



# Academic Personnel Monthly Information Session

Presented by the Office of Academic Personnel

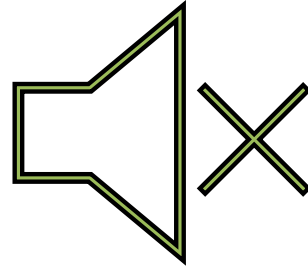
September 26, 2023

# Agenda



- ✓ Onboarding
- ✓ Paper Forms & Electronic Forms
- ✓ UC Path Navigation
- ✓ Common Forms and When Required
- ✓ Pre-Employment Requirements Prior to Submitting AggieService Case
- ✓ Faculty Pre-Hire Process
- ✓ Case Aid Walkthrough
- ✓ Resources
- ✓ Questions & Answers

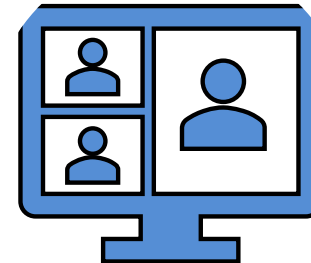
# Housekeeping



Please keep yourself muted during the presentation



Ask questions in chat



Please keep your camera on during the presentation

# Onboarding Academics at UC Schools of Health



The Office of Academic Personnel is committed to helping you through every step while onboarding new members to our UC Davis Health community.

Many steps are required as part of the Onboarding process. In this presentation we will be going over the steps necessary when onboarding a new academic hire. We will discuss forms that are required, review the pre-hire process, as well as go over a refresher of our onboarding case aids.

# Paper vs Electronic Forms

Paper Form	UC Path
<input type="checkbox"/> Background Check Release Form	<input type="checkbox"/> Direct Deposit Enrollment
<input type="checkbox"/> Personal Data Form	<input type="checkbox"/> W4 Status and Withholding
<input type="checkbox"/> Oath/Patent Acknowledgement Form	<input type="checkbox"/> Emergency Contact Information
<input type="checkbox"/> Child Abuse Notification Form	<input type="checkbox"/> Voluntary Self-Identification of Race, Ethnicity and Veteran Status
<input type="checkbox"/> Elder and Dependent Abuse Notification Form	<input type="checkbox"/> Voluntary Self-Identification of Disability
<input type="checkbox"/> Confidentiality Form (to remain on file at department level)	<input type="checkbox"/> I-9 processed through Tracker

# UC Path Navigation- Employee Actions

## Income and Tax Information

- Employee Actions → Income and Taxes → Direct Deposit
- Employee Actions → Income and Taxes → CA State W4 (DE-4)
- Employee Actions → Income and Taxes → Federal Withholding (W-4)

## Personal Information

- Employee Actions → Personal Information → Personal Information Summary (to change name or address)
- Employee Actions → Personal Information → Employee Disclosures
- Employee Actions → Personal Information → Veteran Status
- Employee Actions → Personal Information → Disability Status

# Common Forms & When Required?

Forms	Forms
<input type="checkbox"/> Background Check	Valid for two years, but if it was processed by Staff HR or if employee had a break in service, we still need to process our own (even if it's been 2 years or less).
<input type="checkbox"/> Oath/Patent	Any new to SOM employee must complete an Oath/Patent. Valid for one year from signature date if there is a break in service.
<input type="checkbox"/> I-9 Form	Any new SOM employee needs an I-9 in Tracker, unless they have one from previous UC employment within the past three years. If employee status is terminated and it has been over three years, we need them to complete a new I-9.
<input type="checkbox"/> Exemption/Search Waiver/Search Report Approved	All employees must be hired through an open recruitment or search waiver/exemption.  * Not applicable to GSR's, postdocs, and TA's.

# New Hire Requirements Prior to Submitting AggieService Case

Faculty	Non-Faculty
<input type="checkbox"/> Background Check Cleared	<input type="checkbox"/> Background Check Cleared
<input type="checkbox"/> Section 1 of I-9 Tracker Initiated	<input type="checkbox"/> Section 1 of I-9 Tracker Initiated
<input type="checkbox"/> Approved Exemption/Search Waiver/or Search Report	<input type="checkbox"/> Approved Exemption/Search Waiver/or Search Report
<input type="checkbox"/> Onboarding Documents emailed to Generalist	<input type="checkbox"/> Onboarding Documents emailed to Non-Faculty Analyst
<input type="checkbox"/> Appointment Approved	<input type="checkbox"/> Appointment dossier submitted in MIV (JR Specialist)
<input type="checkbox"/> Appendix II	<input type="checkbox"/> Post Doc approval from Grad Studies

# Faculty Pre-Hire Process



Pre-Hire Process effective 9/1/2022

**Objective:** To obtain an employee UCPATH ID number prior to the employment start date to assist the department with access requests and onboarding only. The pre-hire is not an authorization for employee to start working prior to appointment approval.

**Timeline:** Department must provide Pre-Hire request no earlier than 30 days of appointment start date, and no later than two weeks of the appointment begin date.

AP Analyst will process the Pre-Hire transaction within 3 business days of receipt (this does not include the UCPATH processing time, which may vary and take up to 3-5 working days for processing).

**Initiation:** The appointment dossier must be submitted to AP for the Pre-Hire to be initiated. Department to submit an AggieService- Onboarding case with the required data listed below. AP submits the Pre-Hire via the appropriate Smart HR Transactions template

# Faculty Pre-Hire Checklist



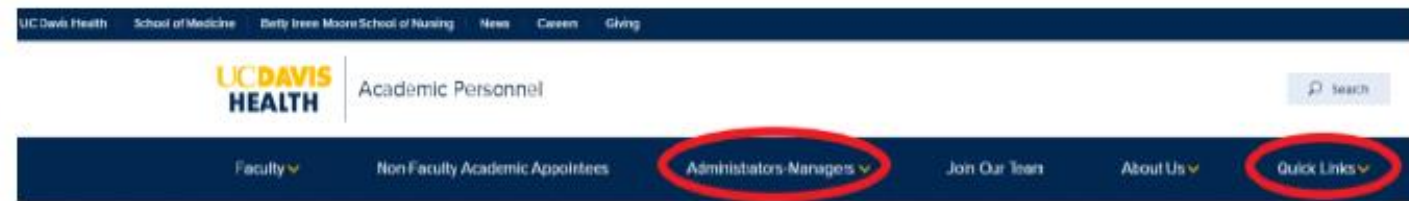
Department must provide the following for the Pre-Hire data entry:

- Appointment dossier completed and submitted to Academic Personnel
- Position information to generate position number (Title, Job Code, Rank, FTE, Dept Code, Reports To PCN, Location, Patient Care y/n)
- Employee Name
- DOB, SSN, and Address (can obtain from the background check release form)
- Background check clearance
- Tracker profile creation and completion of Section 1
- Completed Personal Data Form (including degree information)
- APU
- AAMC Code & Degree

# AP Case Aides for Aggie Service

[Link](#)

## UCD Schools of Health Case Aides for AggieService



### Aggie Service

- Aggie Service Case Aides (Non-Faculty)
- Aggie Service Case Aides (Faculty)

# Aggie Service Case Aides Walk Through

- Onboarding: Faculty
- Onboarding: Non-Faculty

# Important Reminders

- Reference Case Aides for the required information and attachment(s) needed
- Background check should be cleared prior to onboarding
- Section 1 of the I-9 in Tracker must be completed on, or before, the employee's start date
- Oath/patent must be signed on, or before, the employee's start date
- Exemptions, Search Waivers, and Search Reports must be approved prior to onboarding
- Onboarding docs must be emailed to your assigned AP Analyst
- Pre-Hire: if Empl ID is needed prior to start date-request no earlier than 30 days of appointment start date, and no later than two weeks of the appointment begin date

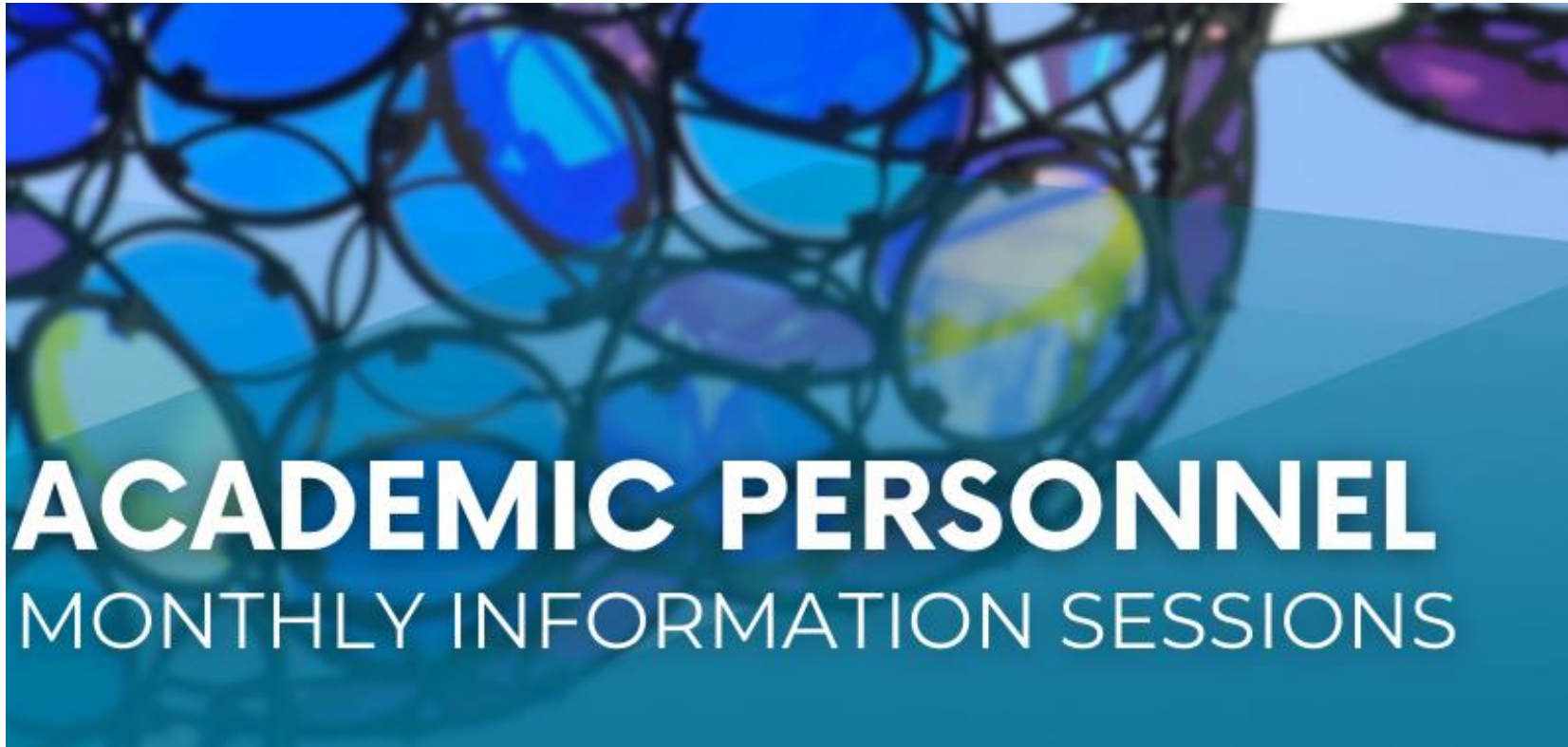


- ✓ Resource 1-AP Website- [Onboarding](#)
- ✓ Resource 2-Pre-hire process PDF
- ✓ Resource 3- [Faculty Case Aid](#)
- ✓ Resource 4- [Non-Faculty Case Aid](#)

# Questions



Upcoming Session-Tuesday, October 24, 2023



Thank you for your attendance today!!!