BFS Payroll

- No Office Hours – Payroll Staff is working 100% remotely
- **Please use Service Now at** [bfshelp.ucsb.edu](http://bfshelp.ucsb.edu) **for all questions and requests.**
- Find answers at [https://www.bfs.ucsb.edu/payroll/ucpath](https://www.bfs.ucsb.edu/payroll/ucpath). We have FAQs and resources, including the training slides and job aids, to assist you with all Payroll related matters.
Tax Withholdings

- **BFS payroll does not have access to employee tax withholdings or W2’s. Employees must use the self-service portal.**
  - If employees are not sure what to choose for their withholdings, irs.gov has calculators that can help them.
  - If an employee is leaving, make sure they first provide a personal (non-UC) email address. This is how they will sign up for the former UC Employee portal to gain access to their W2’s and past paycheck stubs.

- **Employees working remotely in another state or out of the country**
  - The employee needs to go to UCPath and update their address first.
  - Then, the employee goes to the Forms Library > Access Forms to complete the Out of State Tax withholding form. This form is then submitted to Path via a case and will update the employee’s tax withholdings accordingly.
  - For Non-Resident employees working remotely outside the US, please contact Lynn Tran for tax purposes. *(Lynn.tran@bfs.ucsb.edu)*

- **Glacier**
  - The process to nominate employees has not changed.
  - Please make sure to use the same email for Glacier that is their primary email in their UCPath profile.
  - What has changed is that employees upload their signed Glacier forms and supporting documents to Google Drive and share the link with Lynn Tran. *(lynn.tran@bfs.ucsb.edu)*
Oaths

• Oath
  – Use Zoom to administer the Oath and DocuSign to sign the form. This must be done on or before the employee’s first day of work (US Citizens only)
  – Department updates UCPath with the date the oath is signed
  – Email the completed form to Veronika Reidel.
    (Veronika.Reidel@bfs.ucsb.edu)
I-9 work authorization

• Department hires or rehires employee
• Department enters them in UCPaith
• Department opens a ServiceNow ticket **BEFORE** the employee’s **effective date** for **all new hires and rehires**.
  – If UC Path has not come back with the EEID yet, enter TBD in the SN ticket. This will allow us to get the I-9 started
  – If employee is 9/12 academic hire and their effective date is 7/1, then their first date pay date is 8/1 but they start 9/28. Please note in the additional information on the ServiceNow ticket that they are a first day of pay hire.
  – If a ServiceNow ticket was opened before receiving the EEID, then the department will update the ticket or email BFS with the EEID so that we can update the tracker profile and then Path.
• Department directs employee on how to complete Section 2.
• Employee completes Section 1 ON or **BEFORE** their effective date.
• Employee provides BFS with original unexpired documents no later than their 3rd day of work.
• Department verifies the I-9 was completed by looking for the **security clearance** U14 in UC Path.
### Defining the Hire Date

**First day of work vs. first day of pay**

<table>
<thead>
<tr>
<th>Appointment start date</th>
<th>July 1</th>
<th>July 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>First day of <strong>work</strong></td>
<td>July 1</td>
<td>September 27</td>
</tr>
<tr>
<td>First <strong>pay</strong> date</td>
<td>August 1</td>
<td>August 1</td>
</tr>
<tr>
<td>Hire Date for I-9</td>
<td>July 1</td>
<td>August 1</td>
</tr>
</tbody>
</table>

Please notify BFS if your 7/1 effective date hire is effective pay status.
Why does BFS now need us to notify them of re-hired employees if their I-9 is less than 3 years old?

Per USCIS, rehires must have an updated Section 3 and may need a reverification based on the expiration date of the documents presented on the original I-9. Therefore, we are asking the campus to notify BFS of all new and rehired employees to ensure I-9 compliance via ServiceNow. We can then enter in the employee’s rehire effective date and review whether or not a reverification of documents is needed for a rehired employee.
I-9 for employees working outside of the country

• If an employee is not working on US soil (outside the 50 states) they do not need an I-9.
• However, please notify BFS that the employee is working in X country and whether or not they may come to the US in the future so that we can note it in case they pop up on a missing I-9 report.
• If the employee does come to the US at a later date, an I-9 is due. Their effective date would be the day they arrive to the US.
I-9 Temporary** COVID-19 accommodations

Due to social distancing in relation to the COVID 19 Pandemic National Emergency; USCIS has made accommodations allowing employers to temporarily verify employee documents via video conferencing.

**The verification must still be done no later than the employee’s 3rd day of work.**

UCSB is using Zoom video conferencing for verifications by appointment.

Please have employees choose a time via our google calendar appointments at:

https://calendar.google.com/calendar/selfsched?sstoken=UUxkOU8zRGJ1MmhZfGRLZmF1bHR8OThhNTkzNgFhNDdmNWZkNzM5Mzc5NzA4NWU0NDYxZDA

Please note the department must 1st have opened a ServiceNow ticket to trigger Section 1 before the employee’s first day. Once the employee completes Section 1, have them schedule their Section 2.

***The temporary accommodations can be lifted at anytime and we will do our best to inform campus ASAP when it ends.***
What happens if USCIS doesn’t extend the Covid accommodations?

- If that happens prior to our return to the office, UCSB will utilize the remote in-person Section 2 as follows.
  - Those who completed their I-9 via Zoom will need an in-person verification of their documents within 3 days of the USCIS accommodation being lifted.
    - Zoom verifications started Mid-March 2020 and is currently approaching 1000 employees. BFS will send each department a list of employees affected by this when we know the accommodations are not going to be extended.
  - Who can be the remote Section 2 verifier?
    - Standard business practice is a representative at another college/university/school.
    - Due to COVID 19, standard practice may not be available to an employee. In these cases, another person can be used. The qualifications are:
      - Someone over the age of 18 not related to the employee (e.g., a neighbor, clergy, mentor).
      - Has secure Internet access to use the I-9 Tracker link that is sent to them.

- What will departments need to do?
  - For employees who were verified via Zoom:
    - Contact those that were verified via Zoom to obtain their Section 2 in person verifier information. Then provide to BFS via email.
  - For New/Rehire Employees:
    - Open a ServiceNow ticket for Section 1 as normal.
    - Check the box for a remote Section 2.
    - Enter in the name, title and email address of the person doing the remote Section 2.
    - The employee will show their original documents to the remote verifier, who will then verify the original document and enter the information into Tracker and upload a photo of the documents to the secure upload in Tracker.
    - If the person doing the remote Section 2 needs help, BFS will be available to assist.
    - The I-9 tracker then alerts BFS, which will then review for correctness before signing off or will ask for corrections.
Common Work Authorization Questions

• I didn’t know my employee needed an I-9 or to be reverified.
  – It is a department’s responsibility to ensure that their employee has completed their I-9 before their 3 days are up and when their Non-Resident alien employee needs to be reverified. This should be communicated and coordinated between the department and the employee.

• My current employee changed their name. Do they need to do anything in regards to the I-9?
  – Yes, we will need to reverify their documents with their new name. Please contact BFS via ServiceNow with the employee’s ID #, prior name and new name to get the process started.

• My employee changed from a Non-Resident Alien to a permanent resident (green card holder). They updated their I-9 but Path is not reflecting the change and won’t let me extend their position. Can you correct Path?
  – When the employee makes a citizenship change, they need to update their I-9. If, afterwards, Path won’t let you extend the appointment you will need to check that their status in Path was properly updated. After that, contact UC Path via a case.

• My department told me I must have my passport for the I-9, but I don’t have one. What can I do?
  – Please remember, USCIS has a list of acceptable documents. We cannot specify which documents out of the list the employee must bring, as this is considered discriminatory. The current list of acceptable documents is available on the BFS website.
Common Work Authorization Questions

• **How do I know that the I-9 is done?**
  – You will look in UCPath for the security clearance “U14”. There is a job aid on how to do this at bfs.ucsb.edu. If you are still not sure, reach out to BFS and we will gladly let you know the employee’s status.

• **I start on August 15th and it’s currently July 29th, can I do my I-9 now or do I need to wait?**
  – You can do the I-9 earlier than your start date. Section 1 must be done no later than your first day and section 2 your third day of work. You only need to have accepted a position first.

• **My employee is a rehire and separated for less than 120 days. They don’t need a new I-9... Do they?**
  – It depends on when the I-9 was [originally signed](#) and if the document they presented is past its expiration date. That is why we are asking you to open a ticket on ALL hires, new and/or rehired.

• **I have a mass hiring of student employees, do I need a ServiceNow ticket for each one separately?**
  – No. In this instance, you can have a spreadsheet showing the Employee Name, Email, ID and Start/Effective date. Then, open one ServiceNow ticket. In the required fields, enter the word “Various” and attach your spreadsheet to the ticket. In ‘additional information’, indicate that you have a mass hire and are providing the pertinent information in the attached spreadsheet.
Common Oath Questions

• How do I administer the Oath?
  – The Oath is required of all US Citizens and must be signed on or before the employee’s first day of work. It will cause issues to an employee’s service credit and benefits if it is not signed on the first day. To complete the Oath, you sit down with the employee and read aloud the Oath while the employee repeats it back to you. Then, the employee signs that they have taken the Oath and you sign that you have witnessed it. During COVID-19 social distancing, this can be done via Zoom and signed via DocuSign. You then update UCPath with the Oath date and forward the completed form to BFS for storage either through interoffice mail or by emailing the completed form to Veronika Reidel in BFS (this only pertains to while working remotely).

• How do I update UCPath that the Oath was signed?
  – You go to Peoplesoft > Workforce Development > Profile Management > Profiles > Person Profiles. Then, enter in the employee’s ID. On the next screen, you will go to the third tab that says ‘Oath / Patent Signature date’. Then, add new Oath signature date.

Note: The Oath is only good for 1 year from the date signed if there is a break in service.
Common Patent and Glacier Questions

• What about the Patent? How is that done?
  – The employee does this on Employee Self-Service in UCPath. It is under Personal information on the employee dashboard. Have them login their first day to sign it. Self-service is also where they complete their W-4 and sign up for direct deposit. Please note that UC Path does not send an email to employees to do their self-service tasks. Just like the Oath, the Patent is good for one year from the date signed if there is a break in service.

• My employee is a non-resident alien and I heard they need to be nominated for Glacier. What is it and how do I do this?
  – Glacier is a federal tax treaty system and the system of record for UCPath on Non-Resident Alien employees.
  – To nominate your employee, go to: https://www.bfs.ucsb.edu/forms/glacier-nomination-form
Overpayments

- Any questions or request for overpayments should go through BFS ServiceNow.
- Please refrain from going directly to UCPath with any questions. When departments go to UCPath directly, we have no record and cannot verify and validate that it is correct. UCPath will take an inquiry and process an overpayment.
- Make sure the employee’s job record is updated with the correct information prior to submitting a ServiceNow ticket. (e.g., effective end dates, FTE, comp rate, etc).
- Validate pay when a check is in ‘calculated,’ and reach out to us immediately if it will be an overpayment so we can attempt to cancel it before check confirm to avoid the overpayment all together.
Retro payments

• Verify that it will retro. Was the employee paid (even a gross or net 0 check) on that job record since the effective date of the change?
  – If yes, then it should retro on the next available on cycle.
  – If no, an off cycle may be needed. The retro module will not pick up if the employee was not “paid” from that job record.

• If the retro should pick up, notify the employee that it will retro pay on their next check.

• When to open an ETS Kronos historical correction ticket vs Missed Pay.
Payroll reminders

- ACR for a previous fiscal year (prior to 7/1/2020) please provide the FAU in your Service Now ticket.
- When overriding the FAU in a one time pay, make sure to indicate that it is an override in the notes as an extra notice to UCPath.
- Review the payroll processing calendar prior to submitting a one-time or additional pay. Verify that it is not passed the deadline. The deadlines include AWE approval.
- Check review paycheck before submitting a missed pay. Review and analyze the amount that is needing to be paid.
- You must terminate an employee in UCPath prior to opening a ServiceNow final pay ticket. UCPath will not allow us to submit a transaction for an active employee.
- We cannot add anyone to UCPath as an initiator and/or approver. This is done by ETS.
- Verify that your effective dates are correct for overpayments, terminations, I-9, etc.
Recap – Important Reminders

- Departments must notify BFS of all hires. Even rehires may need a reverification regardless of citizenship status or length since previous I-9.
- Departments must keep track of NRA work authorization dates.
- If your department’s I-9 contact changes, notify BFS immediately to keep receiving your courtesy reminders.
- The Oath is only good for one year when there is a break in service. It must be signed on or before employee’s effective date.
- Terminate employees before submitting final pay tickets.
- **Do not use end dates on funding entry.**
- Watch your effective and processing dates in UC Path!
Questions?
Resources

• ServiceNow: bfshelp.ucsb.edu
• Job Aids and Recordings:
  – https://www.bfs.ucsb.edu/payroll/ucpath/resources
• FAQ
  – https://www.bfs.ucsb.edu/payroll/ucpath/FAQ
• BFS COVID-19 updates
  – https://www.bfs.ucsb.edu/administration/bfs-covid-19-status-updates
THANK YOU FOR YOUR TIME