HIRING EMPLOYEES DURING CUTOVER TO UCPATH

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WELCOME to BFS Mini Tune-ups

OBJECTIVE:
Online meetings to provide campus staff with a high level perspective and information on both topics of interest and new/upcoming initiatives and policy updates.

PRINCIPLES:

• Sessions are conducted via Zoom and will last no longer than 30 minutes
• Participants will be muted during the session
• Chat questions can be submitted but priority will be given to questions submitted ahead of time at www.bfs.ucsb.edu/coaching
• The Mini Tune-up website will be updated with session details and information
HIRING DURING CUTOVER

DISCUSSION TOPICS

• Freeze Periods in PPS and UCPath
• Google Forms as temporary tools to collect hiring and position data
• Instructions and due dates for submission of data for mass hire upload files
• Other hiring activities during cutover
• Questions
**HIRING DURING CUTOVER**

Freeze Periods Impacting MO Hiring during Cutover

- PPS freezes for MO transactions at 7 pm on 8/30/2018
- No department access for data entry in UCPath until 9/27/2018

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**HIRING DURING CUTOVER**

Freeze Periods Impacting BW

**Hiring during Cutover**

- PPS freezes for BW transactions at 7 pm on 9/13/2018
- No department access for data entry in UCPath until 9/27/2018

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HIRING DURING CUTOVER

Google forms will be utilized to collect the employee data and position data necessary to hire a new employee (an employee new to UCSB) during the cutover period. Three forms have been developed:

1. Academic New Hire Data Form
2. Staff New Hire Data Form
3. Staff Position Data Form
Hiring During Cutover

Academic New Hire Data Form
(Submission Period 8 a.m. 8/31/2018 to 5 p.m. 9/7/2018)

Your entries will not be saved until you click submit in the final section of this form. Closing the browser before clicking submit will result in lost work. After submitting the data, click the 'Edit Your Responses' link and save the URL as a bookmark in your browser. This will allow you to return to the form to review the data. Step by step instructions are included at the end of the form.

Your email address (cassemetz@ucsd.edu) will be recorded when you submit this form. Not you? Switch account.

* Required

New Hire Name

All fields are required - unless noted.

Last Name *

Your answer

First Name *

Your answer

Staff New Hire Data Form
(Submission Period 8 a.m. 8/31/2018 to 5 p.m. 9/7/2018)

Your entries will not be saved until you click submit in the final section of this form. Closing the browser before clicking submit will result in lost work. After submitting the data, click the 'Edit Your Responses' link and save the URL as a bookmark in your browser. This will allow you to return to the form to review the data. Step by step instructions are included at the end of the form.

Your email address (cassemetz@ucsd.edu) will be recorded when you submit this form. Not you? Switch account.

* Required

This form allows departments to submit hire data for employees new to UCSD during the UCPath cutover period. A Position Number will be required if the employee will be placed into a multi-headcount Position. A separate form is available for departments to request the creation of a new Position (single or multi-headcount) in advance of the hire. Upon submission of the data via this form, please forward the new hire paperwork package (i.e., I-9, W-4, Oath and Patent form) to the Payroll Office immediately. If there are questions during processing, please provide your name and phone number so that you may be contacted.

Staff Position Data Form (Submission Period from 8 a.m. 8/31/2018 to 5 p.m. on 9/13/2018)

Your entries will not be saved until you click submit in the final section of this form. Closing the browser before clicking submit will result in lost work. After submitting the data, click the 'Edit Your Responses' link and save the URL as a bookmark in your browser. This will allow you to return to the form to review the data. Step by step instructions are included at the end of the form.

Your email address (cassemetz@ucsd.edu) will be recorded when you submit this form. Not you? Switch account.

* Required

This form allows departments to submit position data to create multi-headcount staff positions in the UCPATH system during the cutover period. Requests to create multi-headcount staff positions in UCPATH should be limited to staff student employee positions. HR will create the multi-headcount staff positions in UCPATH in advance and provide the requesting department with the Position Number(s) to use when the employee data is submitted via the Google Staff New Hire Data Form. By submitting the Position Data Form, departments with a large number of staff student employee hires during the cutover period will be able to assign multiple student employees to a single staff position and expedite the data entry in the Google Staff New Hire Form. If there are questions during processing, please provide your name and phone number so that you may be contacted.

Submitter Info

Submitter Info
HIRING DURING CUTOVER

Specific steps are outlined in this presentation for departments actively hiring during the cutover period:

- BW-paid staff student new hires
- MO-paid new hires and academic BW-paid hires
- BW-paid staff non-student new hires
- Other types of staff student or academic student hiring actions
HIRING DURING CUTOVER

For BW-paid staff student new hires

1. In advance of hiring, submit requests to create Multi-headcount Positions for the new student hires, via the Staff Position Data Form. For departments with a high volume of student hiring, the data entry on the Staff New Hire Data Form will be significantly reduced if Multi-headcount Positions are requested in advance. Requests can be submitted up through 9/13/18.

2. Human Resources will create the Multi-Headcount Positions in UCPath and provide the requesting department with the Position Number(s) to use when submitting employee data in the Staff New Hire Data Form.

3. All new hire paperwork must be completed by the new employee as required by campus policies.

4. The employee data must be submitted via the Staff New Hire Data Form by 9/20/18 to be included on the Mass Hire file upload on 9/23/18.

5. If the department does not request a Position Number in advance, the data elements to create the Position and the funding of the Position will be collected within the Staff New Hire Data Form.

6. After the data is submitted, forward the new hire paperwork (i.e., I-9, W-4, Oath and Patent forms) to the Payroll Office immediately. The employee should enroll in direct deposit in the UCPath Portal on 9/27/18 or soon after.
For all MO-paid new hires and academic BW-paid hires:

1. All new hire paperwork must be completed by the new employee as required by campus policies.
2. The employee data must be submitted via the Staff New Hire Data Form or the Academic New Hire Data Form by 9/7/18 to be included on the Mass Hire file upload on 9/9/18, by 9/20/18 to be included on the Mass Hire file upload on 9/23/18, or by 9/25/18 to be included on the Mass Hire file upload on 9/27/18.
3. The data elements to create the Position and the funding of the Position will be collected within the Staff New Hire Data Form and the Academic New Hire Data Form. A separate request to create the new Position is not required for single incumbent positions.
4. After the data is submitted, forward the new hire paperwork (i.e., I-9, W-4, Oath and Patent forms) to the Payroll Office immediately. The employee should enroll in direct deposit in the UCPath Portal on 9/27/18 or soon after.
HIRING DURING CUTOVER

For staff non-student BW-paid new hires
1. All new hire paperwork must be completed by the new employee as required by campus policies.
2. The employee data must be submitted via the Staff New Hire Data Form or the Academic New Hire Data Form by 9/20/18 to be included on the Mass Hire file upload on 9/23/18.
3. The data elements to create the Position and the funding of the Position will be collected within the Staff New Hire Data Form and the Academic New Hire Data Form. A separate request to create the new Position is not required for single incumbent positions.
4. Follow the same instructions if hires occur later in September. Employee information must be submitted by 9/25/18 to be included on the Mass Hire file upload on 9/27/18.
5. After the data is submitted, forward the new hire paperwork (i.e., I-9, W-4, Oath and Patent forms) to the Payroll Office immediately. The employee should enroll in direct deposit in the UCPath Portal on 9/27/18 or soon after.
HIRING DURING CUTOVER

Other types of staff student or academic student hiring actions during the cutover period

1. If the student employee already holds a part-time job at UCSB, contact the employee’s home department to confirm the appointment details. The secondary hiring department may hire the student employee during the cutover period, and hold the appointment information until September 27th to initiate the Concurrent Hire template transaction in UCPath. If the concurrent hire results in a FLSA or pay cycle conflict, the hiring department must consult with Human Resources or Academic Personnel.

2. If the student previously held a job at UCSB but has since been separated, the student will need to be rehired (because their PPS record would have converted as a separated employee in UCPath). The department will collect the new hire paperwork as required by campus policies but wait until September 27th to initiate the Rehire template transaction in UCPath.

(Reminder: a Position Number is required to complete the Concurrent Hire and Rehire template transaction. This may require the department to submit a separate request in advance via the Google form to create a new Staff Position in UCPath.)
Questions & Answers

Q1: How do you make changes/edits to a current appointment in PPS while the freeze is happening?
A. Once PPS is “frozen,” updates to employee appointments are no longer possible. Central offices (APO, HR, and Payroll) may be contacted regarding other critical activities during the cutover period in September.

Q2: Will it be open access to anyone to submit a google form?
A: Yes

Q3: Will we receive confirmation when our form is received in Google Forms and processed?
A: No, the Google form will not provide a confirmation.
Questions & Answers

Q4: In UC Path Trainings we were told that when UC Path goes live we would not be able to create the Multi-Headcount Positions and that the HR department at UCSB would convert them into multi headcounts for us as requested. Is this not the case now?

A. The New Position Control Request Form will be used in the UCPath system to request new staff positions, including new multi-headcount positions. After go-live, a department could also request a change to the maximum headcount of existing Positions (created during the conversion process). For academic student positions, all current appointments and new hires will be done as a single headcount position. Departments may choose to transition to multi-headcount positions in the future.
Questions & Answers

Q5: The due date for multi-headcount position requests is September 13th. Will we need to request a specific number of multi-headcount positions?
A. A department may request more than one staff multi-headcount position during this cutover period for student employees (i.e., STDT 1). Each request that is submitted will generate one new Position with a maximum headcount that will be determined by the department.

Q6: Does the due date of September 13th apply for Concurrent Hire and Rehire Position Requests?
A. Yes. It is expected that the UCPath system will be unavailable for transactions between 9/14 and 9/22. The 2nd Mass Hire Upload file will be sent to the UCPath Center on 9/23. It is not known at this time whether HR will be able to create new Positions between 9/23 and 9/26.
Questions & Answers

Q7: Can we create a multi headcount position using the google form in the case we might need it during the cut over period? If it ends up not being needed does that impact anything in UCPath, or should we wait to request at a later time? We plan to try to get most of our hires processed in PPS before the 9/13/18 deadline as student staff that we eventually want to grouped as a multi-headcount position.
A: Positions can be inactivated. The department can submit a request to HR to inactivate a Position after UCPath go-live.

Q8: Can we request a concurrent or rehire position now in case we end up hiring a student that will fit that parameter but then possibly not end up filling that position?
A: Yes, see Q7 above.
Questions & Answers

Q9: If I have a MO ee who starts on 9/10, and will convert over with UC Path, but due to Jury Duty does not start until a few days later, can I RX time of Pay on 9/27 to be reflected on October pay, or should I RX in October for time missed in Sep?
A: Please consult with HR or APO, depending on the employee’s appointment type.

Q10: Using this interim process, what is the approval/review process for transactions?
A. Approvals to submit transactions will happen within the department as is the practice today. Employee, Position, and Funding data that is submitted via the Google forms are presumed to be correct and within the department’s authority to submit.
Questions & Answers

Q11: If we hire in PPS while the freeze is happening, will the employee appointment convert over to UC Path? Or will they be put on a short work break? For example they are in PPS now with start date of Sept. 10, will they become active in UC Path?
A. If the employee is in PPS as of the snapshot date and has a future hire date, the employee will be active in UC Path as of the hire date.

Q12: Can I submit a staff new hire form on 9/7 for someone who is starting 9/10? Rather than wait for the later mass upload?
A. Yes
Questions & Answers

Q13: I have 18 student positions to hire for September. I only need to hire one student, that will not be able to make any of the deadlines for hire into PPS before UC Path. How should I hire one BW Student EE on 9/17?

A: Follow the instructions to hire BW-paid staff student new hires on slide 9.

All new hire paperwork must be completed by the new employee as required by campus policies. The employee data must be submitted via the Staff New Hire Data Form by 9/20/18 to be included on the Mass Hire file upload on 9/23/18. After the data is submitted, forward the new hire paperwork (i.e., I-9, W-4, Oath and Patent forms) to the Payroll Office immediately. The employee should enroll in direct deposit in the UCPath Portal on 9/27 or soon after.

Q14: Can students begin working before their info is entered into the system if the Google Form has been completed and the paperwork has been submitted?

A: Yes.
Questions & Answers

Q15: What about hiring academic grad students as TA's that were active or inactive employees in PPS, during the PPS freeze of September? Is there a form we can use to submit employment data in the meantime?

A: The Mass Hire Upload is only for new employees, new to UCSB. If the student is inactive at the time of conversion, they will be placed on short work break and the department will have to return them from short work break and process the hire into the new Position once the UCPath Portal is available (9/27). If the student has an existing position and this will be a concurrent hire, the department will need to request a position be established and then complete the hire process for the new position. See the explanation on Slide 12, Other types of staff student or academic student hiring actions during the cutover period.
Questions & Answers

Q16: If we're entering academic grad students for TA positions, by the 8/30 deadline for a 10/01/18 to 12/31/18 appointment, and the student takes back their offer 8/30, what is or will there be a procedure to 'take-back' or cancel the appointment before UC Path, or will we need to wait until UC Path launches to terminate the appointment?
A: Please contact Academic Personnel if this situation arises.
Questions & Answers

Q17: If I have 9 new TA’s arriving in mid-September that need to be hired, should I submit a multi headcount or just hire one to one on the mass hire google doc?

A: We will not be using multi-head count positions for TA’s during the conversion or mass hire processes. A separate template will need to be submitted for each new hire.
Questions & Answers

Q18: Do students listed as inactive in PPS but not terminated by main hiring department that will be rehired before the 9/13/18 freeze date need to have new rehire paperwork submitted to HR or will the old hire paperwork on file be sufficient? I just want to know if new rehire paperwork will need to be submitted?

A: If the employee is returning to work, add the Fall appointment/distribution in PPS in accordance with current practice (no new hire paperwork is required). The Fall appointment will be pulled into the conversion process and available in the UCPath system. Please see the email dated 8/30/18 re: “Preparation for UCPath (follow-up to June 19th communication)” sent via the PPS listserv for more information about student hire scenarios.
Questions & Answers

Q19: What is the process for appointing a MO person (GSR) from one department to another. For example, they end on 9/30/18 and start in a new department on 10/1/18?

A: After 9/27 the home department will terminate their appointment and the hiring department will process a new hire using the Intra-location transfer template. The comments sections on both the termination and hire templates should indicate that this is an intra-location transfer.
Q20: What are the exact steps for the hiring process regarding paperwork during the cutover? Can we get a side by side comparison of what we do now with hiring and what we will do after UCPath?

Questions & Answers

Q21: When do we submit the MO EE pay reduction (RX), for September to be reflected in October 1st pay check? Should it be done in PPS today, or on Sept 27 in UC Path?

A: Transactions submitted in UCPath on 9/27 will have missed the payroll cutoff for the October 1st check issued by the UCPath Center. Some transactions may need to be processed by the central offices (APO, HR, Payroll) during September or will be processed by the department on 9/27 or later as a retroactive adjustment.
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