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Lean, Lunch & Learn Workshop + BECOP

"I-9 Process Updates for Staff & Undergraduate Students in Academic Affairs"

April 16, 2025

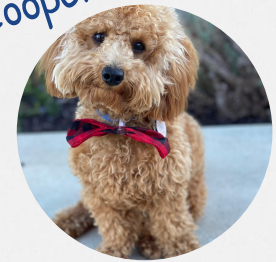
Our Sponsor:

Marie Carter-Dubois

Associate Vice Chancellor,
Finance & Administration, Academic Affairs

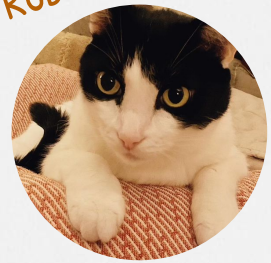
Center for Operational Excellence

Cooper



Ahren Crickard
Director

Robbie



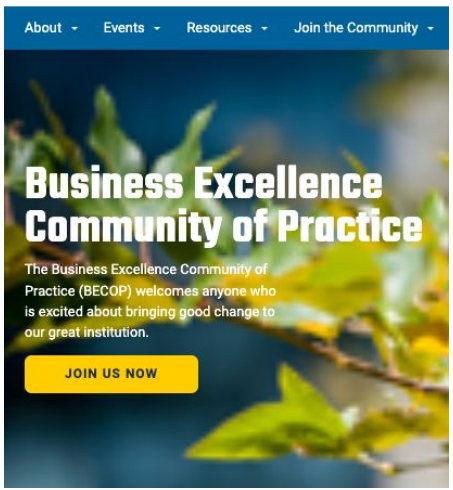
Kevin Waldrop
Assistant Director

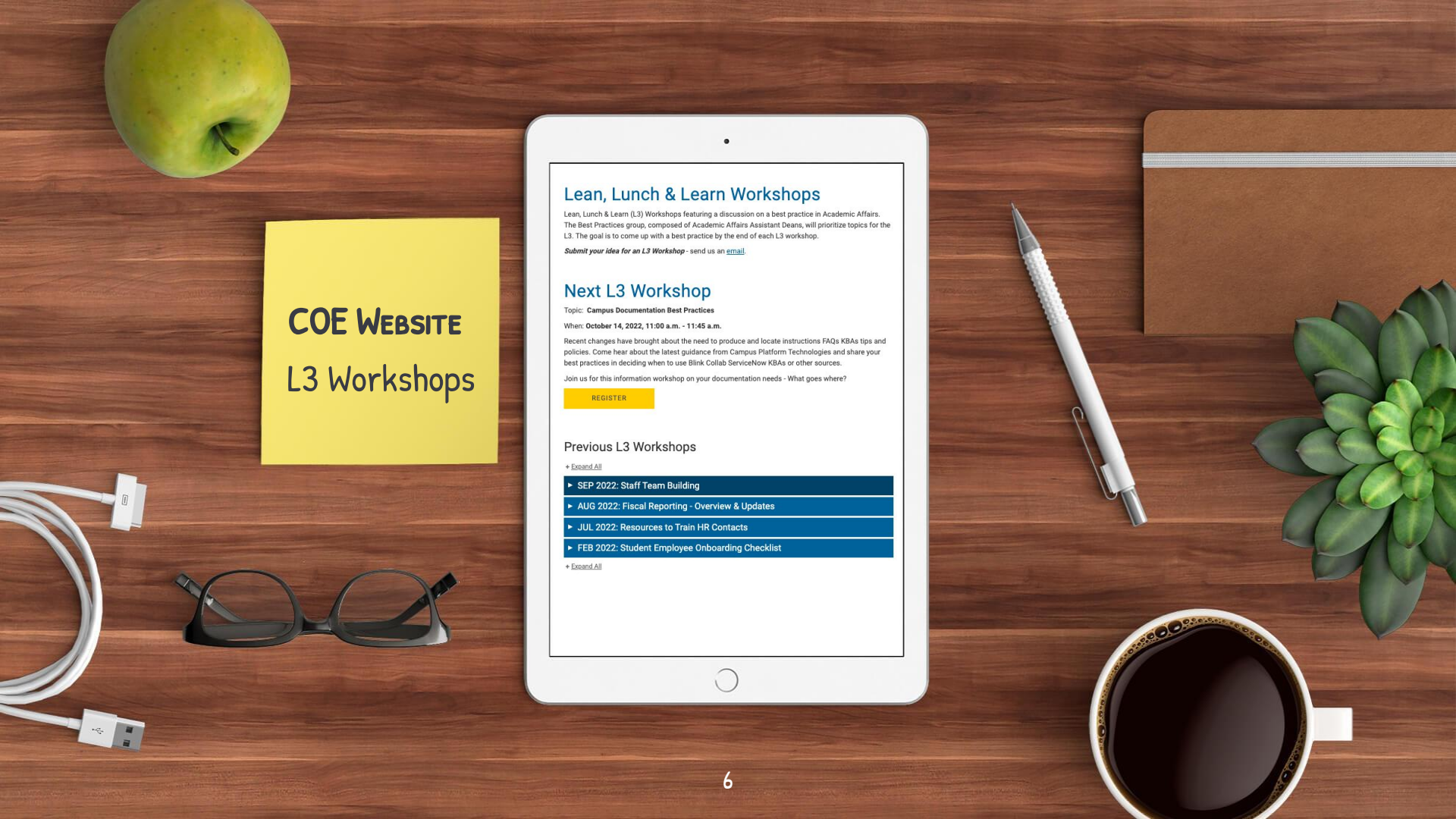
Mipha

Kate Balderston
Sr. Strategic Initiatives Mgr

The "Team"

BECOP
WEBSITE




COE Website
L3 Workshops
Lean, Lunch & Learn Workshops
Lean, Lunch & Learn (L3) Workshops featuring a discussion on a best practice in Academic Affairs. The Best Practices group, composed of Academic Affairs Assistant Deans, will prioritize topics for the L3. The goal is to come up with a best practice by the end of each L3 workshop.
Submit your idea for an L3 Workshop - send us an email.
Next L3 Workshop
Topic: Campus Documentation Best Practices
When: October 14, 2022, 11:00 a.m. - 11:45 a.m.
Recent changes have brought about the need to produce and locate instructions FAQs KBAs tips and policies. Come hear about the latest guidance from Campus Platform Technologies and share your best practices in deciding when to use Blink Collab ServiceNow KBAs or other sources.
Join us for this information workshop on your documentation needs - What goes where?
REGISTER
Previous L3 Workshops
+ Expand All
SEP 2022: Staff Team Building
AUG 2022: Fiscal Reporting - Overview & Updates
JUL 2022: Resources to Train HR Contacts
FEB 2022: Student Employee Onboarding Checklist
+ Expand All

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April 16, 2025

Welcome Our Guests

Melody Chiles

Academic Affairs HR Director
Finance and Administration,
Academic Affairs

SME's

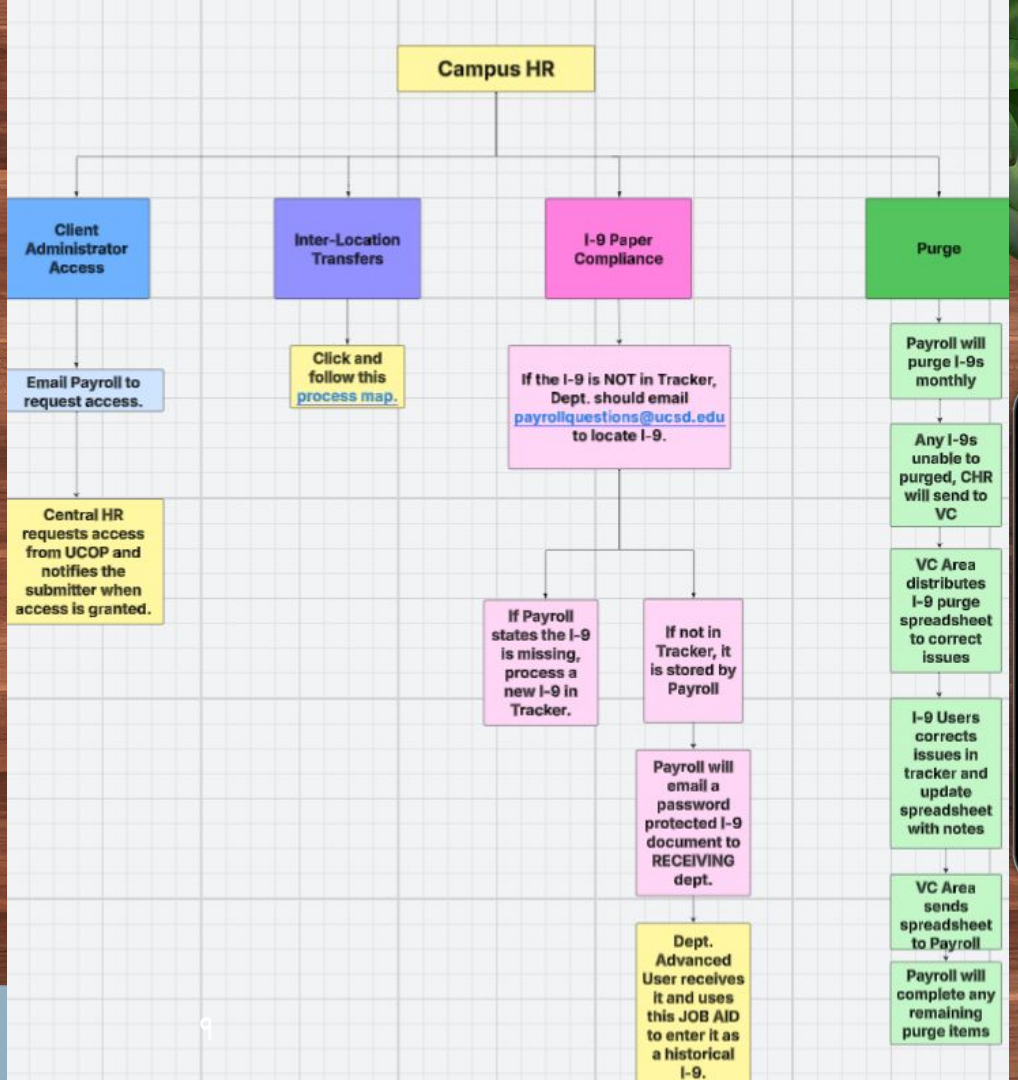
Vanessa Torices, *JSOE*
Liz Mondragon, *Enrollment Mgmt.*
Gilda Smith, *VCAA*

Sally Morgan

Principal Human Resources Analyst
Finance and Administration,
Academic Affairs

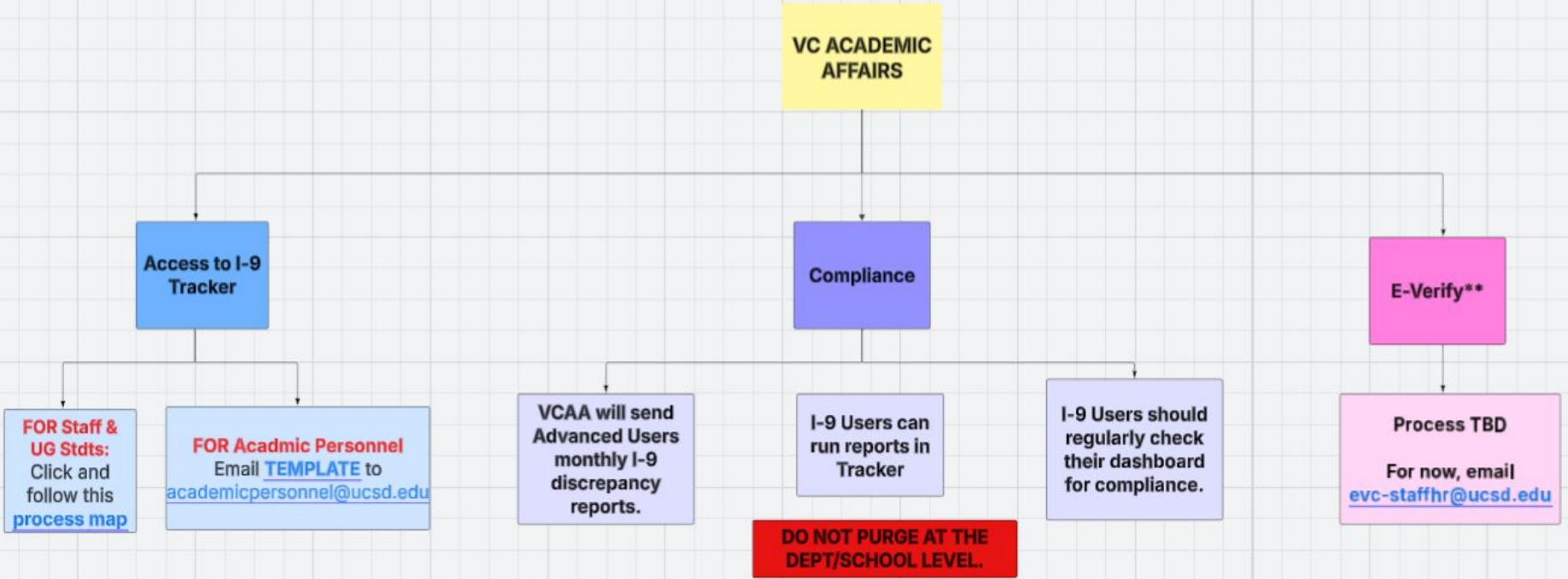
Click to enlarge the process map below:

[what parts Campus HR manages for I-9.]



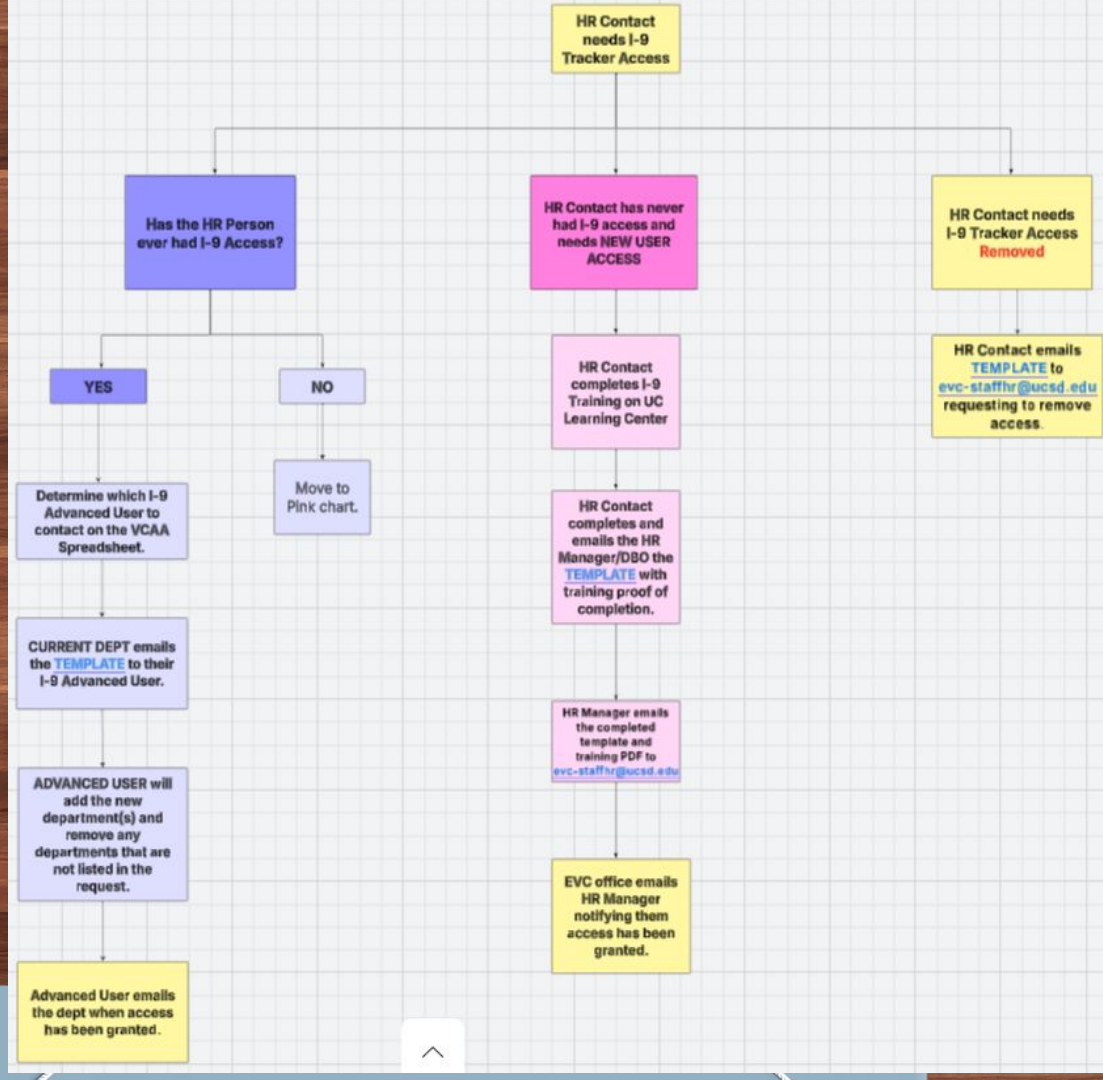
Click to enlarge the process map below:

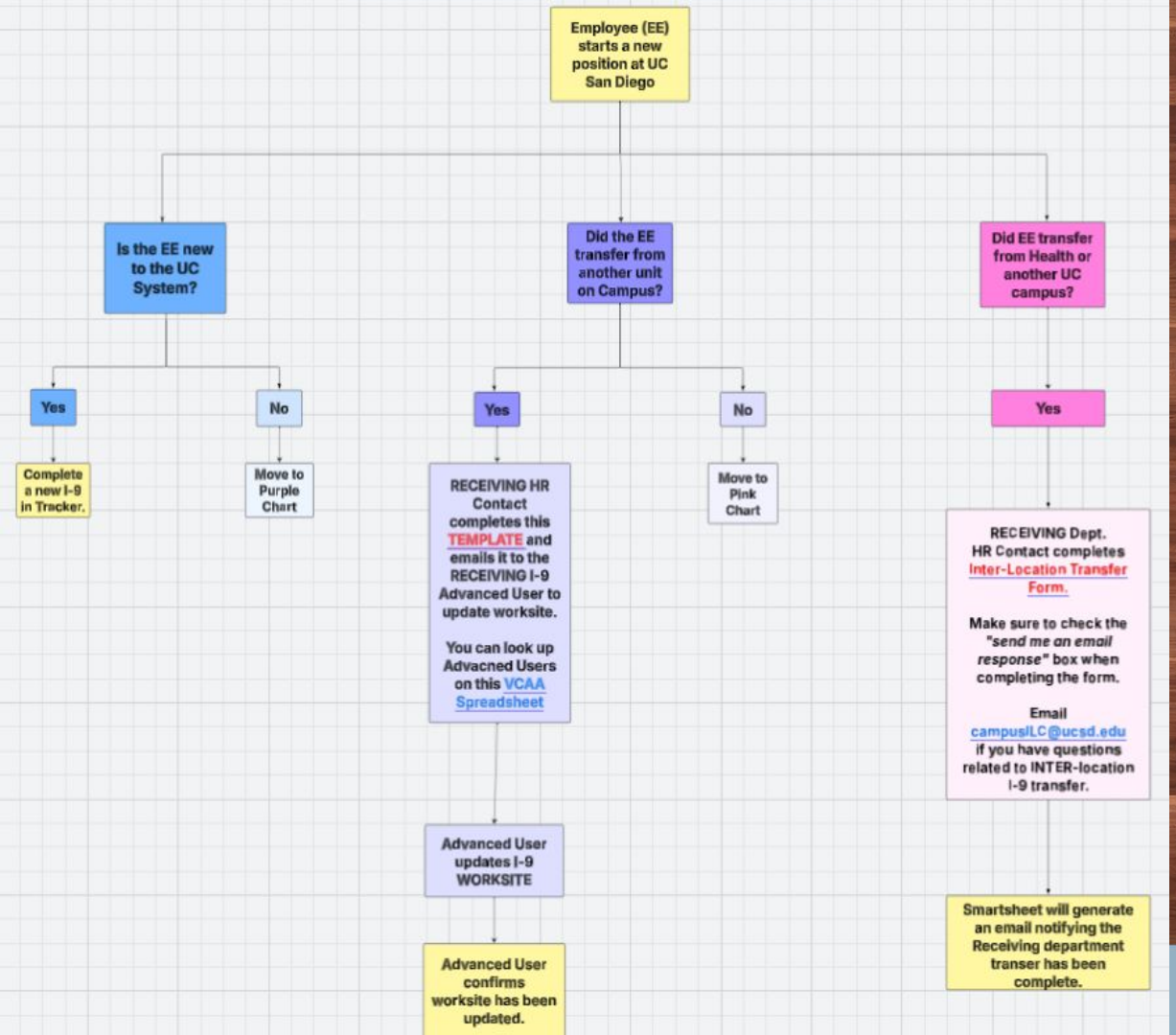
VCAA Process for I-9



Click to enlarge the process map below:

Requesting I-9 Tracker Access for HR Contacts





Click to enlarge the process map below:

[Requesting I-9 Transfer for Employees]

Click to enlarge the process map below:

[I-9 User Types]

I-9 User Types

Client Administrator User

- Access
  - Provide HRC brand new access to I-9 Tracker System
  - Update or remove an I-9 User's worksite locally (UCSD Campus only)
  - Troubleshoot I-9 login issues
- Manage I-9s
  - Update the I-9 User's Legal Name & Contact information in Tracker
- Compliance
  - Access to campus dashboard
  - Send Compliance Reports to Advanced Users
  - Access to UCOP Box Folder for Compliance
  - Access to UCOP BOX Training materials

Advanced User

*with or without e-verify ***

- Access
  - I-9 Transfer: Receiving dept Advanced User updates worksite for Employee locally (UCSD Campus only)
  - Manage E-verify when security role is selected. **
- Manage I-9s
  - Delete I-9s with or without section 2 complete
  - Delete employee profile with a duplicate I-9
  - Merge duplicate I-9 profiles
  - Correct employee information as needed.
- Compliance
  - Access to I-9 dashboard
  - Receive school/admin unit report with I-9 discrepancies
  - Resolve or disseminate I-9 discrepancies within school/admin unit
  - Add audit notes for tracking purposes
  - Access to Google Folder Training materials

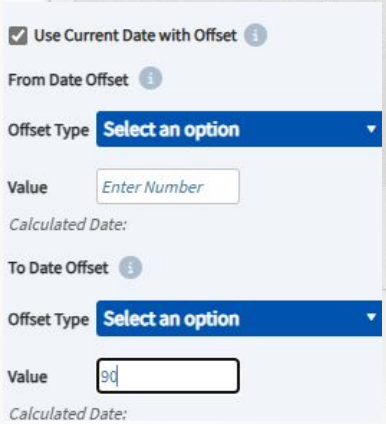
Intermediate User

- Access
  - Send Client Administrator TEMPLATE to request brand new I-9 User Access for the dept.
  - Receiving dept completes the TEMPLATE and sends their Advanced User request to transfer EE I-9 profile.
  - Manage E-verify when security role e-verify is selected.**
- Manage I-9s
  - Answer EE questions re: I-9
  - Delete profile if there is no exisiting I-9
  - Update I-9 profiles as needed
  - Upload Historical I-9s
  - Create new I-9 profiles & forms
  - Complete section 2 of the I-9
  - Re-verify or re-hire section 3 of the I-9
- Compliance
  - Access to worksite(s) dashboard
  - Resolve discrepancies from Advanced User
  - Run custom report in Tracker
  - Access to Google

Running Reports in I-9 Tracker DEMO

Tips for Running Reports in Tracker

- DO NOT save the report to "SHARED Reports" - that is for all UC locations.
- Save report to "My Reports" and either each HRC duplicates, or one forwards the excel spreadsheet.
- Click "include weekends."
- I-9 Summary internal notes are the notes we make.
- FYI: Employment Status in the report is indicating citizenship.
- When choosing I-9 Information, uncheck boxes you don't use such as:
  - Appoint Sec. 2/3 Rep
  - Sec 2/3 awaiting approval
  - E-verify if NA
- Click "Use Current Date w/Offset & choose 30-120 days to be preventive.



RESOURCES & SUPPORT

Campus Wide Resources

- Google Folder with job aids and recordings.

- **Payroll Team**
  - INTER-Location(ILC)Transfers: Email campusILC@ucsd.edu for ILC questions.
  - Monthly I-9 Purge Process in Tracker: Email payrollquestions@ucsd.edu for Purge process questions.
  - Granting/Removing Client Administrator Access: Email payrollquestions@ucsd.edu to request/remove Client Administrator access. *1-3 designated individuals per VC area.*
  - Request a Paper I-9: Email payrollquestions@ucsd.edu to request a copy of a paper I-9.

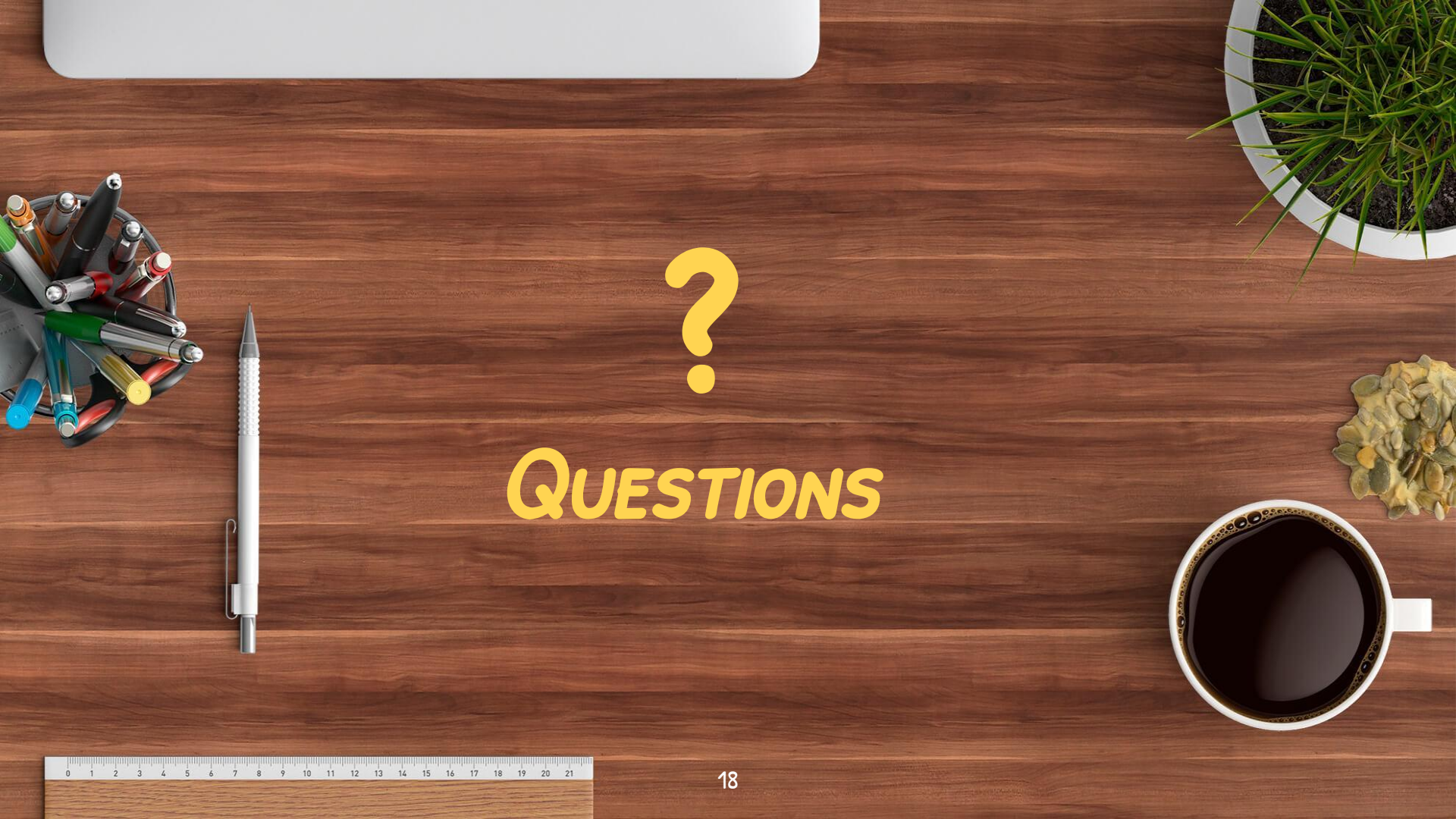
- **ISEO Team:** Email Ischolars@ucsd.edu for**:**
  - Assistance identifying or interpreting work authorization documents.
  - Questions on end date of work authorization.
  - Questions on grace period vs work authorization periods.
  - Discuss reverification of immigration documents.
  - If a scholar is changing their work title.
  - If a scholar is ending their appointment early.

VCAA Wide Resources

- Google Folder
- EVC Team

VCAA Support & Resources

- VCAA Google Folder for "All Things I-9"
- Process Maps
  - Campus HR & VCAA Managing I-9
  - Requesting I-9 Tracker Access for HR Contacts
  - Requesting I-9 Transfer for Employees
  - User Types & Responsibilities
- Teams Channel *coming soon*
- Upcoming Pulse Check for Advanced Users in May


?
Questions

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"TBD"

Have a suggestion, let us know!

Register

L3 Info

10-Second Survey

- Opens upon exit in your browser

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Lean, Lunch & Learn (L3) Exit Survey

Anonymous • 4 questions

1. Including today, how many L3s have you attended?

- ○ 1
- ○ 2
- ○ 3+

2. How relevant was today's topic to your primary role?

- ○ Very
- ○ Somewhat
- ○ Not

3. Do you think you will use any of the information discussed today?

- ○ Yes
- ○ No
- ○ Maybe

4. Comments (optional, anonymous)

Please input

0/200

By responding to this survey, you agree to Zoom's Privacy Statement and Terms of Service.

Submit

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Thank You!

Ahren Crickard, Kevin Waldrop, Kate Balderston

coe@ucsd.edu