ABC 2015 Fall Summit

New Employee Intake

September 9th and 10th, 2015

Today’s Objectives

- Why is the employee intake necessary?
- What does the department need to do?
- What does the employee need to do?
- What does employee intake involve?
- What requirements affect start dates?
Purpose of the Intake

Collect forms and comply with campus, state and federal entities’ requirements

As first point of contact we are in the unique position to offer services that will aid in the employee’s success on campus from day one

- Payroll deducted parking
- Temporary ID
- Direct Deposit
- Maps and directions

2013 Employee Intake Kaizen

The word Kaizen is Japanese and means “Continuous Improvement”.

Kai = Change
Zen = Good

- All intakes are now done in Payroll Services
- Created 2 New Employee Websites
  - http://www.afd.calpoly.edu/newemployee/staff-faculty.asp
  - http://www.afd.calpoly.edu/newemployee/student.asp
- Reduced and consolidated forms
- Staying lean is a continuous process so there is more to come!
Big Picture – Hiring Process

Department works with HR/AP to select new employee

Employee completes intake in Payroll Services

Employee begins work. Payroll routes intake forms to hiring office to finish the hire

Handout Packet Review

1. State Hiring Processes Infographic
2. Student Employment Request Form (SERF)
3. Federal Form I-9
4. New Employee Intake Stats Infographic
5. Payroll Calendar
### SA Intake Process

<table>
<thead>
<tr>
<th>Student Classification</th>
<th>New SA</th>
<th>Current/Former SA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Assistant (SA)</td>
<td>1. Department completes SERF</td>
<td>1. Department hires student online in the Student Pay System</td>
</tr>
<tr>
<td></td>
<td>2. Department sends student with SERF to Payroll Services for intake</td>
<td>2. No action in Payroll for student (I-9 and SSC requirements already met)</td>
</tr>
<tr>
<td></td>
<td>3. Payroll hires student into Student Pay System</td>
<td>3. Timesheet immediately available</td>
</tr>
<tr>
<td></td>
<td>4. Timesheet available within 2-5 business days</td>
<td></td>
</tr>
</tbody>
</table>

More information on Payroll Services Website: [http://afd.calpoly.edu/payroll/student_employment.asp](http://afd.calpoly.edu/payroll/student_employment.asp)

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### ISA Intake Process

<table>
<thead>
<tr>
<th>Student Classification</th>
<th>New ISA</th>
<th>Current/Former ISA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructional Student Assistants (ISA)</td>
<td>1. Department works with Academic Personnel to hire employee</td>
<td>1. Department works with AP to hire employee</td>
</tr>
<tr>
<td></td>
<td>2. Department sends student with completed ISA101 to Payroll for intake</td>
<td>2. No action in Payroll for student (I-9 and SSC requirements already met)</td>
</tr>
<tr>
<td></td>
<td>3. Payroll sends documents to AP</td>
<td>3. Timesheet available within 1-5 days</td>
</tr>
<tr>
<td></td>
<td>4. AP hires student in PeopleSoft</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5. Timesheet available within 3-5 days</td>
<td></td>
</tr>
</tbody>
</table>

More information on Academic Personnel Website: [http://www.academic-personnel.calpoly.edu/content/forms](http://www.academic-personnel.calpoly.edu/content/forms)
## TA/GA Intake Process

<table>
<thead>
<tr>
<th>Student Classification</th>
<th>New TA/GA</th>
<th>Current/Former TA/GA</th>
</tr>
</thead>
</table>
| Teaching Associates (TA) and Graduate Assistants (GA) | 1. Department works with Academic Personnel to hire employee  
2. Department sends student to Payroll Services for intake  
3. Payroll sends documents to AP  
4. AP completes hire in PeopleSoft | 1. Department works with AP to hire employee  
2. No action in Payroll for student (I-9 and SSC requirements already met) |

More information on Academic Personnel Website: [http://www.academic-personnel.calpoly.edu/content/forms](http://www.academic-personnel.calpoly.edu/content/forms)

## Faculty Intake Process

<table>
<thead>
<tr>
<th>Classification</th>
<th>New Faculty</th>
<th>Current Faculty or Former Faculty with I-9 less than 3 years old</th>
</tr>
</thead>
</table>
| Tenure Track, Lecturer, Coach       | 1. Department works with Academic Personnel to hire employee  
2. AP sends appointment details to Payroll  
3. Faculty goes to Payroll for intake  
4. Payroll sends all documents to AP  
5. AP completes hire in PeopleSoft | 1. Department works with AP to hire employee  
2. No action in Payroll for faculty (I-9 and SSC requirements already met) |

More information on Academic Personnel Website: [http://www.academic-personnel.calpoly.edu/content/forms](http://www.academic-personnel.calpoly.edu/content/forms)
## Staff Intake Process

<table>
<thead>
<tr>
<th>Classification</th>
<th>New Staff</th>
<th>Current Staff or Former Staff with I-9 less than 3 years old</th>
</tr>
</thead>
</table>
| Staff          | 1. Department works with Human Resources on recruitment  
2. HR sends appointment details to Payroll  
3. Staff goes to Payroll Services for intake  
4. Payroll sends documents to HR  
5. HR completes hire in PeopleSoft | 1. Department works with HR on recruitment  
2. No action in Payroll for staff (I-9 and SSC requirements already met) |

More information on Human Resources Website: [http://www.afd.calpoly.edu/hr/recruitment](http://www.afd.calpoly.edu/hr/recruitment)

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## Prepare Your New Employee for Intake

- **What does employee need to bring?**
  - Documents to satisfy the I-9
  - Original Social Security Card
  - If SA or ISA: Hiring document (completed and authorized SERF or ISA101)
    - If Federal Work Study, they must bring their award letter
  - **Employee may not begin working until Payroll has authorized employment eligibility via I-9**
Eligibility: Employment v Pay

Federal Form I-9
- Original & unexpired documents
- All new employees
- All rehires (including RA/FERPs) w/ I-9s older than 3 yrs

Social Security Card
- Original required
- CSU requirement to validate legal name and social security number

Eligible for Employment
- Employee is legally able to work

Eligible for Pay
- Pay can be released
- Timesheets available for SA and ISA

Rule: Employee must complete page 1 of I-9 on or before first day of work and return to Payroll with documents for completion of page 2 no later than 3 business days later.

<table>
<thead>
<tr>
<th>SEPTEMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
</tr>
<tr>
<td>I-9: Page 1 must be completed by employee on or before today</td>
</tr>
<tr>
<td>14</td>
</tr>
<tr>
<td>I-9: Last day for Payroll to complete Page 2 to retain effective date</td>
</tr>
<tr>
<td>17</td>
</tr>
</tbody>
</table>

abc.afd.calpoly.edu
Federal Form I-9

Scenario: Employee completes page 1 of I-9 on first day of work and returns on 09/18 with documents for page 2.

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<tbody>
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<td>14</td>
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</tbody>
</table>

1. Employee’s 1st day of work
2. I-9: Page 1 must be completed by employee on or before today
3. Effective Date must be revised to today
4. I-9: Page 2 completed by Payroll today

Offsite, Noncitizen, and Groups Intakes

- Groups
  - Let us come to you for more than 6 employees
- Noncitizen Employee
  - Additional requirement: Glacier
- Offsite Employee
  - I-9 can be completed by another CSU

Contact Genae Jenkins

• Early notification essential for coordination success
• All forms and deadlines still apply

abc.afd.calpoly.edu
New Faculty Orientation

September 11, 9am – 4pm in Kennedy Library

- Provide many new services for new faculty
  - New employee intake
  - Parking permits
  - PolyCard and Portal Support
  - Resource Fair with representatives from many departments

Tips for Success

- Clearly identify and communicate to your new employee:
  - Who they work for
    - Is it State, Cal Poly Corporation, or ASI?
  - What their employee classification is
    - Is it TA, GA, ISA, SA, Staff, or Faculty?
  - What they will need for intake
    - Social Security Card, Documents for I-9, and Hiring Document (if applicable)
- Print SERF from Payroll Services website for latest version
Resources

- State Payroll Services 756-2605
- Academic Personnel 756-2844
- Human Resources 756-2236
- Genae Jenkins
  - gbrown06@calpoly.edu x6-5100
- Leslie Martino – Front Desk
  - lmarti70@calpoly.edu x6-2606
- New Employee Website:
  - http://www.afd.calpoly.edu/newemployee/staff-faculty.asp
  - http://www.afd.calpoly.edu/newemployee/student.asp