



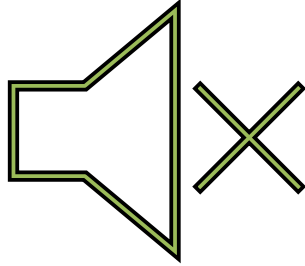
# Academic Personnel Monthly Information Session

Presented by the Office of Academic Personnel

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October 28, 2025

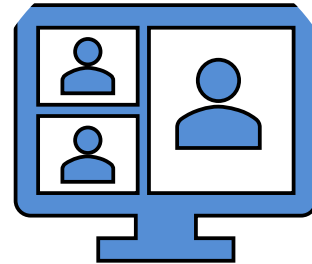
# Housekeeping



Please keep yourself muted during the presentation



Ask questions in chat



Please keep your camera on during the presentation



- Pre-Employment Requirements
- Employment Disclosure Requirement Process
- Tracker I-9
- AggieService Reminders
- Person Organizational Summary

# Pre-Employment Requirements

The clearances and approvals listed below are required before proceeding with a non-faculty hire:

- Employment Disclosure Clearance
- Background Check Clearance
- Tracker I-9 profile and completion of Section 1 (by start date)
- Workforce Management Approval (Postdocs, Jr. Specialists)
- Appointment Approval

Postdocs – Grad Studies approval via AggieService case

Jr. Specialists – Recruitment search report approval or search waiver approval followed by approved appointment dossier

VCPs – Exemption approval in Recruit

CWR/Visiting Titles – Exemption approval in Recruit

# Employment Disclosure Requirement Process

- Please refer to [Employment Disclosure Requirement Process | Academic Affairs](#) for process information, updates, FAQs, and to obtain the current version of the authorization to release information form.
- Employment Disclosure Clearance is required for all new hires, change in department, and change in title. See the FAQs on VPAA's website for additional scenarios.
- Employment Disclosure Clearance is not required for reappointments.
- Clearance must be received before the employee begins working and before the hire is processed in UCPath.

The following slides will discuss the employment disclosure requirement process for non-faculty titles.

# Employment Disclosure Requirement Process

## Employment Disclosure Requirement Process

- Candidate is provided with the required employment disclosure language (by the hiring department) and is given an authorization to release information form for completion and signature. Required language and form can be found at [Employment Disclosure Requirement Process | Academic Affairs](#).
- Candidate signs and completes the authorization to release information form and returns it to the department admin.

The next steps will vary depending on how the candidate is hired.

# Employment Disclosure Requirement Process: JS Recruitment

## **For Junior Specialist recruitments in Recruit:**

- Titles include Junior Specialist and Junior Specialist NEX.
- The required language and updated authorization to release information form (AOR) has been added to Recruit so that it will be included in all new recruitments as of June 2025.
- Candidate must complete the AOR to have a complete application and to be considered for meeting basic qualifications.
- AP submits hiring surveys for applicants in Proposed Candidate status only.
- Your AP non-faculty analyst will submit the hiring survey to VPAA when the search report is approved. Your analyst will upload the authorization to release information form and the candidate's CV when submitting the hiring survey.

# Employment Disclosure Requirement Process: JS Recruitment

- Within 24 hours of receipt of the hiring survey (business days only), VPAA will send the candidate an employee questionnaire for completion.
- Please ask your candidate to check their spam folder/junk mail if they do not receive the employee questionnaire within 24 hours of hiring survey submission.
- Candidate must complete the employee questionnaire to continue the employment disclosure requirement process.
- If the candidate experiences any technical difficulties, please reach out to your AP non-faculty analyst for assistance.
- Once the candidate completes the employee questionnaire, VPAA will process the clearance.

# Employment Disclosure Requirement Process: JS Recruitment

- VPAA will send the clearance email to your AP non-faculty analyst.
- When your AP non-faculty analyst receives the clearance email from VPAA, they will forward the clearance to the department admin.

# Employment Disclosure Requirement Process: Exemption/Search Waiver

## **For employees hired through an exemption or search waiver in Recruit:**

- Titles may include VCP, CWR visiting titles and Research Associate or Fellow, Junior Specialist (search waiver only).
- The department admin uploads the signed authorization to release information form and uploads proof of providing the candidate with the required language. These documents must be uploaded in Recruit. Please do not upload ***clearance emails*** to Recruit.
- Your AP non-faculty analyst submits the hiring survey to VPAA. Your analyst will upload the authorization to release information form and the candidate's CV when submitting the hiring survey.
- Within 24 hours of receipt of the hiring survey (business days only), VPAA will send the candidate an employee questionnaire for completion.

# Employment Disclosure Requirement Process: Exemption/Search Waiver

- Please ask your candidate to check their spam folder/junk mail if they do not receive the employee questionnaire within 24 hours of hiring survey submission.
- Candidate must complete the employee questionnaire to continue the employment disclosure requirement process.
- If the candidate experiences any technical difficulties, please reach out to your AP non-faculty analyst for assistance.
- Once the candidate completes the employee questionnaire, VPAA will process the clearance.

# Employment Disclosure Requirement Process: Exemption/Search Waiver

- VPAA will send the clearance email to your AP non-faculty analyst.
- When your AP non-faculty analyst receives the clearance email from VPAA, they will forward the clearance to the department admin.

***Please note that AP approves exemptions and search waivers after the hiring survey is submitted and prior to receiving employment disclosure clearance from VPAA. You may only proceed with the hire once the employment disclosure clearance is received.***

# Employment Disclosure Requirement Process: Outside Recruit

## **For employees hired outside of Recruit:**

- Titles may include TA, GSR, Reader, Postdoctoral Scholar, Non-Physician Clinical Trainee and Clinical Psychology Intern.
- For hiring survey submission, flexibility is provided based on department preference. Some departments prefer to submit the hiring survey for these titles. Other departments prefer that AP submits the hiring survey. Please work with your AP non-faculty analyst to discuss the best fit for your department.
- If the department submits the hiring survey, please ensure that you enter your AP non-faculty analyst's information for the Dean's Office contact. The Dean's Office back-up contact should be Amy Edwards, [adweaver@health.ucdavis.edu](mailto:adweaver@health.ucdavis.edu). This ensures that our office will receive the clearance email.

# Employment Disclosure Requirement Process: Outside Recruit

- If you would like AP to submit the hiring survey, please email the following to your AP non-faculty analyst (you may include this when requesting the background check and I-9, if preferred):
  - Signed authorization to release information form.
  - Proof of providing candidate with required language.
  - Candidate's CV (not required for student titles).
- Your AP non-faculty analyst submits the hiring survey to VPAA. Your analyst will upload the authorization to release information form and the candidate's CV when submitting the hiring survey.
- Within 24 hours of receipt of the hiring survey (business days only), VPAA will send the candidate an employee questionnaire for completion.

# Employment Disclosure Requirement Process: Outside Recruit

- Please ask your candidate to check their spam folder/junk mail if they do not receive the employee questionnaire within 24 hours of hiring survey submission.
- Candidate must complete the employee questionnaire to continue the employment disclosure requirement process.
- If the candidate experiences any technical difficulties, please reach out to your AP non-faculty analyst for assistance.
- Once the candidate completes the employee questionnaire, VPAA will process the clearance.

# Employment Disclosure Requirement Process: Outside Recruit

- VPAA will send the clearance email to your AP non-faculty analyst.
- When your AP non-faculty analyst receives the clearance email from VPAA, they will forward the clearance to the department admin.

# Tracker I-9: New Requests

- I-9 Requests should be submitted well in advance of the employee's start date.
- Please include the I-9 request when submitting the background check request.
- These requests should be sent to our AP shared inbox [SOMAPTeam@health.ucdavis.edu](mailto:SOMAPTeam@health.ucdavis.edu) with cc to your non-faculty analyst. If your AP non-faculty analyst is out of the office, please include [adweaver@health.ucdavis.edu](mailto:adweaver@health.ucdavis.edu) on the cc of the email in addition to your AP analyst. **Please ensure background check form is legible.**
- In the email, please provide the following information:
  - Employee's first and last legal name
  - Employee's email address
  - Employee's job title
  - Start date
  - Dept Employer Representative name and email address (this person will complete section 2 of the I-9)
  - Comment if employee does not have an SSN

# Tracker I-9: Section 1: Employee Information and Attestation

- Section 1 is completed by the employee.
- Section 1 completion is required on, or before, the employee's start date.
- It is the department's responsibility to ensure that their new hire has completed Section 1. ***Failure to complete Section 1 on time will result in an out of compliance I-9, subject to audit and potential fines.***
- If the employee does not receive the Section 1 email, please contact to your AP non-faculty analyst to request the email to be resent.
- If the employee provides incorrect information in Section 1, we can process a Section 1 Amendment. Please reach out to your AP non-faculty analyst to initiate a Section 1 Amendment.

# Tracker I-9: Section 2: Employer Review and Verification

- Section 2 is completed by the employer (department representative).
- Section 2 completion is required within three days of the employee's start date.
- It is the department's responsibility to ensure that Section 2 is completed on time.  
***Failure to complete Section 2 on time will result in an out of compliance I-9, subject to audit and potential fines.***
- If the department needs the Section 2 email resent (either for non-receipt or if a change has been made to the employer representative), please reach out to your AP non-faculty analyst. They will resend the email and/or update the employer representative.
- If you have any questions or need guidance with completing Section 2, please contact your AP non-faculty analyst for support.

# Tracker I-9: Section 3: Reverification

- Section 3 completion is required for reverification of an employee's work authorization or when the work authorization type has changed.
- Examples include J-1 visa extension (new DS2019), H-1B visa extension, change in status from J-1 to H-1B, receipt of greencard, change to U.S. citizen.
- Please submit a Job Changes case in AggieService to request a Section 3: Reverification. You will need to provide the contact information for the employer representative (department admin) who will complete the Section 3 with the employee.
- It is the department's responsibility to ensure that their employees' work authorization is kept up to date. ***Failure to process a Section 3: Reverification on time will result in an out of compliance I-9, subject to audit and potential fines.***

# AggieService Reminders

In the following slides we will address some important reminders for our most common case types, including Onboarding, Job Changes, and Termination cases.

For detailed instructions for all case types, please refer to our AggieService case aides found at [Administrators / Managers | UC Davis Department of Academic Personnel](#). Select Administrators & Managers from the menu bar and scroll down.



## AggieService

- [AggieService Case Aides \(Faculty, Researchers and Visiting Appointments\)](#)
- [AggieService Case Aides \(Non-Faculty\)](#)
- [Important Reminders](#)
- [Additional Resources](#)

# AggieService Reminders: Onboarding Cases

- Please email all onboarding payroll documents to your AP non-faculty analyst. Please do not upload onboarding payroll documents to the case.
- Onboarding payroll documents include Personal Data Form, Oath/Patent, Child Abuse Notification Form, Elder/Dependent Abuse Notification Form.
- When emailing, please include the following in the subject line:  
Action/Title/Name/Effective Date/AS Case #  
Example: New Hire/Jr. Specialist/Jill Smith/Eff 11/01/25/AS Case #1024567
- Reminder for the Personal Data Form: Employee should provide local address (U.S. address). Please remind them to include Apt #, Suite #, etc. if applicable. This is the address that initial paycheck will be mailed to.
- For Jr. Specialist hires, please submit the onboarding case when the appointment dossier is submitted in MIV.

# AggieService Reminders: Onboarding Cases

- **Document attachments uploaded to the case may include:**
  - Workforce Management Approval (not required for Jr. Specialist appointments hired through an open search)
  - Appointment Letter (GSR, TA, Reader, Postdoc) Please note that Grad Studies emphasized this requirement at their 10/3/25 office hours.
  - Graduate Studies AggieService Case Approval (Postdoc)
  - Employment Disclosure Clearance (all titles)

# AggieService Reminders: Onboarding Cases

**Please provide the following information in the case comments (anything else you'd like us to know?) field:**

- Recruit JPF # and MIV submission date for Jr. Specialist hires
- Exemption EXR # for VCP and CWR hires
- Search Waiver SWR # for Jr. Specialist emergency hires
- Level (LVL) for Postdoc hires
- Salary step for GSR and TA hires
- If employee does not have an SSN, please provide a note to alert us

# AggieService Reminders: Job Changes Cases

- A Job Changes case may be submitted for any of the following reasons: Reappointment, Change in FTE, Reports To Change (RTC), Location Change, and other appointment modification reasons.
- **Document attachments uploaded to the case may include:**
  - Workforce Management Approval (Jr. Specialist and Postdoc only)
  - Appointment Letter (GSR, TA, Reader, Postdoc)
  - Graduate Studies AggieService Case Approval (Postdoc)
  - FTE change approval if the change is effective mid-appointment. Please contact your AP non-faculty analyst for guidance on the approval process.

# AggieService Reminders: Job Changes Cases

**Please provide the following information in the case comments (anything else you'd like us to know?) field:**

- MIV submission date for Jr. Specialist reappointments
- Exemption EXR # for VCP and CWR reappointments
- Level (LVL) for Postdoc reappointments (for our confirmation only; LVL is changed on either 4/1 or 10/1)
- Salary step for GSR and TA reappointments
- New FTE %, if applicable
- FTE % split for dual appointments (ex: Postdoc Employee/Fellow, GSR Trainee/Supplement)

# AggieService Reminders: Termination Cases

- A Termination case is required to end all appointments not scheduled to auto-terminate.
- Currently, only graduate student appointments (GSR, TA, Reader) are set to auto-terminate.
- If a graduate student will leave employment earlier than their auto-termination date, a termination case is required.
- All termination cases route for approval in AggieService. Please note that we are unable to assign a case owner and make case updates until the termination case is approved by your department's designated approver.
- **Important: All appointments remain active beyond their end date unless a termination is processed. This may result in an overpayment.**

# AggieService Reminders: Termination Cases

## Common Termination Case Reasons (not an exhaustive list):

- **Resign – Accept Another Job:** Use when employee has accepted another job outside of the UC system.
- **Transfer Intra Location:** Use when employee has accepted a job with another UC Davis department (main campus or Health). There should be no break in service.
- **Interlocation BU Transfer:** Use when employee has accepted a job with another UC. There should be no break in service.
- **Appointment Expired:** Used when terminating at established appointment end date.

# AggieService Reminders: Termination Cases

**Please provide the following information in the case comments (anything else you'd like us to know?) field:**

- Vacation payout balance for applicable titles
- Date(s)/Hours of vacation used in last pay period, if applicable
- Administrative contact information and department and/or campus name for employees transferring to another UC department or another UC.

# AggieService Reminders: Termination Cases

## Document attachments uploaded to the case may include:

- Employee resignation with department acknowledgment for voluntary terminations.
- 30-day notice letter with email sent to the employee for VCPs terminated prior to their established end date.
- Approved layoff notification letter with email sent to the employee for employees terminated early due to layoff. Contact your AP non-faculty analyst for guidance with the layoff process.
- Ecotime balance/history for Jr. Specialist, Non-Physician Clinical Trainee, and Clinical Psychology Intern terminations. Please let us know if employee will use/has used any vacation during the final pay period of employment. ***We do not have access to view Ecotime. Terminal vacation payout may be delayed if we do not receive the Ecotime balance/history.***

# AggieService Reminders

## Important Reminder for all case types

Please double check that the information provided in the case fields match any comments provided **Anything else you'd like us to know?**.

Example: Comments field shows a 50% FTE for onboarding, but the FTE field data shows a 100% FTE.

# UCPath Person Organizational Summary

Person Organizational Summary allows view access to an employee's records within the entire UC system.

The default view will show the current status of Active records and show a history of Inactive records.

In addition to active status, Person Organizational Summary will also show pre-dated entries.

This is a helpful research tool when hiring as you can easily locate if a candidate is a current or past UC employee.

# UCPath Person Organizational Summary

To view a future dated update:

## Person Organizational Summary

Person ID [REDACTED]

Benefit Eligibility Hours  
Limited Hours Career  
Floater Hours Career

### Employment Instances

Find | View 1 First 1-2 of 2 Last

ORG Instance 0 HR Status Active Last Hire 10/01/2021  
Primary Job:  Payroll Status Active Termination Date

### Assignments

Personalize | Find | View All | First 1 of 2 Last

Empl Record	EFFDT	HR Status	Business Unit	Position Number	Dept ID	Department Description	Job Code	Description	Expected Job End Date	FTE	Empl Class	Union Code	FLSA Status	Pay Group	Employee Type	Probation Code	Probation End Date
0	09/16/2025	Active	DVCMP	[REDACTED]	[REDACTED]	MED [REDACTED]	003282	GSR-FULL FEE REM	03/31/2026	1.000000	Academic: Academic Student	BR	E	3M9	S	None	

# UCPath Person Organizational Summary

To view a future dated update:

Assignments																	Personalize	Find	View All	Print	Export	First	2 of 2	Last
Empl Record	EFFDT	HR Status	Business Unit	Position Number	Dept ID	Department Description	Job Code	Description	Expected Job End Date	FTE	Empl Class	Union Code	FLSA Status	Pay Group	Employee Type	Probation Code	Probation End Date							
0	10/01/2025	Active	DVCMP	[REDACTED]	[REDACTED]	MEL [REDACTED]	003282	GSR-FULL FEE REM	03/31/2026	0.500000	Academic: Academic Student	BR	E	3M9	S	None								

# Resources

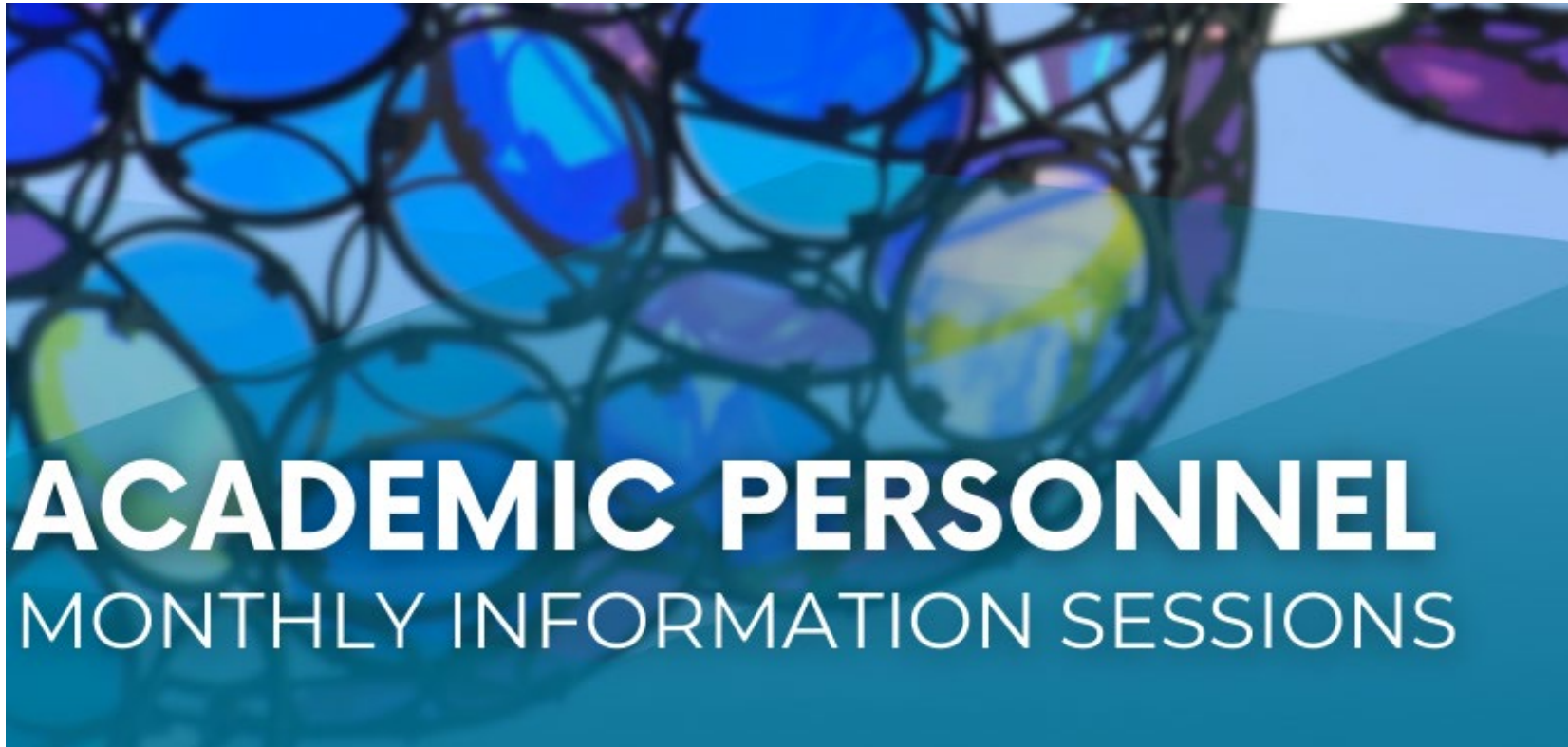


- ✓ [Employment Disclosure Requirement Process | Academic Affairs](#)
- ✓ [New Hire and Recall Information | UC Davis Academic Personnel](#)
- ✓ [TA, AI , GSR, and Reader Appointments | UC Davis Graduate Studies](#)
- ✓ [Postdoctoral Scholar Appointment and Promotion | UC Davis Graduate Studies](#)
- ✓ [Information on New Bargaining Agreements | UC Davis Graduate Studies](#)
- ✓ [Salary Scales and Information | UC Davis Graduate Studies](#)

# Questions



Upcoming Session-Tuesday November 25th



Thank you for your attendance today!!!