

ONBOARDING

New Hire Initial Request

Department/Cluster submits a new employee hire CASE via Aggie Service for academic or student staff hires (onboarding CASE). When the department/clusters initiated a staff recruitment via AggieService, the department/cluster will email in the case to name the new hire or a CHILD CASE has been initiated from recruitment CASE so that recruitment and new hire are associated with one another for record keeping purposes.ⁱ

Note: The information from the child case will/should include the following information:

- *Employee contact phone/email.*
- *Anticipated start date.*ⁱⁱ

HR Analyst contacts the new hire to schedule a new hire appointment. If the new employee is transferring from another unit on campus, new hire documents will have been completed and the HR analyst will reach out to the employee's Shared Service Center to request access to the payroll record.ⁱⁱⁱ

HR Analyst sends the new employee an email with attachments and instructions on what to have complete when they come in for their new hire appointment.

Background Check

If background check is needed, the HR Analyst will call employee to schedule first available appointment for background check at UC Davis Police Department or UC Davis Health Police Department. HR Analyst completes first page of **LiveScan** and forwards to new employee and requests they complete the second page and take with them to their background check with appropriate ID.

Note: Background check appointments are 3-4 weeks out, HR analyst will have to consult hiring supervisor on scheduling of appointment and if will impact anticipated start date. HR analyst will notify supervisor of the time delay of background check to see how it will impact their start date. Campus permits new employee to work while awaiting results of background check.

Template Background email and form in Box

HR Analyst notifies hiring manager on **LiveScan** results and updates the CASE in AggieService. Notification times will vary depending upon when background appointment is scheduled and when DiSSC received the result, 2-3 weeks.

Reference Checks for Academic Senate with tenure

For tenured senate appointments, a reference check is done by Academic Affairs. Dean's office will work with HR Manager/CAO if any issues arise with senate reference check.

For tenure-track senate/federation titles no background checks are required. (i.e. assistant professor or lecturer with potential security of employment).

New Employee Appointment (Checklist)

After HR Analyst schedules new hire appointment, the HR Analyst prepares the new hire paperwork which includes.

- UC W-4/DE 4
- State Oath of Allegiance/Patent Policy and Patent Acknowledgment (UPAY 585)
- Voluntary Self-Identification of Race, Ethnicity and Veteran Status (U5605)
- Voluntary Self-Identification of Disability (Form CC-305)
- Personal Data Form (UPAY 544-3) which includes emergency data information.
NOTE: At the new hire appointment, DiSSC staff will confirm the contact information is verifiable and express the importance current/accurate information to the new employee.
- Near Relative form if applicable.
Note: At the new hire appointment, DiSSC staff will inform the employee of the near relative policy and provide definition of “near relative”
- Depending upon department’s/cluster’s practice, CTO Form: (99, CX, SX, F3, TX, RX or HX Compensatory Time Agreement form) when applicable.
- IF applicable send paperwork for DMV Pull Notice system

- If Student/Postdoc hire include:
 - Position Not Covered By Social Security form (UCRS 419)
 - In some instances, limited or contract appointments, for FICA designation, code M is appropriate, in those cases they may also need to sign the UCRS 419 form. For more information: <https://hr.ucdavis.edu/departments/benefits/dept-resources/fica-codes>

- At the appointment, the HR Analyst/Payroll Personnel
 - Complete new hire paperwork with employee
 - PPS New Hire Entry is completed
 - Social Security number
 - Date of Hire
 - Personal information-address, Tax withholding
 - Title, title code
 - FTE
 - Benefits eligibility (Period of Eligibility-31 days from date of hire)
 - Probationary period if new hire.
 - Leave accruals
 - Salary (for academics with off-scale component to their salary DOS code as REO)
 - If applicable, sign up employee for [DMV Pull Notice Program](#)
 - Enter new employee data in PEAKS

- HR Analyst will email the welcome information which includes:
 - At Your Service: Set up Direct Deposit^{iv}, Change Personal Information, See pay stubs
 - Online TRS: Pay Period, Payday, Pay disposition
 - UC Davis Computing Account: IT Express Computing link
 - TAPS: Parking Permits, Go Club benefits for bikers, bus riders, etc.
 - UC Learning Center: Required classes (UC Cyber Security , Sexual Harassment & UC Ethical Values)

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- Other UC Information: Principles of Community, IT Helpdesk, Warn me, Worker's Comp notice, [DUO](#) (multi-factor authentication system)
- Employee ID Card: setup appointment
- New Employee Orientation: Benefit Orientation, New Employee Welcome, Online New Employee. *Although not required; New Employee Orientation is highly recommended to attend in person.*
- Senate Faculty-New faculty workshops are conducted in September, contact dean's office to sign-up. Senate faculty hired November 1 will have to be signed up the following year.

Email template in Box with information outlined above.

Downstream Systems Processing/Best Practices

The HR Analyst/Payroll Personnel adds supervisor(s) to Time Reporting system. (not applicable for Academic Senate and Specialists in Cooperative Extension).

For all staff positions (contract/limited appointments included), the HR Analyst/Payroll Personnel sends a copy of the position description to supervisor to have the new employee and supervisor both sign for employees for personnel records. Dept/Cluster supervisor provides a signed form to employee for their records and emails the signed form (copy CAO) to DiSSC for record keeping.

For employees on probation, HR analyst will send two emails at different times during the probation period. First email is sent 10 weeks after start date to the supervisor (copy CAO) to inform them of the midpoint review for employee and include probation end date in email as a reminder. Second email is sent to supervisor 20 weeks after start date to inform the supervisor of the probation end date (copy CAO) reminding them of pending probation end date and completing the necessary paperwork.

If the supervisor decides to extend the probation period, inform HR analyst to update probation end date in payroll.

NOTE: EMAIL DRAFTS TO BE DONE BY M. ROYER

HR analyst will remind unit to send a "Welcome Email" to announce new hire to department for staff/student staff/federation hires.^v

- Department chair will announce Senate and Specialist in Cooperative Extension hires
- CAO will coordinate meetings with Account Managers, Facility Coordinators (office/lab space) and IT

Post New Employee appointment

Two weeks after the employee's start date, HR Analyst follows up with employee to remind them of their PIE for health benefits. Enquires if there are any questions that need to be addressed and directs them to the appropriate resource. Remind them of their health benefits, either FULL/MID-LEVEL/CORE.

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Two weeks after the employee's start date, HR Analyst follow ups with hiring manager to ensure the new employee has been placed on appropriate email listservs, has obtain access to the systems' needed for their work. Check if any assistance can be given to gain approvals.

ⁱ A New Hire Child Case can be created from the Recruitment which allows for the DiSSC staff to finalize the recruitment while initiating the new hire. The data will all be collected in one Case.

ⁱⁱ It is critical to be as accurate with the start date. In future state, changing the start date once submitted is a process that requires additional paperwork and the transactions take time to update at the UC Path Center.

ⁱⁱⁱ In Future State, when an employee transfers from one department to another department, DiSSC has to end first appointment and a second transaction to begin the new appointment. Sequential transactions must occur to ensure so enough time needs to be allotted to account for the processing time needed.

^{iv} DiSSC recommends all employee do direct deposit. If the employee is insistent on a paper check, then the staff may provide the Pay Distribution Form, however they should inform the new employee that once UC Path paper checks will be mailed by the UC Path Center via US Post office on their designated payday. 3-4 days delivery.

^v Template available if needed.