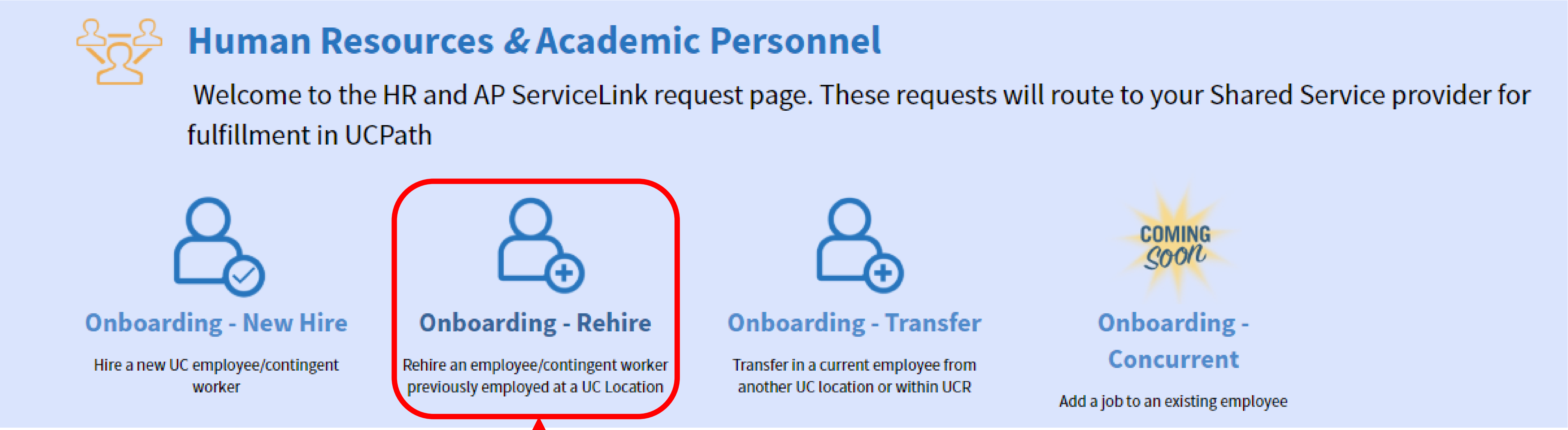
Onboarding – Rehire (Staff)

Job Data – Job Compensation & Pay Components

Data Point	Data Location on UCR Forms
Compensation Frequency	Offer Letter (Attached to ServiceLink form)
Comp Rate Code	Offer Letter (Attached to ServiceLink form)
Compensation Rate	Offer Letter (Attached to ServiceLink form)
Pay Components Frequency	Offer Letter (Attached to ServiceLink form)

Rehire – AP

ServiceLink Form (AP – Rehire)



The same ServiceLink Form – Onboarding – Rehire is used to rehire Staff, Academic Appointees, and Contingent Workers. Rehired employees must have an existing Job Record in UCPath.

Onboarding – Rehire (AP)

Academic Recall

Usage: Use to recall retired academic appointees.

Example: UCR Academic Appointee retires in December 2017. Their retirement is recalled and they are rehired into a part-time position at UCR at 43%.

Emeritus Faculty

Usage: Use to add an emeritus job to a retired faculty.

Example: Retired UCR faculty is rehired as Emeritus Faculty.

Onboarding – Rehire (AP) (continued)

Rehire fr. Layoff – Pref, < 120

Usage: Use for rehires from the same business unit (UCR). Use to rehire following a layoff and secured through the preferential rehire process within 120 day of separation.

Example: UCR staff employee was laid off from position in December 2017. They secure reemployment through the preferential rehire process in February 2018.

Rehire fr. Layoff – Pref, >= 120

Usage: Use for rehires from the same business unit (UCR). Use to rehire following a layoff and secured through the preferential rehire process where there is greater or equal to 120 days of separation.

Example: UCR staff employee was laid off from position in December 2017. They secure reemployment through the preferential rehire process in August 2018.

Onboarding – Rehire (AP) (continued)

Rehire, >= 120 days break

Usage: Use for rehires from the same business unit (UCR). Use for a regular rehire to return to pay status where there is greater or equal to 120 days of separation.

Example: UCR employee is voluntarily terminated in December 2017. They are rehired into a new position at UCR in August 2018.

Rehire, < 120 days break

Usage: Use for rehires from the same business unit (UCR). Use for a regular rehire to return to pay status following less than 120 days of break in service.

Example: UCR employee is voluntarily terminated in December 2017. They are rehired into a new position at UCR in February 2018.

Onboarding – Rehire (AP) (continued)

Reinstatement

Usage: Use for rehires from the same business unit (UCR). Use to return to pay status following an involuntary break in service that was not a layoff.

Example: An error was made during conversion and an employee was avertedly terminated.

Rehired Retiree

Usage: Use for rehires from the same business unit (UCR). Use to return to pay status, in accordance with the Policy on Reemployment of UC Retired Employees, following a retirement, and the employee continues to draw retirement benefits.

Example: A UCR employee of 30 years retires in June 2018. They are rehired to work on a special project part-time from August to December 2018.

Onboarding – Rehire (AP) (continued)

Rehire fr. Layoff – No Pref, < 120

Usage: Use for rehires from the same business unit (UCR). Use to rehire following a layoff and not secured through the preferential rehire process within 120 days of separation.

Example: UCR staff employee was laid off from position in December 2017. They are rehired into a new position in February 2018, but not through the preferential rehire process.

Rehire fr. Layoff – No Pref, >= 120

Usage: Use for rehires from the same business unit (UCR). Use to rehire following a layoff and not secured through the preferential rehire process where there is greater or equal to 120 days of separation.

Example: UCR staff employee was laid off from position in December 2017. They are rehired into a new position in August 2018, but not through the preferential rehire process.

Onboarding – Rehire (AP) (continued)

Rehire – Retirement Suspended

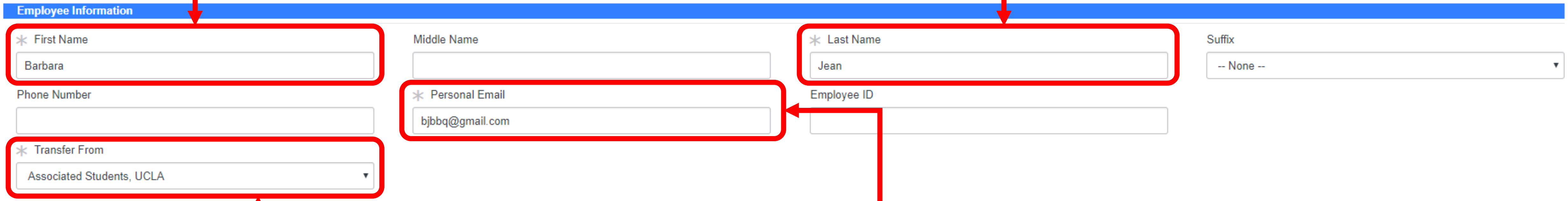
Usage: Use for rehires from the same business unit (UCR). Use to return to pay status following a retirement suspended and employee become an active UCR member again.

Example: UCR staff employee retires in December 2017. Their retirement is suspended and they are rehired into a new full-time position at UCR.

Employee Information (AP)

Incumbent's First Name

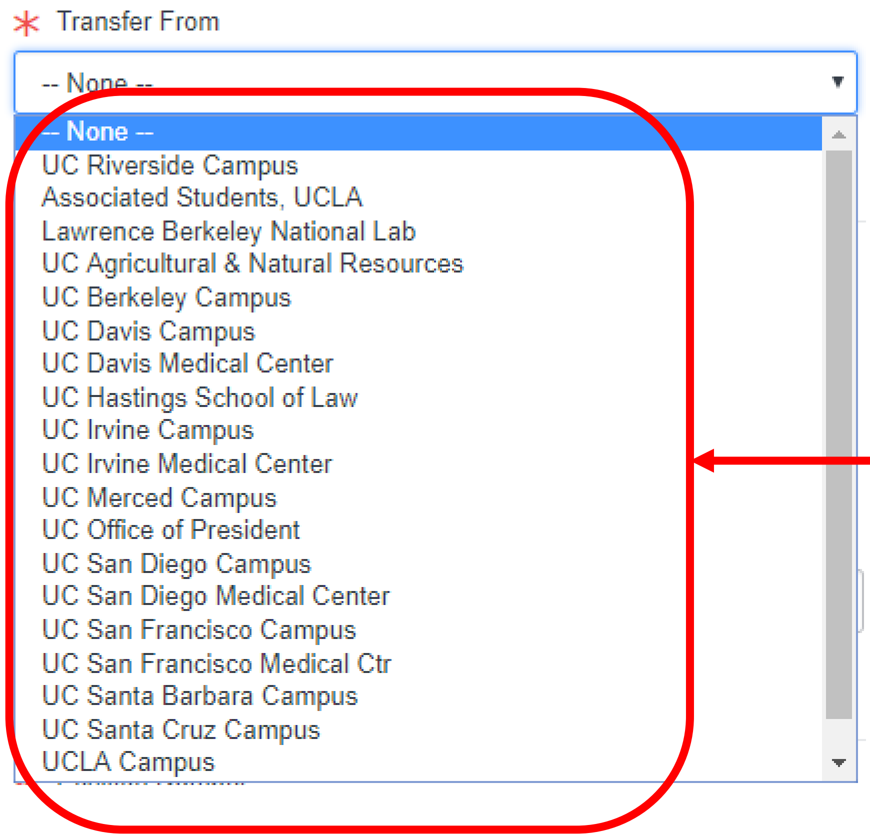
Incumbent's Last Name. All other fields are optional (Middle Name, Suffix, Phone Number, and UCPath Employee ID).



As a rehired employee, the incumbent once worked at a UC Campus. Select the correct UC Campus from the "Transfer From" dropdown.

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.

Transfer From (AP)



From the dropdown, select the UC Campus where the incumbent was previously employed. You can choose from:

- UC Riverside Campus
- Associated Students, UCLA
- Lawrence Berkeley National Lab
- UC Agricultural & Natural Resources
- UC Berkeley Campus
- UC Davis Campus
- UC Davis Medical Center
- UC Hastings School of Law
- UC Irvine Campus
- UC Irvine Medical Center
- UC Merced Campus
- UC Office of President
- UC San Diego Campus
- UC Medical Center
- UC San Francisco Campus
- UC San Francisco Medical Center
- UC Santa Barbara Campus
- UC Santa Cruz Campus
- UCLA Campus

Employee Relationship Information (AP)

Employee Relationship Information

* Organizational Relationship Type

Employee

* Employee Type

Academic

* Job Effective Date

07/01/18

Organizational Relationship Information is "Employee"

On a Visa

Employee Type is "Academic"

Remote Hire

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

-- None --
ACA - Academic Recall
EMR - Emeritus Faculty
REH - Rehire - Break in Service
PR2 - Rehire fr Layoff-Pref, < 120
PRF - Rehire fr Layoff-Pref, >=120
RE2 - Rehire, < 120 days break
REH - Rehire, > or = 120 days break
REI - Reinstatement
RET - Rehired Retiree
RL2 - Rehire fr Layoff-No Pref, <120
RLO - Rehire fr Layoff-No Pref,>=120
RSR - Rehire - Retirement Suspended

-- None --

Onboarding Reason in ServiceLink is equivalent to Reason Code in UCPath

Academic Appointees on Visa/Remote Hires

Employee Relationship Information

* Organizational Relationship Type: Employee

* Employee Type: Academic

* Job Effective Date: 07/01/18

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.

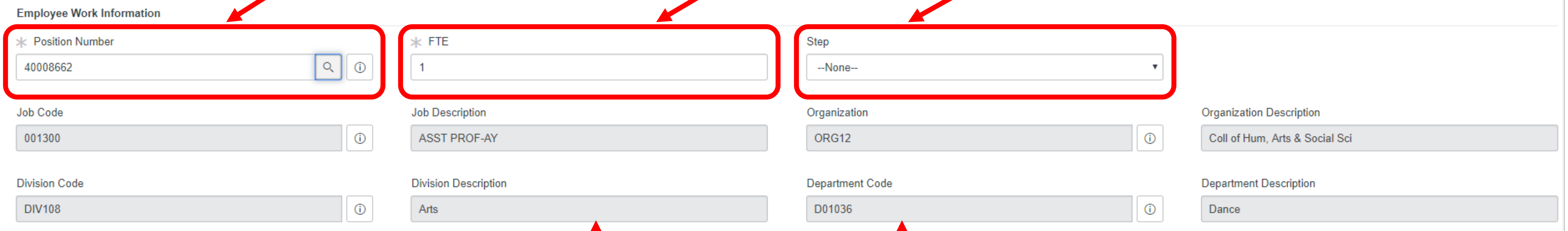
If the incumbent is a Remote Hire, or will not be able to attend an in-person Onboarding session, check the "Remote Hire" box. Checking this box will NOT prompt any ServiceLink tasks or automatic email notification.
It is the responsibility of the SSC Fulfiller to make alternate arrangements, such as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

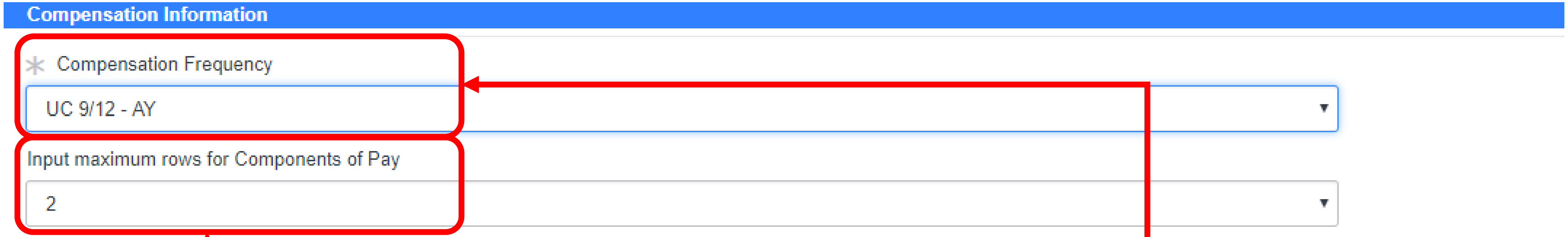
Enter FTE for the Job. This can be < = the position FTE

If the Position is stepped, select the appropriate Step



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)



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

Comp Rate Code	Comp Rate	Job Compensation Frequency

Comp Rate Code	Comp Rate	Job Compensation Frequency

- [ ] Add Recurring Additional Compensation?
- [ ] Add Job Earnings Distribution for Summer Salary?

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.

To add Recurring Additional Compensation, check this box.

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

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.

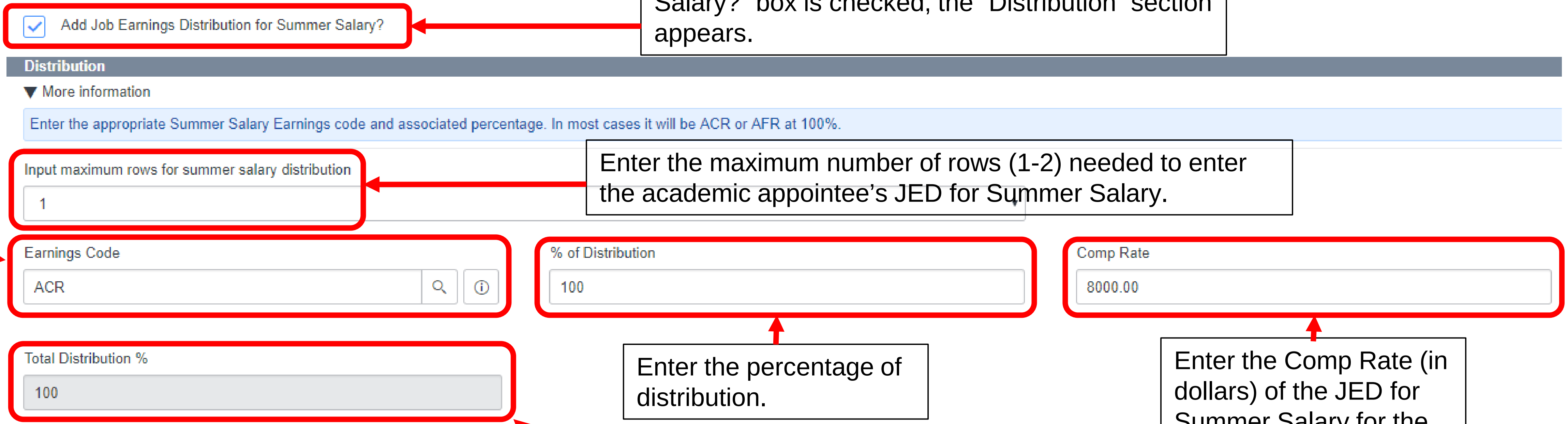
Enter the Pay Amount (in dollars) of the Recurring Additional Compensation for the entered Earnings Code.

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.



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

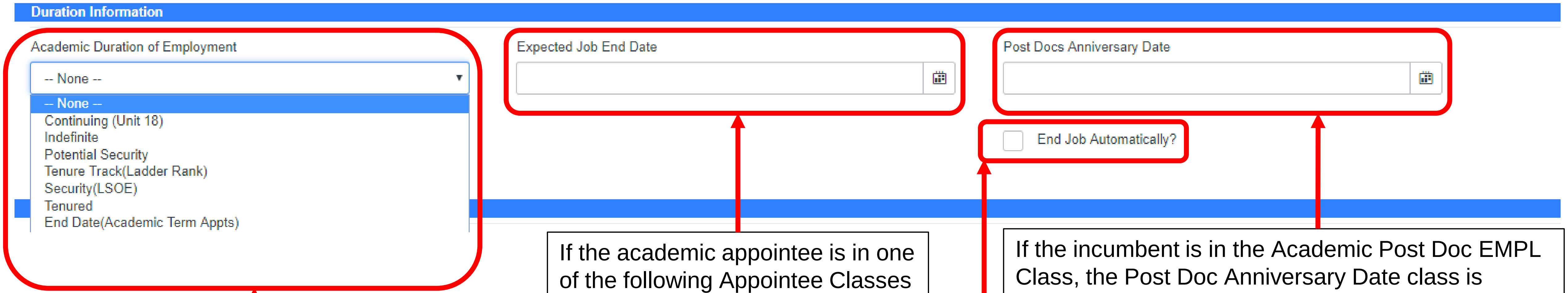
Enter the percentage of distribution.

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

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

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

Duration Information (AP)



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 class 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.

REHIRE

Onboarding Tasks (AP)

Onboarding Tasks (select all that apply)

Accountability Structure

- [ ] Order Required Equipment
- [x] Create or Reactivate NetID
- [x] Schedule Day 1 In-Person Session
- [x] Send NetID to Employee
- [ ] Grant System Access
- [x] Update Enterprise Directory
- [ ] Issue Equipment and Assets
- [x] Confirm FAU is Correct

Shared Services

- [x] Complete UCPath Template Based Hire
- [x] Monitor Completion of Background Check
- [x] Complete Onboarding Packet
- [x] Conduct Day 1 In-person Session
- [x] Verify Documents and File Paperwork
- [x] Update Required UCPath Checklist Items (Oath and Patent/Patent Waiver)

Gray checked boxes are required tasks assigned to the ServiceLink Assignment Group Accountability Structure_Onboarding Accountability Fulfiller. Additional tasks can be manually added, if needed. All checked tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.

All SSC tasks are required and cannot be modified (with the exception of the “Monitor Completion of Background Check”). 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.

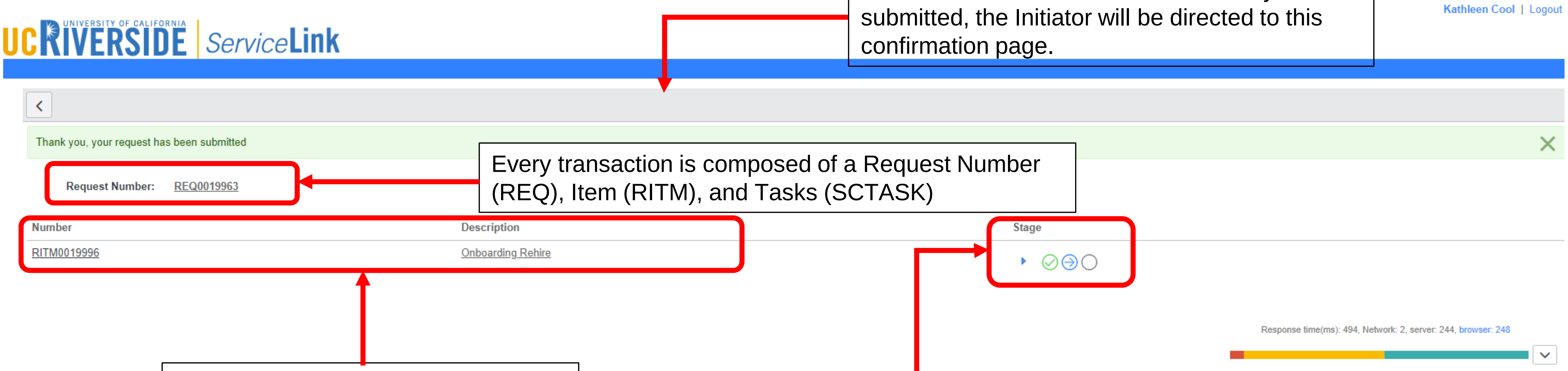
Comments & Attachment (AP)

Comments 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

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



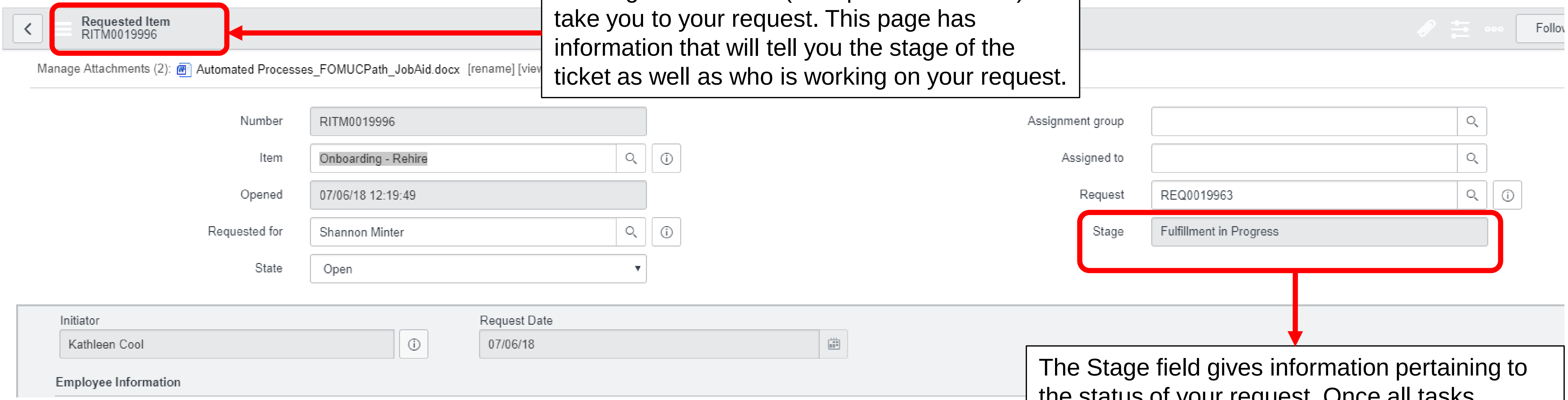
Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

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

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

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.

For a rehire, two tasks will be created simultaneously – to confirm the FAU and create/reactivate NetID. 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.

Catalog Tasks (5) | Approvers | Group approvals

Catalog Tasks | State | Search

Request item = RITM0019996

Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0035439	Create or Reactivate NetID	UCPath ORG12 Onboarding Accountability S...			Open
SCTASK0035441	Schedule Day 1 In-Person Session	UCPath Harvest Onboarding Shared Service...			Open
SCTASK0035438	Complete Onboarding Packet	UCPath Harvest Onboarding Shared Service...			Open
SCTASK0035440	Complete UCPath Template Based Hire	UCPath Harvest Onboarding Shared Service...			Open
SCTASK0035442	Confirm FAU is Correct	UCPath ORG12 Onboarding Accountability S...			Open

Actions on selected rows...

1 to 5 of 5

The Shared Services Center will similarly be assigned three tasks as part of the rehire request. The SSC fulfiller will change the state of the tasks from “Open” to “Closed” when completed. When all tasks reflect a “Closed” state, the RITM stage will automatically change to “closed complete.”

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.
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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) – Rehire

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

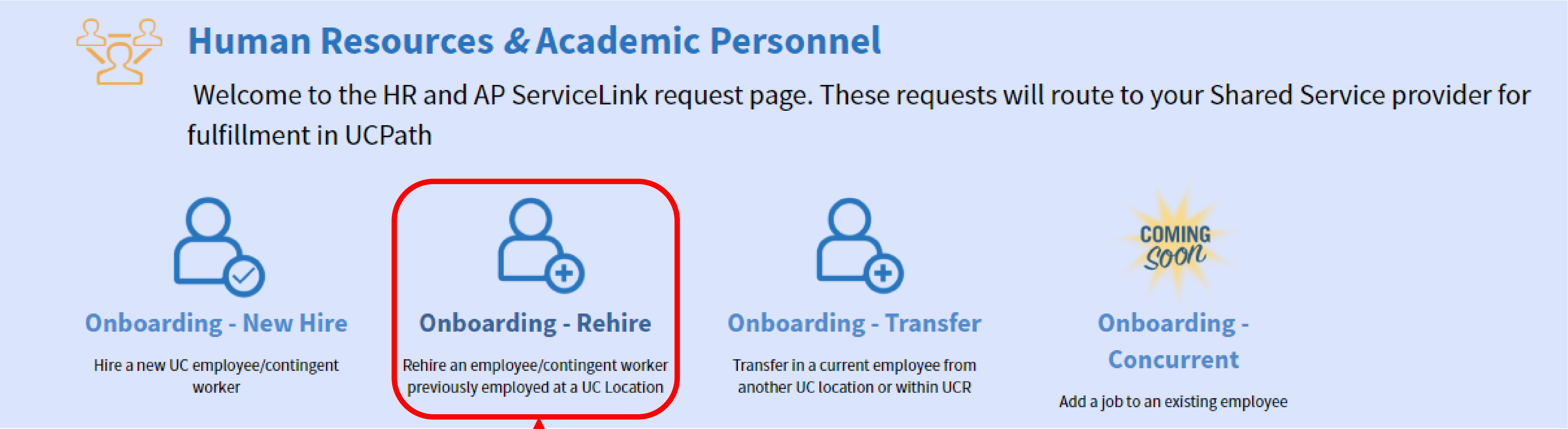
Onboarding – Rehire (AP)

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

Rehire – CWR

ServiceLink Form (CWR – Rehire)



The same ServiceLink Form – Onboarding – Rehire is used to rehire Staff, Academic Appointees, and Contingent Workers. Rehired employees must have an existing Job Record in UCPath.

Onboarding – Rehire (CWR)

Contingent Worker Renewal

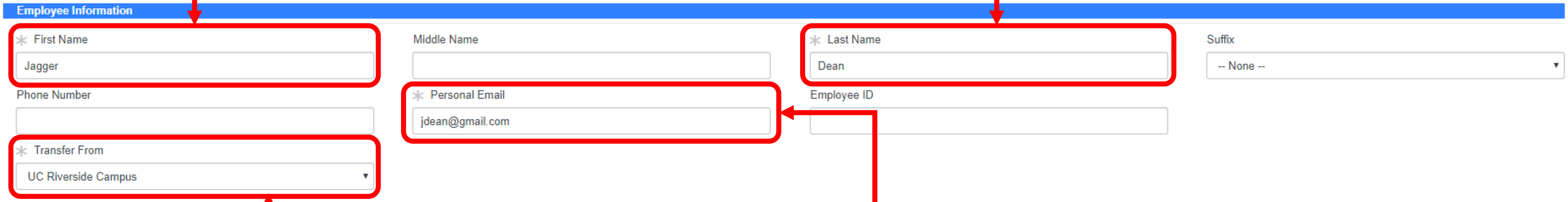
Usage: Use to renew a Contingent Worker with or without a position.

Example: A contingent worker performed job duties at UCR from January 2018 to March 2018. In August 2018, they are rehired at UCR to work on a project until the end of the year. They are still employed as a contingent worker and are not paid through UCPC.

Employee Information (CWR)

Incumbent’s First Name

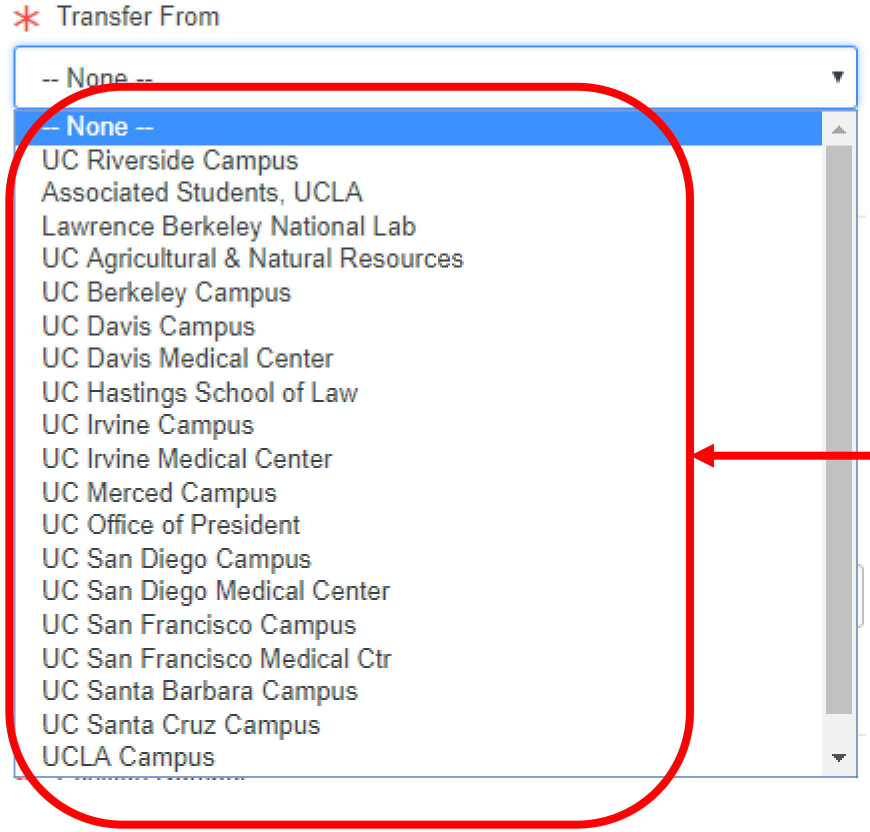
Incumbent’s Last Name. All other fields are optional (Middle Name, Suffix, Phone Number, and UCPath Employee ID).



As a rehired employee, the incumbent once worked at a UC Campus. Select the correct UC Campus from the “Transfer From” dropdown.

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.

Transfer From (CWR)



From the dropdown, select the UC Campus where the incumbent was previously employed. You can choose from:

- UC Riverside Campus
- Associated Students, UCLA
- Lawrence Berkeley National Lab
- UC Agricultural & Natural Resources
- UC Berkeley Campus
- UC Davis Campus
- UC Davis Medical Center
- UC Hastings School of Law
- UC Irvine Campus
- UC Irvine Medical Center
- UC Merced Campus
- UC Office of President
- UC San Diego Campus
- UC Medical Center
- UC San Francisco Campus
- UC San Francisco Medical Center
- UC Santa Barbara Campus
- UC Santa Cruz Campus
- UCLA Campus

Employee Relationship Information (CWR)

Employee Type defaults to “N/A”

Employee Relationship Information

* Organizational Relationship Type	* Employee Type	* Job Effective Date	Expected Job End Date
Contingent Worker	N/A	03/05/18	07/01/18
* Will Contingent Worker Supervise Employees?	On a Visa	Remote Hire	
No			

Select if CWR will supervise UCR Employee(s)

Organizational Relationship Information is “Contingent Worker”

Job Effective Date for CWR is first day access is needed (CWR are not paid through UCPath)

Include an Expected Job End Date. This is not a required field in ServiceLink, but it is in UCPath

Onboarding Reason

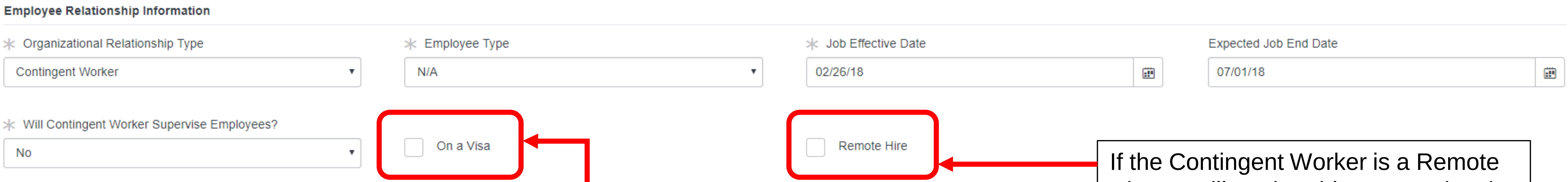
-- None --

-- None --

RNW - Contingent Worker Renewal

Onboarding Reason in ServiceLink is equivalent to Reason Code in UCPath

Contingent Workers on Visa/Remote Hires



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 Contingent Worker 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 (CWR)

With a Position

* Will Contingent Worker Supervise Employees?

Yes

If a contingent worker supervises UCR Employee(s), they will need to be Onboarded with a Position. When asked “Will Contingent Worker Supervise Employees,” select “Yes” from the dropdown.

Employee Work Information

* Position Number

40020569

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

Job Code	Job Description	Organization	Organization Description
CWR015	Visiting Scholar	ORG11	Bourns College of Engineering

Division Code	Division Description	Department Code	Department Description
DIV102	Engineering - Academic	D01003	Computer Science & Engineering

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.

Employee Work Information (CWR)

Without a Position

Will Contingent Worker Supervise Employees?

No

If a contingent worker does NOT supervise UCR Employee(s), they can be Onboarded without a Position. When asked "Will Contingent Worker Supervise Employees," select "No" from the dropdown.

Employee Work Information

Job Code	Job Description	Organization	Organization Description
CWR015	Visiting Scholar	ORG11	Bourns College of Engineering

Division Code	Division Description	Department Code	Department Description
DIV102	Engineering - Academic	D01003	Computer Science & Engineering

Instead of entering a Position Number, enter the appropriate Job Code. Job Codes for Contingent Workers (with and without a Position) start with "CWR." This was done during Conversion on UCR Job Codes designated as being appropriate for Contingent Workers.

The Job Description will default based on the Job Code selected. Organization Description will populate based on the Organization selected. The Division Description will populate based on the chosen Division Code. Department Code (required) will generate the corresponding Department Description.
Even if Organization and Division Code are not required for a ServiceLink request, it is highly recommended that this information (if known) be added to the request. Location, Empl Class (Staff/AP) and Supervisor Position Number are all required data points for the UCPath transaction.

Onboarding Tasks (CWR)

Onboarding Tasks (select all that apply)

Accountability Structure

- [ ] Order Required Equipment
- [x] Create or Reactivate NetID
- [x] Send NetID to Employee
- [ ] Grant System Access
- [x] Update Enterprise Directory
- [x] Monitor Completion of Background Check
- [ ] Issue Equipment and Assets

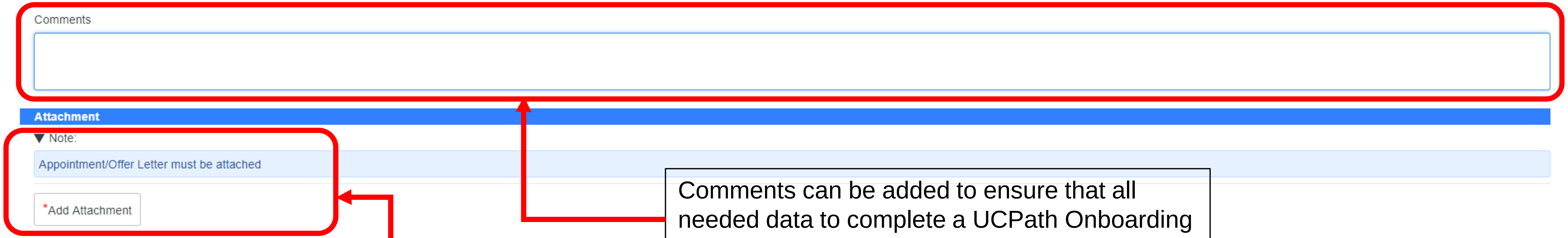
Shared Services

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

Gray checked boxes are required tasks assigned to the ServiceLink Assignment Group Accountability Structure_Onboarding Accountability Fulfiller. Additional tasks can be manually added, if needed. All checked tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.

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 (CWR)

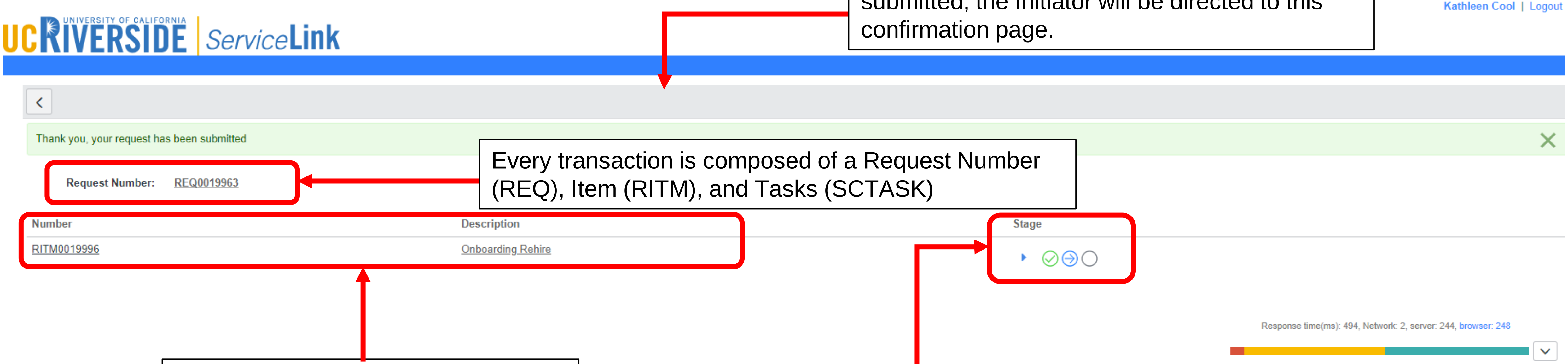


Comments can be added to ensure that all needed data to complete a UCPath Onboarding transaction is included.

ServiceLink Onboarding requests require that the Initiator attach an Offer Letter. In some instances (such as Student Volunteers), this can be an email or other informal notification of the "hire."

ServiceLink Initiator

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



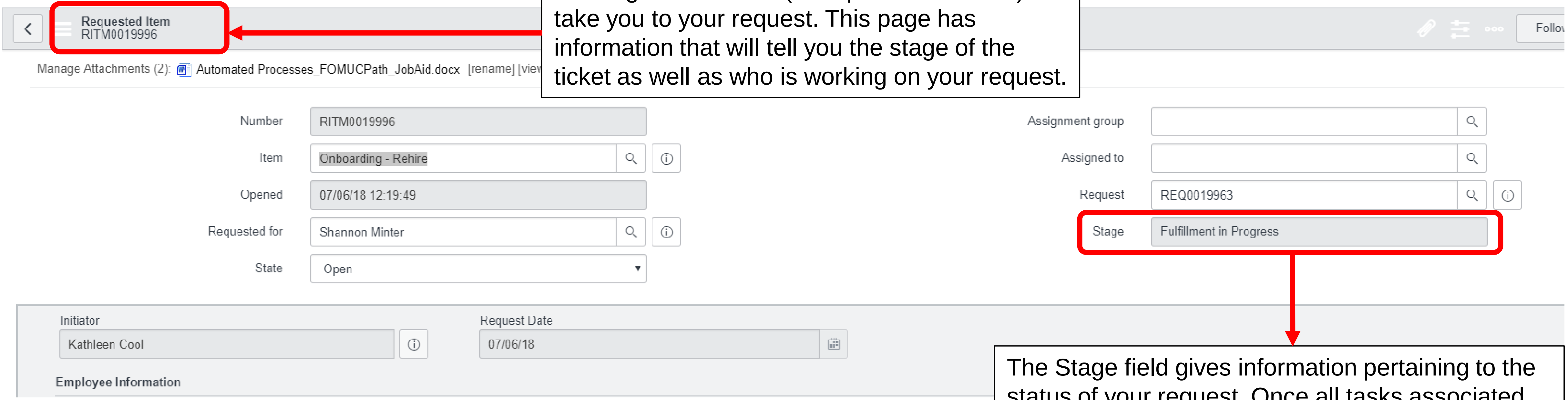
Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

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

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.

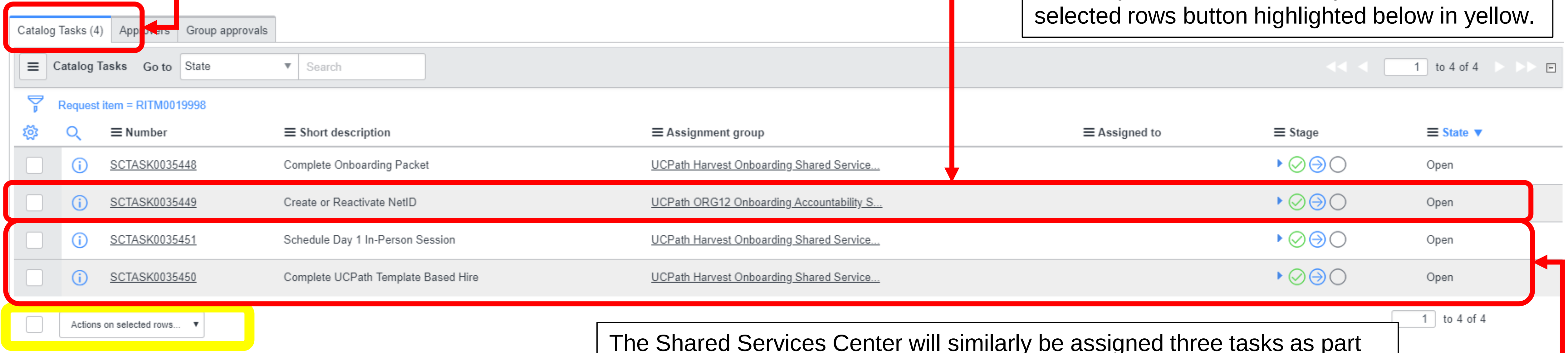


The Stage field gives information pertaining to the status of your request. Once all tasks associated with this request are closed, the stage will update automatically to “Closed Complete.” This means that your request has been successfully completed and transacted in UCPath.

ServiceLink Fulfiller

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.

For a CWR rehire, one task will be created – to create/reactivate NetID. 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.



The Shared Services Center will similarly be assigned three tasks as part of the rehire request. The SSC fulfiller will change the state of the tasks from "Open" to "Closed" when completed. When all tasks reflect a "Closed" state, the RITM stage will automatically change to "closed complete."

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 (CW) – New Hire

Personal Data

Data Point	Data Location on UCR Forms
First & Last Names	ServiceLink Form – Employee Information & UCR Personal Data Form
Address Line 1, City, State, Postal Code	UCR Personal Data Form

Onboarding – New Hire (CWR)

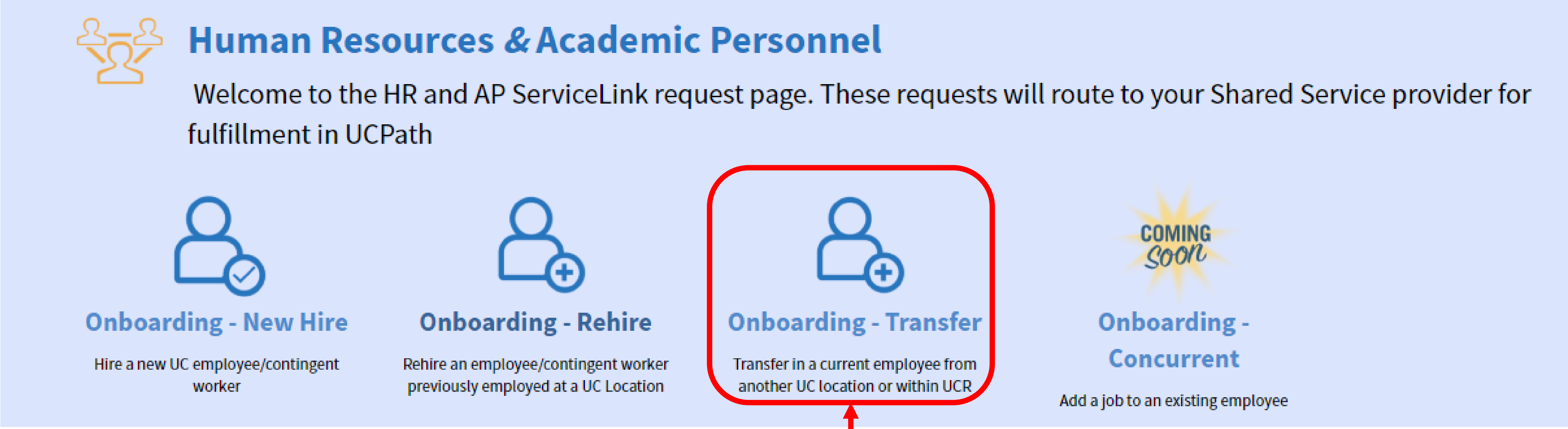
Job Data

Data Point	Data Location on UCR Forms
Business Unit	Populates Automatically – Riverside Campus
Department	ServiceLink Form – Employee Work Information
Location Code	Populates from Job Code
Job Code	ServiceLink Form – Employee Work Information
Employee class	Populated from Job Code
Supervisor ID	ServiceLink Form – Employee Relationship Information
Expected Job End Date	ServiceLink Form – Employee Relationship Information

Intra BU Transfer – Staff

UCRIVERSIDE
FOM|UCPath Training

ServiceLink Form (Staff – Intra BU Transfer)



The same ServiceLink Form – Onboarding – Transfer is used to Transfer (both Intra and Inter BU) Staff and Academic Appointees. Transferred employees must NOT have a break in service.

Onboarding – Intra BU Transfer (Staff)

This transfer type is for transfers WITHIN UCR (BU=Campus/Location)

Involuntary Demotion

Usage: Use for involuntary transfer to lower salary range maximum for disciplinary reasons in a different department

Example: A UCR employee is involuntarily demoted (not their choice) to a position in a different department at UCR with a lower salary range maximum for disciplinary reasons. There is no break in service.

Lateral Transfer

Usage: Use for the transfer of an employee from one position to another position in a new department.

Example: A UCR employee is transferred to a position in a different department at UCR with the same salary range maximum. There is no break in service.

Onboarding – Intra BU Transfer (Staff) (continued)

Per Diem to Career

Usage: Use for the transfer of an appointment of a per diem employee into a careen position. This is being tracked so that employees who receive less (in the career position) are not flagged as a demotion.

Example: A UCR employee is transferred from a per diem position to a career position at UCR. There is no break in service.

Promotion

Usage: Use to change an employee from one position to another in a new department which has a higher salary range maximum. Promotions are normally obtained through a competitive recruitment process.

Example: A UCR employee applies for and is offered a position in a different department at UCR with a higher salary range maximum. There is no break in service.

Onboarding – Intra BU Transfer (Staff) (continued)

Transfer – Dual Employment

Usage: Use to transfer to a concurrent dual-employment job.

Example: A UCR employee is transferred to a concurrent dual-employment job in a different department at UCR. There is no break in service.

Voluntary Demotion

Usage: Use for voluntary transfer to a position with a lower salary range maximum in a different department.

Example: A UCR employee is voluntarily demoted (their choice) to a position in a different department at UCR with a lower salary range maximum. There is no break in service.

Onboarding – Intra BU Transfer (Staff) (continued)

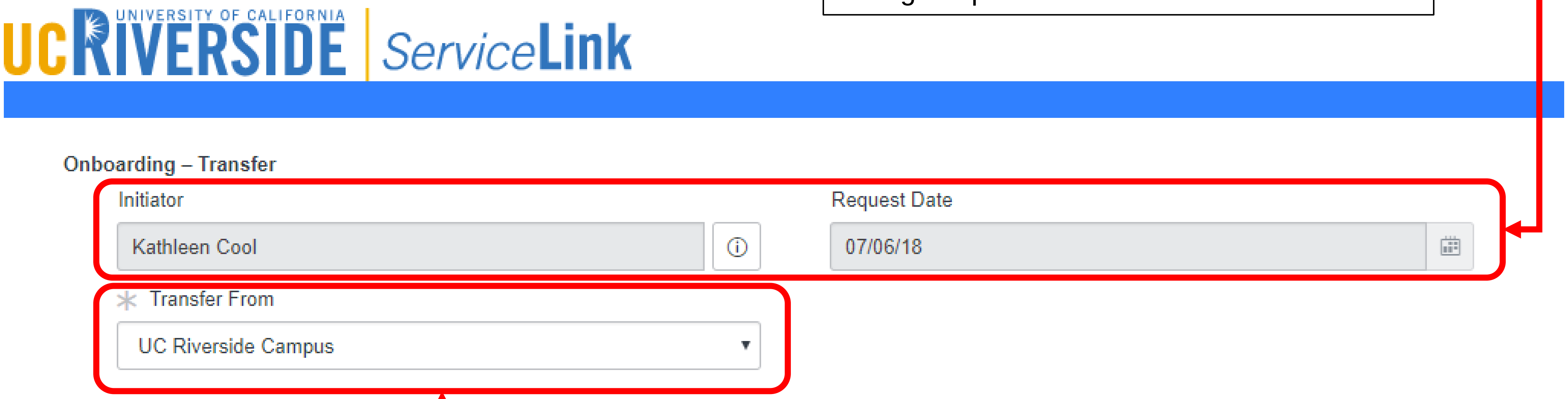
Temp Out of Class Assignment

Usage:

Example:

Onboarding – Transfer (Staff)

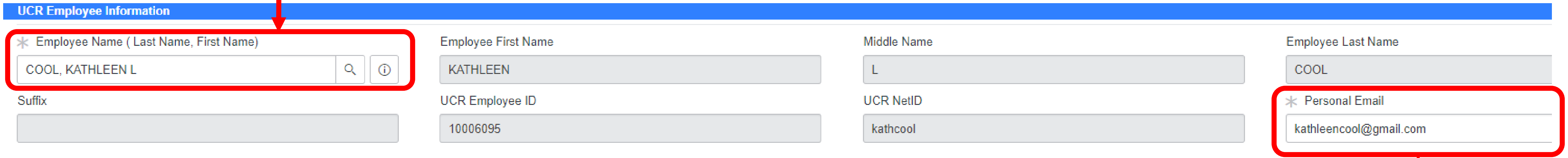
The Initiator and Request Date fields will populate automatically. These cannot be changed/updated.



Select from the dropdown where the employee is coming from. For an Intra BU Transfer (within UCR), the Transfer From location will always be UC Riverside Campus.

Employee Information (Staff)

You can type in the employee's name (last name, first name) in the Employee Name field directly or click on the magnifying glass icon to search. You can search using different criteria, including Employee Name, Job Code, Job Description, etc. Based on the person selected, the Employee First Name, Middle Name, Employee Last Name, Suffix, UCR Employee ID, and UCR NetID will populate automatically. This data is pulled from UCPath via HRDW and is accurate as of 24 hours ago.

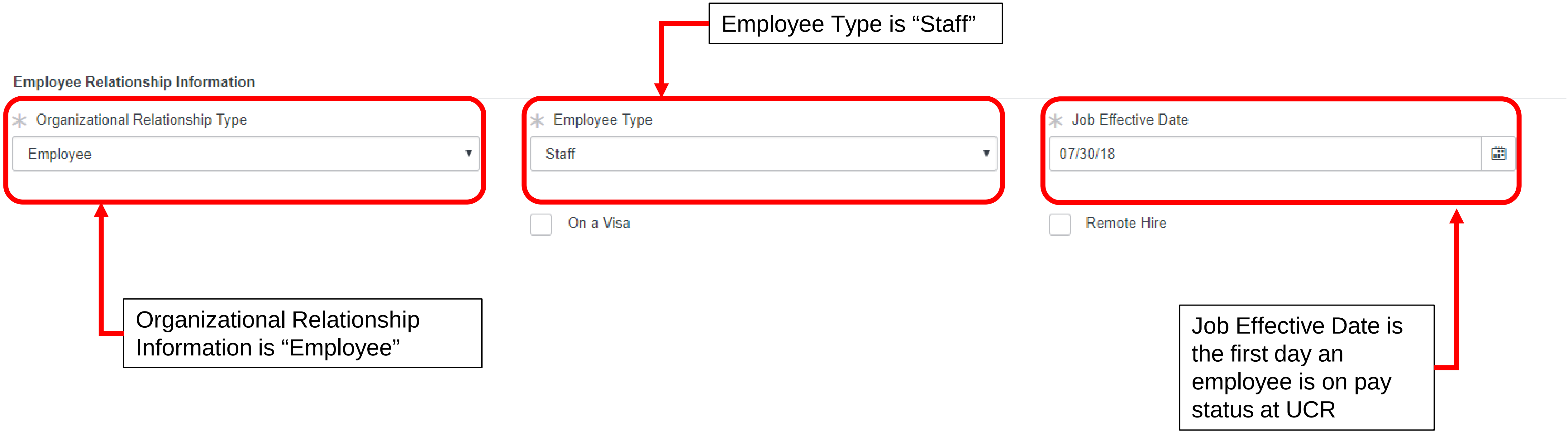

UCR Employee Information

Employee Name (Last Name, First Name)	Employee First Name	Middle Name	Employee Last Name
COOL, KATHLEEN L	KATHLEEN	L	COOL
Suffix	**UCR Employee ID**	**UCR NetID**	**Personal Email**
	10006095	kathcool	kathleencool@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 (Staff)

INTRA BU TRANSFER



Employees on Visa/Remote Hires

Employee Relationship Information

* Organizational Relationship Type	* Employee Type	* Job Effective Date
Employee	Staff	07/30/18

☐ On a Visa

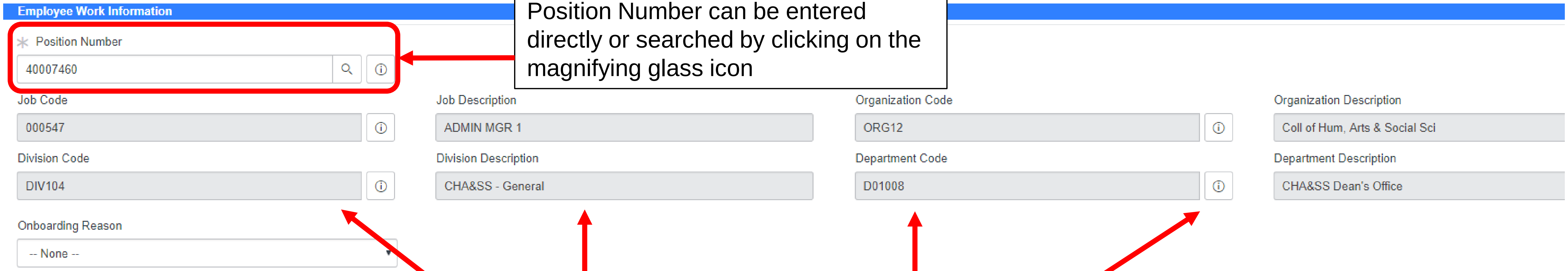
☐ Remote Hire

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 (Staff)

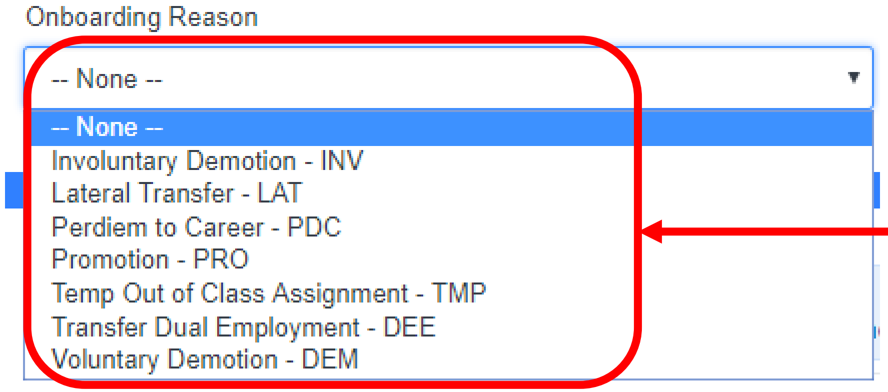
INTRA BU TRANSFER



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

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.

Onboarding Reason (Staff)



Onboarding Reason in ServiceLink is equivalent to Reason Code in UCPath. Select the appropriate Onboarding Transfer Reason from the following options:

- Involuntary Demotion
- Lateral Transfer
- Per Diem to Career
- Promotion
- Temp Out of Class Assignment
- Transfer Dual Employment
- Voluntary Demotion

Onboarding Tasks (Staff)

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

- [x] Create a single task for all Task Listed Below
- [ ] Order Required Equipment
- [ ] Schedule Day 1 In-Person Session
- [ ] Grant System Access
- [ ] Update Enterprise Directory
- [ ] 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)

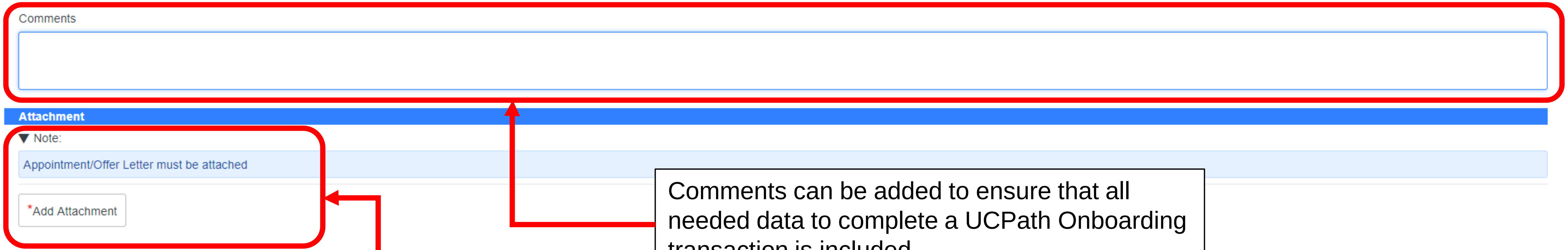
You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the "Create a single task for all Task Listed Below" will create one task that will need to be closed once completed. Individual 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

- [x] Complete UCPath Template Based Hire
- [ ] Monitor Completion of Background Check
- [x] Complete Onboarding Packet
- [ ] Update Required UCPath Checklist Items (Oath and Patent/Patent Waiver)

Two SSC tasks are required; the rest are optional. 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 (Staff)



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 Offer Letter. For Staff, the Offer Letter contains additional information required for the SSC Fulfiller to transact in UCPath.

ServiceLink Initiator

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

Kathleen Cool | Logout

UC RIVERSIDE | ServiceLink

Thank you, your request has been submitted

Request Number: REQ0019968

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

Number	Description	Stage
RITM0020001	Onboarding – Transfer	

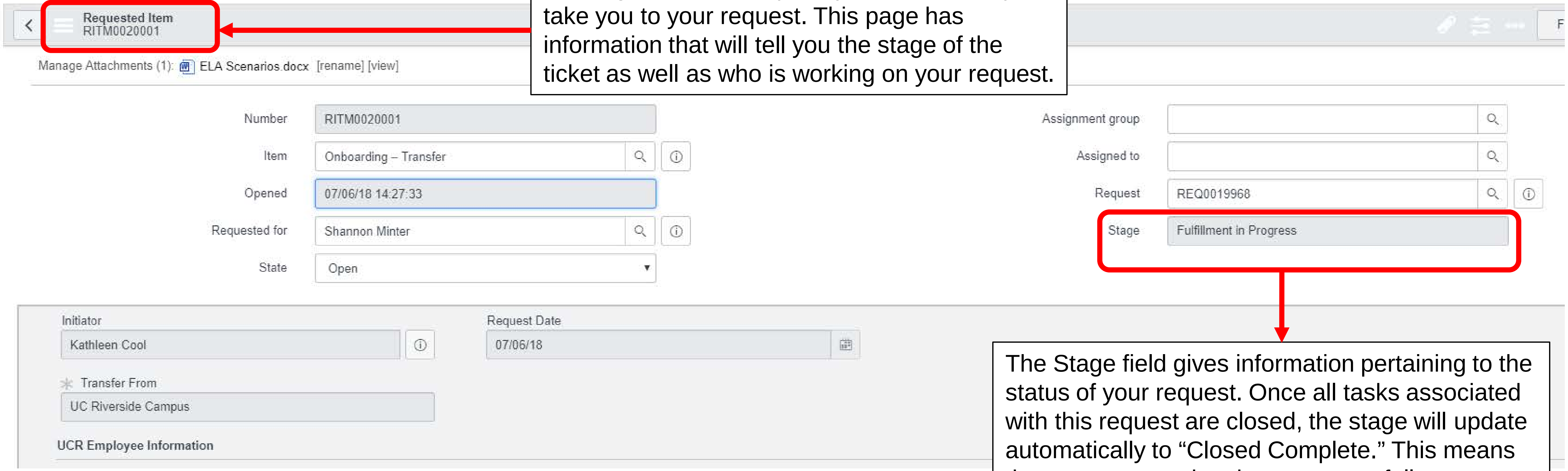
Response time(ms): 8347, Network: 7804, server: 317, browser: 226

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

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.

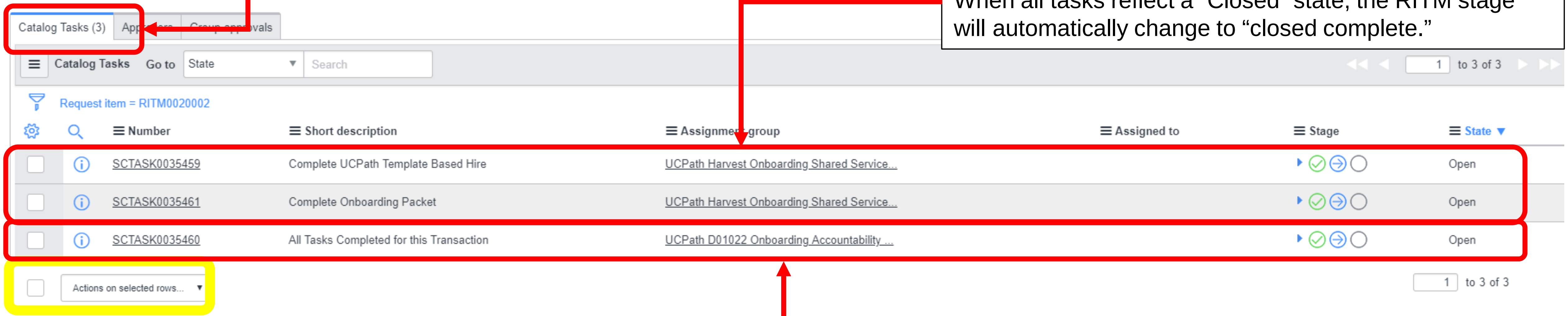


The Stage field gives information pertaining to the status of your request. Once all tasks associated with this request are closed, the stage will update automatically to “Closed Complete.” This means that your request has been successfully completed and transacted in UCPath.

ServiceLink Fulfiller

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 be assigned two tasks – Complete UCPath Template Based Hire and Complete Onboarding Packet. 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."



If you remember, 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.

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 (Staff) – Intra BU Transfer

Job Data

Data Point	Data Location on UCR Forms
Position Number	ServiceLink Form – Employee Work Information
Employee Classification	Offer Letter (Attached to ServiceLink form)
Establishment ID	Defaults from Position data, but is editable
Standard Hours	Defaults from Position data, but is editable
FTE	Offer Letter (Attached to ServiceLink form)
Step (for step-based positions only)	Offer Letter (Attached to ServiceLink form)

Onboarding – Intra BU Transfer (Staff)

Job Data (continued)

Data Point	Data Location on UCR Forms
Probation Code	Offer Letter (Attached to ServiceLink form)
Probation End Date	Offer Letter (Attached to ServiceLink form)
PY Career Duration (partial-year Empl Classes only)	Offer Letter (Attached to ServiceLink form)
Expected Job End Date (for Contract, Casual/Restricted, Floater, and Staff Rehired Retiree)	Offer Letter (Attached to ServiceLink form)

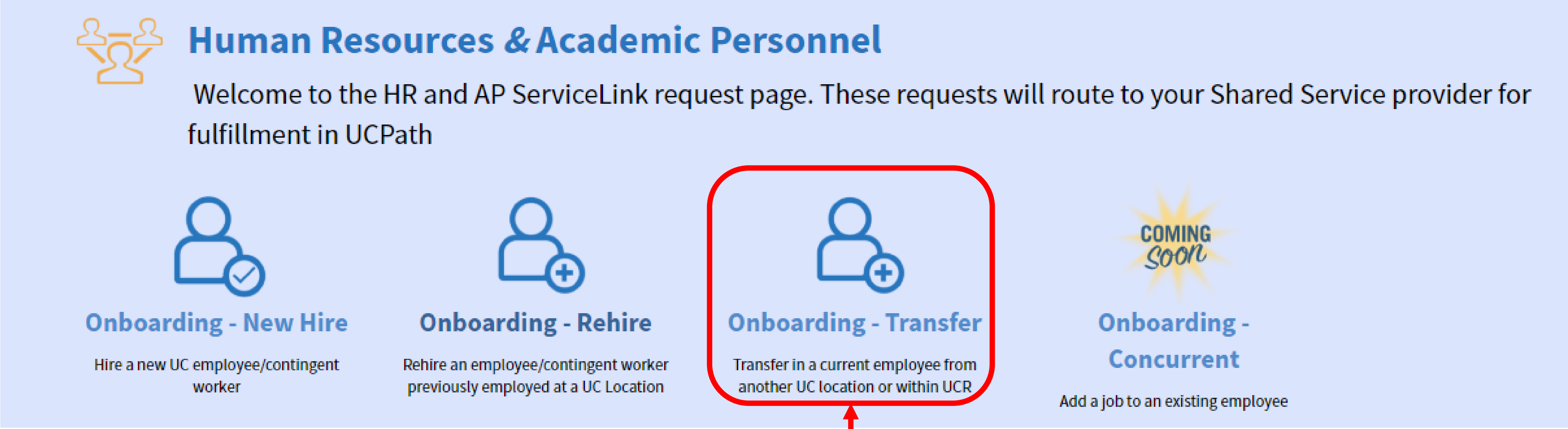
Onboarding – Intra BU Transfer (Staff)

Job Data – Job Compensation & Pay Components

Data Point	Data Location on UCR Forms
Compensation Frequency	Offer Letter (Attached to ServiceLink form)
Comp Rate Code	Offer Letter (Attached to ServiceLink form)
Compensation Rate	Offer Letter (Attached to ServiceLink form)
Pay Components Frequency	Offer Letter (Attached to ServiceLink form)

Intra BU Transfer – AP

ServiceLink Form (AP – Intra BU Transfer)



The same ServiceLink Form – Onboarding – Transfer is used to Transfer (both Intra and Inter BU) Staff and Academic Appointees. Transferred employees must NOT have a break in service.

Onboarding – Intra BU Transfer (AP)

This transfer type is for transfers WITHIN UCR (BU=Campus/Location)

Academic Intra-Campus Transfer

Usage: Use when a person moves to a new department and position.

Example: A UCR employee is transferred to a position in a different department at UCR. There is no information on whether the transfer is a demotion (voluntary or involuntary), a lateral transfer, or a promotion. There is no break in service.

Lateral Transfer

Usage: Use for the transfer of an employee from one position to another position in a new department.

Example: A UCR Academic Appointee is transferred to another position in a different department at UCR with the same salary range maximum. There is no break in service.

Onboarding – Intra BU Transfer (AP) (continued)

Involuntary Demotion

Usage: Use for involuntary transfer to lower salary range maximum for disciplinary reasons in a different department

Example: A UCR Academic Appointee is involuntarily transferred (not their choice) to a position in a different department at UCR with a lower salary range maximum for disciplinary reasons. There is no break in service.

Promotion

Usage: Use to change an employee from one position to another in a new department which has a higher salary range maximum. Promotions are normally obtained through a competitive recruitment process.

Example: A UCR Academic Appointee applies for and is offered a position in a different department at UCR with a higher salary range maximum. There is no break in service. This reason code is NOT used to promote a faculty member within the same series.

Onboarding – Intra BU Transfer (AP) (continued)

Transfer – Dual Employment

Usage: Use to transfer to a concurrent dual-employment job.

Example: A UCR Academic Appointee is transferred to a concurrent dual-employment job in a different department at UCR. There is no break in service.

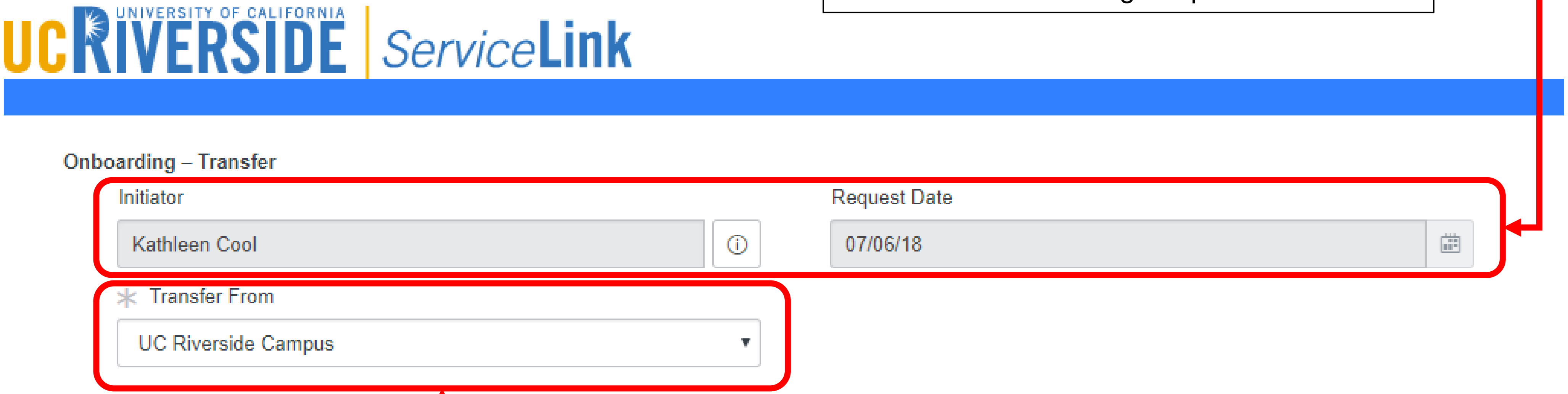
Voluntary Demotion

Usage: Use for voluntary transfer to a position with a lower salary range maximum in a different department.

Example: A UCR Academic Appointee is voluntarily transferred (their choice) to a position in a different department at UCR with a lower salary range maximum. There is no break in service.

Onboarding – Transfer (AP)

The Initiator and Request Date fields will populate automatically.
These cannot be changed/updated.

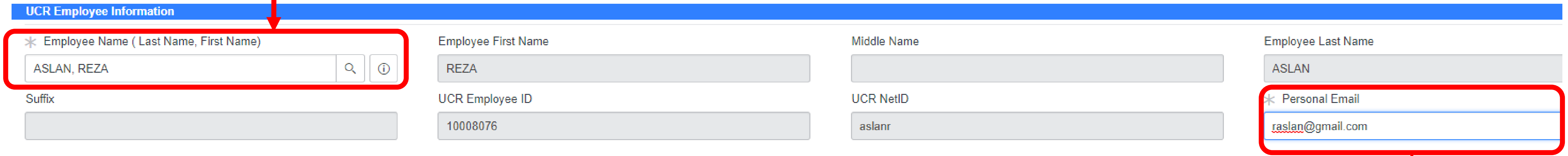


Select from the dropdown where the employee is coming from. For an Intra BU Transfer (within UCR), the Transfer From location will always be UC Riverside Campus.

Employee Information (AP)

INTRA BU TRANSFER

You can type in the employee's name (last name, first name) in the Employee Name field directly or click on the magnifying glass icon to search. You can search using different criteria, including Employee Name, Job Code, Job Description, etc. Based on the person selected, the Employee First Name, Middle Name, Employee Last Name, Suffix, UCR Employee ID, and UCR NetID will populate automatically. This data is pulled from UCPath via HRDW and is accurate as of 24 hours ago.



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)

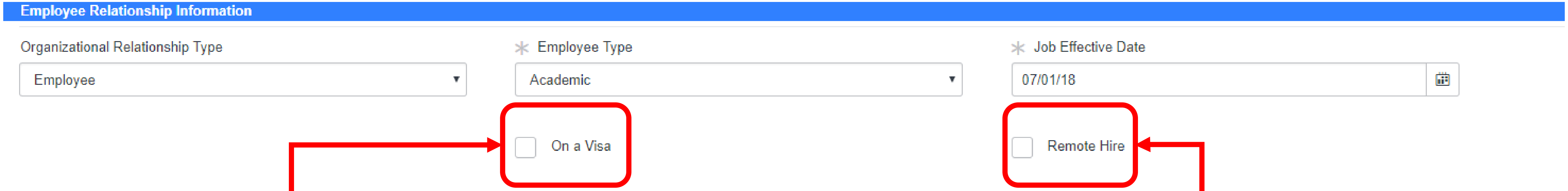
INTRA BU TRANSFER

Employee Type is “Academic”

Organizational Relationship Information is “Employee”

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

Academic Appointee on Visa/Remote Hires

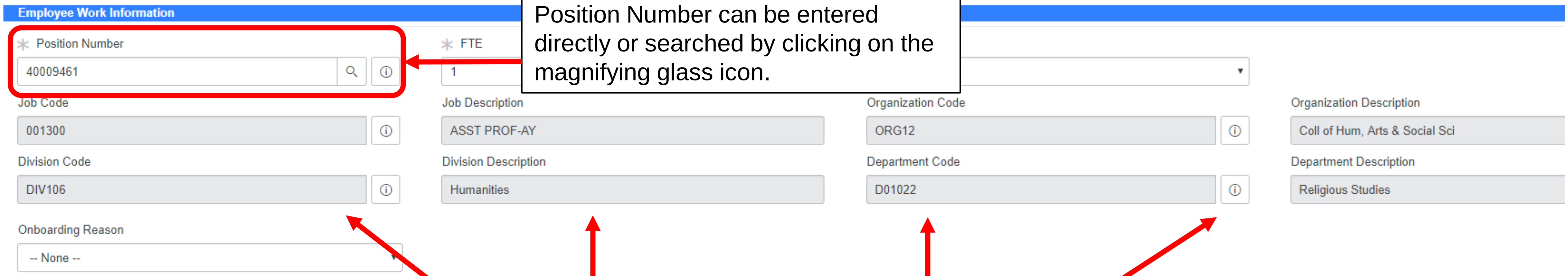


If the incumbent is on a Visa, check the “On a Visa” box in the Employee Relationship Information section. Checking this box will prompt the system to send an email notification to International Students and Scholars Office. This email is for informational purposes only.
When the SSC Fulfiller verifies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

INTRA BU TRANSFER

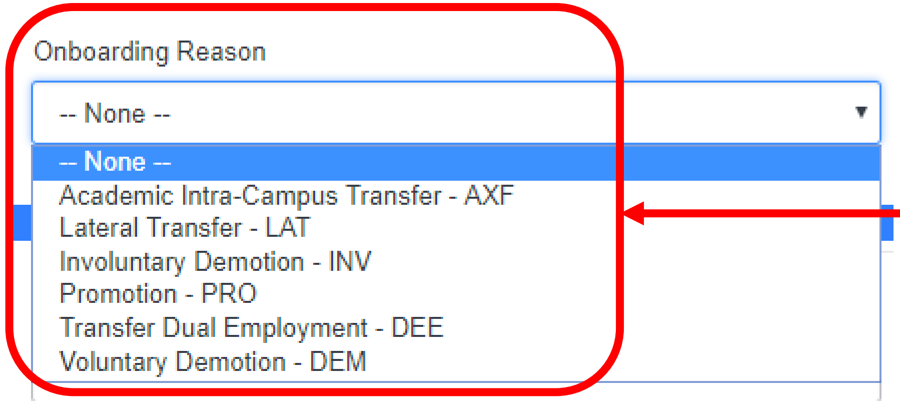
Employee Work Information (AP)



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

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.

Onboarding Reason (AP)

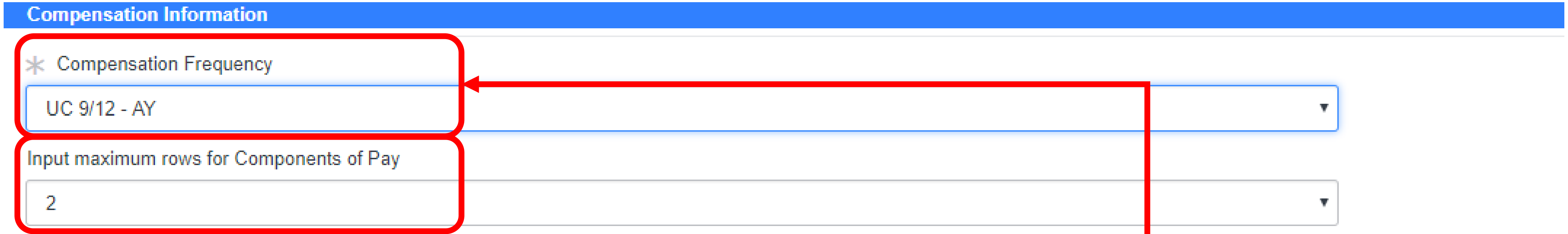


Onboarding Reason in ServiceLink is equivalent to Reason Code in UCPath. Select the appropriate Onboarding Transfer Reason from the following options:

- Academic Intra-Campus Transfer
- Involuntary Demotion
- Lateral Transfer
- Promotion
- Transfer Dual Employment
- Voluntary Demotion

INTRA BU TRANSFER

Compensation Information (AP)

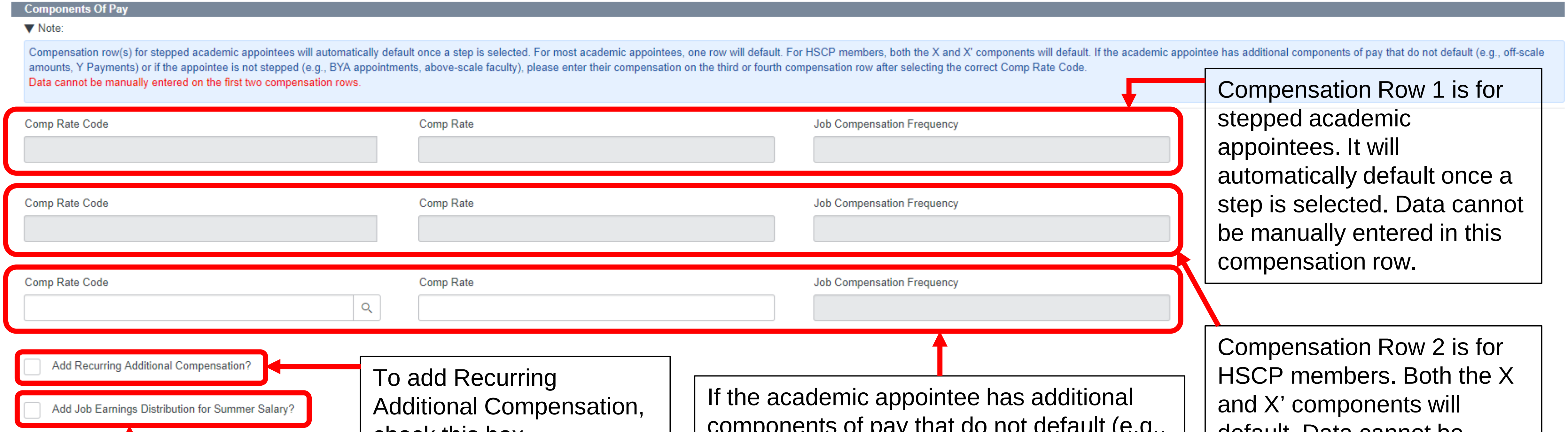


Choose how many rows for Components of Pay you would like to display (1-6). Row 1 is for stepped academic appointees and will automatically default once a step is selected. Row 2 will default for HSCP members with both X and X' components. If the academic appointee has additional components of pay that 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)



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.

To add Recurring Additional Compensation, check this box.

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.

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

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.

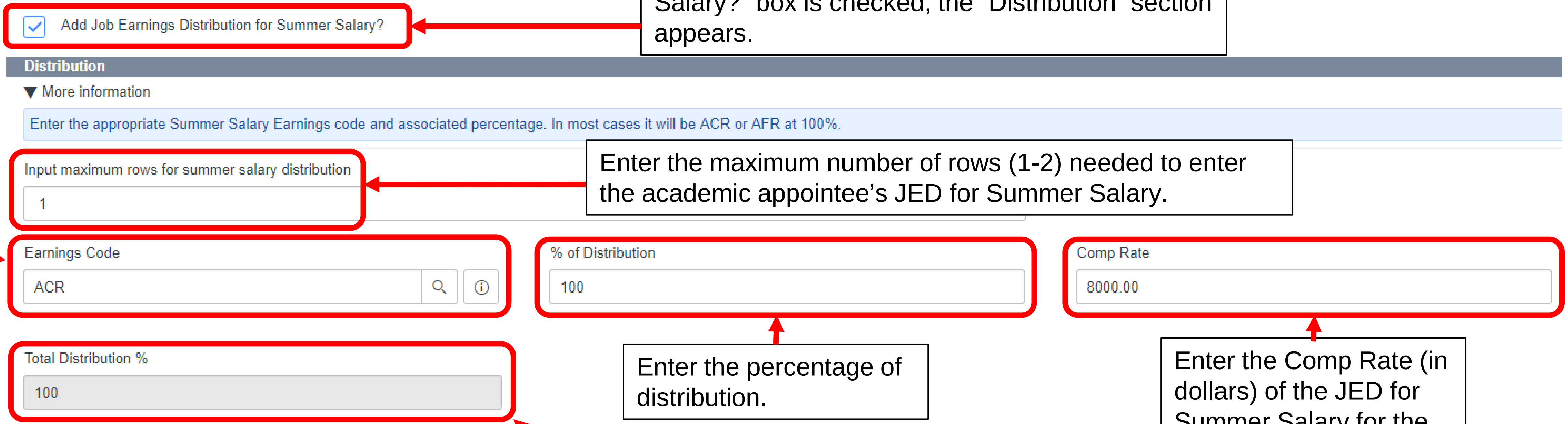
Enter the Pay Amount (in dollars) of the Recurring Additional Compensation for the entered Earnings Code.

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.



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

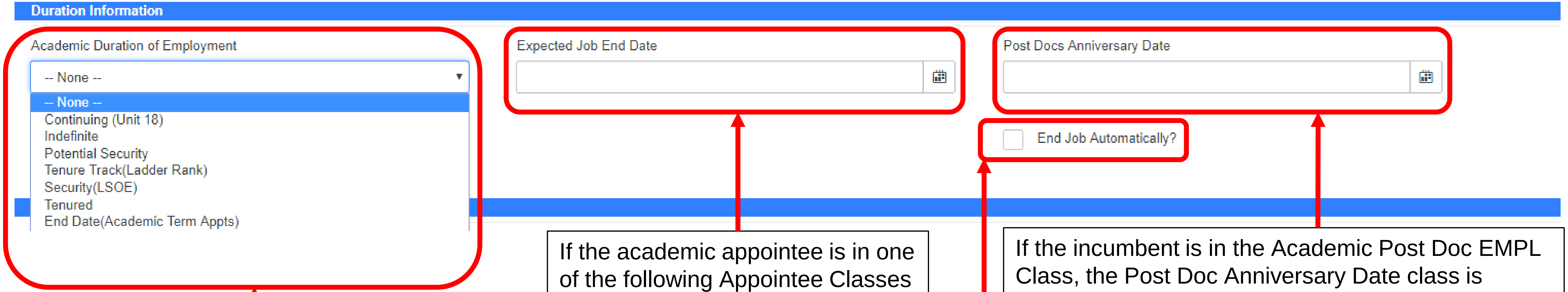
Enter the percentage of distribution.

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

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

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

Duration Information (AP)



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 class 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

- [x] Create a single task for all Task Listed Below
- [ ] Order Required Equipment
- [ ] Schedule Day 1 In-Person Session
- [ ] Grant System Access
- [ ] Update Enterprise Directory
- [ ] 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)

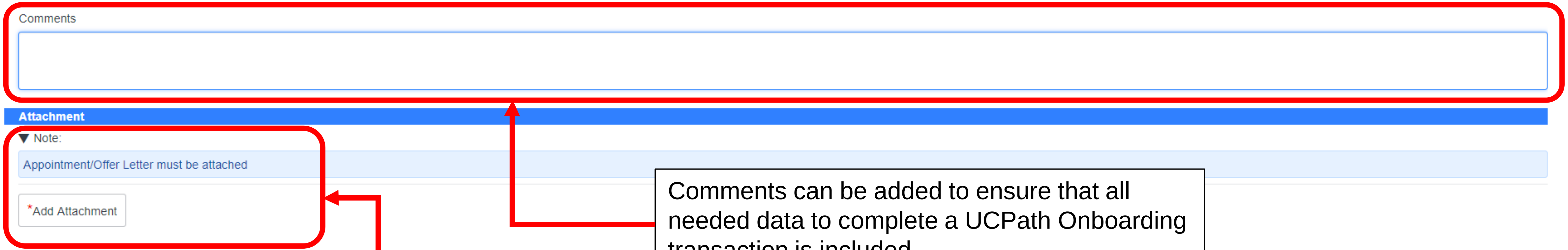
You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the "Create a single task for all Task Listed Below" will create one task that will need to be closed once completed. Individual 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

- [x] Complete UCPath Template Based Hire
- [ ] Monitor Completion of Background Check
- [x] Complete Onboarding Packet
- [ ] Update Required UCPath Checklist Items (Oath and Patent/Patent Waiver)

Two SSC tasks are required; the rest are optional. 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)



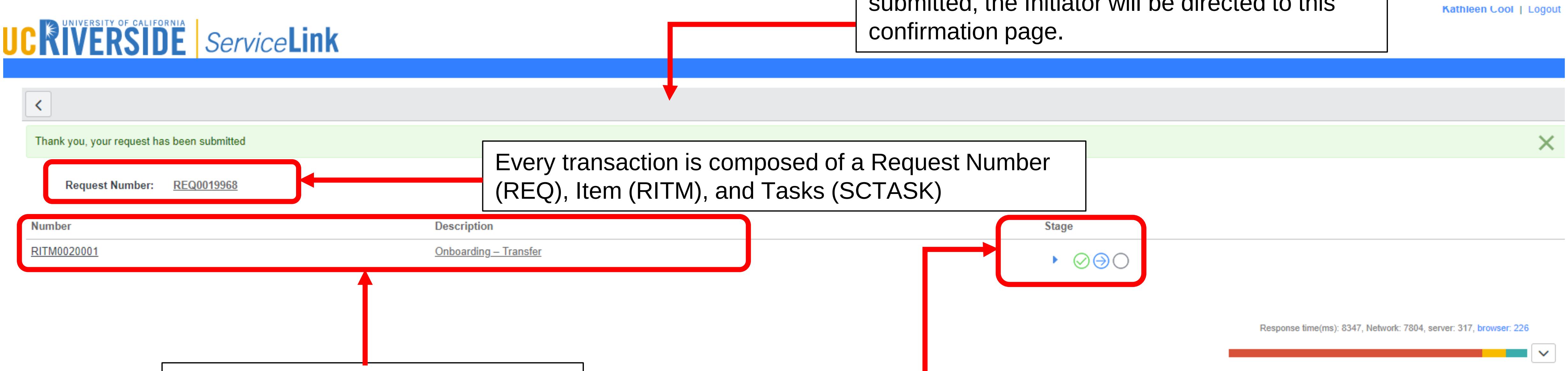
Comments can be added to ensure that all needed data to complete a UCPath Onboarding transaction is included.

ServiceLink Onboarding requests require that the Initiator attach an Offer Letter. For Staff, the Offer Letter contains additional information required for the SSC Fulfiller to transact in UCPath.

ServiceLink Initiator

INTRA BU TRANSFER

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



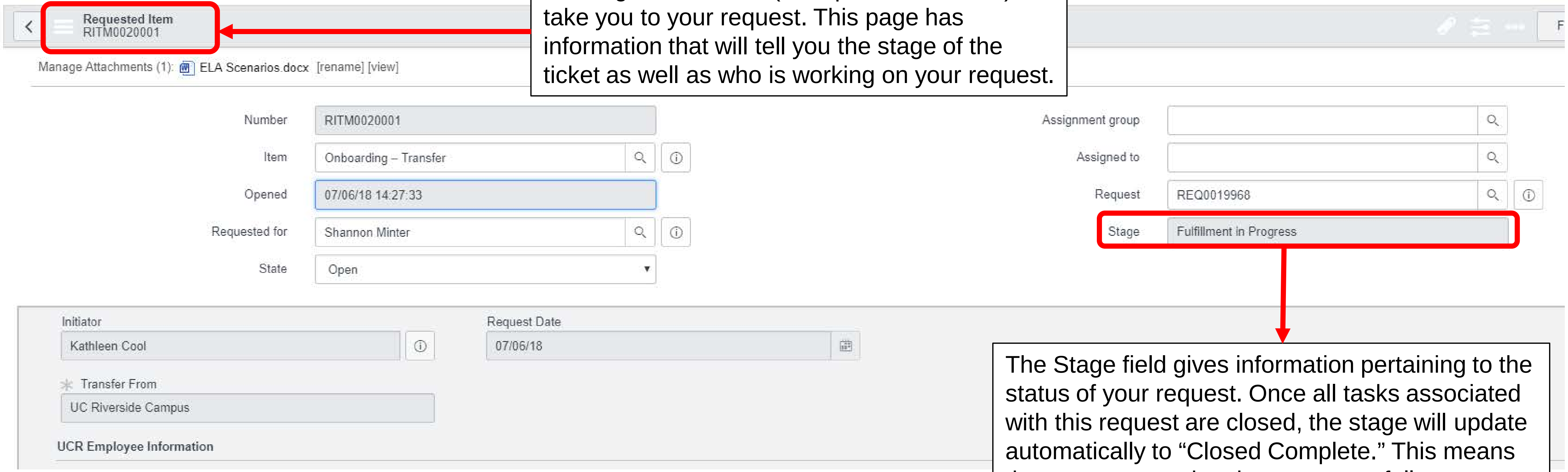
Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

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

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.



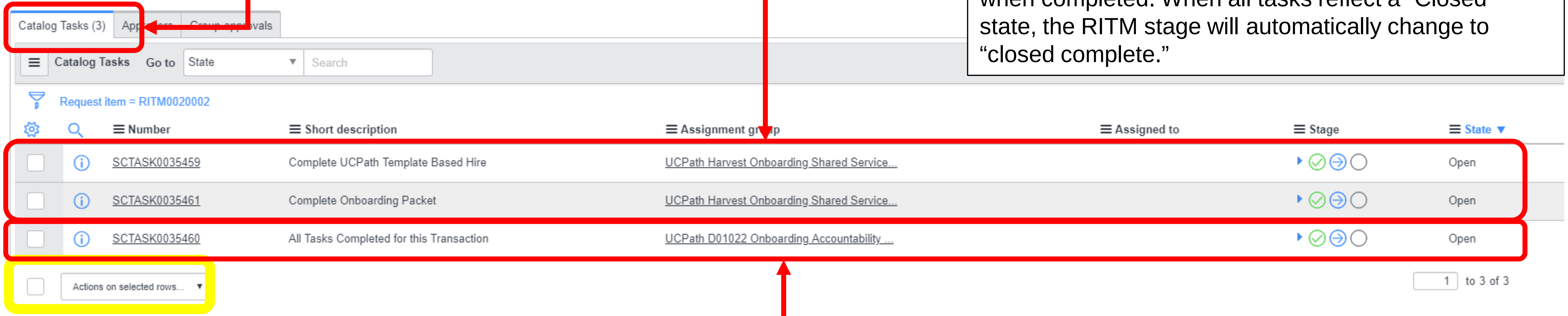
The Stage field gives information pertaining to the status of your request. Once all tasks associated with this request are closed, the stage will update automatically to “Closed Complete.” This means that your request has been successfully completed and transacted in UCPath.

ServiceLink Fulfiller

INTRA BU TRANSFER

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 be assigned two tasks – Complete UCPath Template Based Hire and Complete Onboarding Packet. 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.”



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.

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) – Intra BU Transfer

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

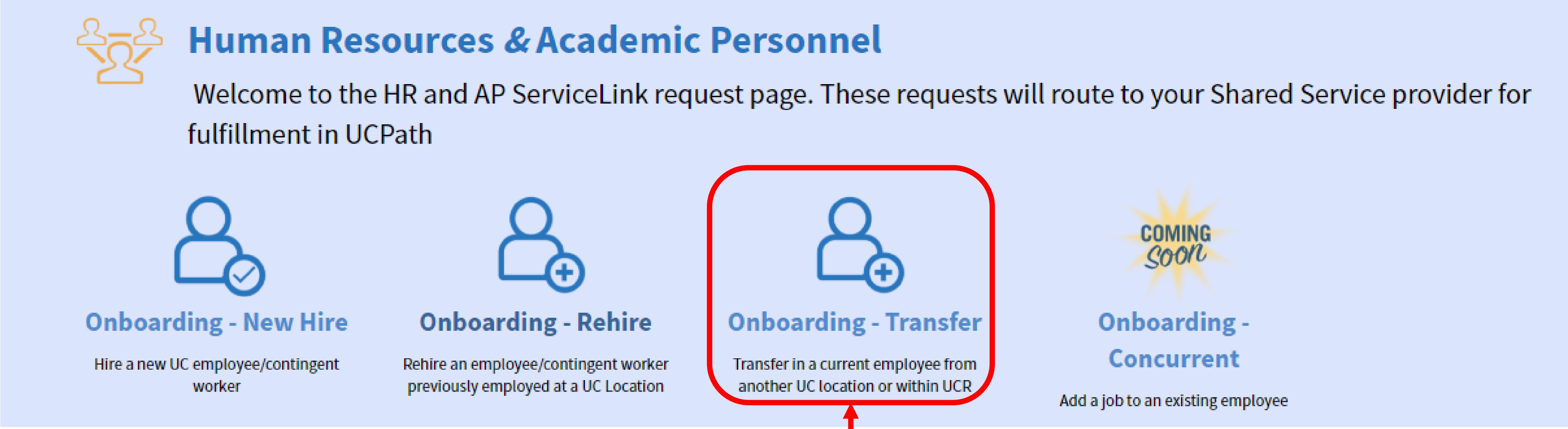
Onboarding – Intra BU Transfer (AP)

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

Inter BU Transfer – Staff

ServiceLink Form (Staff – Inter BU Transfer)



The same ServiceLink Form – Onboarding – Transfer is used to Transfer (both Intra and Inter BU) Staff and Academic Appointees. Transferred employees must NOT have a break in service.

Onboarding – Inter BU Transfer (Staff)

This transfer type is for transfers OUTSIDE UCR (BU=Campus/Location)

Transfer-Inter BU, Demotion

Usage: Use for an Inter-Business Unit transfer where there is no break in service and the transfer is a voluntary demotion for the employee. This is a transfer from a non-UCPath location to a UCPath location.

Example: A staff employee at UC Davis is transferred to a new position at UCR with a lower maximum salary range. There is no break in service.

Transfer-Inter BU, Lateral

Usage: Use for an Inter-Business Unit transfer where there is no break in service and the transfer is a lateral move for the employee. This is a transfer from a non-UCPath location to a UCPath location.

Example: A UC San Diego staff employee is transferred to a new position at UCR with the same maximum salary range. There is no break in service.

Onboarding – Inter BU Transfer (Staff)

Transfer-Inter BU, Promotion

Usage: Use for Inter-Business Unit transfer where there is no break in service and the transfer is a promotion for the employee. This is a transfer from a non-UCPath location to a UCPath location.

Example: A UC San Francisco staff employee is transferred to a position at UCR with a higher maximum salary range. There is no break in service.

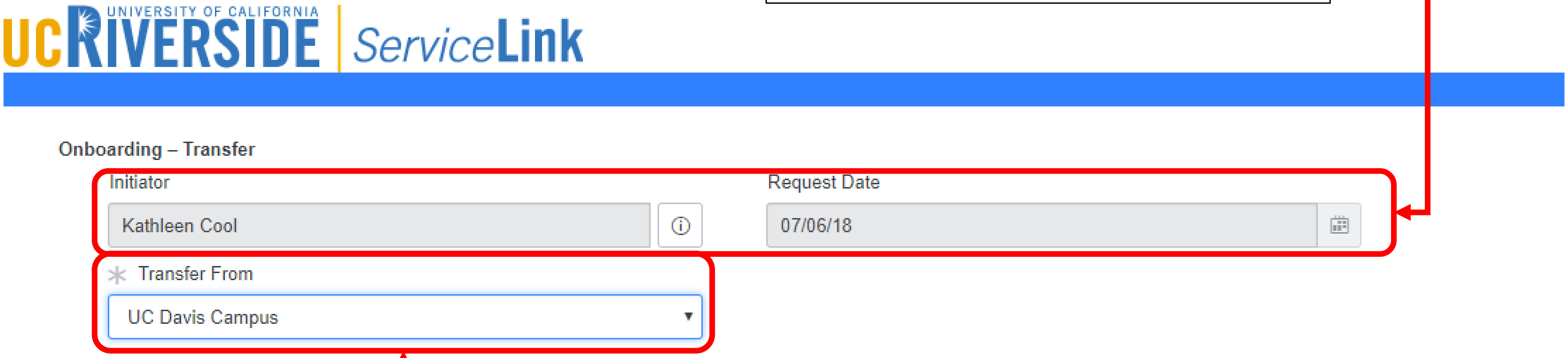
Transfer-Inter BU, Undefined

Usage: Use for intercampus transfers when there is no way of knowing if the transfer is a promotion, lateral, or demotion.

Example: A UC Santa Barbara staff employee is transferred to a new position at UCR. There is no way of knowing if the transfer is a demotion, a lateral transfer, or a promotion. There is no break in service.

Onboarding – Transfer (Staff)

The Initiator and Request Date fields will populate automatically. These cannot be changed/updated.



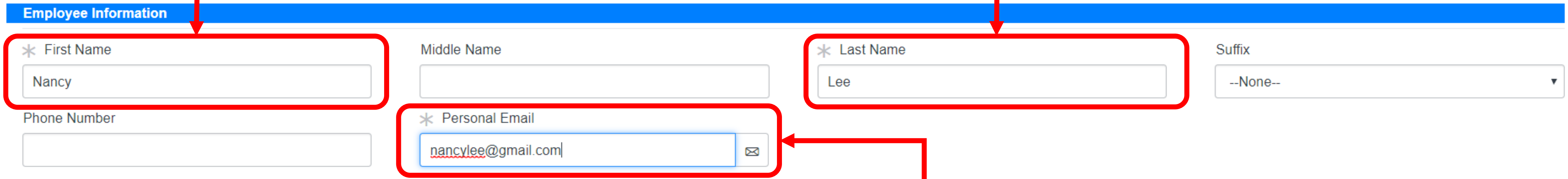
Select from the dropdown where the employee is coming from. For an Inter BU Transfer (Location other than UCR to UCR), the Transfer From location will always be a UC Campus OTHER than UCR.

Employee Information (Staff)

INTER BU TRANSFER

Incumbent's First Name

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



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.

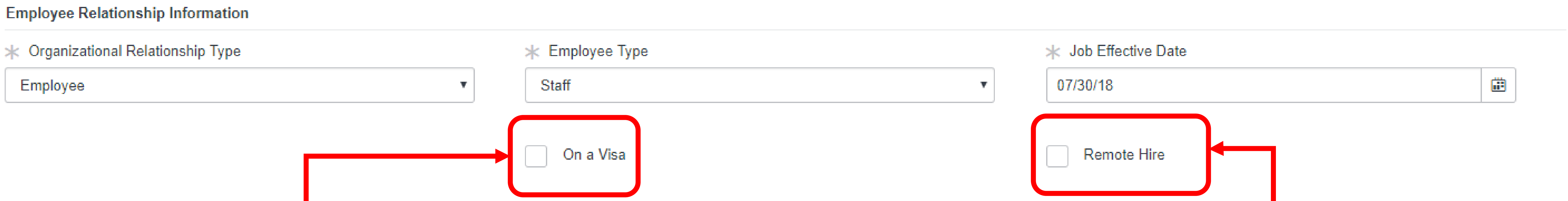
Employee Relationship Information (Staff)

Employee Type is “Staff”

Organizational Relationship Information is “Employee”

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

Employees on Visa/Remote Hires

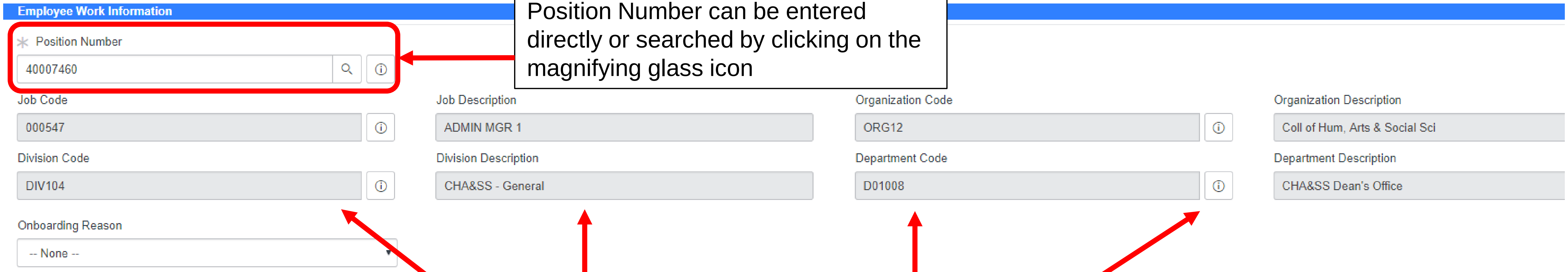


If the incumbent is on a Visa, check the “On a Visa” box in the Employee Relationship Information section. Checking this box will prompt the system to send an email notification to International Students and Scholars Office. This email is for informational purposes only.
When the SSC Fulfiller verifies 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 (Staff)

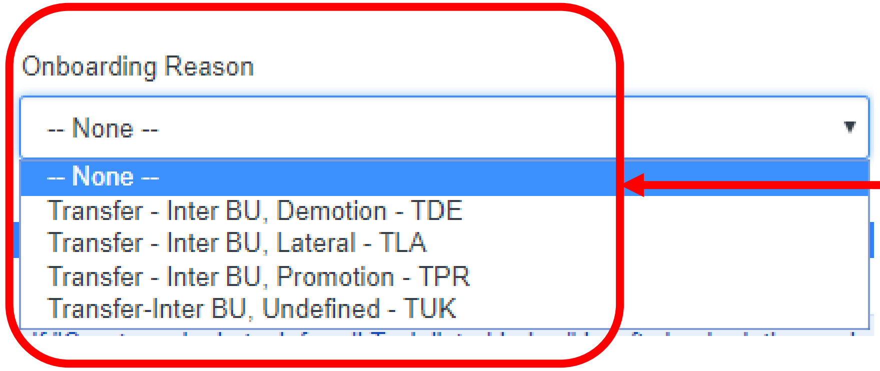
INTER BU TRANSFER



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

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.

Onboarding Reason (Staff)



Onboarding Reason in ServiceLink is equivalent to Reason Code in UCPath. Select the appropriate Onboarding Transfer Reason from the following options:

- Demotion
- Lateral
- Promotion
- Undefined

Onboarding Tasks (Staff)

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

- [x] 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)

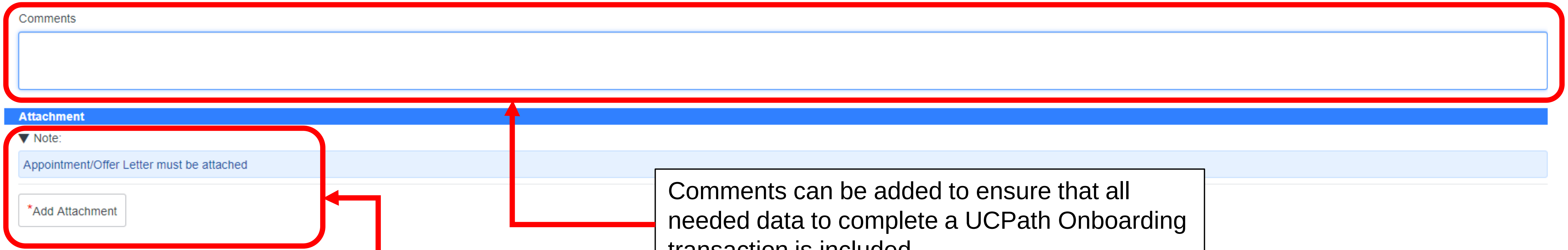
You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the “Create a single task for all Task Listed Below” will create one task that will need to be closed once completed. Individual 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

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

All SSC tasks are required (except Complete Onboarding Packet) 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 (Staff)

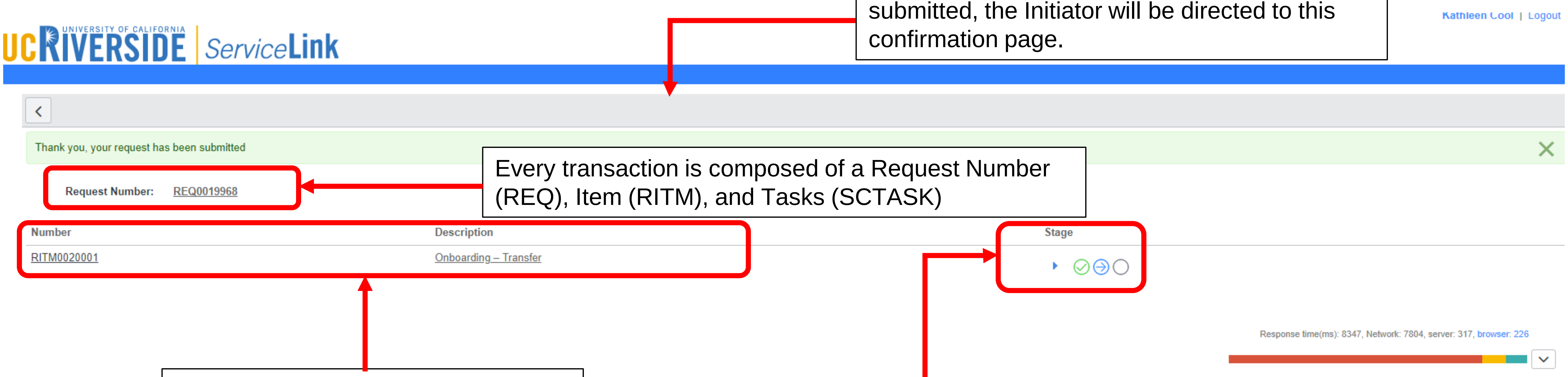


Comments can be added to ensure that all needed data to complete a UCPath Onboarding transaction is included.

ServiceLink Onboarding requests require that the Initiator attach an Offer Letter. For Staff, the Offer Letter contains additional information required for the SSC Fulfiller to transact in UCPath.

ServiceLink Initiator

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



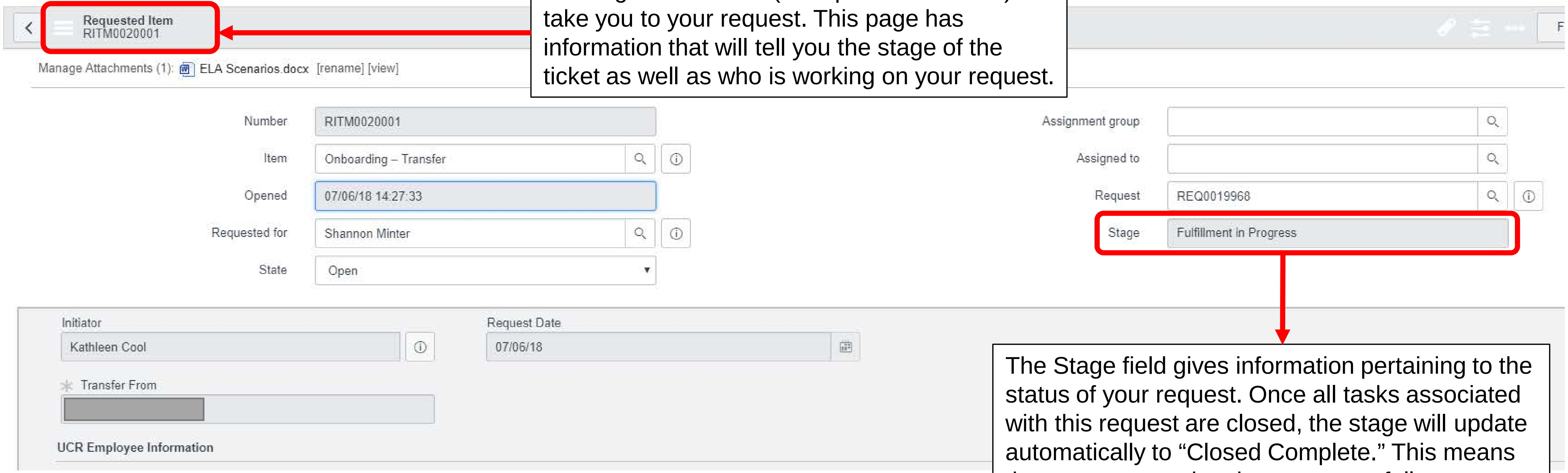
Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

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

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.

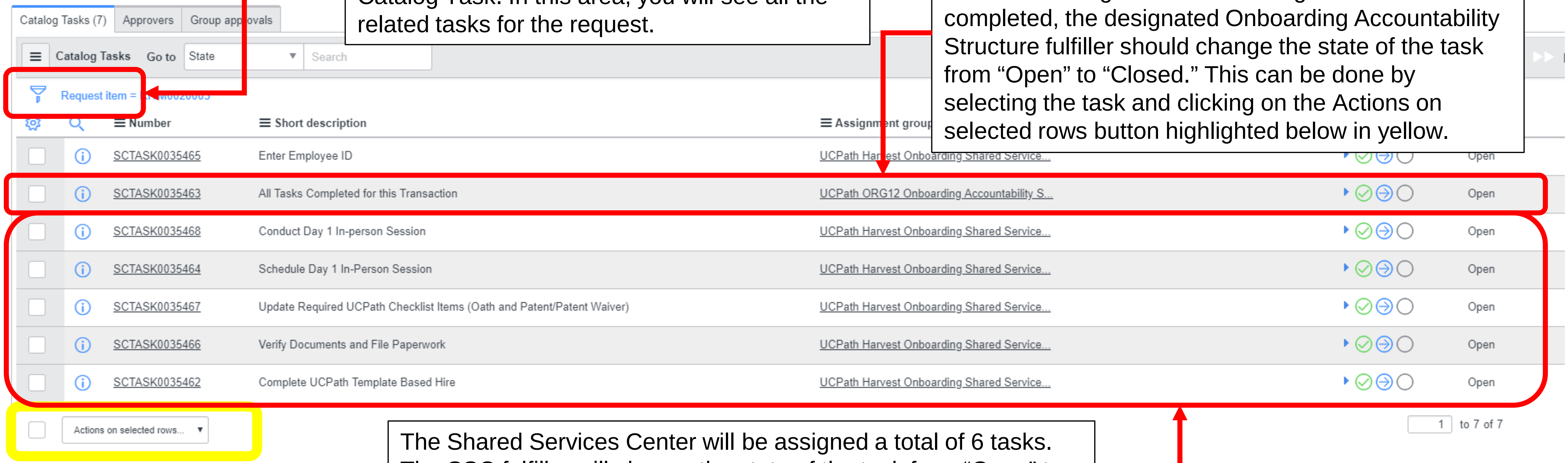


The Stage field gives information pertaining to the status of your request. Once all tasks associated with this request are closed, the stage will update automatically to “Closed Complete.” This means that your request has been successfully completed and transacted in UCPath.

ServiceLink Fulfiller

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.

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.



The Shared Services Center will be assigned a total of 6 tasks. 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.”

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 (Staff) – Inter BU Transfer

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

Onboarding – Inter BU Transfer (Staff)

Job Data

Data Point	Data Location on UCR Forms
Position Number	ServiceLink Form – Employee Work Information
Employee Classification	Offer Letter (Attached to ServiceLink form)
Establishment ID	Defaults from Position data, but is editable
Standard Hours	Defaults from Position data, but is editable
FTE	Offer Letter (Attached to ServiceLink form)
Step (for step-based positions only)	Offer Letter (Attached to ServiceLink form)

Onboarding – Inter BU Transfer (Staff)

Job Data (continued)

Data Point	Data Location on UCR Forms
Probation Code	Offer Letter (Attached to ServiceLink form)
Probation End Date	Offer Letter (Attached to ServiceLink form)
PY Career Duration (partial-year Empl Classes only)	Offer Letter (Attached to ServiceLink form)
Expected Job End Date (for Contract, Casual/Restricted, Floater, and Staff Rehired Retiree)	Offer Letter (Attached to ServiceLink form)

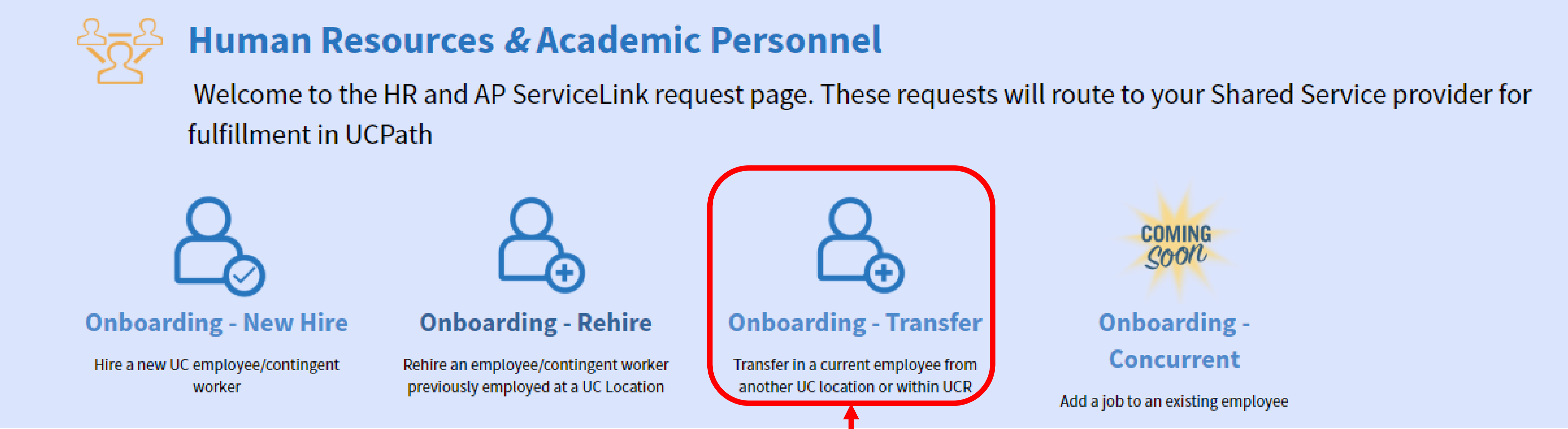
Onboarding – Inter BU Transfer (Staff)

Job Data – Job Compensation & Pay Components

Data Point	Data Location on UCR Forms
Compensation Frequency	Offer Letter (Attached to ServiceLink form)
Comp Rate Code	Offer Letter (Attached to ServiceLink form)
Compensation Rate	Offer Letter (Attached to ServiceLink form)
Pay Components Frequency	Offer Letter (Attached to ServiceLink form)
UFIN 301	Receive from terminating location

Inter BU Transfer – AP

ServiceLink Form (AP – Inter BU Transfer)



The same ServiceLink Form – Onboarding – Transfer is used to Transfer (both Intra and Inter BU) Staff and Academic Appointees. Transferred employees must NOT have a break in service.

Onboarding – Inter BU Transfer (AP)

This transfer type is for transfers OUTSIDE UCR (BU=Campus/Location)

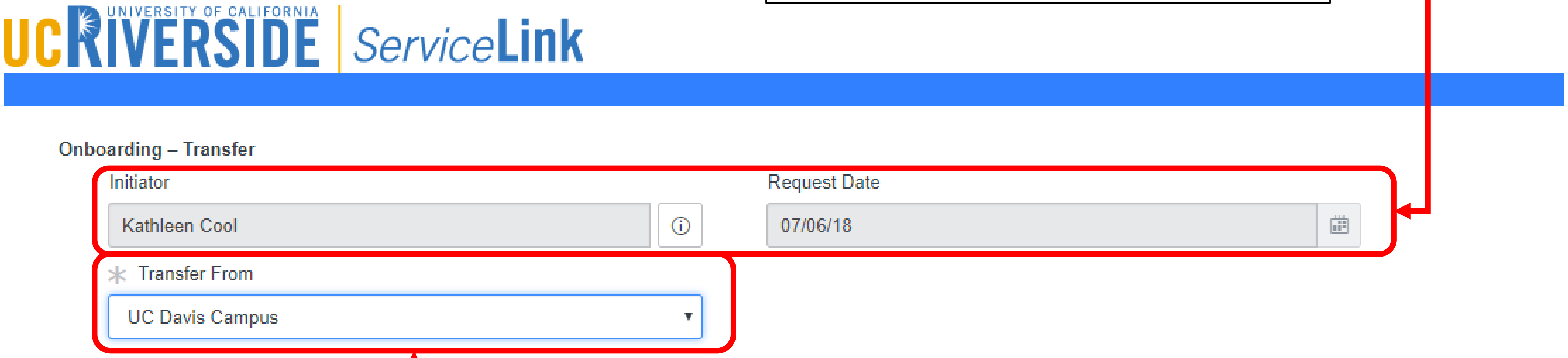
Academic Inter BU Transfer

Usage: Use for an inter location transfer of an academic employee

Example: A faculty member from UCLA is transferred to a new position at UCR. There is no break in service.

Onboarding – Transfer (AP)

The Initiator and Request Date fields will populate automatically. These cannot be changed/updated.

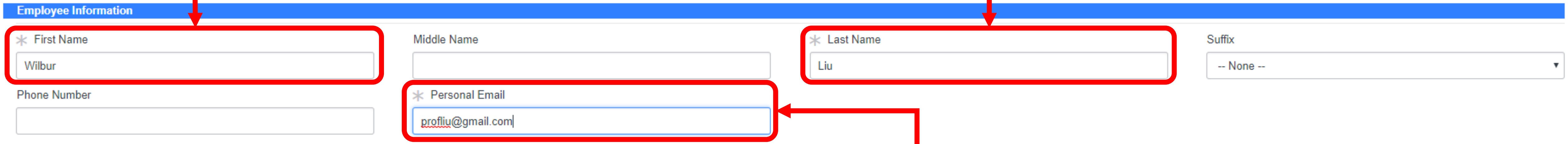


Select from the dropdown where the employee is coming from. For an Inter BU Transfer (Location other than UCR to UCR), the Transfer From location will always be a UC Campus OTHER than UCR.

Employee Information (AP)

Incumbent's First Name

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



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)

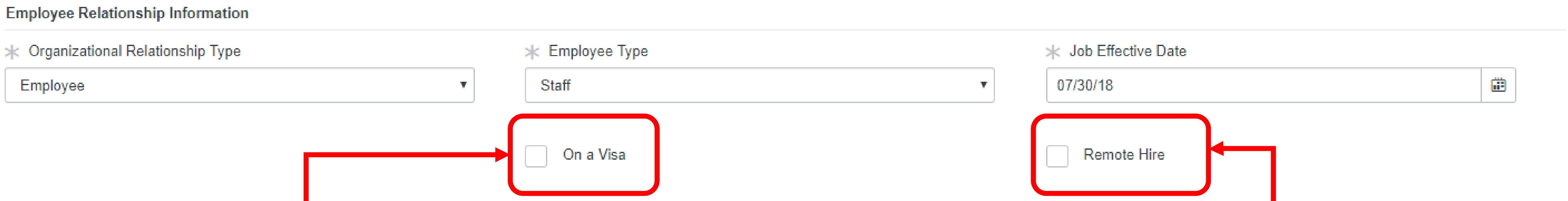
INTER BU TRANSFER

Employee Type is “Staff”

Organizational Relationship Information is “Employee”

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

Academic Appointee on Visa/Remote Hires

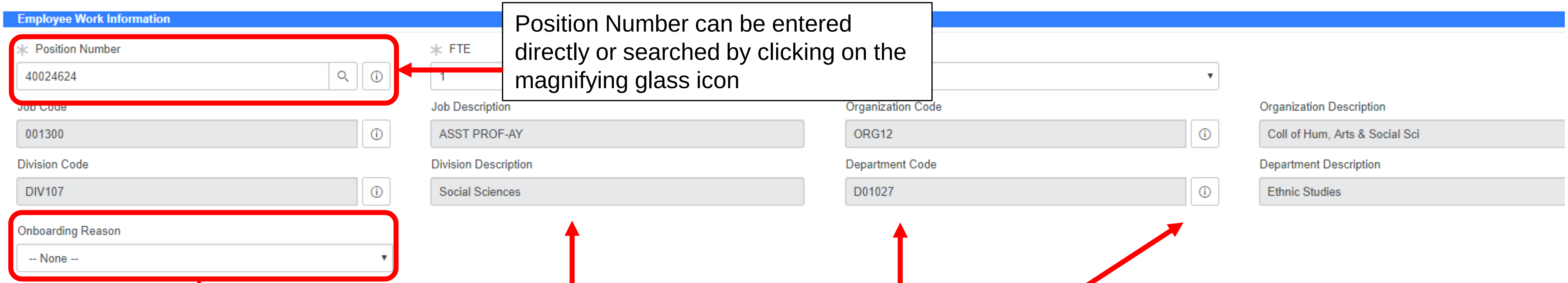


If the incumbent is on a Visa, check the “On a Visa” box in the Employee Relationship Information section. Checking this box will prompt the system to send an email notification to International Students and Scholars Office. This email is for informational purposes only.
When the SSC Fulfiller verifies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

INTER BU TRANSFER

Employee Work Information (AP)

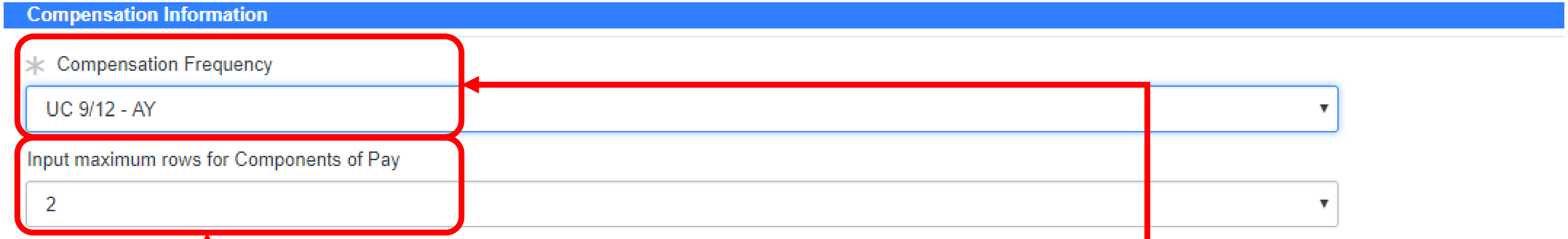


Position Number can be entered directly or searched by clicking on the magnifying glass icon

There is only on Transfer code for this type of request for Academic Appointees.

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)



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

Comp Rate Code	Comp Rate	Job Compensation Frequency

Comp Rate Code	Comp Rate	Job Compensation Frequency

☐ Add Recurring Additional Compensation?

☐ Add Job Earnings Distribution for Summer Salary?

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.

To add Recurring Additional Compensation, check this box.

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

Recurring Additional Compensation (AP)

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

Add Recurring Additional Compensation?

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

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

Earnings Code

ACR

% of Distribution

100

Comp Rate

8000.00

Total Distribution %

100

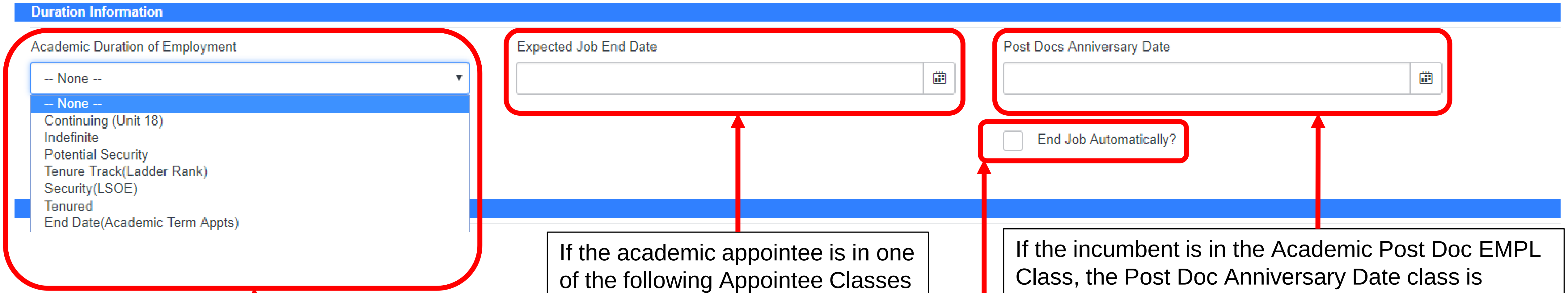
Enter the percentage of distribution.

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

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

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

Duration Information (AP)



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 class 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

- [x] 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)

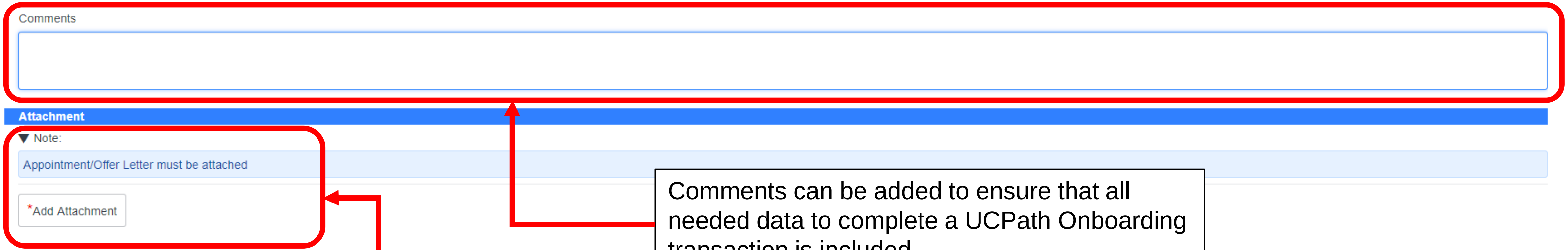
You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the “Create a single task for all Task Listed Below” will create one task that will need to be closed once completed. Individual 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

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

All SSC tasks are required (except Complete Onboarding Packet) 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)

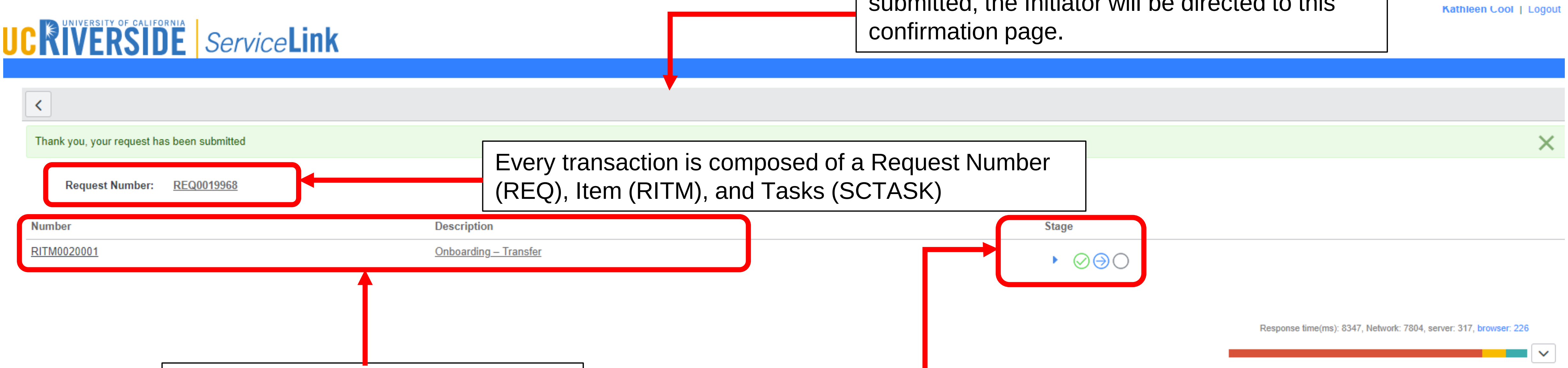


Comments can be added to ensure that all needed data to complete a UCPath Onboarding transaction is included.

ServiceLink Onboarding requests require that the Initiator attach an Offer Letter. For Staff, the Offer Letter contains additional information required for the SSC Fulfiller to transact in UCPath.

ServiceLink Initiator

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



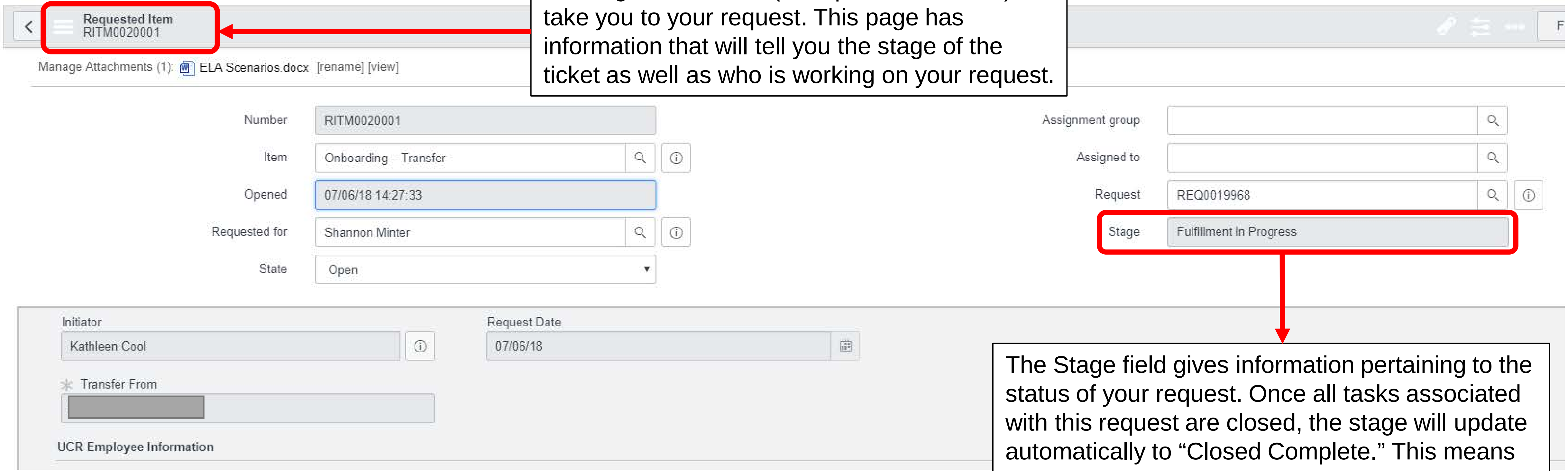
Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

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

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

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.

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.

Catalog Tasks (7) | Approvers | Group approvals

Catalog Tasks Go to State Search

Request item = RITM0020003

Number	Short description	Assignment group	
SCTASK0035465	Enter Employee ID	UCPath Harvest Onboarding Shared Service...	Open
SCTASK0035463	All Tasks Completed for this Transaction	UCPath ORG12 Onboarding Accountability S...	Open
SCTASK0035468	Conduct Day 1 In-person Session	UCPath Harvest Onboarding Shared Service...	Open
SCTASK0035464	Schedule Day 1 In-Person Session	UCPath Harvest Onboarding Shared Service...	Open
SCTASK0035467	Update Required UCPath Checklist Items (Oath and Patent/Patent Waiver)	UCPath Harvest Onboarding Shared Service...	Open
SCTASK0035466	Verify Documents and File Paperwork	UCPath Harvest Onboarding Shared Service...	Open
SCTASK0035462	Complete UCPath Template Based Hire	UCPath Harvest Onboarding Shared Service...	Open

Actions on selected rows...

1 to 7 of 7

The Shared Services Center will be assigned a total of 6 tasks. 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.”

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) – Inter BU Transfer

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

Onboarding – Inter BU Transfer (AP)

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

Onboarding – Inter BU Transfer (AP)

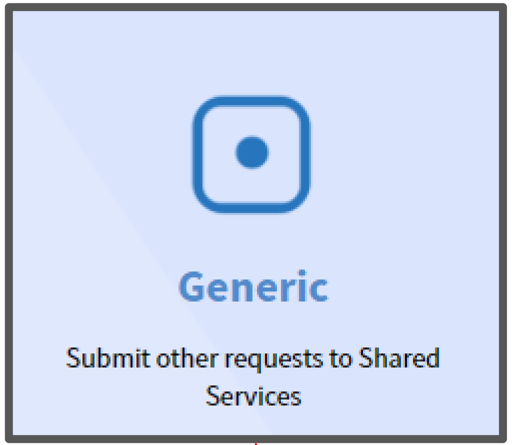
Job Data – Job Compensation & Pay Components

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
UFIN 301	Receive from Terminating Location

Concurrent Hire – Staff

ServiceLink Form (Staff – Concurrent Hire)

Once developed and tested, ServiceLink Initiators will request Concurrent Onboarding for both Staff and Academic Appointees using the Onboarding – Concurrent ServiceLink form.



Pending development and testing of the Onboarding – Concurrent ServiceLink form, the ServiceLink Generic request form is used to request Concurrent Hires for both Staff and Academic Appointees.

Onboarding – Concurrent Hire (Staff)

Concurrent Hire – Dual Employment

Usage: Use to add a concurrent dual-employment job.

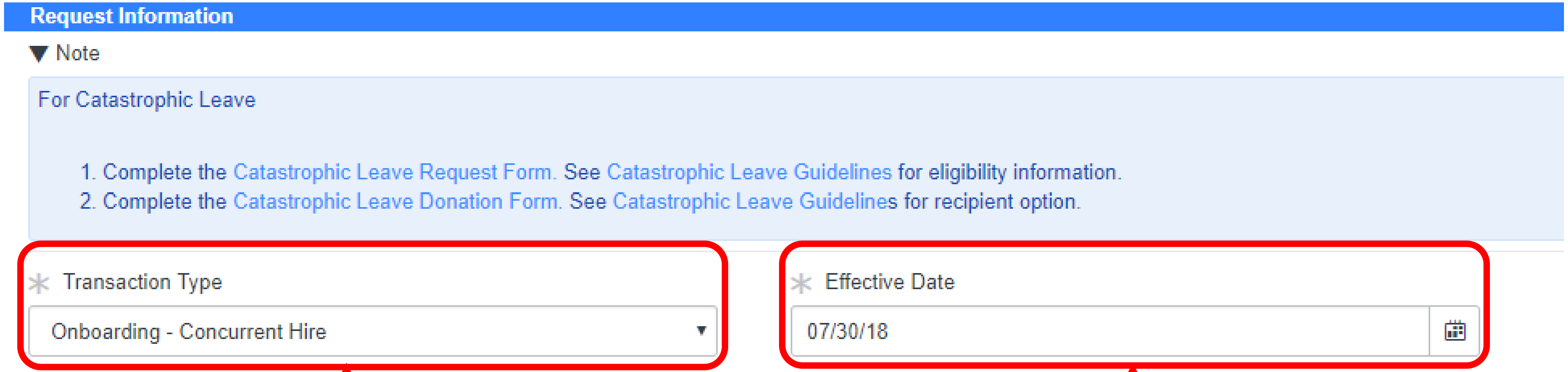
Example: A UCR employee holds a full-time position in facilities and performs additional work at in another department at UCR on a regular basis.

Concurrent Hire – Non Dual Employment

Usage: Use to add a concurrent employee record (appointment). This means that an employee is working in two or more jobs at the same time in different departments and/or job codes.

Example: A part-time student employee at the UCR rec center is hired concurrently into another part-time position at UCR.

Request Information



On the Generic Request form, select “Onboarding – Person of Interest” from the Transaction Type dropdown.

Select the Effective Date. This should be the first day the Person of Interest needs to be tracked in the system.

Employee Information

Employee Information

▼ Note:

For Multi-location Appointments, Onboarding - Concurrent Hire, Onboarding - Transfer and Other transaction types you must select Employee Name or Accountability Structure before submitting request

* Accountability Structure

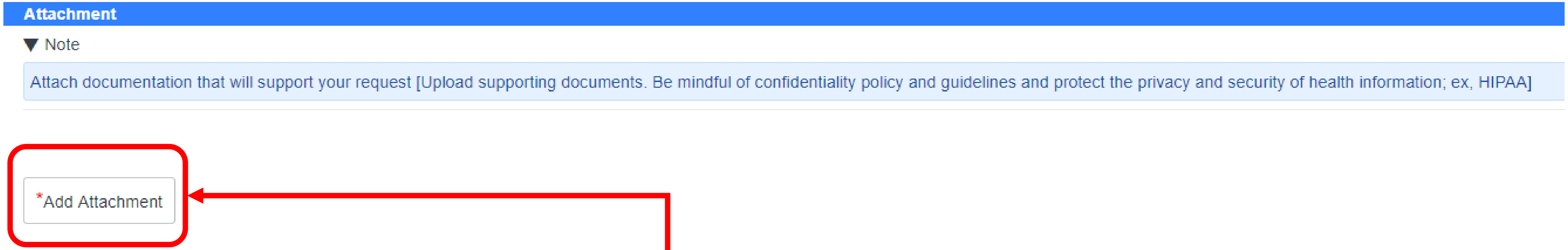
-- None --

* Comments

Select the Accountability Structure requesting the "Onboarding" of the Person of Interest. This will ensure that the request is routed to the appropriate Shared Services Center.

Enter the Person of Interest's name in the comment field if the "Employee Name" field does not populate (as in this example). Other pertinent information such as POI type (Staff or AP) and End Date should be entered in the comments field.

Attachment



An attachment is required for this type of transaction. An email or other informal document supporting the “Onboarding” of the Person of Interest can be attached. Be mindful of confidentiality policy and guidelines when uploading documentation.

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.

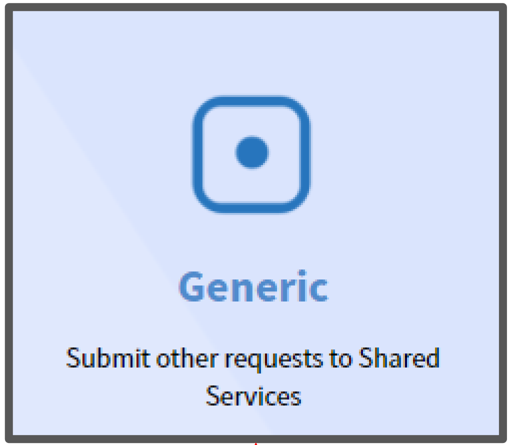
Additional Data Required for UCPath Transaction (Staff) – Concurrent Hire

Data Point	Data Location on UCR Forms
Dual Employment Letter	Signed letter stating: • It would be impractical to employ another person; • Additional job will not exceed 12 calendar months; • Time worked on the additional appointment will not be detrimental to employee's performance; • Employee's full-time department head agrees to the arrangement.
Multi-Location Agreement	Signed UPAY 560

Concurrent Hire – AP

ServiceLink Form
(AP – Concurrent Hire)

Once developed and tested, ServiceLink Initiators will request Concurrent Onboarding for both Staff and Academic Appointees using the Onboarding – Concurrent ServiceLink form.



Pending development and testing of the Onboarding – Concurrent ServiceLink form, the ServiceLink Generic request form is used to request Concurrent Hires for both Staff and Academic Appointees.

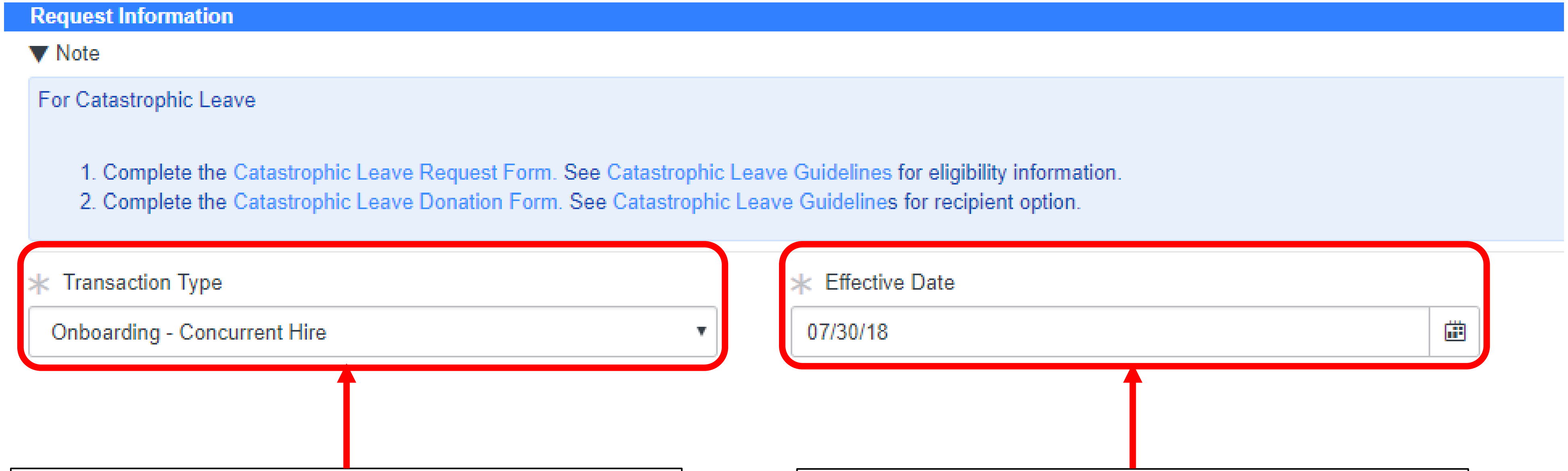
Onboarding – Concurrent Hire (AP)

Academic Concurrent Hire

Usage: Use to add a concurrent job (either Dual or Non-Dual employment).

Example: A UCR Faculty member is a Professor in Biology and holds an Administrative position in the same department.

Request Information



On the Generic Request form, select "Onboarding – Person of Interest" from the Transaction Type dropdown.

Select the Effective Date. This should be the first day the Person of Interest needs to be tracked in the system.

Employee Information

Employee Information

▼ Note:

For Multi-location Appointments, Onboarding - Concurrent Hire, Onboarding - Transfer and Other transaction types you must select Employee Name or Accountability Structure before submitting request

* Accountability Structure

-- None --

* Comments

Select the Accountability Structure requesting the "Onboarding" of the Person of Interest. This will ensure that the request is routed to the appropriate Shared Services Center.

Enter the Person of Interest's name in the comment field if the "Employee Name" field does not populate (as in this example). Other pertinent information such as POI type (Staff or AP) and End Date should be entered in the comments field.

Attachment

Attachment

▼ Note

Attach documentation that will support your request [Upload supporting documents. Be mindful of confidentiality policy and guidelines and protect the privacy and security of health information; ex, HIPAA]

*Add Attachment

An attachment is required for this type of transaction. An email or other informal document supporting the "Onboarding" of the Person of Interest can be attached. Be mindful of confidentiality policy and guidelines when uploading documentation.

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.

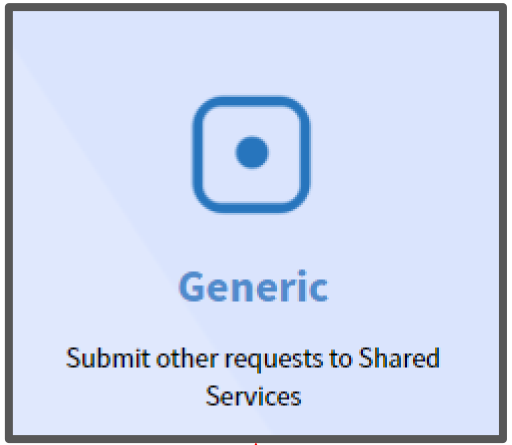
Additional Data Required for UCPath Transaction (AP) – Inter BU Transfer

Data Point	Data Location on UCR Forms
Dual Employment Letter	Signed letter stating: • It would be impractical to employ another person; • Additional job will not exceed 12 calendar months; • Time worked on the additional appointment will not be detrimental to employee's performance; • Employee's full-time department head agrees to the arrangement.
Multi-Location Agreement	Signed UPAY 560

Person of Interest

ServiceLink Form (Person of Interest)

Once developed and tested, ServiceLink Initiators will request Person of Interest Onboarding using the Onboarding – Person of Interest ServiceLink form.



Pending development and testing of the Onboarding – Person of Interest ServiceLink form, the ServiceLink Generic request form is used to request Person of Interest Onboarding.

Onboarding – Person of Interest

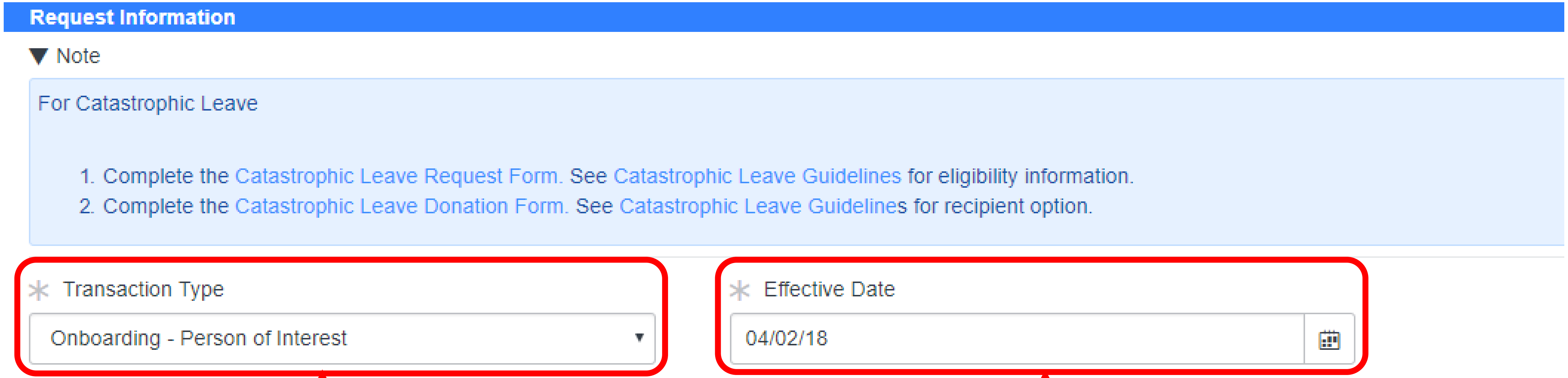
Definition: A Person of Interest (POI) is someone who is tracked by UCR for various reasons; such as a potential hire or potential external source.

POIs do NOT:

- Have a Job Data pages in UCPath
- Have UCPath Self Service access
- Receive POI compensation through UCPath

POI Examples : Associates of the President or Chancellor, Potential Academic Hires, Potential Staff Hire, External Compliance Auditor

Request Information


Request Information

▼ Note

For Catastrophic Leave

1. Complete the Catastrophic Leave Request Form. See Catastrophic Leave Guidelines for eligibility information.
2. Complete the Catastrophic Leave Donation Form. See Catastrophic Leave Guidelines for recipient option.

* Transaction Type

Onboarding - Person of Interest

* Effective Date

04/02/18

On the Generic Request form, select "Onboarding – Person of Interest" from the Transaction Type dropdown.

Select the Effective Date. This should be the first day the Person of Interest needs to be tracked in the system.

Employee Information

Employee Information

▼ Note:

For Multi-location Appointments, Onboarding - Concurrent Hire, Onboarding - Transfer and Other transaction types you must select Employee Name or Accountability Structure before submitting request

* Accountability Structure

-- None --

* Comments

Select the Accountability Structure requesting the “Onboarding” of the Person of Interest. This will ensure that the request is routed to the appropriate Shared Services Center.

Enter the Person of Interest’s name in the comment field if the “Employee Name” field does not populate (as in this example). Other pertinent information such as POI type (Staff or AP) and End Date should be entered in the comments field.

Attachment

Attachment

▼ Note

Attach documentation that will support your request [Upload supporting documents. Be mindful of confidentiality policy and guidelines and protect the privacy and security of health information; ex, HIPAA]

*Add Attachment

An attachment is required for this type of transaction. An email or other informal document supporting the "Onboarding" of the Person of Interest can be attached. Be mindful of confidentiality policy and guidelines when uploading documentation.

Data Required for UCPath Onboarding Transactions

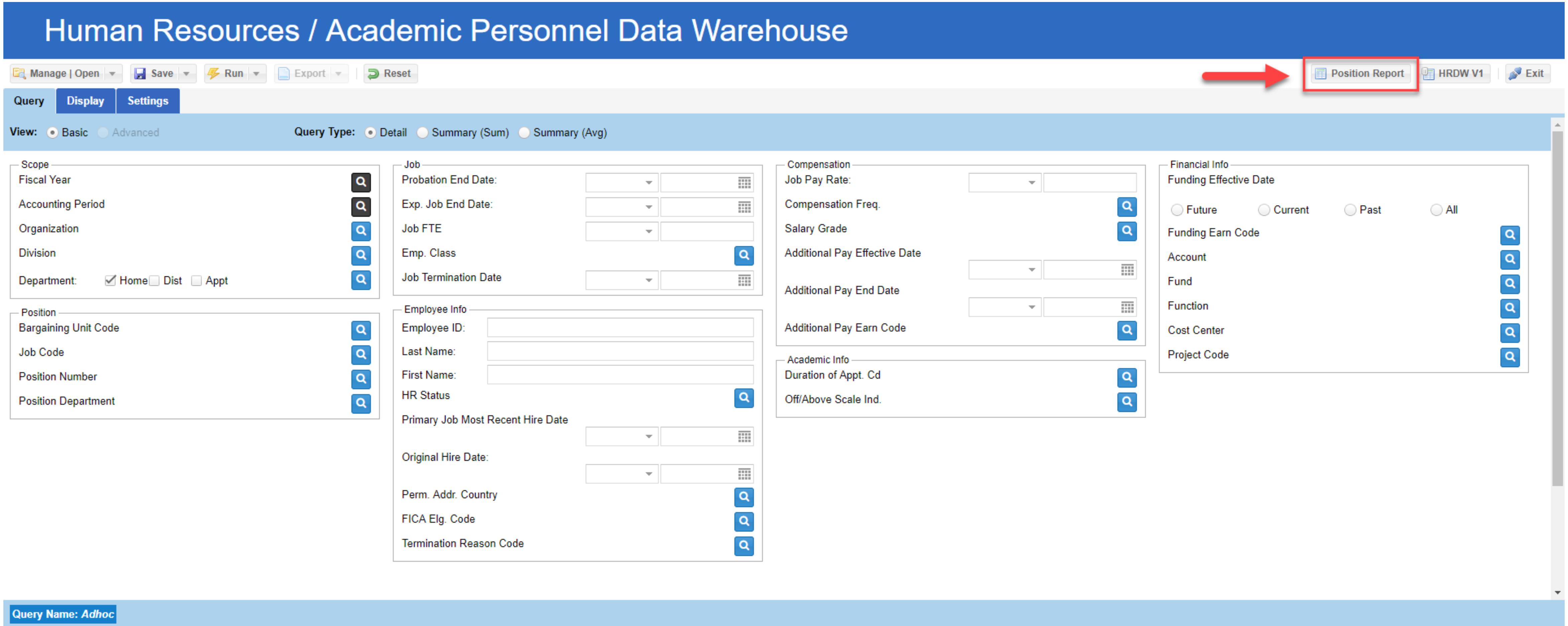
Key Data Point	Definition
Employee ID	Employee ID (or Empl ID) is generated by UCPath after a New Hire has been successfully processed.
Effective Date	The JOB Effective Date (different from the Position Effective Date) is the first day a given employee should be paid or the first day a contingent worker 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 (POI)

Data Point	Data Location on UCR Forms
First & Last Names	
POI Type	Staff or Academic
POI Business Unit	Defaults to Riverside Campus
POI Expected End Date	

HRDW Reporting

HRDW Position Report



UC RIVERSIDE UNIVERSITY OF CALIFORNIA
FOM|UCPath Training

HRDW Position Report (continued)

Department Position Report

D01000 - Graduate School of Education

First Name	Last Name	Employee ID	Position Number	Job Code	Budg. Lev. Ind.	ERN	Acct.	Actv.	Fund	Fnct.	Cost Ctr	Proj. Cd.	Dist. %	Effective Dt.
Unfilled			40006792	001010 - ASSOC DEAN	P		503910	A01000	69993	40			100	12/01/2017
Unfilled			40006792	001010 - ASSOC DEAN	P	STP	305130	A01000	19900	40			42.5	12/01/2017
Unfilled			40006792	001010 - ASSOC DEAN	P	STP	305130	A01953	19900	40	QEIC		57.5	12/01/2017
Unfilled			40008626	001010 - ASSOC DEAN	P		305110	A01000	19900	40			100	12/01/2017
Unfilled			40008626	001010 - ASSOC DEAN	P		305130	A01000	19900	40			56.67	12/01/2017
Unfilled			40008626	001010 - ASSOC DEAN	P		305130	A01953	19900	40	QEIC		43.33	12/01/2017
Unfilled			40008626	001010 - ASSOC DEAN	P		503910	A01000	69993	40			100	12/01/2017
Unfilled			40008626	001010 - ASSOC DEAN	P	STP	305130	A01000	19900	40			56.67	12/01/2017
Unfilled			40008626	001010 - ASSOC DEAN	P	STP	305130	A01953	19900	40	QEIC		43.33	12/01/2017
Unfilled			40009146	002310 - TEACHG ASST-GSHIP	P		303110	A01024	57168	44			100	12/01/2017
Unfilled			40009146	002310 - TEACHG ASST-GSHIP	P		303120	A01000	19900	40	QETA		100	12/01/2017
Unfilled			40009639	002310 - TEACHG ASST-GSHIP	P		303110	A01024	57168	44			100	12/01/2017
Unfilled			40009639	002310 - TEACHG ASST-GSHIP	P		303120	A01000	19900	40	QETA		100	12/01/2017
Unfilled			40010786	004921 - STDT 2	P		504120	A01000	19931	40	QECNF		100	12/01/2017
Unfilled			40019703	003276 - GSR-PARTIAL FEE REM	P		303110	A01000	62166	62	QEUSD		100	01/01/2018
Unfilled			40019704	002310 - TEACHG ASST-GSHIP	P		303120	A01000	19900	40	QETA		100	01/01/2018
Unfilled			40019782	009605 - LAB AST 1										01/16/2018
Unfilled			40019783	009605 - LAB AST 1										01/16/2018
Unfilled			40020079	002310 - TEACHG ASST-GSHIP	P		303120	A01000	19900	40	QETA		100	01/01/2018
Unfilled			40020491	004922 - STDT 1	P		504120	A01000	19900	40			100	01/01/2018
Unfilled			40020981	001300 - ASST PROF-AY	P		300130	A01000	19900	40			100	02/01/2018
LILIANA	AGUAYO	10009795	40005702	004545 - STDT ACAD ADVISOR 3	P		500110	A01000	19900	40	QEUMR		100	12/01/2017
PAUL	AMAYA	10007086	40008237	003266 - GSR-NO REM	P		303110	A01000	57224	44			100	01/29/2018

UCPath Inquiry

HR Inquiry

EACS Role	HR Inquiry
UCPath Role	WFA Inquiry
UCPath Role Description	Inquiry role to view the main WFA pages
Page/Job Aid Links	**Path**
Person Organizational Summary	Main Menu > Workforce Administration > Personal Information > Person Organizational Summary
Additional Names	Main Menu > Workforce Administration > Personal Information > Biographical > Additional Names
Modify a Person	Main Menu > Workforce Administration > Personal Information > Modify a Person
Emergency Contact	Main Menu > Workforce Administration > Personal Information > Personal Relationships > Emergency Contact
Security Clearance	Main Menu > Workforce Administration > Personal Information > Security Clearance
Workforce Job Summary	Main Menu > Workforce Administration > Job Information > Review Job Information > Workforce Job Summary

HR Inquiry (continued)

EACS Role	HR Inquiry
UCPath Role	WFA Inquiry
UCPath Role Description	Inquiry role to view the main WFA pages
Page/Job Aid Links	**Path**
Job Data	Main Menu > Workforce Administration > Job Information > Job Data
Person Profiles	Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles
Add/Update Position Info	Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info
Person Checklist	Main Menu > Workforce Administration > Personal Information > Organizational Relationships > Person Checklist
Transaction Status	Main Menu > Workforce Administration > Smart HR Template > Transaction Status

HR Inquiry (continued)

EACS Role	HR Inquiry
UCPath Role	Contract Pay Inquiry
UCPath Role Description	Monitor contract pay details before and after a person is paid on contract pay.
Page/Job Aid Links	**Path**
Contract Payment Details	Main Menu > Payroll for North America > Employee Pay Data USA > Contract Payment Details
Update Contract Pay NA	Main Menu > Workforce Administration > Job Information > Contract Administration > Update Contract Pay NA

HR Inquiry (continued)

EACS Role	HR Inquiry
UCPath Role	PayPath Inquiry
UCPath Role Description	Inquiry role to view an employee's current Job Data, Position Data, and Additional Pay in one location.
Page/Job Aid Links	**Path**
Person Organizational Summary	Main Menu > Workforce Administration > Personal Information > Person Organizational Summary
Workforce Job Summary	Main Menu > Workforce Administration > Job Information > Review Job Information > Workforce Job Summary
Add/Update Position Info	Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info
Employee Details Page	Main Menu > UC Customizations > UC Extensions > Employee Details Page
PayPath Actions	Main Menu > UC Customizations > UC Extensions > PayPath Actions

FAU / SCT Inquiry

EACS Role	FAU / SCT Inquiry
UCPath Role	Funding Inquiry
UCPath Role Description	View approved and saved funding transactions
Page/Job Aid Links	**Path**
Funding Entry	PeopleSoft Menu > Set Up HCM > Product Related > Commitment Accounting > UC Customizations > Funding Entry
Funding Entry Inquiry	PeopleSoft Menu > Set Up HCM > Product Related > Commitment Accounting > UC Customizations > Funding Entry Inquiry
UCPath Role	Funding Inquiry
UCPath Role Description	View approved and saved funding transactions
Page/Job Aid Links	**Path**
Review Retro Distribution	PeopleSoft Menu > Payroll for North America > Payroll Distribution > UC Customizations > Review Retro Distribution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Additional Courses

- UCRSL 110: ServiceLink Navigation for Initiators
- UCRSL 120: ServiceLink Navigation for Fulfillers
- UCRPDM 200: Advanced FOM ServiceLink Position Data Management

FOM|UCPath Training Team Email

FOMUCPathtraining@ucr.edu

FOM|UCPath AP Team Email (for AP-specific questions)

APUCPathSupport@o365ucr.onmicrosoft.com

Training Resources

http://fomucpath.ucr.edu/training/resources.html

Your Feedback Please

https://tinyurl.com/ucrfomucpathfeedback

Thank You