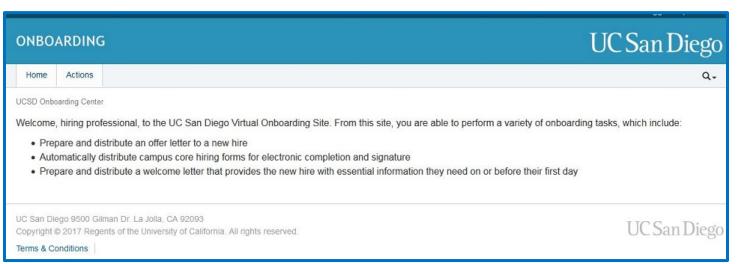# UC San Diego ONBOARDING Solution

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Inconsistent and Disjointed Hiring Practices and Experience

Over the course of a year, UC San Diego hires approximately 11,500 people. Departments have differentiated hiring practices across the University, and the experience of the new hire would vary depending on not only which department was hiring them, but also the individual responsible for completing the employee onboarding. New hire paperwork consisted of approximately 40 pages of paper forms to be reviewed and signed along with the departmental HR representative on their first day of work. Not only were each of these pages printed but also saved in department filing cabinets. In some cases, entire rooms were necessary to store this paperwork. Initial new employee assets, such as their campus ID badge and parking pass, were obtained by traveling to the respective office for a face-to-face transaction. Across departments onboarding would vary; in some cases, it took two weeks or longer to complete, consequently resulting in inconsistent experiences for each new hire, delay in time to productivity, incomplete and non-compliant documentation, and inefficient use of employee labor-hours for departments.

ONBOARDING to the Rescue!

Through collaboration and numerous partnerships, the Project Management and Business Integration Office (PMBI) along with Information Technology Services (ITS), Academic Personal Office (APO), and Campus Human Resources (HR), developed the UC San Diego ONBOARDING Solution! This Solution provides a consistent, efficient, and harmonious experience for all during

"It is very professional and creates a good impression."   ~ Pilot User

the hiring process of a new employee. Not only does this lead to a positive and welcoming experience for all new hires to the university, but it also alleviates departments from having to print and store documents, and sit with the new hire to complete voluminous pages of paperwork. The Solution ensures departments are compliant with all new hire paperwork, policies and onboarding is timely.

The Solution provides:

- **Capacity** – Automation gives staff time back in their day; alleviates departments' new hire document storage.
- **Compliance** – Solution smart forms configured according to respective data requirements and policy.
- **Connection** – A meaningful and personal connection transpires between the university and the new hire.
- **Customer Service** – New hire forms are self-paced for completion before arriving on campus.
- **Reduced time to productivity**- Allows for e-mail and business systems access before the start date; the day after starting UCNet ID for AYSO is active.

Pilot Outcomes

Over the course of a nine-month pilot implementation for Career Staff New Hires, 30 Human Resources staff from six departments and an entire VC area performed 152 successful hiring processes. The results show the quality of service improving e.g. responsiveness, reliability, and positive feedback. Most substantial are the dramatic savings:

- **80%** Labor Savings: 120 hours per transaction reduced to 24.
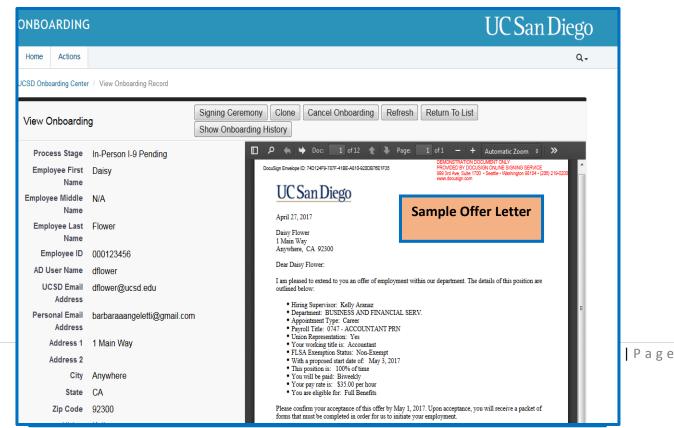- **$420,000** Cost Savings: equivalent labor savings.

In a Nutshell…

The UC San Diego virtual ONBOARDING Solution optimizes the way HR representatives perform new hire processes by automating the distribution and completion of new hire paperwork, work authorization, and business systems set up and provisioning. This optimization leads to a positive experience for the new hire and an efficient way for departments to hire new employees.

Accomplishing this through the implementation of a digital signature tool for collecting electronic signatures, a digital document storage repository, and software to act as the data integrator and driver of the process workflow. What was once entirely a paper process, performed on the new hire's first day of work is now electronic and completed before the new hire ever gets to campus.

The HR Initiator/Super User enters unique data about each new hire, and the Solution generates an Offer Letter to preview and edit, if necessary, before distributing the Offer Letter. Once the Offer Letter is accepted, automatically the Core Campus forms for completion are distributed. Once the Offer is accepted, a Welcome Letter containing relevant links and information is automatically distributed and provides an automated process for the in-person signing ceremonies that are to be completed either by the start date or day 3 of employment.

ONBOARDING data fields configured and captured for the offer letter are then pre-populated on corresponding data fields within all new hire core forms. All data fields are set up and required based on compliance and data formatting needs. This configuration ensures that the data entry into required fields is complete and in the correct format.
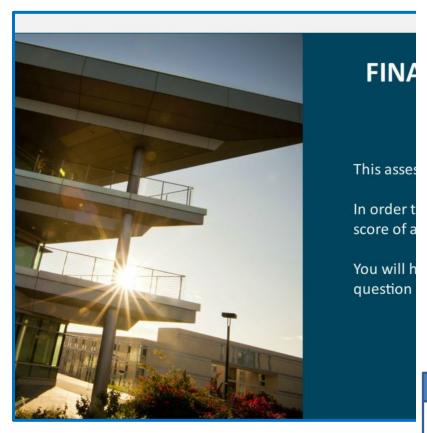
Additional error-correction and editing capabilities allow UC San Diego to improve data quality, addressing our enhanced compliance goal - including 100% compliance with all I-9 requirements.

This process brings the power and strength of the data to the fingertips of departments while also providing the protection of forms for audit and compliance purposes. Once signed and complete, forms are automatically routed and indexed into the secure document repository, reducing the administrative burden on departments of handling paperwork, manual document review, and indexing and scanning of forms into the repository.

Developing standard templates and an automated workflow achieve the goal of creating a standard and distributed process using a virtual model for shared services. The virtual shared services environment, while not fitting the typical model for brick and mortar shared services, ensures consistent practices among business practitioners throughout the university.

Providing computer-based training in addition to an on-line training resources library gives UC San Diego HR Initiators/Super Users required training and assessment of competency before using the Tool. Also, all of the training materials are available on demand, should it be necessary.

"Face-to-face training was fantastic, as has been the supporting documentation."
~ Pilot User

"It's a fabulous system that will do wonders for the university. ~ Pilot User

In the Beginning

Strategically choosing a representative sample of the University, the Project Team partnered with six key departments and one entire Vice Chancellor area. These areas cover a range from small departments that rarely hire using manual processes to large departments hiring frequently with supporting systems and applications. These seven units became known as pilot departments, and the Project Team met and consulted with them during the design and development of the Solution. Initiating the project in March 2015, the team launched the pilot in March 2016.

Throughout the rollout process, engaging departments, and collecting continuous feedback to incorporate into the Solution and training materials were essential. Pilot users participated in multiple in-person testing and training

sessions; including scripted business cases, FAQs, Quick Reference Documents, and videos that demonstrate the Solution. The training materials were developed and stored in the Training Resources Library (public website) to reinforce the in-person sessions conducted by the Project Team. Many of the enhancements to the Solution after the pilot deployment were the direct result of recommendations made by this group.

Innovatively Fault Tolerant, Highly Available, and Repeatable

- Modular design allows for:
    - Easy editing and minimal administration for compliance form templates,
    - Flexible timeline for compliant I-9 completion (Section 1 by Day 1, Section 2 by Day 3),
    - Reviewing, pushing back, or approving Core New Hire forms within ONBOARDING Record

"The Project Team created a perfect system and they are glad to have it."
~ Pilot User

- Facilitates EMP ID generation, email, and business systems access by the first day of work- allows PPS entry up to 14 days in advance of New Hire Start Date;
- Ability to access and print 15-day comp parking pass;
- UC San Diego email and Active Directory set up request for a New Hire is standardized for Department Security Administrators (DSAs);
- Consistency in all departments unifying in distributing a formal offer letter to all new hires;
- Increases compliance and data integrity by allowing for the review and pushback of core new hire forms.

Providing an additional benefit to the university is the technology platform used to build the Solution. This technology allows for work completed for ONBOARDING to be repeated and scaled for many other local Higher Ed business processes requiring the use of forms, electronic signatures, and data integration e.g. Separations and Leaves of Absence.

This Solution demonstrates how optimization of processes can create capacity within departments by freeing up time and resources that no longer need to be committed to transactional work, thus allowing departments to focus on their core mission and goals. The greatest demonstration of the innovation the Solution represents is that we developed both a business and a technical process that has wide-ranging adaptability to other business areas.

Higher Education in Concert

Before embarking on the journey of optimizing how the University hires employees, the project team made an effort to connect with comparable outside institutions to learn from those who had already optimized the way they hire new employees. Having an open dialogue with these contacts gave the team an understanding of what worked and, more importantly, what didn't work for them which was incorporated into the optimization strategy. The Universities consulted with were UC San Francisco, University of Texas, University of North Carolina-Chapel Hill, Stanford, and Arizona State University.

No two universities are the same, and within a university no two departments are the same. Understanding the climate of our local organization and that of the University of California system, the team was able to create a solution that would be optimal for our structure, culture, and way of performing business. The project team developed a successful strategy that allows for further process re-engineering; this success is due to the project teams' early engagement with leaders, collaborating with key departments across campus, and integrating technology team members with understanding of the business process and policies.

Developing a modular design for the comprehensive solution allows for other universities or outside institutions to utilize the Solution for their needs. Multiple other UC locations have expressed an interest in pursuing use of the Solution. Outside institutions may use the tool to optimize their process whether it be the comprehensive solution to

hire employees, or a part of the process, such as distributing standardized offer letters, forms or completing I-9 verification. With all UC locations Single Sign On can be federated, thus allowing other campuses to use our version of the Solution.

Keep the Additional Benefits Coming!

Standardized and Distributed

There are over 450 departments across the UC San Diego Campus and Medical Center. Delivering a Solution which is standardized and distributed electronically across the enterprise allows for greater consistency across departments when hiring employees. Understanding the differences between units; the size, the scope of services i. e. the business processes transacted, the volume of transactions, and the level of expertise among those performing the transactions, allowed for the focus to be the business process and the supporting technology.

Sustainable

Adding to cost and labor savings, an additional benefit is the Solution's significant impact on sustainability. Departments no longer need to print the forms and create a paper file for each new hire. The file is created electronically and stored in a secure digital document repository. As a result, the Solution delivers not only significant savings (cost and labor), efficiency gains, and greater overall customer satisfaction campus-wide, but contributes to the university's sustainability initiative as well.

Unsustainable

- 40+ Forms Printed per New Hire
- 40+ Forms Manually Completed with HR Representative on or before Start Date
- New Hire Forms Filed into Department File Cabinets

Sustainable

- 22 Forms Delivered Electronically to New Hire
- 22 Forms Electronically Completed Prior to Start Date
- New Hire Forms Electronically Route, Index to Digital Document Repository (iDocs)

Repeatable and Scalable

Building a Solution agnostic to a department allows for the focus to be on how to re-engineer business processes utilizing supporting technology which is repeatable and scalable to meet the needs of the enterprise. Having knowledge and understanding of how the business performs processes locally, the Solution Architect had the forethought to develop code that can expand regardless of the business transaction/process. Leveraging development work for ONBOARDING, the process for deploying remaining employee types and other additional business processes can scale to meet the need of the entire Campus, Medical Center, and even outside universities.

"The online functionality allows new hires time to read and understand forms vs. signing them blindly in the HR Rep's office on the first day." ~ Pilot User

UC San Diego Email and Business Systems Access

The ONBOARDING Solution has changed the way HR professionals view hiring processes on campus. New employees who require specific training before beginning their job duties can now access the Learning Management System on day two of employment instead of waiting, in some cases, longer than a week for UC San Diego email and business systems access.

"She's one person, and not having to prepare all the forms ahead of time is a great time saver."   ~ Pilot User

Having a new hire set up and ready to work their first day vs. days of lost productivity awaiting system or application privileges has given back to departments and new hires valuable time, while also providing them information and access that will better prepare them for their first day on campus.

Complimentary Parking Pass and Employee ID Card

Through a partnership with Transportation Services, when a new hire receives their Welcome Letter they have the option to print a 15-day complimentary parking pass before their arrival on campus. Collaboration is ongoing with Student Business Services to enable new hires to upload their photo for their campus ID badge, then delivering it to the hiring department by the specified start date. Early outreach and an interactive experience is part of the new hire welcome to UC San Diego, establishing a connection between the new hire and the University.

UCPath Alignment

This Solution optimizes UC San Diego's alignment with UCPath for go-live. Evaluating and improving processes impacted by UCPath will identify where data gaps exist to ensure all data is captured and available for consumption by HCM. Identifying these gaps early on allows for them to be addressed in any local tool developed. Behind the scenes, ONBOARDING process data moves from the Solution into the Data Warehouse which is then available for consumption by downstream applications and departments.

> *"[They are] very pleased with the Solution overall."* ~ *Pilot User*

Early understanding of and alignment with future state processes assists with change management by incrementally introducing new processes and terms. User acceptance testing was an additional opportunity for training and feedback for future process improvements. Keeping process re-engineering specific to the process and supporting technology ensures only minimal disruption to organizations across campus.

The Customer Perspective: Impact to University Onboarding

Customer feedback on using the new Solution has been positive. Surveying the pilot departments and project team, using the ProSci® methodology for Change Management practices, provided a mean Change Management score of 4.2. The scoring is on a scale of 1–5 (5 being the greatest and one the least), and both groups felt an acceptable level of comfort with the changes. Moreover, they believed practices within their departments, as well as their acceptance and use of the Solution, would ensure reinforcement for sticking to the change. Most motivating for departments to use the Solution are the gains in efficiency—no more copying, processing, and filing of paper forms.

Next ONBOARD

The Solution currently supports career staff and short-term exception new hires, represented, non-represented, and foreign visitors. Development work will begin early summer to bring functionality to the Solution in support of the remaining staff populations: Temporary Employment Services (TES) new hire to position pool, student new hire and re-hire, and inter and intra-campus transfers. Expanding use of the Solution for hiring Academics (Ladder-Rank Faculty, GSRs, Post-Docs, etc.) to the University is currently underway. Following the same career staff implementation approach to deploy the Solution for Academic Appointee types will support the remaining types of hires to the University, Campus and Medical Center.

The Solution functionality, which is repeatable and scalable, can adapt to optimize processes beyond hiring new employees. By abstracting the source code, additional objects can be spun up in approximately one hour for a database DocuSign integration, whereas prior to custom code was required, requiring at least two days of development. In the future, developing additional objects for supporting business processes such as Leave of Absence and Separations, this code abstraction will be quite valuable.