UCPath Integration with Tracker

September 27, 2018

UNIVERSITY OF CALIFORNIA UCRIVERSIDE | Human Resources

Mission | *We provide HR leadership and expertise to create and support a high-performing, inclusive workplace which advances UCR's mission and strategic objectives.*

Vision | *UCR HR is the benchmark in higher education for visionary and innovative HR strategies and exemplary service delivery.*

UCPath Integration with Tracker Status Update

- In August the UCPath Center began testing Tracker integration with UCPath in preparation for the planned deployment on Monday, October 1st

- Locations, including UCR, were invited to test Tracker over the last week

- ***If*** the UCPath Center does deploy the integration as planned, UCR was informed that the UCPath Center can no longer support the historical I-9 process. This means *UCR will need to move forward with the full Tracker implementation effective October 1st*. On this date, Tracker I-9 will be our primary process for I-9 and the location will no longer complete a paper I-9

**** Go/no go decision will be made by the UCPath Center late this evening. Communication will be sent out by the UCR project team tomorrow

Worksite: Security in Tracker

- UCR Tracker Administrators will maintain worksites under position data in UCPath post integration so that worksites in UCPath will always match the worksites in Tracker
- Location users will only have access to certain worksites and can only view employee records in the worksites (same as today)
- UCR has one worksite for all E-Verify records that only E-Verify Administrators have access

Updating Worksite in UCPath

- A position must have a worksite assigned to trigger ***any*** action on the Tracker dashboard prior to being hired
  - If a worksite is updated manually after position has been approved it will not trigger any action on Tracker dashboard

- In order to update the worksite, if the position is new or vacant, ***position control role*** in UCPath can assign the worksite but users must have ***position admin role*** assigned if the position has already filled

********** Currently in UCPath the worksite is not a required field but a change request has been submitted this week

UCPath Position Control: Update/add position with Tracker Worksite

HR Worksite

- HR Worksite is a new table/field added under UC Custom Position Data and drives the majority of UCPath and Tracker integration functionality.

Description | Specific Information | UC Position Data | Budget and Incumbents | Supporting Documents

Position Number 40000005
Headcount Status Open
Current Head Count 0 out of

Employee Relations Code — Find | View All — First 1 of 1 Last

Effective Date 11/01/2015
Status Active

HR Worksite ID 2 State Government Relations
*Employee Relations Code All Others, Not Confidential
Representation Code Covered

Special Training Code — Personalize | Find | — First 1 of 1 Last

	Special Training Code	Description
1		

Security Clearance — Personalize | Find | — First 1 of 1 Last

	Security Clearance Type	Description
1		

Save | Return to Search | Previous in List | Next in List | Notify | Add | Update/Display | Include History

UNIVERSITY OF CALIFORNIA UCPath

Look Up HR Worksite ID

Worksite ID begins with

Look Up | Clear | Cancel | Basic Lookup

Search Results

View 100 First 1-11 of 11 Last

Worksite ID	Description
806	Information Technology Solutions
812	School of Public Policy
817	Vice Chancellor Student Affairs
820	University Advancement
825	UCR E-Verify
851	University Library
853	Electrical & Computer Engineering
856	Chemical and Environmental Engineering
857	Winston Chung Global Energy Center
863	Mechanical Engineering
864	Bourns College of Engineering Dean's Office

Position Control Request. Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > Position Control Request

UCPath Smart HR Template

Name needs to be exactly what is on the employee's employment documents

Personal email is not required for Tracker, but if UCR decides in the future to use automated emails for section I this will required

Tracker Profile ID is only needed in cases where the employee's I-9 was created before the HR template is submitted

Employee Information

Primary Name - English

*First Name | Middle Name

*Last Name | Name Suffix

Date of Birth

Diversity - United States — Personalize | Find | View All | First 1 of 1 Last

Ethnic Group

1

Personal Data - United States

Military Status

Person Education Level

Highest Education Level A

Person Gender

*Gender Unknown

Person National ID United States

National ID Type PR | National ID

Person Address 01 - United States

*Address Type Home | Address Line 1

Address Line 2 | City

State | *Postal Code

County

UC Oath Date

Oath Signature Date

Person Phone Number — Personalize | Find | View All | First 1 of 1 Last

Phone Type | Telephone | Preferred

Person Email Address — Personalize | Find | View All | First 1 of 1 Last

Email Type | Email Address

UC Patent Acknowledgment

Patent Acknowledgment | Modified Patent Ackmnt Sign Dt

UC I-9 Information

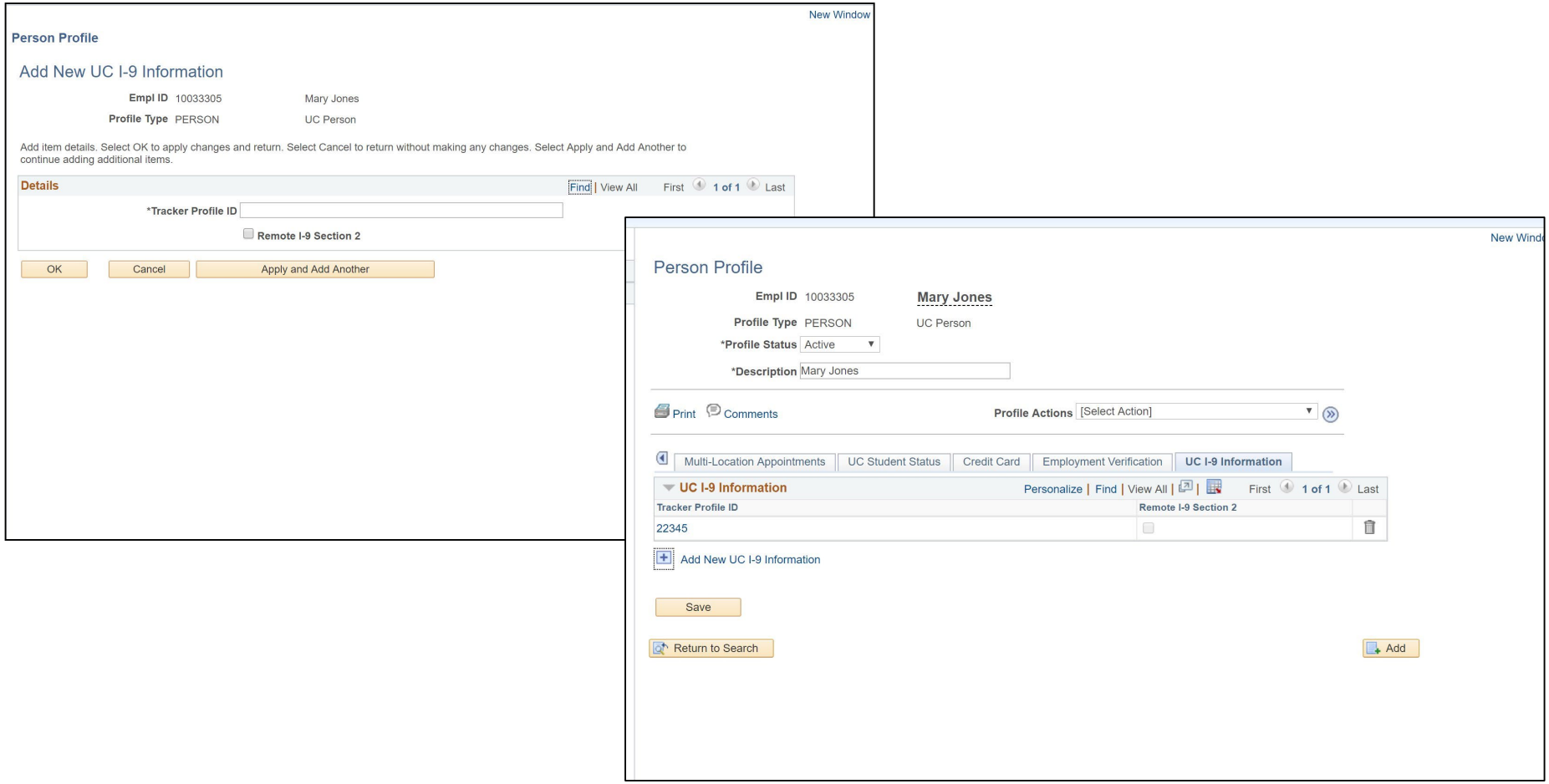
Tracker Profile ID | Remote I-9 Section 2

Business Unit | External System

External System ID

Comments

UCPath: UCPath Profile ID



Navigation: PeopleSoft Menu > Workforce Development > Profile Management > Profiles > Person Profiles
the have to select the arrow, since the I-9 UC information is the 10th tab

Timing of data integration

- UCPath data triggers Tracker action when the UCPath Center approves it (automated, real time)
- Tracker data is updated in UCPath on the following schedule: 8am, noon, 4pm and midnight (currently not automated)

Multiuse Link

- Currently not supported by the UCPath Center as a best practice
- UCR Administrators have created a multiuse link for each of our worksites
- SSC or department users will need to manually add link to communication to allow new employees to complete section I of the I-9 remotely and provide the password for the new employee to access the link
- Risk: Using the multiuse link, users can access to create a duplicate section I's of an I-9 if they use it more than once. Tracker will notify users of a duplicate record so they can request that an Administrator delete duplicate entries

Re-Hire Section III

- If a Tracker I-9 does **not** exist, even if the employee's paper I-9 was signed 3years or less from their hire date, the employee will need to complete a new I-9 in Tracker
- If a Tracker I-9 exists and was signed within 3 years or less from hire, users can complete section III of the Tracker I-9

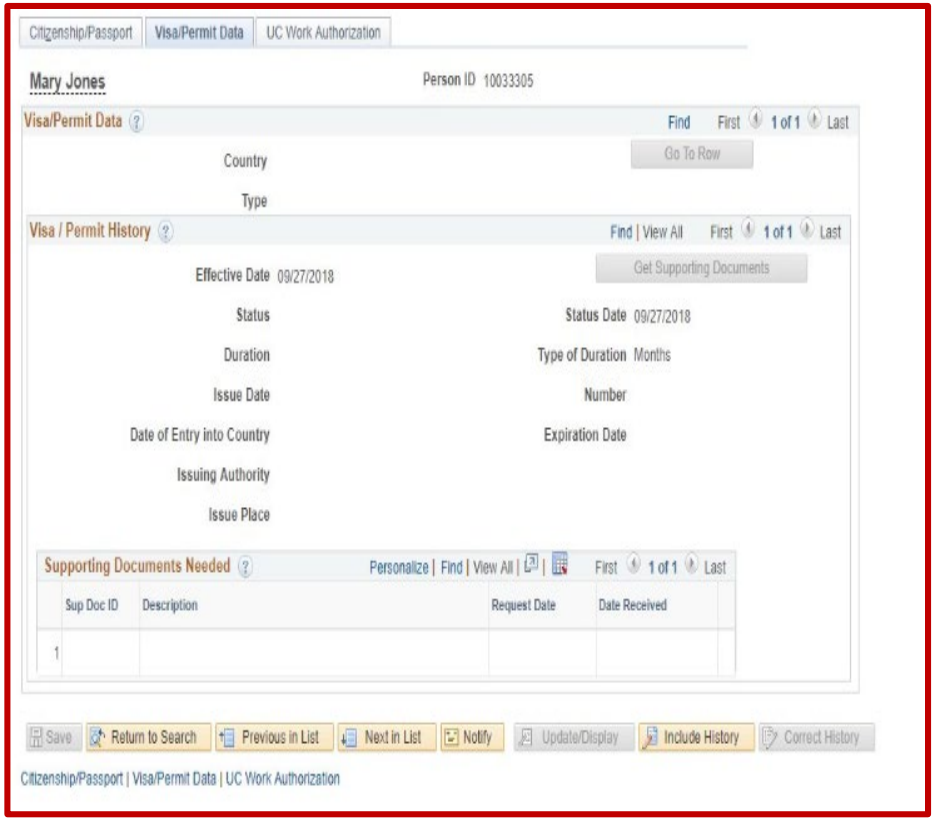
Updating Work Authorization

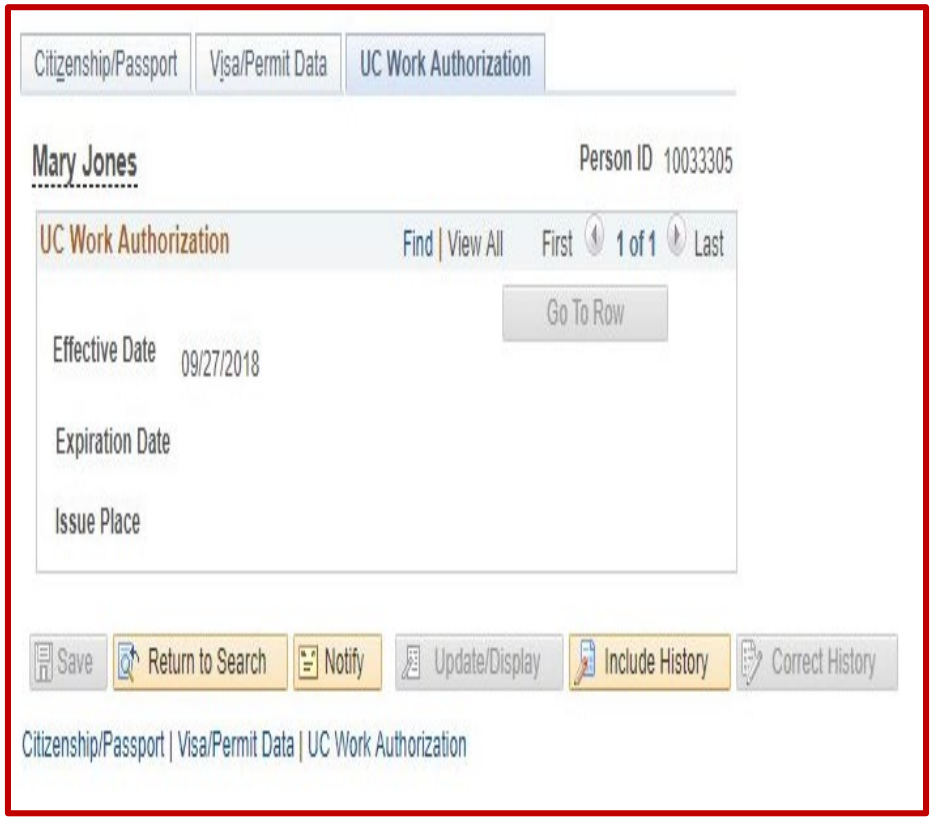
Users should complete section III and upload images of the updated documentation into Tracker

When the I-9 Section 3 has been completed and saved in Tracker for an employee whose work authorization was subject to expiration, the web service will send the following information back so that it can be recorded in UCPath:

- Visa Type
- Visa Effective Date
- Visa Status
- Status Date
- Visa Expiration date
- Type of duration

HR Inquiry role: Can *view* Tracker data updated UCPath Visa/Permit Data and UC Work Authorization



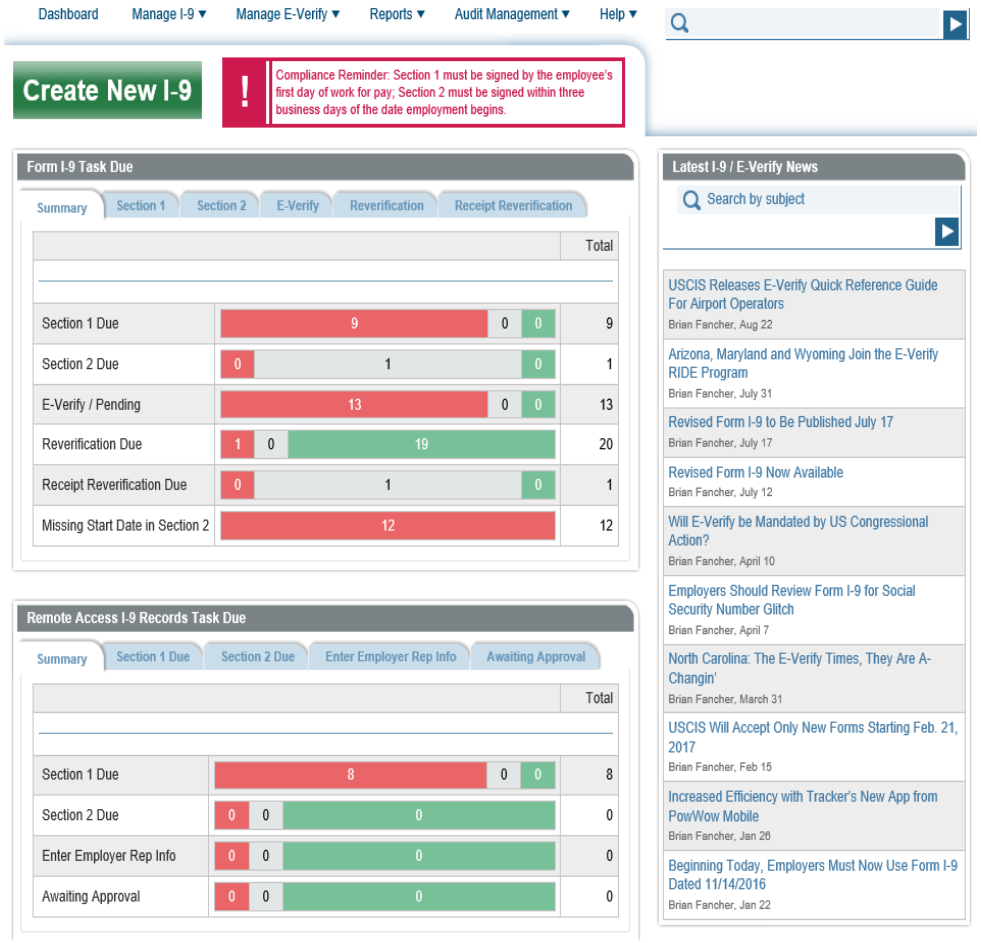


***Currently the Citizenship/Passport tab is populated by Glacier Tax System

Dashboard Monitoring

Just as a reminder: UCR has decided to deploy Tracker with no notifications enabled

Users will need to monitor their dashboard for actions needed



E-Verify Worksite

The Office of Research sends an email to Mary White, which identifies employees who are paid on a federal grant

UCR's E-Verify Administrators are Mary White (primary) and Sonya Potter (secondary.) They will process the E-Verify transaction:

- Does a Tracker I-9 exists:
  - **If yes**, the employee I-9 will be moved into the E-Verify worksite. The move will trigger the workflow to complete the E-Verify process. When the process is complete, Mary or Sonya will move the employee's I-9 back to the original worksite
  - **If no**, Mary or Sonya will reach out to the department to obtain a historical I-9. Once the historical I-9 has been created, the images of the documents uploaded, Mary or Sonya will move the employee I-9 into the E-Verify worksite. The move will trigger the workflow to complete the E-Verify process. When the process is complete, Mary or Sonya to move the employee's I-9 back to the original worksite.

As a reminder, social security number and employment documentation is required to complete the E-Verify process

Current Defects as of Today

Item #	Issue / Defect / Enhancement	Current status	Date when Definitely in PUAT	Comments
1	Tracker id issue on template transactions	Completed	Completed	Please test
2	Reverification issue; Work around functions in PUAT, Enter in tracker, tell us, we will run report and run it into UCPath, no date for more automated solution yet. (Brad will send AJ reports to test) validation of results	Work around approach in PUAT, Locations enter in PUAT, tell us, Brad runs reports to have it put in UCPath. Brad is doing up process documentation for delivery on Monday.	Completed	Brad is investigating if this can be fully automated for next release
3	Hire date needs to be sent to tracker	Completed	Completed	Please test
4	Rehire employees not sending correct transactions, it's doing an update, but not a create	Completed	Completed	Please test
5	Locations working outside US, location data set properly.	Completed	Completed	Please test
6	Action Reason code	Completed	Completed	Please test
7	Search position codes and show simple desc.	Completed	Completed	Please test
8	Defect concerning data being stored about worksite - Position control (does not work) and admin (works)	In PDev, expect in PTST today, possibly in PUAT 9/26, EOD	Wednesday 9/27 8 am	
9	Concurrent hire in country for an employee whose existing, active job is outside the country does not trigger a message to Tracker, actually linked to #5, UCR 5 and 9 are the same or extension.	Will not be completed before 9/30. Workaround	Not in before 30th	Aj - will develop a query to id, and contact location with the information.
10	Future dated transactions (Hire ,Rehire, Terminations) not triggering a message to Tracker	In PUAT , please test		
11	Make HR Wrksite on position a required field and add a dummy for all No's. (Enhancement)	Business decision, HR Compliance and UCPath WFA decision. Email sent.		
12	Date of Birth is not being sent to Tracker from UCPath on Create Employee Profile calls, but is included XML	This is not a defect. Alisa explained that Tracker actually masks the data with X's on display	Completed	
13	Currently all template based transactions are being sent to Tracker as Remote Section 1 and 2, when it should only be Remote Section 1. Remote Section 1 and 2 should only take place if the Remote Section 2 checkbox is checked on the template.	In PUAT , please test		
14	When an employee's Primary job is terminated, that then flips all rows on Security Clearance to Inactive. Which is why there was not a termination message sent to Tracker after the employee's second job was terminated. This will be a change to PeopleSoft delivered code, and not I-380. The impact is that if an employee has an I-9 in Tracker and has multiple jobs, once ALL jobs are terminated, there will not be a message sent to Tracker terminating the I-9.			

Tracker I-9 Support

- ***General questions or issues***, please send an email to fomucpath@ucr.edu. Emails will be routed to a Tracker Administrator for resolution

- ***UCR Administrators***: Heidie Rhodes, Antonette Toney, LaKesha Welch, Veronica Luna, Sonya Potter and Mary White

- ***Training*** Link : I-9 Tracker System Training, I-9 Policy Training and Examples of Visa Documents for I-9

- ***Job Aids*** Link: How to Process F-1 Visa, Tracker Scanning with iPad, Faculty Retroactive Hire, Tracker Complete Manual, Role Based Training Guide for Tracker, Employee Handbook I-9, and UCR Local I-9 Policy

- ***For questions on the Tracker iPads or UCR AirWatch Security profile*** installed on the Tracker iPads email Bearhelp@ucr.edu or call (951)827-IT4U

Tracker Workgroup Next Steps

- 30/60/90 Day Project Check-ins
  - Review the UCR Tracker process, UCR configuration and status of defects
- UCR Configurations
  - Automatic emails triggered by UCPath approval of position (configured by worksite)
  - Notifications for section I, section II, section III or E-Verify needed (configured by employer, all of UCR)
  - Re-hire require new I-9 (configured by worksite)

Questions

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