TAM and Onboarding Training
For Hiring Managers

https://ucanr.zoom.us/j/5307501324

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Human Resources

September 18 & 24, 2019
The Process: Pre-TAM

• Open a Zendesk ticket and start a Position Management (PM) form.
• Include the Zendesk ticket number on page one of your PM form and route it for signatures. It MUST go through financial controls, RPM, and get all required approvals before HR can process.
• Concurrently, create your PD in JobBuilder (JB) on the UCOP website or use CATS if you’re recruiting a position that doesn’t exist in JB yet. (i.e. A represented title)
• Submit PD either as a doc, CATS Class Log #, or cite your PD in JobBuilder with your signed Position Management Form in your Zendesk ticket.
TAM = Talent Acquisition Management
(in a nutshell)

• We post the position
• You review the applicants
• You decide who to interview, your committee and your questions
• You decide who to hire
• We hire them!
TAM Navigation

- Log into UCPath using your credentials: https://ucpath.universityofcalifornia.edu/home
- Go to the PeopleSoft Menu and select Recruiting
- Select Browse Job Openings to see jobs you are listed as having access
## TAM –Browse Job Openings

### Search for Job Openings

- Search job openings

### Filtering Options

- 010 Open
- Clear All Filters

### Results

<table>
<thead>
<tr>
<th>Job ID</th>
<th>Posting Title</th>
<th>Category</th>
<th>Recruiting Location</th>
<th>Department</th>
<th>Business Unit</th>
<th>Days Open</th>
<th>Status</th>
<th>No Action Taken</th>
<th>Total Applicants</th>
</tr>
</thead>
<tbody>
<tr>
<td>1683</td>
<td>PHYS PLT MECH 2</td>
<td></td>
<td>PARLIER</td>
<td>KEARNER AGRICULTURAL CNTR</td>
<td>UC AG &amp; NATURAL RESOURCES</td>
<td>5</td>
<td>010 Open</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>1655</td>
<td>LAB AST 2</td>
<td></td>
<td>DAVIS</td>
<td>UC AG &amp; NATURAL RESOURCES</td>
<td>UC AG &amp; NATURAL RESOURCES</td>
<td>7</td>
<td>010 Open</td>
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<td>1</td>
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<tr>
<td>1654</td>
<td>LAB AST 1</td>
<td></td>
<td>DAVIS</td>
<td>UC AG &amp; NATURAL RESOURCES</td>
<td>UC AG &amp; NATURAL RESOURCES</td>
<td>7</td>
<td>010 Open</td>
<td>0</td>
<td>0</td>
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<tr>
<td>1651</td>
<td>FARM LABORER</td>
<td></td>
<td>DAVIS</td>
<td>UC AG &amp; NATURAL RESOURCES</td>
<td>UC AG &amp; NATURAL RESOURCES</td>
<td>7</td>
<td>010 Open</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
TAM –Reviewing Applicants
TAM – Reviewing Applicants

Manage Job Opening

Job Opening ID: 995000
Job Posting Title: APPLICATIONS FROG 3
Job Code: 007300 (APPLICATIONS FROG 3)
Position Number: 401133742 (APPLICATIONS FROG 3)

Applicants

<table>
<thead>
<tr>
<th>All</th>
<th>Applicant Search</th>
<th>Applicant Screening</th>
<th>Activity &amp; Attachments</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>(10)</td>
<td>(10)</td>
<td>(0)</td>
<td>(0)</td>
<td>(0)</td>
</tr>
</tbody>
</table>

Applicants

Select | Application Score | Assessment Status | Attachment | Applicant Name | Applicant ID | Type | Disposition |
------|-------------------|-------------------|------------|----------------|--------------|------|-------------|
[ ] | | | | Gary Cooper | 698861 | External | Applied |
[ ] | | | | Belle Davis | 698862 | External | Applied |
[ ] | | | | James Dean | 698863 | External | Applied |
[ ] | | | | Vivian Leigh | 698864 | External | Applied |
[ ] | | | | Steve McQueen | 698855 | External | Applied |
[ ] | | | | Marilyn Monroe | 698858 | External | Applied |
[ ] | | | | Paul Newman | 698857 | External | Applied |
### TAM – Reviewing Applicants

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
<th>Status</th>
<th>Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Robert Reed</td>
<td>699859</td>
<td>External</td>
<td>02/26/2019</td>
<td><img src="image" alt="Actions" /></td>
</tr>
<tr>
<td>Jane Russell</td>
<td>699069</td>
<td>External</td>
<td>02/26/2019</td>
<td><img src="image" alt="Actions" /></td>
</tr>
<tr>
<td>Elizabeth Taylor</td>
<td>699058</td>
<td>External</td>
<td>02/26/2019</td>
<td><img src="image" alt="Actions" /></td>
</tr>
</tbody>
</table>

**Group Actions**
- [Recruiting Actions]
  - [Mark Reviewed]
  - [Manage Interviews]
  - [Create/View Evaluation]
  - [Print Applications]
- [View Applications]
TAM – Applicant Materials

Consolidated Application Report for Job Opening LAB AST 2

Please find attached the consolidated Applications report for the requirement.

Job Opening ID: 1665

Job Posting Title: LAB AST 2

Confidential Report

Job Posting Description

How to Apply

Review the job posting and click the internal applicant link to apply. Use the same credentials used to login to UCPath to access the internal UC ANR job postings in order to apply.

Employment applications must be submitted online through our careers site. Please note, we do not accept resumes or applications by email or on paper.

About Us

Since 1914 UC Cooperative Extension has been the bridge between local issues and innovative answers through the power of UC research.
## Spreadsheet Disqualifications

<table>
<thead>
<tr>
<th>Dispositions for (Position Name) (Job ID:XXXX)</th>
<th>Initial Screening: REJECT (select from drop down)</th>
<th>Initial Screening: Invite to Interview</th>
<th>Notes</th>
<th>HR APPROVAL to Interview</th>
<th>Post Interview: REJECT (select from drop down)</th>
<th>Selected Candidate (or RANK order)</th>
<th>HR APPROVAL to Offer</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate First &amp; Last</td>
<td>Does not meet min qual-exp</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candidate First &amp; Last</td>
<td>Incomplete app</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candidate First &amp; Last</td>
<td>Not as qual-educ</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candidate First &amp; Last</td>
<td>Not as qual-exp</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candidate First &amp; Last</td>
<td>Not as qual-skills</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Candidate First &amp; Last</td>
<td>Not eligible</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candidate First &amp; Last</td>
<td>Withdrew</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The Rest of the Story

- Salary analysis completed
- Offer made and accepted
- Background Check and Fingerprinting process and clearance
- HM/employee decide start date and inform recruiter
- Recruiter prepares Job Offer in TAM and provides Offer Letter and Pre-Hire form to candidate
- Recruiter does Prepare for Hire action in TAM
- Employee starts and gets onboarded at location
# Checklist

## Position Control to Hire

### Hiring Manager (HM) Checklist

<table>
<thead>
<tr>
<th>Zendesk Ticket #</th>
<th>Date</th>
<th>HM/Supv.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Recruiter:</th>
<th>Phone #: 530-750:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- [ ] PM to Supv.
- [ ] PM to Fin Ctrl.
- [ ] PM to State/REC Dir.
- [ ] PM to Unit/Dir.
- [ ] PM to RPM.
- [ ] PM to HR.
- [ ] Career
- [ ] Limited
- [ ] Waiver
- [ ] Contract

<table>
<thead>
<tr>
<th>Job Title</th>
<th>TC</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- [ ] Identified (Cand.: ___ %) [ ] Rehire

- [ ] Fixed [ ] Variable

- [ ] Job Builder or CATS ID

- [ ] Submit request in Zendesk, get ticket number. [support@ucanrhelp zendesk.com](mailto:support@ucanrhelp zendesk.com)

- [ ] Initiate Position Management (PM) Form and obtain all required approvals including RPM. Monitor form. [https://ucanr.edu/sites/ANRSPU/files/2310422.pdf](https://ucanr.edu/sites/ANRSPU/files/2310422.pdf)

- [ ] Create or update position in JobBuilder (JB). [https://ucanjobbuilder.ucanr.edu](https://ucanjobbuilder.ucanr.edu)

- [ ] If Identified Candidate, complete Waiver of Recruitment. [https://ucanr.edu/sites/ANRSPU/files/244202.pdf](https://ucanr.edu/sites/ANRSPU/files/244202.pdf)

- [ ] Submit PM form, JB ID or CATS CL#, and Waiver (if appropriate) in same Zendesk ticket. [https://ucanhelp zendesk.com](https://ucanhelp zendesk.com)

(HR reviews, approves, enters PD in UCPath, adds position number. Zendesk. moves PD from JobBuilder to TAM, builds job opening in TAM, posts job. Applicants apply.)

- [ ] Log in to UCPath > PeopleSoft > Recruiting > Browse Job Openings.

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Employees are required to complete new hire documents on or before the 1st day of employment. Failure to do so will cause delays in employee pay, benefit eligibility, access to UC systems and other employment-related tasks.

Uploaded via the [HR Document Uploader](https://hr.berkeley.edu/document-uploader) tool (access via UC ANR Portal).

- Oath (Required)
- Compensatory Time Off (CTO) Agreement Forms (select form Non-Exempt hires)
- Statement Concerning Social Security (student & limited term hires only)
- Signed Position Description
UCPath Electronic Onboarding

Verify Personal Information
• Employee Disclosures & Patent Agreement (Required)
• Ethnicity, Veterans Status, Disability Status, Gender Status (Optional but encouraged)
• Prior Service Verification (employees coming from a state or UC, complete and sign)

Income and Taxes
• W-4 & Federal Withholdings (Required)
• Direct Deposit (Optional) — activation may take up to one to two pay cycles to go into effect. Employees will receive a paper payroll check until their direct deposit has been activated. Paychecks are mailed via U.S. mail which may take up to 3-5 additional days.
• Glacier Nonresident Tax Compliance System — all non-US citizens & non-permanent residents are required to access and use this system.
• Verification of Employment (informational purposes only) — employees wishing to verify their employment and/or income can do so by accessing the “Employment Verification” page in UCPath.
I-9 and E-Verify Tracker

- The online form can be completed as early as the day the employee has accepted an offer of employment, but no later than the third business day after the employee’s hire date. The employee will receive an email from Tracker.

Health & Other Benefits - Employees have only 31 days from the first day at work (or the first day in an appointment that makes the employee newly eligible for benefits) to enroll in their health and welfare benefits.

- UC Benefits & Compensation – learn more about benefit eligibility and enrollment options.
- UC Davis Benefits Center – email (benefits@ucdavis.edu) or phone (530-752-1774). Hours of operation are Monday-Friday 8:30am-12pm and 1pm-4:30pm (excluding holidays).

Retirement Benefits - Employees have 90 days from their hire date to choose a primary retirement benefit. Employees who do not choose a primary retirement option will automatically be enrolled in Pension Choice.

- myUCretirement.com/choose – employees can go here to make their primary retirement benefit choice.
- UC Retirement Benefits – learn more about the retirement benefit options.
- Retirement Planning Resources – access resources and contacts.
References and Helpful Links

- **Zendesk** – Submit tickets to HR for Recruitments and/or questions.
- **UCPath** – Employees can go here to access employment-related forms and links, such as personal information, tax withholding, and benefit and direct deposit enrollment. Supervisors can access TAM from UCPath home >PeopleSoft Menu >Recruiting
- **JobBuilder** – Supervisors go here to enter the position descriptions.
- **HR Document Uploader** – Supervisors can go here to upload the employee’s completed Oath, CTO, Social Security Statement, and/or signed Position Description.
- **ANR Onboarding Resources** – Employees and supervisors can go here to access the New Employee and Supervisor onboarding guides.
- **New UC Employee Roadmap** – Employees can go here to learn more about the steps they need to take as a new UC employee.