UCI UCPath
Transactor Digest

February 28, 2024

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.

UCPath Online Unavailable March 8 - 11

Please note the following important UCPath information for March:

- UCPath will be unavailable from Friday, March 8 at 12 p.m. to Monday, March 11 at 6 a.m. due to system upgrades / March cutovers.
- All pending AWE transactions requiring UCPath processing need to be approved by Thursday, March 7 at 3 p.m.
- Only PayPath transactions that can be approved before noon Friday March 8 can be entered after 3 p.m. March 7.
- Ask UCPath will be unavailable on Saturday, March 9, from 2 p.m. to 4 p.m.

New UCPC Case Submission Process (Ask UCPath Enhancements)

Beginning March 11, the "Ask UCPath" case submission process on UCPath online will be changing for employees. With the enhancements, employees will enjoy a simplified experience that makes the inquiry process easier and more user-friendly.

- The new experience eliminates the need to select a topic and category.
- When an employee submits an inquiry through Ask UCPath, the system will automatically determine the topic, category, and subcategory based on the information in the inquiry.
- The updates landing page displays both open and recently closed cases, providing employees with easier access to their inquiries.
- UCPath will suggest available resources to aid in answering a question or resolving an issue; if those do not answer the question, the employee can then click to submit an inquiry.
- The system will ask the employee to confirm the best contact phone number and email, and to upload any related files.
- The system will then open a case and route it to the appropriate team. The case number will be displayed to the employee, with an option to request an appointment. The employee will also receive an email with the case number.

Resources:
- [Ask UCPath Enhancements](#) (includes information on reopen case coming in April)
- [Ask UCPath Infograph](#)

Manage Job Updates and Other Changes in March Deployment

Manage Job Updates

As part of the March UCPath changes there will be additional enhancements to Manage Job transactions. This is the second phase of a multi-phased project.

- UC Irvine will roll out these changes to a pilot group with representation from several of the Divisions on Campus, COHS, and the Medical Center.

- This new functionality allows for approvals like we have for PayPath and adds some transactions currently done in Templates.
- Some limitations remain in this version, as it does not allow for retro transactions and is limited to Job transactions only.
- PayPath and Template Transactions continue unchanged.
- We will use this pilot group to learn more about the new functionality, how it can be best used at UC Irvine, and to determine when we want to make this more broadly available.

We encourage you to continue exploring the Manage Job tile as it is available as View only to those not participating in the pilot and will help everyone prepare for future changes.

- Manage Job shows current and historical employment data. This information can assist in researching employment activities.
- There are tabs that display employee information. Each tab can be opened separately, or you can use the "Expand All" option to open all the tabs at once.
- This can be used in the same way that you use Job Data and Workforce Job Summary information.
- There is a job aid to help you familiarize yourself with this tile. Beginning February 6, we are covering the Manage Job Data in our bi-weekly Tuesday Training Tips virtual sessions; you can view the presentation and recording on ucpath.uci.edu under Common Resources > Tues. Training Tips Archives > February 2024 >> 2/6 and 2/20 Recording (and / or Presentation)

Other Changes Being Deployed in March
- Annual UCPath upgrade to the latest version of PeopleSoft
- Automation of process of reinstating voluntary disability plans for employees returning from leave of absence. This reduces the manual work and errors in employee premium calculations and in reinstating plans after leaves.

Spring Quarter Reminders

Spring 2024 Graduate Division Deadlines

- Friday, March 1: Deadline to input student positions into UCPath. This does not ensure that fee credits will be available to the student accounts prior to the fee payment deadline if there are student academic issues or fund errors. Please note: Earlier deadlines are necessary due to the UCPath approval / workflow process.
- If a student becomes academically ineligible for employment or fellowship support after they have already been appointed (i.e., due to final grades posted after the position deadline for each quarter), exception requests must be submitted to the Graduate Division no later than 5 p.m. Monday of the third week of the position quarter.
- Other exceptions for employment or fellowship for each quarter should be submitted on or before 5 p.m. on Mondays to ensure that exceptions are reviewed for that week.

Spring 2024 Payroll Processing Reminders

- *Employee Data Change:*
  Bi-Weekly: 4/11/24
  Monthly: 4/18/24
- *PayPath / Position Management:*
  Bi-Weekly: 4/16/24
  Monthly: 4/23/24

New Year UCPath Data Review

As we begin the new year and new quarter, take the opportunity to review your employee data in UCPath. This may help to avoid overpayments, missed pay, or funding errors. Remember to log-in to VPN to access Cognos. Cognos reports, available in Zot!Portal > Decision Support:

- Employee Roster Report
- Job Distribution (Funding by person)
- Position Fund Auditing (Funding by position)

Examples: Hire Dates / End Dates, FTE, Comp Rate, Location / Cubicle, Multi-headcount, and Pay Frequency.

- Go to the UCPath Report "Quick Guide" to view the description of available reports.

- Develop a process of reviewing employee data on regular intervals and reviewing payroll expenses.
- Early identification of errors in employee information is important in avoiding outcomes that may cause a hardship to our employees.

Top Three Things To Remember About DRs and SCTs

The top three things to remember regarding Direct Retros (DRs) and Salary Cost Transfers (SCTs) are here in the form of frequently asked questions and answers:

1. *Question:* How to find my DR or SCT when I've started it (Initiated) but did not submit?
   Answer: Use the **Review Retro Distribution** menu option for a DR and the **Review Salary Cost**.

2. *Question:* How do I know if I should process an SCT or DR?
   Answer: Always start with SCT and if a DR is needed, the SCT will have a link that says **SCT Eligible for Old Tool**.

3. *Question:* Can I get help with my first SCT in the new tool?
   Answer: Yes. There are job aids and UPKs available that can be accessed from a link on the UCI UCPath Transactor website under the Funding & General Ledger > Salary Cost Transfer. Assess and review those tools first. If additional help is needed, work with your Finance POC or open an EEC ticket to UCPath Finance & Accounting.

GL/SCT/DR Processing Schedules

View the General Ledger (GL), Salary Cost Transfer (SCT) and Direct Retro (DR) schedules on the transactor page on the UCI UCPath website under Funding and General Ledger (GL) > Calendars. The DR schedule is included in the SCT schedule.

2024 Printable Payroll Calendars Available

Bi-weekly and monthly payroll calendars for 2024 are available on the UCI UCPath transactor website under Payroll Management > Additional Resources > bi-weekly and monthly payroll calendar.

Retro Pay

What is the difference between Missed Pay and Retro Pay?
- Missed Pay = Hours or earnings that were due but not previously paid to the employee.
- Retro Pay = Income owed to an employee. It's the difference between the rate an employee should have been paid and the rate the employee was paid on a previous pay period.

Retro Pay Module
Navigation: UCPath Dashboard > Quicklinks > Payroll Resources is the Retro Pay Matrix. This guide will assist transactors in determining if the Retro Module will process the pay due or if a Payroll Request transaction is required. It is also available on the UCI UCPath transactor website under the Payroll Management section. Access the **Retro Pay Scenarios** tab in the Retro Pay Matrix (Excel Spreadsheet) to view Retro pay examples and how they will be paid. Note: E-078=Payroll Requests.

IMPORTANT: Departments should review all Retro payouts to ensure accuracy. If you need assistance with adjusting an incorrect retro payout, please submit an EEC ticket to alert a Payroll team member.

Training Material Updates

The training team at UCPC continues to update training materials with new navigation, name formats, and/or searching functionality. Recent updates include:

- Absence Mgmt: Extended Leaves training (PHCABML200) and location support for absence management.

- Workforce Administration: Employee Data Inquiry, Template transactions Parts 1 and 2, Experience Based.

Did You Know … ?

- Employees can generate their own verification of employment documents directly from UCPath > Income and Taxes > Verification of Employment > Generate Summary Report
- Employees who've opted out should refer verifiers (such as banks, employers or leasing agents) to UCPath to complete employment and income verifications (phone: 855-982-7284 or email: ucpath@universityofcalifornia.edu)
- Refer to UCnet for more details

Tuesday Training Tips Call-In Sessions

All transactors are invited to attend our bi-weekly Tuesday Training Tips call-in sessions on timely topics and lessons learned. Topics are published on the UCI UCPath transactor website the day before the meeting, and an agenda is emailed to transactors beforehand. Join us for sessions on March 5, March 19, and April 2.

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

Find Resources on the Transactor Web Page

Visit the UCI UCPath transactor web page often for resources such as pay cycle clocks and transaction deadlines, latest information, support documents, job aids, training schedules, UCPath system access (security) information, processing schedules, and more.

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