**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.)**

**ONBOARDING** *last updated 1/8/19*

| **Completed** | **System or resource used** | **Description of use or need** | **Notes** |
| --- | --- | --- | --- |
|  | UC Path | Department uses UCP system to create a position | <https://www.bfs.ucsb.edu/payroll/ucpath> |
|  | UC Path | Department uses UCP system to fund the position | <https://www.bfs.ucsb.edu/payroll/ucpath> |
|  | UC Path | Department uses UCP system/Smart HR template to enter new hires or transfers from UCSB or another UC | <https://www.bfs.ucsb.edu/payroll/ucpath> |
|  | UC Path | Employee logs into UC Path to complete W-4, patent acknowledgement, and direct deposit | <https://www.ucpath.ucsb.edu/employee-and-manager-self-service-resources>  <https://www.ucpath.ucsb.edu/employee-and-manager-self-service-resources> |
|  | State Oath of Allegiance | Departments must return Oath form to BFS on or prior to the employee's start date | 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. Section 2 must be completed in person at BFS; employee needs to bring original work authorization verification documents | https://www.bfs.ucsb.edu/sites/www.bfs.ucsb.edu/files/docs/payroll/UCPath-Job-Aid-Work-Authorization-Verification-At-A-Glance.pdf |
|  | Personnel File | Personnel files for staff employees are maintained by each employee's Home Department. All staff personnel records should be maintained in a secured and confidential location for 5 years after separation | <http://www.hr.ucsb.edu/managers-supervisors/personnel-files> |
|  | UCSB NetID | Login for many campus systems; send link <https://secure.identity.ucsb.edu/manager/> to employee | <http://www.identity.ucsb.edu/customers/provisioning/> |
|  | Background Check (if required) | Review criteria for background checks and initiate if needed | https://www.hr.ucsb.edu/employment/background-checks |
|  | 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 |
|  | 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 https://www.hr.ucsb.edu/training/new-employee-orientation |
|  | Voice Mail | Change voice mail password and update outgoing message | May need to have Comm Services reset password; call x8700 |
|  | 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. |
|  | Department Email Account and Department Aliases | Create new Connect email accounts | See “Create New”: https://secure.identity.ucsb.edu/connect\_admin\_portal/ |
|  | 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/> |
|  | Nameplate | For desk/door | Place order in advance of employee start date |
|  | Business Cards | Place order in Gateway: https://gateway.procurement.ucsb.edu/Login.aspx | Log on to Gateway, and select Office Depot punchout, then click on “To begin ordering business cards” |
|  | Kronos | Set up employee profile in Kronos | Train employee on time card approval (if supervisor, also train in manager role) <http://www.ets.ucsb.edu/files/docs/KronosCheatSheet.pdf> |
|  | 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> |
|  | Shared Drive | Shared-use files in department | Dept staff sets up access |
|  | Campus Directory | Employee to enter individual info after NetID is activated | <https://secure.identity.ucsb.edu/editor/> |
|  | Update Blue Pages | Campus directory (on-line) listing for department information | Authorized departmental representative sends email to [help@commserv.ucsb.edu](mailto:help@commserv.ucsb.edu) which includes both current listing and requested change |
|  | 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 | Active shooter video and distressed student protocol below <http://emergency.ucsb.edu/activeshooter.html>  <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> |
|  | Job Description | Employee is required to sign JD | Print out from OASIS after recruitment is closed, get signatures; copy to employee and supervisor, and put original in file |
|  | Parking Permit | Employee goes to Parking Services | Sign up for monthly permit/direct withdrawal |
|  | 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 |
|  | Period of Initial Enrollment | Remind new hires about PIE for benefits enrollment | Employee logs in to the UCPath portal to enroll in benefits, make changes and ask questions: ucpath.universityofcalifornia.edu |
|  | Work Schedule | Possible flex schedule | Must be approved in advance by supervisor and MSO; verify in writing |
|  | UCSB Alert | Encourage employee to sign up | <https://alert.ucsb.edu/register.php> |
|  | Performance Evaluation | Inform employee about evaluation cycle | New employees on probation receive 3-month, 6-month, and then go on regular annual cycle. |
|  | Department Web Site | Add employee to web site, including photo | Schedule photo |
|  | Business Cards | Ordered through Gateway | Department only pays for staff business cards |
|  | Welcome Email | Send to dept listserv to introduce new employee | Include start date, office location, schedule, etc. |
|  | 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>  <https://oeosh.ucsb.edu/training/> |
|  | Introductions | Introduce new staff to colleagues in Academic Personnel, Office of Research, Business and Financial Services | Can also set up any necessary training, mailing lists, standing meetings, etc |

**FINANCIAL/HR SYSTEMS ACCESS**

| **Completed** | **Systems access needed** | **Description of use or need** | **Notes** |
| --- | --- | --- | --- |
|  | UC Path | Initiators and Approvers must attend training to obtain access to the system | https://www.ucpath.ucsb.edu/training/instructor-led-training-schedule |
|  | 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 | 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 | Needs UCSBnetID <http://wh.isc.ucsb.edu/> |
|  | GMC-Gateway | New employees need to be added to GMC by Department Security Administrator for appropriate authorization for purchasing in Gateway | 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 <http://www.bfs.ucsb.edu/sites/www.bfs.ucsb.edu/files/forms/Misc.%20Form%205.pdf> |
|  | Connexxus | Travel advance requests, Trip ID, and travel reimbursements | DSA sets up and determines appropriate access in GMC-Assignments-ALLN02 <https://apps.accounting.ucsb.edu/TRAVEL/Secure/Login.aspx?ReturnUrl=%2fTRAVEL%2fMenus%2fMainMenu.aspx> |
|  | 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) |
|  | 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 | Set up account at [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 |
|  | Sona Systems | Web-based research sign-up system to help interested research volunteers enroll in research studies | Need administrator account set up by another administrator—depts that use have own link |
|  | 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 | 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> |
|  | GSFR | To post graduate student tuition/fees/gship | Request form from [Jennifer.Ramirez@graddiv.ucsb.edu](mailto:Jennifer.Ramirez@graddiv.ucsb.edu) or log in to GradNet and click on ‘GSFR Access Request Form’ under the Resources section. |
|  | GradNet | Graduate Program Advisors | GradNET Access Request form completed and mailed to Grad Div: [Jillian.Nofziger@graddiv.ucsb.edu](mailto:Jillian.Nofziger@graddiv.ucsb.edu)   |  | | --- | |  | |
|  | 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. | <https://egrades.sa.ucsb.edu/Login.aspx?ReturnUrl=%2f>  Access requested by Manager through Registrar’s Office; log in using UCSB NetID and password |
|  | 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/> |

***\*****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 sends email request for access to help@aait.ucsb.edu |
|  | RECRUIT | Online academic recruitment management | Manager sends email request for access to help@aait.ucsb.edu |
|  | Departmental voting system | If applicable | Managed within department |
|  | OISS Database | Office of International Students and Scholars | Request login and pw from OISS <https://issd.sa.ucsb.edu/Departments/index.asp> |

***Please note: This is a comprehensive list and subject to change; not every new employee will need every system on this list. Type and degree of access and set up will be determined by the manager, department practice, and needs of the position. 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@ltsc.ucsb.edu.***