**ONBOARDING & SYSTEMS ACCESS: STAFF**

**(Although every effort is made to keep the information below updated, please note that campus systems, processes, and links may change at any time.)**

**GENERAL ONBOARDING** *last updated 10/1/19*

| **Completed** | **System or resource used** | **Description of use or need** | **Notes** |
| --- | --- | --- | --- |
|  | Background Check (if required) | If department determines, pre-hire, that a background check is necessary, HR obtains required information from new employee and notifies department of results when available. | https://www.hr.ucsb.edu/employment/background-checks |
|  | UCSB NetID | New employee needs to obtain NetID, a required login for many campus systems. Manager needs to assign a temporary affiliate UCSB NetID before employee is hired. This will convert automatically to a permanent NetID once hiring process is completed. | <http://www.identity.ucsb.edu/> |
|  | UCPath | Employee logs into UCPath to complete W-4, patent acknowledgement, and direct deposit info (must have UCSB NetID). | <https://www.ucpath.ucsb.edu/employee-and-manager-self-service-resources> |
|  | State Oath of Allegiance | Employee must sign oath form in person in department on or before first day of work. Department then sends form to BFS. | https://www.bfs.ucsb.edu/sites/www.bfs.ucsb.edu/files/forms/State%20Oath%20of%20Allegiance.pdf |
|  | BFS/Tracker | New employee receives email from Tracker to complete section 1 of I-9. Employee must complete Section 2 in person at BFS within the first three days of employment; employee must bring original work authorization verification documents. (When dept initiator enters employee email into UCPath, HOME option must be selected to trigger this email.) | https://www.bfs.ucsb.edu/sites/www.bfs.ucsb.edu/files/docs/payroll/UCPath-Job-Aid-Work-Authorization-Verification-At-A-Glance.pdf |
|  | Parking | HR orders a complimentary parking permit for employee’s first day on campus, which employee picks up at the Parking Services office in Lot 30. If already in UCPath, employee can also order permanent parking permit at the same time. | <https://www.tps.ucsb.edu/parking-permits/staff-b-permits-current-employees> |
|  | New Employee Orientation | Intro to benefits, retirement, safety programs for new employees and those who are newly eligible for benefits. | First and third Tuesdays of each month in HR—no registration required. Information is included on the hiring proposal to employee. |
|  | UCSB Access Card | Functions as employee ID as well as Access Badge for certain employees and specific building access. | Obtain card from desk in UCen. https://www.policy.ucsb.edu/files/docs/policies/access-card-application.pdf |
|  | Kronos | Set up employee profile in Kronos. | Train employee on time card approval (if supervisor, also train in manager role). <https://timekeeping.ucsb.edu/> |
|  | Connect Calendar | Campus scheduling calendar. | <http://www.connect.ucsb.edu/> Connect account provisioning is an automatic process that occurs at the time a user activates their UCSBnetID.  The department's Group Tagger tags them accordingly, and deactivates accounts when no longer needed. |
|  | Period of Initial Enrollment | Remind new hires about PIE for benefits enrollment. | Employee logs in to the UCPath portal to enroll in benefits: ucpath.universityofcalifornia.edu/employee self service |
|  | Job Description | Employee is required to sign JD. | Print out from OACIS after recruitment is closed, get signatures; copy to employee and supervisor, and put original in file |
|  | Department Email Account and Department Aliases | Create new Connect email accounts. | See “Create New”: https://secure.identity.ucsb.edu/connect\_admin\_portal/ |
|  | Shared Drive | Shared-use files in department. | Dept staff sets up access |
|  | Signature Authorization | Request any needed signature authorizations based on role/responsibilities. | <http://www.bfs.ucsb.edu/sites/www.bfs.ucsb.edu/files/forms/Signature%20Authorization%20Form%20Mar%202014%20revision_0.pdf> |
|  | Delegation of Authority | Designates the official(s) who can authorize particular **actions(s),** such as approving a request to travel, entertainment, honoraria, etc. | <http://www.policy.ucsb.edu/delegations/> |
|  | Campus Directory | After employee activates their NetID, remind the employee to enter individual info. | <https://secure.identity.ucsb.edu/editor/> |
|  | Update Campus Directory of Departments | Communications Services' Campus Directory of Departments, Offices, and Services, sometimes known as the Blue Pages, is an online listing of telephone and address information for UCSB departments, offices, and services. | Authorized departmental representative sends email to [help@commserv.ucsb.edu](mailto:help@commserv.ucsb.edu) which includes both current listing and requested change. |
|  | Nameplate | For desk/door. | Place order in advance of employee start date. |
|  | Business Cards | Place order in Gateway, selecting department-preferred template. | https://gateway.procurement.ucsb.edu/Login.aspx Log on to Gateway, and select Office Depot punchout, then click on “To begin ordering business cards.” |
|  | Personnel File | The Primary Job department maintains the Personnel files for staff employees. All staff personnel records are maintained in a secured and confidential location for 5 years after separation. | <http://www.hr.ucsb.edu/managers-supervisors/personnel-files> |
|  | Welcome Email | Send to department faculty and staff to introduce new employee. | Include start date, office location, schedule, etc. |
|  | Introductions | Introduce new staff to colleagues in Academic Personnel, Office of Research, Business and Financial Services. | Set up any necessary training, standing meetings, add to mailing lists, etc. |
|  | Voice Mail | Change voice mail password and update outgoing message. | May need to have Comm Services reset password; submit ticket: <http://www.commserv.ucsb.edu/> |
|  | UCSB Alert | Encourage employee to sign up. | <https://alert.ucsb.edu/#/login> |
|  | Keys | Distribute keys to office spaces requiring access. | Give access code for key pads, if needed |
|  | Safety Information | Inform employee about departmental procedure in the event of an earthquake, fire, emergency meeting place, distressed students, etc. | <http://www.emergency.ucsb.edu/emergency-response-procedures>  <http://www.sa.ucsb.edu/responding-to-distressed-students/protocol> |
|  | Copy Machine | Set up on copiers/scanners. | Training on copier use, including scan feature and password, if required. |
|  | Mailbox | Set up mailbox and key, if needed. | Dept staff to set up mailbox and issue key. |
|  | Attendance Guidelines | Departmental policy – give copy. | Coordinate with personnel policies or bargaining unit. |
|  | Overtime | For non-exempt employees. | Give appropriate form for bargaining unit. <http://www.hr.ucsb.edu/forms> |
|  | Probationary Period | Three-month review and six-month probationary period report form required for new employees—copy to supervisor. | Make note on calendar re: 3-month review (written) and probation period end date. <http://www.hr.ucsb.edu/forms> |
|  | Annual Performance Evaluation | Inform employee about annual evaluation cycle and process. | <https://www.hr.ucsb.edu/managers-supervisors/performance-evaluations> |
|  | Core Competencies | Effective July 2014, UCOP requires core competencies for staff. | Give employee copy of model. <http://www.hr.ucsb.edu/managers-supervisors/performance-management/uc-core-competencies> |
|  | Department Internal Lists | Home address, phone number, etc. | Update in-house personnel lists, routing slip, contact list, emergency phone tree, etc. |
|  | Work Schedule | Possible flex schedule. | Must be approved in advance by supervisor and MSO; verify in writing. |
|  | Department Web Site | Add employee to web site, including photo. | Schedule photo. |
|  | UC Learning Center | Employee registers online for classes, with prior approval from manager. | If employee changes departments, email Katherine Abad to update manager name:[katherine.abad@hr.ucsb.edu](mailto:katherine.abad@hr.ucsb.edu) |
|  | Training | All employees must complete appropriate training: safety training (EH&S), sexual harassment training, ethics training, computer security. | Determine which training needed, depending on role. <http://www.ehs.ucsb.edu/iipp/employee-safety-and-environmental-responsibilities> |
|  | LinkedIn Learning | Formerly Lynda.com, this training website offers over 14,000 online courses at no cost to UCSB employees. | <https://www.learningcenter.ucsb.edu/> |

**FINANCIAL/HR SYSTEMS ACCESS**

| **Completed** | **Systems access needed** | **Description of use or need** | **Notes** |
| --- | --- | --- | --- |
|  | UCPath | Initiators and Approvers must complete all required online and in-person training to obtain access to UCPath. These courses are available to all employees but with priority given to new employees. | Please register for each of these courses via the UC Learning Center under the UCPath Initiator and Approver Training Curriculum. <https://www.learningcenter.ucsb.edu/> |
|  | BORIS | Process phone bills and handle phone accounts. | Send email to [help@commserv.ucsb.edu](mailto:help@commserv.ucsb.edu) to set up access. |
|  | Online Travel Voucher | Access to Travel Voucher system: request Trip ID for direct bill airfare, create travel advance requests, and request travel reimbursements. | DSA sets up and determines appropriate access in GMC-Assignments .<https://gateway.procurement.ucsb.edu/gmc/login.aspx> |
|  | On-line GL | Web link to online GL. | Add new employee to online GL with account access and authorizations. <https://olgl.bfs.ucsb.edu/login/> |
|  | Data Warehouse | New employee must request access via EZ access. | Need UCSBnetID. <http://wh.isc.ucsb.edu/> |
|  | GMC-Gateway | Department Security Administrator adds new employees for appropriate authorization in Gateway purchasing. | Depends on role: approver, buyer, receiver, requestor in GMC-Assignments-Gateway. <https://gateway.procurement.ucsb.edu/gmc/login.aspx> |
|  | ALLN02 | Access to campus online systems: BARC, BLIS, disbursements, purchase orders. | DSA sets up and determines appropriate access in GMC-Assignments-ALLN02.  <https://gateway.procurement.ucsb.edu/gmc/login.aspx> |
|  | GMC Administrator | Gateway Management Console –assign dept purchasing admin, and dept security admin roles. | DSA sets up roles/access in GMC-Assignments. <https://gateway.procurement.ucsb.edu/gmc/login.aspx> |
|  | ESPRESSO | Portal to TOE, TOF, general ledger. | Set up TOE, TOF, etc., access in GMC-Assignments-ALLN02. <http://espresso.ucsb.edu/> |
|  | Online Form 5 | To process non-payroll payment requests. | DSA sets up and determines appropriate access in GMC-Assignments-ALLN02. <https://gateway.procurement.ucsb.edu/gmc/login.aspx> |
|  | Connexxus | Online travel, lodging, and car rental booking for all UC employees, for both business and personal travel. UCSB NetID required. | <https://travel.ucop.edu/connexxus/book-online> |
|  | FlexCard | New employees must attend training before allowed access. Test completion required for most roles. | Check UC Learning Center for class schedule (allocator, cardholder, reviewer, etc). <https://www.learningcenter.ucsb.edu/> |
|  | GUS | Custom database system for managing and maintaining funding source, purchasing, lien, and other essential financial information. | Access may be delegated to department IT or be obtained at <http://gus.ucsb.edu/> |
|  | Recharges | Processed in GUS, need FTP set up to transmit data from GUS to Accounting. | Contact Susan Esparza in Accounting. |
|  | ORBiT | Office of Research Bit of Information; used to track proposals and awards. | To obtain an account and receive training on the use of ORBiT, contact the Systems Adminstrator at (805) 893-3726 or [orbithelp@research.ucsb.edu](mailto:orbithelp@research.ucsb.edu) |
|  | STAR classes (Office of Research) | Sponsored Projects Training for Administrators in Research. | Classes and certification through OR.<http://www.research.ucsb.edu/spo/contracts-and-grants-liaison-resources/star-class-schedule/> |
|  | Cayuse | Proposal software package for preparation and electronic submission of proposals. | Set up account at [cayuse@research.ucsb.edu](mailto:cayuse@research.ucsb.edu); will need UCSB NetID. |
|  | OR AHS | Application for the use of human subjects. | UCSB NetID required for login-contact OR to set up account. <https://orahs.research.ucsb.edu/index.aspx?ReturnUrl=%2f> |
|  | Campus Listservs | Accounting, Purchasing, OR, Cayuse, HR Management, GauchoVoice, etc. | Contact relevant departments to add staff email addresses. |
|  | OACIS | Online Application and Classification System, used for staff personnel actions. | Supervisor requests new user access in OACIS via Users-Create User Account link. <http://www.hr.ucsb.edu/compensation/online-application-classification-information-system-oacis> |

**STUDENT SERVICES SYSTEMS ACCESS**

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| --- | --- | --- | --- |
| **Completed** | **Systems access needed** | **Description of use or need** | **Notes** |
|  | STAR (Student Systems) | Submit request through Registrar based on position. Options include GOLD Emulator (request via Comments section), SREG, DARS/AAA, eGrades, multiple STAR roles, UA,DARS Workflow. ***(Note:*** *To replicate another staff member’s systems access, go to STAR,“View Completed Requests,” and click on employee name.)* | FERPA quiz must be completed first. (<https://my.sa.ucsb.edu/ferpatraining/>)  and then DSA submits request <http://apps.sa.ucsb.edu/star/Depts/DeptLogin.asp> |
|  | Graduate Student Financial Portal | To review student financial support, view funding programs details, establish fellowships commitments (Stipends, Tuition, NRST, Health Insurance) or review Employment Fee Remission Benefits (Tuition, NRST, Health Insurance) for Academic Student Employees and monitor needed Employment Exceptions. | Log in to GradNet and click on “Financial Portal Access Request Form” under the Resources section. |
|  | GradNet | Review graduate student data by quarter/degree program. Graduate Programs Assistants (GPAs) and Graduate Advisors (GAs). | |  | | --- | | GradNET Access Request form here: <https://gradnet.ucsb.edu/files/forms/Intranet_Access_Form.pdf> | |
|  | BARC | Review student billing. | GCM-Assignments-ALLN02. <https://gateway.procurement.ucsb.edu/gmc/login.aspx> |
|  | eGrades | Used by staff grading coordinators to access class lists, upload grades, assign proxy access, and for a variety of other functions. Used by faculty to upload grades. | Access requested by Manager through Registrar’s Office; <https://registrar.sa.ucsb.edu/faculty-staff/resources-for-faculty-staff/requesting-access-to-student-systems> |
|  | Master Course Approval | Used by undergrad advisors to change or add new courses. | Manager sends email to Academic Senate at [help@senate.ucsb.edu](mailto:help@senate.ucsb.edu) |
|  | AAA Access | Conduct degree audits and progress checks, submit and/or approve petitions. | Manager requests access from Registrar’s office. |
|  | Gaucho Space | A software application for the administration, documentation, tracking, reporting and delivery of educational courses or training programs on the web. | <https://gauchospace.ucsb.edu/courses/> |
|  | OISS Database | Office of International Students and Scholars. | Request login and pw from OISS. |

***\*****To replicate another staff member’s systems access, go to STAR,“View Completed Requests,” and click on employee name.*

**ACADEMIC PERSONNEL SYSTEMS ACCESS**

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| --- | --- | --- | --- |
| **Completed** | **Systems access needed** | **Description of use or need** | **Notes** |
|  | AP Folio | Campus system for submitting merit and appointment cases for academic employees. | Manager submits AP Folio and UC Recruit Authorizations Request/Change Form at <https://ap.ucsb.edu/forms/> |
|  | UC RECRUIT | Online academic recruitment management. | Manager submits AP Folio and UC Recruit Authorizations Request/Change Form at <https://ap.ucsb.edu/forms/> |

***Please note: This is a comprehensive list and subject to change; not every new employee needs every system on this list. The manager, department practice, and needs of the position determine the type and degree of access. If you have suggestions for additional entries, or notice errors, please contact Cathy Pollock, Assistant Dean, College of Letters & Science, at 893-5289 or cpollock@ucsb.edu.***