

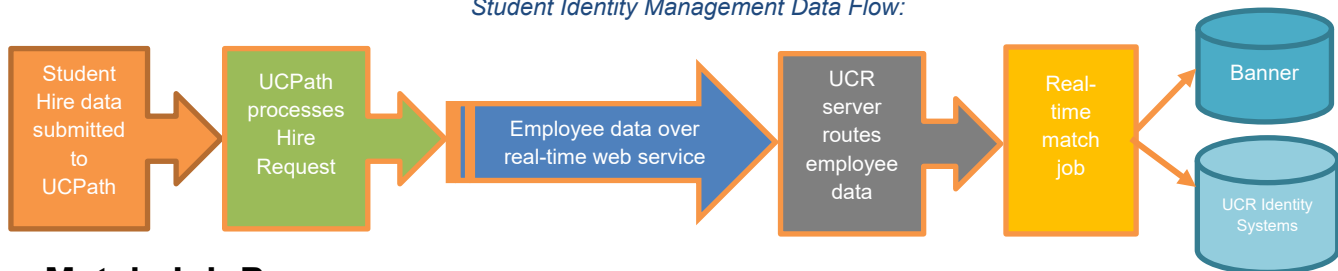
# UCPath-Banner Match Program

## Students

### Background and Summary:

Identity profiles are established for all employees that require access to local systems, the UCPath portal, Timesheet (TARS), UC Learning Center (LMS) and a UCR business email address. Because certain rules and limitations are applied to active Students that become employees, their identity profiles are created in conjunction with the UCR Banner system that contains student data. When students become employed by UCR, an HR record is entered into the UCPath system. The job and person attributes, including the Employee ID (EMPLID) are sent to UCR where the data needs to be reconciled to the Student record in Banner. The UCPath employee record and Banner Student record are matched and stored in Banner and the UCR Identity Systems.

*Student Identity Management Data Flow:*



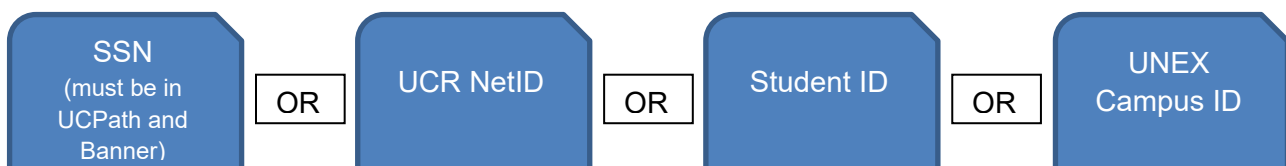
### The Match Job Process

The UCPath-Banner Match program uses one of 4 values to verify a student's identity and match the employee ID (EMPLID) and the UCR NetID:

1. Social Security or National ID (must be in both UCPath and Banner)
2. Student ID (Numeric)
3. UCR NetID (Student NetID issued by Banner)
4. UCRX Campus ID (Numeric, Issued by the UNEX Destiny1 system)

The Student ID, UCR NetID or UNEX Campus ID must be provided to the Shared Service Center prior to the Onboarding template being entered into UCPath. This data is entered into the External System field of the template. This information cannot be added after UCPath has processed the template.

*Matching data points include:*



# UCPath-Banner Match Program

## Entering the UC External System ID

The UCPath transactor (SSC) selects the External System value from the drop-down menu. Then enters the provided value into the UC External System ID field in the SMART HR Template.

When one of the External System values are added to the External System ID field, the UCPath EMPLID and UCR NetID will automatically be reconciled and no further action is required. If the External System value is not entered in the Smart HR template, an ITS Helpdesk ticket will need to be opened requesting the NetID and EMPLID be manually reconciled.

The screenshot shows the 'UC External System ID' form. It has three main input fields: 'Business Unit' with the value 'RVCMP', 'External System' (empty), and 'External System ID' (empty). There are search icons next to the Business Unit and External System fields.

The screenshot shows a search results window. The search criteria is 'Value' and 'begins with'. The results table is as follows:

Value	Description
CRUZID	UCSC Username
LGCY_POSN_NBR	Legacy PS Position Number
PPS_ID	PPS ID
PSFT_ID	PeopleSoft ID for PS Locations
UCL_STUDENT_ID	UCL Student ID
UCRX_CAMPUS_ID	UCRX CAMPUS ID
UCR_NETID	UCR NETID
UCR_STUDENT_ID	UC Riverside - Student ID
UCSBCAMPUSID	UCSB Campus ID
UCSBSTUDENTID	UCSB Student ID
UCSCEACULTVID	UCSC DivData Faculty System ID

The 'UCR\_NETID' row is highlighted with a red box. An orange arrow points from this row to the 'External System' field in the form above.

**Note:** If an Affiliate NetID was generated via eForms, entering that NetID into the External System ID field of the Onboarding template will also automatically reconcile the UCPath EMPLID and UCR NetID. No further action is required. See CWR process below.

After UCPath processes the Smart HR template, access to UCPath, UCLC, and Timesheet systems will be dependent on when the identity management jobs are scheduled to run populating the various databases. This could take 24-36 hours.

## Student Rehire or Concurrent Hire Processing

The External System values entered on an employee hire template stays on the Person Data record. You may encounter an error in UCPath if the value already exists:

The screenshot shows a 'Person Address 01 - United States' form. A 'Message' dialog box is overlaid on top, containing the text: 'External System ID is already active/exist for the selected Business Unit and External System.' Below the message is an 'OK' button. In the background, the 'UC External System ID' form is visible, with 'Business Unit' set to 'RVCMP', 'External System' set to 'UCR\_NETID', and 'External System ID' set to 'd001'.

This will be a hard stop in the template transaction. Remove the External System value you entered and then submit the template when ready. Because the student employee already has a previously reconciled record, the Identity profile already exists and will reactivate in the case of a rehire, or have no impact in the case of a concurrent hire. If an External System ID needs to be changed on the Person Data record, a UCPath case will need to be opened for the change. Locations do not have edit access to these fields.

## Contingent Workers (CWR)

### Background and Summary

Contingent Workers are persons that provide a service to the University, either as a volunteer or outside agency. They are not paid through the UCPath system but still require an Identity profile for campus access to systems or resources such as UCLC (LMS), parking, library, and campus/community events.

The Student ID, UCR NetID or UNEX Campus ID must be provided to the Shared Service Center prior to the CWR Onboarding template being entered into UCPath. This data is entered into the External System field of the template. This information cannot be added after UCPath has processed the template. If the CWR is not a student and is not an employee (staff or faculty), request a NetID through the Affiliate-eForm\* process prior to requesting the UCPath transaction.

**\*Note:** The Affiliate-eForm NetID request will soon be replaced by the ITS project IAMRiverside. Updated process steps will be provided upon implementation of that project.

The UCPath transactor (SSC), enters the NetID in the External System field in either the UCR\_NetID (used for Students or non-employees) or UCRS\_CampusID field in the SMART HR Template.

The UCPath-Banner Match program will reconcile the External System ID value to the UCPath EMPLID. No further action is required to complete the CWR Identity profile.

If the External System value is not entered in the Smart HR template, an ITS Helpdesk ticket will need to be opened requesting the NetID and EMPLID to be manually reconciled.