UCI UCPath
Transactor Digest

July 19, 2022

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.

Changes Coming to UCPath: Lived Name and Improved Navigation Projects

Some changes are planned for UCPath this fall and are scheduled to deploy October 22. Stay tuned for more information on these two upcoming changes to UCPath.

Improved Navigation (Fluid)
This project is intended to make finding transactions easier and reduce clicks by adjusting how transactors navigate to transactions. It will not change any transactions – just how you navigate. Traditional navigation that we have today will still be available in a new location. The UCI UCPath training team will create a video to demonstrate the new functionality.

Gender Recognition and Lived Name (GRLN)
The GRLN ("Lived Name") project will introduce some changes in what name you see in certain areas within UCPath, and in how you search for a name in UCPath. These changes support UCOP's Gender Recognition and Lived Name Policy. Changes for transactors will include the following:

- Many transactions and fields in UCPath will only display the 'lived' name – the legal name display will be limited.
- Going forward, Employee ID will be the most reliable way to search for an employee to process transactions.
- Person Org will display only the lived name; Person Search will display the legal name.
- Modify a Person can be used for other ways to confirm that the correct employee ID is being used.
- Training on how to find and search for information to complete transactions will be available via e-learning and Zoom in September.

Please refer to UCI's Gender Affirmation Glossary for Lived Name, Legal Name, and other related terms related to being an affirmative and supportive campus for all, and to the GRLN Policy Implementation page to learn more about UCI's implementation of this policy. Questions regarding transactional-related changes related to this policy, will be addressed in upcoming training, or please email ucpath@uci.edu.

Converting UCPath Bookmarks to Favorites

Due to some of the changes UCPath will be making in October, Bookmarks in UCPath for transactors will not convert to the updated UCPath – but Favorites will convert. Any bookmarks for non-PeopleSoft areas, including Employee Self Service, Manager Self Service, forms, or Quicklinks will be retained.

Our recommendation is to begin converting current bookmarks to Favorites so they will be there at conversion using this process:

- Open bookmarked item
- Click on 'new window' – it opens the same page in native PeopleSoft
- Click on 'Favorites' in the upper left-hand corner
- Add to Favorites

UCPath Update: Position and Job Data Update Form

UCPath recently combined the Job Data Update form and Position Update form into one consolidated form. The newly created Position & Job Data Update form includes all applicable position and job data fields needed for correction requests. UCPath will

discontinue previous versions of the forms and will no longer accept them after August 31, 2022. Please note the following:

- Effective immediately, begin using the newly created Position and Job Data Update form located in the UCPath online forms library.
- To locate the Position and Job Date Update form in UCPath, click the following options: Forms Library > Human Resources > Position & Job Update
- To request a correction to an employee's position or job data record, complete the Position & Job Data Update form, and then submit the form by logging in to UCPath and clicking on "Ask UCPath." Use the following options when creating your inquiry:
    - **Topic**: Select "Workforce Administration
    - **Category**: Select "Submit Form – Workforce Administration"

Additional Resources:
[Position & Job Update Form](#)

Q3 GL Calendar Now Available

The Q3 GL calendar is now available on the UCI UCPath website's [Transactional User page](#) under UCPath Support Documents > GL and Finance > GL Calendar.

Topic Listings on Tuesday Training Tips & Presentation Archives

After each bi-weekly, virtual Tuesday Training Tips session, the PPT presentation and recording are listed [on our website](#) under Latest Information > Tuesday Training Tips – Presentations & Recordings for your reference. We have now included the topics covered in each session on this list of archived sessions so you can more easily find the topics you want to know more about.

New Hire Training - Next Sessions in November

Virtual, instructor-led new hire training will be offered in November. New transactors hired between now and then should view the recorded training sessions for their role via the [UCLC](#). Completion of training will be monitored for system access. If the new hire cannot find the desired course in UCLC or encounters an error, please view the recorded session on our [UCI UCPath site](#) > Access Transactional User Materials > Training

Presentations.

If there are immediate training needs or if your division has questions, please reach out to Debbie Kistler (dkistler@uci.edu) or Angel Rivera (arriver2@uci.edu).

Off Cycle Requirements and Reminders

Process Overview: Off-Cycle Pay Process
Below is a list of items that may be accepted for off-cycle processing:

- Time not submitted due to department oversight
- Hire transaction not entered into UCPath before deadlines
- Employee (hourly or salary) missing significant portion of regular pay
- Final pay for:
    - Represented employees (voluntary or involuntary terminations
    - Non-represented employees (involuntary terminations)
- Situations requiring expedited payments due to:
    - Adherence to legal contract or agreement
    - Financial hardship

Below is a list of items that will not be accepted for off-cycle processing after stabilization:

- Refunds for local deductions
- Retroactive pay owed to an employee due to:
    - Promotion
    - Mass wage increase
    - Lump sum payments

Off-Cycle Payroll Requests
Many off-cycle requests are using the code "financial hardship." Financial Hardship off-cycle requests should be for missing part or all of normal pay. This does not apply to things such as Star awards or additional pay; those should be processed through PayPath or one-time additional pay and will be processed on next on-cycle pay. If there is a reason that requires it to be processed off-cycle, that needs to be documented in the comments. Payroll will not be approving off-cycle requests that don't meet the criteria.

Off-Cycle Reminders

- There is no need to open an EEC ticket to tell Payroll an off-cycle request has been submitted; an EEC ticket adds extra work for everyone.
- The payroll team checks the off-cycle worklist at least once per hour and reviews/approves; they are mindful of the 2:00 deadline.
- Once approved by payroll, it will be available on off-cycle dashboard soon after for additional monitoring
- Overpayments and payroll requests that are not being treated as off-cycle will not be updated on the dashboard.

Reminder: The Status of Smart HR Transactions Can be Viewed in UCPath

The status of Smart HR transactions can be viewed in UCPath: UCPath > Main Menu > UC Customizations > UC Extensions > SS Smart HR Transactions. Please note:

- "Denied" status indicates the transaction was not approved by your location approver(s).
- "Cancel" status indicates the transaction was approved at the location but canceled by UCPath.
- The cancellation reason can be seen in "View comments".
- Templates can be cloned, updated as appropriate, and then resubmitted.

UCPath Notice: Phone Service Transition

UCPath began the first phase of its transition to a new phone system provider, Talkdesk, on July 13, 2022. When employees call UCPath, they will now experience the following new changes:

- Callers will enter the first initial of their last name for authentication purposes, in addition to the previously required entries (last four digits of their social security number and date of birth).
- Callers may leave a voicemail while waiting to speak with an agent when the "call back" feature is not available.
- Callers will hear the average estimated wait time while waiting to speak with an agent.

Additional notices will be shared as new Talkdesk features are released.

Upcoming Training and Resources

Grad Student Appointments
Virtual workshop to review the Fall hiring process
Date: August 2 | Time: 1 – 2:30 p.m.
Location: Zoom

GRLN Task Force
The UCI UCPath team has joined the GRLN (Gender Recognition and Lived Name) Task Force for the Lived Name project. Stay tuned for updates, training, and resources.

UCI UCPath Transactor Page
Remember to visit our UCI UCPath website for access to transactor resources and guides to assist you in successfully navigating through UCPath. Our website has links to job aids, training presentations and recordings, system notifications, transaction deadlines, and links to related websites such as the Employee Experience Center.

Continuous Improvement Efforts and Accomplishments

The UCI UCPath team is continually seeking ways to improve systems and processes for transactors. Below is an overview of recent efforts and accomplishments.

Leave of Absence (LOA): Completed additional training resources.
Training Tips | POC (Points of Contact)

Finance Workshops: Completed first two pilot workshops with the Merage School of Business and School of Information and Computer Sciences on Finance interfaces between UCPath and KFS. We are currently working with the Executive Management team. If your school is interested in a workshop on Finance interfaces between UCPath and KFS, please contact us at ucpath@uci.edu.

UCI UCPath GL Support Process Improvement: As part of DFA's Lean Six Sigma (LSS) Yellow Belt program to apply LSS tools and principles to real projects, Andrea Garrison, Nasser Kahn, Peter Stacholy, Venkata Vadrevu, Oscar Amezcua, and Phillip Nguyen are spearheading a project to improve the GL support experience for transactors

and support staff. The objective is to significantly reduce the resolution time of issues and the number of service requests by:

- Educating UCI UCPath transactors and EEC (Employee Experience Center) support staff on how payroll expense data flows within UCPath and other systems so they understand who to reach out to for assistance
- Enhancing the EEC Knowledge Base around the GL area to reduce number of service requests and improve resolution time

Implementing this process improvement initiative will enable UCPath transactors to more efficiently complete and reconcile transactions, meet deadlines, and enhance accurate financial reporting. The team will launch the project in July 2022 with an anticipated completion date by December 2023.

Call-In Center Hours

The virtual call-in center is available Monday–Friday from 10 a.m.–12 noon via Zoom. Call in any time during these hours for questions about transactions in UCPath.

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

Did You Know…?

Only one case should be submitted for an employee, even if the employee has multiple issues. If separate cases are submitted, the cases will likely route to different case owners, causing duplicate efforts.

Subscribe to Keep Informed

If you or someone you know is a transactor who doesn't already receive this e-digest or other UCPath Alert emails, click to subscribe to our digital mailing list to receive all updates.

Thank You!

UCI UCPath
Questions? Email ucpath@uci.edu