



UCI UCPATH

Transactor Digest

April 19, 2023

A source of updates and information for UCI UCPATH Transactional Users

Visit the transactional user page on the ucpath.uci.edu website for UCPATH support documents, FAQs, call-in center hours, and more.

Summer Salary Training

Summer Salary training is being offered virtually with two sessions May 3 and May 10 to review transactions and monitoring. Choose from the available SSL301: Summer Salary training sessions below and [REGISTER HERE](#). Please contact arriver@uci.edu if you have any questions. Thank you!

SSL301: Summer Salary (Campus)

Session 1:

- Date: 5/3/2023
- Time: 10 a.m. – 12 p.m.

Session 2:

- Date: 5/10/2023
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- Time: 1 p.m. – 3 p.m.

Training Refreshers Schedule

Sign up for the last Training Refreshers session of this month on the topic of Budget Distribution. This virtual session will take place on April 25 from 1 – 2 p.m. [REGISTER HERE](#) to participate.

Lived Name Update

Go-live for the Lived Name project will be June 20. Training will be available and is summarized below. Detailed dates, times, and sign-up information will be available and shared later this month.

- Training will be required for those people who will have access to Legal Name (“Name”). This includes these roles: HCM Initiator, HCM Approver, HCM Inquiry, People Services, WFA No PII, HCF as well as Central Payroll and Central HR.
- Training for Inquiry Only roles will be available via e-learning on UCLC in late May.
- Training for Initiator and Approver roles will be conducted in 90-minute Zoom sessions starting the week of May 22 through June 16.

Payroll Adjustment Form

A new Payroll Adjustment Form (formerly known as Reclassification of Earnings) is available on the [transactor web page](#) under UCPATH Support Documents > GL and Finance > Funding > Reclassification of Earnings / Payroll Adjustment Form 3/2023. You can also [access this form here](#).

[Review the PPT presentation](#) from the April 4 Tuesday Training Tips session to find out more about this form, when and how to use it, and to review some different scenarios with using the form.

Ask UCPATH Enhancements

UCPath has redesigned the 'Ask UCPath' site to improve the user experience. [View this short video](#) that provides a general overview of the redesigned Ask UCPath site. The enhancements include user-friendly search options for quick information access, enhanced self-service capability, and a new web page for transactors with "Submit on behalf of employee" access.

All Employees: "Ask UCPath" site users can now enjoy a redesigned landing page with the following features:

- Enhanced "Quick Search" for fast access to frequently requested content.
- Prioritized "trending topics" with commonly requested items like tax forms.
- A frequently asked questions (FAQ) section.
- Easy-to-access employee resource links.

"Submit an Inquiry on Behalf of" (SOBO) Transactors: Transactors will enjoy these changes and enhancements because of this update:

- New "Ask UCPath" web page for transactors.
- Enhanced "Quick Search" for fast access to frequently used content.
- Streamlined knowledge base/help library.
- Easy to access transactor resource links.

Additional changes on how an inquiry is submitted will come this Fall in the next phase .

FY23 UCPath-KBM Annual Timeline Now on Website

A new calendar from the budget office is available on our website. The [FY23 UCPath-KBM Annual Timeline](#) is on the [transactor web page](#) under UCPath Support Documents > GL and Finance > Budgeting

Inter-Location Transfer Information

Inter-location transfer information is available in UCNet (links below). If you have any questions, please contact our UCI Transfer Coordinator, Philip Nguyen, through the [virtual call-in center](#) M-F, 10 a.m.–12 p.m. or through an [EEC](#) ticket.

[Inter-Campus Transfer Information](#) (changing jobs within UC)

[List of transfer Coordinators / Campus Contacts](#)

Reminders on Key Transactions

- Workforce Job Summary is important to use to confirm current and future status to inform new transactions.
- For Intra-Campus Transfers (changing jobs within UCI), it is important to reach out to the other department to confirm the method to be used to transfer. The department losing the employee may want to retain the employee record and access to the employee, which would require a concurrent hire and termination and not a transfer transaction.
- The Cubicle field is on the bottom of the Job Data Tab in PayPath; there is an [EEC knowledge article](#) available on cubicle changes. For cubicle only changes, use DTA/CRS Action/Reason.

The screenshot displays the PayPath interface. The top section is titled "Earnings Distribution" and contains a table with the following data:

*Earnings Code	Comp Rate	Distribution %
1 ERT ERIT-Regular	0	20.000
2 REG Regular Pay		80.000

Below this is the "UC Job Data" section, which includes several fields: ERIT/Phased Retirement End Dt, Probation Code (set to None), Location Use End Date, Location Use Type, Trial Employment End Date, PY Career Duration, Probation End Date, and a "Cubicle" field. The "Cubicle" field is highlighted with a red rectangular box. At the bottom of the section is a "Job Data Comments" text area.

Did You Know...?

The [Benefits Resources page](#) was updated with added 2023 benefits billing calendars: de-enrollment and processing. Access the content by navigating to UCPATH > Quicklinks > Benefits Resources > section Location Users – Administrators > [Benefits Billing Calendars](#)

Did You Also Know...?

Employees can generate their own verification of employment (VOE) documents directly from UCPATH > Income and Taxes > Verification of Employment > Generate Summary Report

Instructions on the page explain how verifiers (such as banks, employers or leasing agents) can verify employment using UC's third-party partner, [The Work Number](#).

- Refer to [UCnet](#) for more details.
- Beginning April 28, students will also use the same VOE process and work number. There will be a process for them to opt out if they want to.

Virtual Drop-In Center Hours

The virtual drop-in center for transactors is available Monday through Friday from 10 a.m. to 12 p.m. via Zoom. You can join any time during these hours for answers to UCPATH questions. We are here to help.

- Zoom link: <https://zoom.us/j/8519035805>
- One tap mobile: +16699006833,,8519035805#

Tuesday Training Tips Call-In Sessions

All transactional users are invited to attend our bi-weekly Tuesday Training Tips call-in sessions on timely topics and lessons learned. Topics are published on [our website](#) the day before the meeting, and an agenda is emailed to transactors beforehand. Join us for sessions on 5/2, 5/16, and 5/30.

- The Zoom # for these sessions will be: <https://zoom.us/j/6485693025>
- One tap mobile:+16699006833,,6485693025#

Subscribe to Keep Informed

If you or someone you know is a transactor who does not already receive this Transactor Digest or other UCPATH Alert emails, [subscribe](#) to our digital mailing list to receive all updates.

Thank You!

UCI Division of Finance and Administration | With U • For U

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Questions? Email ucpath@uci.edu