UCI UCPath
Transactor Digest

July 26, 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.

Thank You, Transactors!

Colleagues, we appreciate all the work that you do to support UCPath. Thank you!

Graduate Student Hiring

Departments should take the opportunity to review their graduate student employment data and note the following reminders:

- Confirm all Spring Quarter jobs have terminated to avoid possible overpayments.
- Short Work Break (SWB) assignments have been added. Reinstatement is required to put them on SWB and follows the Data Change deadline.
- Review summer hire requests to assure graduate students do not miss pay.

See the Payroll Processing Calendar for data entry deadlines.

Hire Template Reminders

- **Please do not use special characters when entering a Lived or Legal Name in template-based hires.** There are currently problems with special characters that impact search. As a result of the special character, individuals may not appear in Person Organization Summary. UCPath has shared that this is a defect but are still working on a solution. Until there is a solution, please do not use special characters.

- If there is a need to process a termination for a person who did not start working, please manually remove the date shown in the last date worked field.

- When a transaction is denied by UCPC, a notification is routed to the UCI submitter and usually includes comments explaining why the entry was denied. Often the comments also include helpful details on how to correct the transaction. Please review those comments thoroughly before redoing the transaction. Reach out to your Point of Contact (POC) or UCI Drop-In Center if questions remain.

Approver Training Videos

If you are an Approver and haven't yet reviewed the UCPath Approver Training Series videos, we encourage you to view them now. These three videos (three lessons) are available on the ucpath.uci.edu website under Training Presentations (yellow button) > UCPath Approval Training Series.

UCPath Job Aids Updates

New UCPath Help Site Folder – Academic
Under this new header, the Location Support for Academic Personnel folder is a collection of job aids that focus on actions for academic employees. Currently the folder provides job aids for managing transactions in UCPath for academic student employees, steps for how to enter the averaged FTE for Unit 18 (IX) appointments, new guidelines with best practices for academic job end dates, and job setup for GSR Fellows and Trainees.

Workforce Administration Changes

PayPath Transactions: There are updated matrixes and a newly added matrix for *Summer Session Teaching: Graduate Student Employee in Summer Session (BX)* in the [Summer Salary Processing job aid](#) on the UCPath help site.

Benefit Eligibility & Triggers Job Aid

Recently Updated:

- Location users will find information outlining the key fields that determine if an employee is eligible for benefits and which benefit package they are eligible for. The job aid is helpful in troubleshooting employee benefit issues and understanding what areas of an employee's record trigger benefit eligibility changes.
- To find the updated job aid, navigate to: Help/FAQ > Location Users > Benefits > Location Support for Benefits > [Job Aid: Benefit Eligibility & Triggers](#)

Training and Reminders

Lived Name Training (Required)

There are two courses for Lived Name training; which one you take depends on your role. Please complete the training if you haven't already done so.

1. **Individuals with inquiry-only role:**
   Please register and review the mandatory UCPath Lived Name inquiry video training in UCLC. This six-minute video summarizes the changes in UCPath that resulted from the Lived Name Policy implementation and presents some new methods for searching for employees. [Please register via UCLC](#) for this e-learning. Search **UCPath Lived Name Inquiry** for the course. Be sure to watch to the end and when you close the training window; it should record that you have passed and will receive credit for the course.

2. **Individuals with access to Legal Name in UCPath as an initiator or approver:** For individuals with access to Legal Name in UCPath as an initiator or approver, Lived Name training is required. An hour-long, e-learning version of training is now available in UCLC that can be taken to satisfy this required training. Search for **UCPath Lived Name Training (ILT Recording)**. If you no longer need a UCPath initiator or approver role, please contact your supervisor to request that it be removed via KSAMS.

Reminder: UCLC takes approx. 24 hours to register completion of a course.

Transactor Web Page Redesign Project

The UCI UCPath team is working on making improvements to the UCI UCPath transactor web page to make it more user friendly and easier to find effective tools and resources for UCI transactors. Stay tuned for more information on when these updates will be published.

Tuesday Training Tips Archives

Tuesday Training Tips virtual sessions are held bi-weekly via Zoom. These 60-minute sessions cover current topics relevant to transactors and provide an opportunity to ask questions to the UCI UCPath team on any topic.

If you can't attend a session, you can access an archive of recordings and PPT presentations on the transactor page of the ucpath.uci.edu website, under Latest Information > Tuesday Training Tips – Presentations & Recordings. Each session is listed by date, with topics covered in each session by the date(s) for easy topical reference.

Processing Mass PayPath Transactions

If you need to process a Mass PayPath transaction, please open an EEC ticket. UCPath> UCPath Mass Transactions Request > Transaction Type (PayPath)

The HRIS team will provide instructions for the template, and for uploading and processing. Departments cannot process these without working with the EEC team.

Did You Know...?

An invalid or missing social security number can impact an employee's health, welfare, and retirement benefits. Please ensure that all social security numbers are entered correctly, either at time of hire or by employee in case of a delayed SSN # being obtained.

- Employees can make updates in Employee Self Service by navigating to **Employee Actions > Personal Information > Personal Information Summary**.
- Once the change is made and submitted, UCPath will validate the update and validate the employee's legal name, date of birth and social security number with the Social Security Administration. This process can take 2-3 business days.
- Employees will receive an approved or denied email notification at their primary email address. If denied, the email will explain the reason. The employee should then validate the number or contact the Social Security Administration for assistance.

Review the user guide for more details. [UCPath > Help/FAQ > Self Service users > PHCMPOR110: Employee Actions: Personal Information > Update My Social Security Number (SSN)](#)

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 upcoming sessions on 8/8, 8/22, and 9/5.

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

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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 UCPath
Questions? Email ucpath@uci.edu