

# UCI UCPath

## Transactor Digest

June 20, 2024

*A source of updates and information for UCI UCPath Transactional Users*

Visit the transactional user page on the [ucpath.uci.edu](https://ucpath.uci.edu) website for UCPath support documents, FAQs, and more.

## Retirement Processing Reminders

Please review the following job aids for Retirement and Emeriti:

- **Job Aid:** [Emeriti Processing Following Retirement](#)
- **Job Aid:** [Retirement Transaction Process for July 1 Retirement - COLA](#)

Please note, to be eligible for COLA, use the effective date of 6/28/24 and last day worked of 6/27/24 or earlier – this provides 6/28 as the day off pay status.



## Job End Dates

Expected Job End Dates need to be reviewed and adjusted as appropriate to avoid unplanned terminations. Utilize the [Job Ending Dashboard](#) to monitor jobs ending in June to determine if they need to be extended.

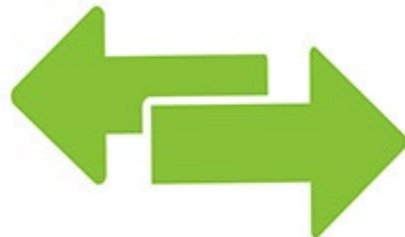
## Fiscal Year-End Reminders

Please note these important fiscal year-end dates and reminders:

Action	Date/Time
Funding entry freeze and rollover	6/21 – 6/27
Last date to approve Direct Retros for 2024	7/4 by 5 p.m.
Last date to approve Salary Cost Transfers.	7/7 by 8 p.m.
DRs and SCTs in an Initiated status need to be either finalized and submitted or cancelled before year end.	
Clear expenses posted to BF10002	6/20 at noon

## Salary Cost Transfer Reminders

- Always start with SCT and the system will alert you if it needs to be done via Direct Retro. Note DRs and SCTs have different approval deadlines; please use [calendars](#) to determine approval due dates.
- High risk SCTs highlight the rows that are high risk in red to draw attention for approvers; this does not indicate an error.
- Work Study DRs and SCTs should not be bundled. Submit one paycheck per transaction.
- Work study DRs or SCTs cannot be processed for any past academic year. Do not wait till deadlines to process Work study, as they have more behind the scenes steps that are required to be done before fiscal close.
- Review Job Aids and UPKs in UCPATH for more details and help.



## Budget Distribution Page Updates

Budget Distribution page must be updated when:

- New positions are created for permanently budgeted positions.
- Permanently budgeted positions are vacated.

## New Team Members at UCI UCPATH



### Welcome, Jesse Madrigal

Jesse Madrigal is a new Business Analyst with the UCI UCPATH team, responsible for administering UCPATH Roadmap projects, testing new system updates, providing technical expertise in evaluating and defining complex systems, and helping to standardize UCPATH system and local business process requirements. He has worked for the University of California for seven years, including four and a half years at the UCPATH Center, and recently worked for UC Irvine's School of the Arts in the Dean's office. He is a California Baptist University alumnus, and enjoys traveling, learning how to play the guitar, and going on hikes with his two dogs.



### Welcome, Sylvia Jeung

Please join us in welcoming Sylvia Jeung to the UCI UCPATH GL team as a Senior Business Analyst. Sylvia comes to us from UC San Diego, where she led the financial side of UCPATH for the past six years from system implementation to ongoing operations. She's excited to bring that knowledge to UC Irvine where she will manage UCPATH-related projects and support existing processes, specializing in general ledger and commitment accounting. She earned a BS in Electrical Engineering and an MBA from San Diego State University. In her spare time, she enjoys being a ski patroller in Big Bear in the winter and playing beach volleyball the rest of the year.

## Check Your Junk Mail for UCI UCPATH Emails

Please check your junk/spam mail or Outlook rules folders for UCI UCPATH emails. Since the UCI UCPATH team changed the email distribution method to ZotMail, we have discovered that some people have Outlook Rules or settings that reroute ZotMail-delivered emails to a spam folder or other folder. If you would like to keep receiving UCI UCPATH emails, such as the Transactor Digest, bi-weekly Training Tips Agenda emails, and alert emails, please readjust settings and rules to allow for ZotMail emails.



## Review Information for GSR/TA for Summer

Please note the following information for GSR/TAs for the summer.

### Employee Data Review

Review employment data for the graduate student population to ensure that:

- **Appointment End Dates** are entered and correct to avoid overpayments and missed pay.
- Employees who are returning in the Fall can be placed on **Short Work Break (SWB)**. SWB can be entered individually using **PayPath**. The Effective Date of your transaction is the start date of the SWB. The transaction will require an Expected Return Date to be entered.
- **Summer employment** is entered as applicable. Please review the Payroll Processing deadlines for MO pay period to ensure on time salary payments.

### Resources for SWB Processing

Find general information on the UCI UCPath website under PayPath and Terminations. These other resources will help with processing.

- [Short Work Break Matrix](#)
- [Short Work Break Matix for U18](#)
- [How to Process a SWB](#)



### Review Employee Data

Cognos Reports:

- [Employee Rosters Report](#)
- [Job Distribution Report](#)

## Summer Salary Information on UCI UCPath Website

The following Summer Salary resource materials have been added to the [UCI UCPath transactor website](#):

### Summer Salary 2024 Recording and Presentation

Find the recording and PowerPoint presentation of Summer Salary 2024 information in the following areas of the [website](#):

Training > Learning Library > [Summer Salary 2024 – Presentation](#)

Training > Learning Library > [Summer Salary 2024 – Recording](#)

Training > Reference Materials > [Training Presentations and Videos](#) > Training Videos > [Summer Salary 2024 – Recording](#)

Training > Reference Materials > [Training Presentations and Videos](#) > Training Presentations > [Summer Salary 2024 – Presentation](#)

### Late Summer Salary Entry Job Aid (New)

A new job aid has been added to the [UCI UCPATH transactor website](#) in the Position Management & Hiring section. Go to Position Management & Hiring (New, Rehire, Concurrent) > Academic > [Late Summer Salary Entry Job Aid](#). This is to provide direction on how to enter Summer Salary after the fact, such as entering in Sept. for July Summer Salary. The [Summer Salary Processing Job Aid](#) is also in this area.

## Metrics for UC Irvine Campus and UCI Medical Center

### Template Transaction Processing (May 2024)

Smart HR Hires	1,085
Smart HR Other (Terminations, Transfers, etc.)	915
Transactions Canceled	109
Average UCPATH Processing Time	.4 of a Day

### Off-Cycle Processing (May 2024)

Transaction Volume	289
UCPATH Turnaround Time	6.2 Days

## Find Help & Resources: Transactor Support Web Page

UC Irvine's UCPATH transactors have a dedicated web page with information on how to find local and systemwide help and resources regarding transactions, opening cases, staying up to date on the latest information, and accessing frequently used forms and knowledge resources. To access this page:

- Go to UC Irvine's [UCPATH transactor Web Page](#) (login / DUO required for access).
- Click on the Get Help / Support Resources icon.



- Click on subject boxes to display information or to access additional links. Documents will open in a separate browser window.

## 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 June 25, July 9, and July 23.

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



## Discover 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.

## Subscribe to Keep Informed

If you or someone you know is a transactor who does not already receive our emails, please [SUBSCRIBE](#) to receive the monthly Transactor Digest and other UCI UCPath emails.

### *Submit Ideas for Future Newsletters*

*Interested in a UCPath transactor topic? Let us know your topic for a future edition.*

*Send an email to [ucpath@uci.edu](mailto:ucpath@uci.edu)*

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Questions? Email [ucpath@uci.edu](mailto:ucpath@uci.edu)