UCI UCPath
Transactor Digest

February 22, 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.

W-2 and Former Employee Access

W-2s are now available in UCPath. Questions or adjustments to a W-2 requires a UCPC case to be opened. If a former employee needs access, please note the following:

- Former employees need a non-UC email address to be in UCPath in order to log into the former employee portion of UCPath and receive a W-2.
- If the former employee doesn't have a non-UC email address in UCPath, an email can be entered via a Data Change transaction on a template transaction.
- After the former employee's non-UC email address is in UCPath, ask the former employee to register for an account using that email with this link.
- Ensure that the former employee signs in choosing the bottom option: Former Employee (not UCI).

Who Processes Transactions for Graduate Student Researchers (GSR)?

Students sometimes work in different departments/schools from the one in which they study. The department with the funding should create a position to hire someone. Once the position is created, only the department that was entered in the creation of the position has access to the position number.

- The organization that owns the position should be able to hire and add the funding for that position.
- If there is a Principal Investigator (PI) in your school asking to hire a student and they have the funding approved, then the department with the funding should be able to create the position, hire the GSR, and create the funding transaction.
- If you are unsure, check with your CPO or MAABO.
- COHS departments utilize the EEC onboarding ticket to hire employees after they have created the position and added the funding.
- For other Academic hires, the department that will be assessing the performance for the employee should do the hiring and entering in UCPath.

Work Location/Phone in UCPath (AB119 Requirement)

With the addition of Graduate Student Researchers to the list of those that require certain employee data to be provided to unions, the due date for updating UCPath with missing work location and work phone information has been extended to March 17, 2023.

As departments are updating the cubicle information, a PayPath issue has been discovered that cubicle data is not saving in some cases. While this has been reported to UCPath Center, a workaround is available. Please check with your department's UCPath Point of Contact (POC) or Chief Personnel Officer (CPO) for details on a workaround. Additionally, local HR needs to make sure our DDCs (Dept. Directory

Coordinators) are also kept in the loop about AB-119 project. DDCs are responsible for entering work phone numbers into UCI directory.

Thank You – Survey Results

Thank you to those who completed the web page redesign survey. We will use the feedback to improve content and navigation on the [transactional user's web pag](#)e of the [ucpath.uci.edu](#) website so you have relevant tools and resources. Stay tuned for future web page improvements.

Retroactive Earnings Codes

Retroactive earn codes are generally created by the UCPath Center. Please consult with the UCPath Training/Support (Daily drop-in line) or submit an [EEC](#) ticket for retro earnings code guidance.

Looking Ahead – June 2023 Deployments

This year we are working on several big projects, including two launching in June.

- *UCPath Upgrade*
    - This will be primarily behind-the-scenes; small changes will be made in look and labels, but not in functionality
- *Lived Name in UCPath - Changes to implement the GRLN Policy*
    - Fields will be labeled either Legal Name or Name. There is a UCOP requirement that no pages display both a legal name and a lived name.
    - Demos from the UCPath Team to our team are taking place right now.
    - We plan to conduct workshops/training to familiarize transactors with how to search, where the legal name will be, and reminders to **ask for Employee ID.**
    - Begin now to request Employee ID from anyone requesting that a transaction be processed.

o   We will have more information to share next month.

What to Do If an Employee is Missing a Paycheck

If an employee is missing a paycheck, take the following actions:

- If the employee's previous job ended more than 60 days ago, remind them that Direct Deposit account information has ended, so they will need to sign up for Direct Deposit again. This is an issue especially for Graduate students who may have been on Fellowship/CWR last quarter, which is not considered employment.
- Check to see if they got paid using the Dept. paycheck report.
- If the report shows a manual paycheck was issued, confirm that the correct address was in UCPath. Tell them to confirm that the address is correct or if it was recently changed to the correct address.
    - If the address is correct within UCPath, let the employee know that paper checks can take 5-7 days to arrive in the mail.
    - If the address is not correct within UCPath, or the paycheck has not been received after 7 days, ask the employee to open a case in UCPC with Topic: Payroll, Category: Paycheck, Subject: Missing Paycheck. Tell them to include in the description the request to issue a stop payment and reissue a check.

PayPath Reminders and Retroactive Effective Dates

The February 7 Tuesday Training Tips session covered many current topics, including PayPath reminders and retroactive effective dates. Transactors should carefully analyze the need for a retroactive effective date to ensure the employee will be paid correctly, so the team presented several steps to consider. They also covered resources and nuances to PayPath that should be considered when processing transactions that require 'inserting' data between existing rows of information.

To learn about this information, view the 2/7/23 Training Tips Presentation or Recording on

the Transactional User's web page of the ucpath.uci.edu website, under Latest Information > Tuesday Training Tips – Presentations & Recordings.

Did You Know...?

Out-of-state income tax withholding requests can be processed online through self-service.

- The Out-of-State Income Tax Withholding eForm is available in UCPath (*UCPath > Forms Library > Access Form > Payroll > Out-of-State Income Withholding).*
- For step-by-step instructions view the job aid Update My Out-of-State Tax Withholding.

Did You Also Know...?

- You can now access updated UCPath Workforce Administration training material to use when creating a position. The new job aid **Special Training Codes** provides a list of special training codes, code definitions, and compliance program owners. The job aid can be found using this link Job Aid – Special Training Codes.
- 2023 new hire benefits orientation information is available on UCNet. Click UCPath Benefits Webinars for upcoming live sessions and recorded webinars, which include closed captions.

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 our transactor distribution list. Join us for sessions on 3/7, 3/21, and 4/4.

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

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Thank You!