

Final



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Process Name/Step	Context/Information	Is this a new step in the To-Be Process?
Step 6 - Required Forms/Tasks	Includes UCPath Employee Paperwork. CWR's are only required to fill out UC Patent Acknowledgement and UCR Personal Data Form. *Note Transactional Unit will do background check through simplybook.me and send link to CWR. Results will go to the Transactional Unit and SSC. SSC will be responsible for entering background check information in UCPath.	No
Step 8 - Attach Documents to TBH	This step includes attaching the Personal Data Form and Appointment Letter to TBH. If the decision is that it is not appropriate for UCR to attach Personal Data Form and appointment letter to the Smart HR template the Transactional Unit will need to open a case for all CWRs and attach documents.	Yes
Step 8a-8d - Background Check	Transactional Unit initiates background check (This may occur before TBH is submitted or after). SSC and Transactional Unit receive background check results and SSC enters information into UCPath. If there is an issues with the background check Labor Relations gets involved.	No
Step 11a - Deny Transactions	 Phase 1: SSC AWE Approver needs to add a comment when transaction is denied. Note: If SSC AWE Approver denies the transaction before going to UCPC the Transactional units can clone transaction and resubmit. Phase 2: AWE Approver will move to the Transactional Unit. 	Yes
Step 15a - Resubmitting and Cloning	In the event that the template is cancelled by UCPC WFA Productions, the template is returned (with comments) to the Transactional Unit Initiator to correct and resubmit. At this point, the transaction can be cloned by the Transactional Unit Initiator (as long as UCPC WFA Production cancelled the transaction). The Transactional Unit Initiator will also email their SSC to inform them of the cancellation and ask to advise in the event that the transaction was incorrectly cancelled.	Yes
Step 19 - Affiliate Account Request	Any affiliate that is also entered as a CWR will need to have their affiliate NetID and their CWR EMPL ID manually mapped together by ITS. SSCs will need to create a ticket with EMPL ID and NetID and have ITS merge the profiles together. Note: This can take up 2 weeks to get. This is being submitted as a technical requirement for process redesign. The To-Be state presumes that the NetID process will be automated when the CWR is entered into UCPath. Steps 19, 20, 21, and 21a will not be present in the future state.	No
Step 21a - CWR NetID	There is no notification that CWR has received NetID. CWR will reach out to the Transactional Unit if they don't have the NetID within 3 business days. Transactional Unit will then reach out to ITS by emailing Bearhelp@ucr.edu or by opening a ticket through Servicelink.	No
Training	Manager. Sexual Harassment and Cyber Security training are assigned automatic. Policy: Anyone who works in a lab space (faculty, staff, students, volunteers) are required to take the UC Lab Safety Fundamentals course. This training is required to be completed before anyone begins work in a lab space, and is required to be taken every 3 years.	

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Start / End

On-page Reference



Shows the start and end of a process. The text should indicate the trigger action or condition that puts the process flow in motion or indicates that it is complete.

Task/Activity



Captures a specific task or activity. Written starting with a verb ("Prepare Form"). A box should reflect a single role and tool to complete a specific output.

Automatic Process



Represents a process, task, or activity that is accomplished through a system or program. For example, "Upload Data (Nightly)".

Off-page reference



Shows the continuation of the flow on another page. Label the inside of the symbol with a capital letter and number (e.g., "A/2" indicates look for point A on page 2).

One way connection



Connection arrows show the direction that the process flows.

Roles and Tools



These annotation boxes are placed below task/activity boxes or decision points to clarify the generic role that performs the step (e.g., "Manager") and/ or to clarify the functionality or tool that supports it, e.g. Workflow, PPS. These boxes are not required for each step.

UCPath Central Process

Color indicates processes performed by UCPath as defined on related Central FSPD Maps (cannot be revised on local map)





On page connectors link one point in a process flow diagram to another. They help reduce flow lines that cross other shapes and lines. They are labeled with capital letters to show matching jump points.

Subprocess



Indicates another process or set of processes formally defined elsewhere. For example, "Perform Background Check" as part of the Onboarding process.

Decision



Or Connector



Shows when processes diverge, usually for more than two branches. Can be helpful in indicating variations (e.g., one path for Faculty, one for Staff, one for Students).

Consultation/Collaboration

Consultation/collaboration lines link two task/activity boxes that are performing the same function together or in consultation with each other. Not used for formal reviews or approvals.

Annotation



Provides comments or clarification to a task, connector, or subprocess. Helpful to indicate where there is variability or inefficiency or where complex rules may apply to how a particular task is completed

UCPath Local Process

Color indicates processes performed by Local Campus as defined on related Central FSPD Maps (cannot be revised on local map)

