GUIDE TO PERSONNEL ACTIONS ON IHC-MANAGED GRANTS

This process begins when a PI notifies the IHC of a need to hire an employee on an IHC-managed grant. The IHC will notify the PI's home academic department if a recruitment or visa is required. If no recruitment or visa is needed, the IHC begins with step 5.

The PI's Home Academic Department:

1. Manages the **recruitment** for the position if an open recruitment is required.
2. Completes the appropriate **visa** process in coordination with OISS for international hires. The home academic department should be listed as the primary site of activity, with the IHC as a secondary department for contact from OISS if possible.
3. Maintains a **personnel file** with recruitment and visa info for the employee.
4. Notifies the IHC of proposed hire, obtaining and forwarding:
   a. Job Description info from recruitment
   b. Appropriate Visa Form (e.g. DS-2019) if applicable
   c. Academics: Departmental Letter of Recommendation
   d. Academics: CV
   e. Academics: Academic Biography
   f. Staff Recruitments: Offer to employee from HR

The IHC:

5. Manages the position creation in UC Path.
   a. For Academics:
      I. Obtains documentation for an **appointment case** as needed from the PI and/or home academic department.
      II. Submits the appointment case through AP Folio for appointment approval and creation of the UC Path position.
      III. Forwards the approved case to the PI Home Academic Department, allowing for conclusion of the recruitment.
   b. Limited Staff: Submits the job description to HR for approval.
   c. All Staff: Enters the position in UC Path and submits it for approval.
   d. Postdocs: Prepares a Notice of Appointment letter (**offer letter**) for the employee in coordination with the PI and Director, and obtains the employee's signature. Forwards a copy of the letter to the IHC, and retains a copy in the personnel file.
6. Upon receipt of approvals and confirmation of offer acceptance, collects new hire data from employee and **hires** the employee in UC Path.
7. Nominates the employee for **Glacier** if applicable.
8. Upon approval of the hire, follows up with the employee regarding next steps.
9. On Day 1:
   a. Has employee sign **Oath** form
   b. Confirms completion of the **I-9** online form and BFS verification
   c. Provides instructions on setting up a UCSB **Net ID**
   d. Confirms the employee configuration in **Kronos** is correct, and explains time card submission process.

The PI's Home Academic Department:

10. Coordinates with PI to provide **office space** and **keys** for the employee
11. Following NetID Setup, assists employee with setting up a **department email** address

The IHC:

12. Manages all **post-hire** personnel actions, including:
   a. Timecard sign-off
   b. **Changes** in time percentage or other job data
   c. **Salary Actions** (note that supporting documentation may be required from the PI and/or home academic department chair)
   d. Appointment and visa **extensions**
   e. **Terminations**, notifying home department for email separation and key return.

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