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**UC Tech Awards 2023 Candidate**

**Category:** INNOVATION  
**Name:** The New Hire Packet Project (7)  
**Number of people:** (7)  
**Location:** UC Berkeley

1. **Person submitting the application/nomination**
   1. Luis O. Hernández Muñiz, Director of Productivity and Collaboration Services  
      UC Berkeley, Berkeley IT, Campus IT Experience (Staff)
   2. **Email address:**lohm@berkeley.edu
   3. **The name of your organization:** UCB
2. **Award category:** INNOVATION
3. **Name of person, name of the team, or name of the project to receive the award**

The New Hire Packet Project

1. **All project team members - if applicable**  All are staff
   1. Vahid Nadi, Manager of Information Management and Workflow
   2. Janet Speer, Director of BRS Central Services
   3. Joseph Mitola, Information Management & Workflow, Technical Lead & Architect
   4. Tony Venuto, Information Management & Workflow, Perceptive System Administrator
   5. Patricia Juarez, Information Management & Workflow, Project Manager, Lead Business Analyst
   6. Sina Carroll, Information Management & Workflow, DocuSign Service Lead
   7. Colette Arreguin, People & Culture, Subject Matter Expert
2. **Which location was affected by the work?** (the name(s) of the organization affected)

UCB

1. **Summary** (1-3 sentences synthesizing the longer “Narrative - see below)

The “New Hire Packet Project” is a collaboration between the Berkeley IT Information Management and Workflow team and the People and Culture Central Services team. The project’s goal is to automate and eliminate repetitive and manual processes, particularly data entry, related to the hiring and onboarding of new employees, and in doing so reducing the timeframe of processing a new employee from 3 weeks to as little as 3 days. Divided in three phases, phase 1 has already been completed and significantly reduces the timeframe of processing a new employee by up to 20 days.

1. **Narrative** (1.5-2 pages in Word - up to about 1,000 words- feel free to include visuals). This is a descriptive narrative about the person/team (and their portfolio of work - or the initiative/project - in terms of the selection criteria for that award. Please include:
   1. Description of the initiative(s) or portfolio of work that supports the nomination based on the award description.
   2. How they meet selection criteria (complexity, impact, and mission alignment).
   3. How their success is measured/quantified.
   4. The time during which the work was done.

For more information to help you create this narrative, please scroll below to learn more about each award category.

Onboarding a new employee is one of the most time-consuming and labor-intensive processes in the UC system. On average, onboarding a new employee takes between 3 weeks from the time they sign the Job Offer letter to the time they appear in the UCPath system. This has a significant impact on the time to hire as downstream systems such as email address, ID Cards, and other types of system access cannot be issued until the Employee ID is assigned in the UCPath system. The slow process causes a less than ideal experience for the new employee and delays in hiring negatively impacts departments and mission-critical objectives. How can we shorten this process, reduce wasted time, improve productivity and reduce frustration?

Working with our partners at People & Culture, we have designed and have developed a new multi-phased project that leverages DocuSign, and the Document Management System known as Perceptive Content to shorten the onboarding process from 3 weeks to 3 days. This project saves the university money and time by reducing paperwork and collecting all data, signatures and approvals electronically; it removes weeks worth of labor and improves the accuracy of data by eliminating the manual entry of data; and it improves security by eliminating the need to transfer and share files with different teams.

Phase 1, which we internally call the “New Hire Packet Project”, has already been completed by the Imagine Team and is currently being rolled out in Berkeley Regional Services (BRS), with BEST as the pilot region. This phase removes up to 20 days off the process it will replace, by eliminating four manual steps. Although the idea for this phase is simple, it required cross-functional collaboration between different teams to design, prepare systems for the intake of this data, test, and finally deliver a working system in a production environment.

The phase leverages the DocuSign integration with Perceptive Content to move the “New Hire Packet” from DocuSign to Perceptive Content every 10 minutes. When a packet becomes available, a notice is sent to the Human Resource Information Management (HRIM) transactional processing team to alert them that the packet has arrived. This part of the automation eliminates four manual steps in the process and improves our security posture by removing: the download and storing of documents to an initial location, editing of documents to include identifying information for new employees, re-sharing of documents across teams, and the final archival of the documents. Behind the scenes, once all documents are signed and updated as “Complete” in DocuSign, an automated workflow exports all documents from DocuSign to Perceptive Content using APIs. All data elements in DocuSign documents are imported into Perceptive Content with pre-mapped index and custom property fields. At this stage, HR users can automatically extract all pertinent values for keying into the UCPath system (a future phase of the project will eliminate this manual data entry altogether). Once the new employee ID is created, records in the Perceptive Content system automatically update and capture the newly minted Employee ID number using the Employee API.

The amount of time between final signature by a new employee and data entry into the UCPath system has been reduced by up to 20 days, and almost all manual manipulation of the new hire packet has been removed. The amount of paper and labor to print and organize all documents and to connect them with the newly minted Employee ID will eventually be reduced to zero, hence saving the UC System significant funds in paper and electricity, which can be put to much better use, and allowing staff to perform higher-level work than simple data-entry and repetitive tasks. Finally, since Perceptive Content is a P4 compliant system, the documents will be archived or purged as per policy in the system hence improving data security. No filing cabinets are needed!

Phase 2 of the project will use the DocuSign integration with Perceptive Content to move the “Offer Letter”, which has been configured in the UCPath Mass Upload format for all job data elements. This move will allow Perceptive Content to combine the data from the offer letter with the new hire packet for upload into UCPath, will save Talent Acquisition (Recruitment) from having to manually enter data and manipulate files, and will ensure the offer letter arrives 100% of the time for proper pension benefits administration. This integration will happen every 10 minutes and a notice will be sent to the Talent Acquisition (TA) team, alerting them the signed offer letter has arrived and they can send the case to the Onboarding team to send out the new hire packet, completed in phase 1 as described above. The amount of time between final signature on the Offer Letter to the Onboarding team sending out the New Hire Packet will be less than 1 hour and could be as fast as 10 minutes. We are exploring the potential to automate the sending of the New Hire Packet when the Offer Letter is signed by the candidate. This phase ensures accurate records and sets us up for phase 3.

In phase 3 of the project, we will use Perceptive Content APIs to export a newly created CSV file into a UCPath-approved Box folder daily. In essence, this is a mass upload of new hires from Perceptive Content to UCPath. This will eliminate any remaining manual data entry processes completely from HRIM by leveraging the data employees themselves provide and removing the need to rekey data. We will also work with our ServiceNow partners to completely automate the process from the time the HR Ticket has been finalized in their system, to data entry into UCPath, and finally archiving the employee paperwork in the Perceptive Content system.

Phase 1 has been fully completed by the Imagine Team and is already showing great results with BRS during the pilot. By the end of this project, the improvements will reduce the entire onboarding process dramatically, eliminating waste and manual data entry as much as possible. It will improve productivity since the new hire and the hiring unit won't have to wait weeks to gain access to campus resources like email and calendar, and reduce frustration for both the employee and their supervisor.