UC PATH: GOING LIVE WITH TRACKER

Jim Corkill, Controller
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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
I-9 Tracker Complete is a new tool to create and track I-9 forms with the benefits of:

- I-9s are processed digitally, eliminating the need to fill out paper forms.
- Section 1 of the form is completed online by the employee before or on their first day.
- Compliance of I-9 forms can be tracked over time:
  - Timeliness
  - Renewals
  - E-verify
UCPATH NEWS – UPDATES: Changes to New Hire Packets & Employee Documentation Procedures

BFS Communications <communications@bfs.ucsb.edu>  
Mon, Sep 17, 9:07 AM (2 days ago)

**** This message is being sent on behalf of Jim Corkill. Please do not reply to this message****

TO: Campus Community
FR: Jim Corkill, Director, Controller, Business & Financial Services (BFS)
RE: UCPATH NEWS – UPDATES: Changes to New Hire Packets & Employee Documentation Procedures

Please read these important updates (in red) to the information previously sent about changes to the processing of new hire employee documentation in preparation for the transition to UCPath.
New Hire Packet Processing

Employees Hired On or After 9/27/18:

For new hires who will begin work on or after September 27, there are several changes to the documentation that will be required in order to properly onboard employees.

1. **State Oath of Allegiance**: A new Oath form will be required starting 9/27, and will be available on the BFS website at that time, here: https://www.bfs.ucsb.edu/payroll/forms. Departments MUST send Oath forms to BFS on or prior to the employee's start date. Completed Oath forms will continue to be forwarded to BFS.


3. **Form W-4, Employee's Withholding Allowance Certificate**: Form W-4 will be completed by employees on the UCPath self-service website starting 9/27.

4. **Direct Deposit**: Employees will complete their direct deposit enrollments once they are active in UCPath and the self-service website is available starting 9/27. As applies now, employees will receive paper checks until the direct deposit enrollment process is completed.
New Hire Packet Processing

Employees Hired On or After 9/27/18:

For new hires who will begin work on or after September 27, there are several changes to the documentation that will be required in order to properly onboard employees.

1. I-9 Verification:

   - Continue paper I-9 verification until further notice. After integration is finished, UCSB will switch to the online tool, Tracker, that UCPath mandates for completing I-9 work authorizations.
   - As previously communicated, when new employee information is entered into UCPath, an email is generated to the new hire, with instructions to complete the first section of the I-9 verification prior to arriving for work on campus. The employee will be directed to visit a predefined location or satellite site on campus to complete the verification process on or prior to their start date. More details about Tracker, including a Mini Tune-Up information session, will be coming soon.
**I-9 Tracker Lifecycle**

1. **Start**
   - Initial I-9 procedures that follow a Hire or Re-hire including completing I-9 Section 1, 2 and/or 3, as appropriate

2. **Initial I-9 Process**
   - Initial E-Verify & GLACIER Set-up
     - Initial E-Verify check for eligible Employees, based on funding in UCPath. Also, establishing a GLACIER profile for eligible Employees

3. **Termination**
   - Updates to Tracker and GLACIER, as appropriate, due to an Employee’s termination from UC

4. **Funding Changes**
   - Change in Funding (including a change due to Position Management update) that cause an Employee to become subject to E-Verify

5. **Personal Data Changes**
   - Updates to Tracker and GLACIER, as appropriate, when the employee experiences a relevant change in their personal data (e.g., Name change)

6. **Documentation Changes or Expire**
   - Updates to Tracker and GLACIER, as appropriate, due to expiration of, or changes to and Employee’s work authorization documentation (e.g., visa expiration date, visa type, etc.)

7. **Updates to Tracker and GLACIER, as appropriate, due to an Employee’s termination from UC**

8. **End**

The lifecycle includes:
- **Initial I-9 Process**: Completing I-9 Section 1, 2 and/or 3, as appropriate.
- **Termination**: Updates to Tracker and GLACIER due to an Employee’s termination.
- **Funding Changes**: Change in Funding due to Position Management update.
- **Personal Data Changes**: Updates to Tracker and GLACIER based on relevant personal data changes.
- **Documentation Changes or Expire**: Updates to Tracker and GLACIER due to expiration of or changes to Employee’s work authorization documentation.

The diagram illustrates the cyclical nature of the lifecycle, with arrows linking the different stages, highlighting the flow of actions and updates required at various stages.
I-9 Tracker Workflow – New Hire

- **UCPath**
  - Hire action finalized in UCPath

- **Tracker I-9 Complete**
  - Tracker receives information about Hire action from UCPath
  - Tracker generates a profile for the Employee

- **BFS/Satellite Site I-9 Processor**
  - Tracker Account Information

- **Employee**
  - Completes I-9 Section 1 in Tracker using instructions from Tracker I-9 Complete
Employee Email Notification

You have been hired by the organization listed below, and your new employer is requesting that you complete Section 1 of the Form I-9 using an electronic system to verify your eligibility to work in the United States. Department of Homeland Security regulations require that all employees (both citizens and non-citizens) complete this section no later than your first day of work.

Employer Name: UC Santa Barbara
Expected Start Date: 10/29/18

To access your section of the Form I-9 online, please visit the following secure link and follow the on-screen instructions:
Form I-9 for Testcase One

IMPORTANT NOTE: You will not be able to return to this form after it has been electronically signed and submitted to your employer.

After completing your section of the I-9 form, the next step is to present your identity and U.S. employment authorization document(s) to an authorized Employer Representative who must complete Section 2 of the I-9.
I-9 Tracker Workflow – New Hire

Start

UCPath

Hire action finalized in UCPATH

Tracker receives information about Hire action from UCPATH

Tracker generates a profile for the Employee

Tracker stores I-9 documentation

Completes I-9 Section 1 in Tracker using instructions from Tracker I-9 Complete

BFS/Satellite Site I-9 Processor

Verifies documents and assists completing I-9 Section 2 in Tracker

Employee

Completes I-9 Section 2 in Tracker

Track Account Information

I-9 Completion Date

Receives I-9 verification information from Tracker

Hire Information

I-9 Processor

Employee
Worksite Locations

- Faculty and Staff new hires will visit BFS to present documents for section 2
- Student new hires will visit a department/division worksite to present documents for section 2

- **Worksite Job Aid**
Tracker I-9 Complete

- Additional workflow diagrams and I-9 job aids can be found on the BFS website under Payroll/UCPath
- Notification of conversion date to be announced via the ACTGNEWS listserv
Questions & Answers

Question:
Once we go live with Tracker, if an employee has a work permit (employment authorization document) that is going to be expiring, who will be reaching out to the employee to re-verify employment eligibility? Will it be BFS?

Answer: BFS will monitor the work permit through Glacier and send emails to the employees.
Questions & Answers

Question:
Since the Oath is only for citizens, in the previous state, we used the I-9 form to verify if we needed to have employees complete this section. Since are no longer viewing I-9 documentation, is the expectation now that the department will ask the employee if they are a citizen? Or do we provide the form and leave it up to the employee to decide if they complete it or not?

Answer:
The department can ask if the employee is a US citizen then fill out the Oath, and if you are not then you don’t have to sign.
State of California Law requires all US citizens must sign the Oath on the first day of employment.
**Questions & Answers**

**Question:**
Since an I-9 is valid for 3 years from the employee's date of hire, if a limited employee is separated after 5 months of employment, and if they are re-hired weeks later, it's not clear if they would still need to complete a new I-9 or not?

**Answer:**
On rehires, we revivify only if rehire date is more than 3 years after prior I-9 completion date. We re-verify when an EEs work authorization expires or changes.
Question:
What happens if employee fails to complete I-9 by expected start date? Does UCPath automatically change the start date of the job when/if it's completed? No they will not change the start date.

Answer:
They will put the employee on Leave no Salary until they are in compliance or terminated. You the department will start hearing from BFS if your new employee does not come in on the start date and every day there after until they are out of compliance. At which point BFS will give the information over to UC Path and HR.
Questions & Answers

Question:
Where in the Library are students supposed to go?

Answer:
They will need to email Brandyn Gibson at: bgibson@ucsb.edu to set up an appointment. There will be a location in the new part of the library by the check-in desk.
Questions & Answers

Question:
For section 2 I-9 verification, where do non-student academic employees go?

Answer:
Business and Financial Services
Questions & Answers

Question:
Do we treat name changes and/or citizenship changes the same and sends the employees to BFS?

Answer:
Yes they will come to BFS. Please contact Shannon Jackson or Noah Whatoff in BFS if you need this so we can make sure a Tracker profile is created first.
Question:
Confirming that we are still submitting Glacier Nomination Forms. Once completed will be a part of UC Path, correct?

Answer:
The procedure for Glacier has not changed.
Questions & Answers

Question:
When completing the new hire template, how are we supposed to gather the incumbent’s information (social security, DOB etc.) to input into UCPath?

Answer:
Ask the employee for the information.
CLOSING - BFS Mini Tune-ups

NEXT STEPS:

Visit the Mini Tune-ups website to:
• View our session blog updates
• Sign up for future sessions and submit questions
• Submit suggestions for future topics

www.bfs.ucsb.edu/coaching
Thank You!

WRAP UP