UCI UCPath
Transactor Digest

October 25, 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.

November Release Key Dates

Action Required for November Release Go-Live

Note: The UCPath system will NOT be down during this deployment except for General Ledger (GL) transactions.

The upcoming transition to the new Salary Cost Transfer (SCT) tool and decimal precision change requires initiators and approvers of direct retros and funding entries to adhere to the following deadlines to prevent their transactions from being canceled:

- All direct retros and funding entry transactions (including high-risk) must be approved by **Friday, November 3 at 5 p.m**. Transactions that are not approved by this time will be canceled by the UCPath Center and will have to be re-entered when the General Ledger (GL) modules come back up on Monday, November 13.

- Key dates to consider:

o   November 6 - 12: Funding, Direct Retro, and Budget transactions will be unavailable for viewing, submitting, or approving.

o   Monday, November 13: New functionality will be live.

Review **key SCT deployment activities and dates** from now through December 2023 to ensure Direct Retro and Funding entries are reviewed and approved on time.

New SCT Virtual Training - Register Now

The goal of the Salary Cost Transfer (SCT) Redesign project, set to go live on November 13, is to simplify the SCT tool to improve UC business requirements and reduce the complexity when processing SCT transactions.

View the Salary Cost Transfer (SCT) virtual training schedule and important notes, and then register for courses via the UCLC. Training is available from October 23 through December 8.

Processing Work Study

New Hires

If you have a student employee who will be receiving work study funds, but have NOT yet hired them, please follow the steps below:

1.   Create new position and add job details or Update Vacant Position. The Effective Date of position/change should be prior to student's start date.

2.   In the "Specific Information" tab, add a Work Study Program by selecting a value in the Pool ID field.

Removing Work Study from a Vacant Position

If the employee has vacated a Work Study position, the department will need to remove Pool ID, using Position Management:

Update Vacant Position

1.   Enter unique Effective Date (i.e., date position was vacated)

2.   Select the Reason Code

3.   Navigate to "Specific Information" tab

4.   Remove Pool ID value

Adding Work Study via PayPath Actions

When making changes/updates to a filled position you must first identify the Action and Action Reason code.

- For position data changes, the Action is always the same, POS. You only need to complete the Position Change Reason.
- Be sure the Effective Date* of the transaction is on the date in which the student will use their funding. NOTE: This date will impact the use of Direct Retro/Salary Cost Transfers if this is a retroactive transaction.
- Update the **Position Pool** field with the appropriate Work Study funding code that corresponds to the student's assigned Work Study funding program**.**

Removing Work Study via PayPath Actions

The Work Study Pool ID should be removed when a student is still working however the student's funding has been exhausted. This will keep the system from trying to perform the funding split when it is no longer necessary.

- Be sure the **Effective Date** of the transaction is on or after the date in which the student's funding is exhausted.
- Update the **Position Pool** field by *removing* the Work Study **Pool ID** code.

UCI UCPath Transaction Support Updates

Although the Virtual Drop-In Center has been discontinued, there are many options to receive support with transactions and to ask questions, including:

- Contact the Point of Contact in your School/Division. This list is on the UCI UCPath website at UCPath.uci.edu > Transactor Support > Common Resources > Point of Contact List
- Check for resources on UCI UCPath's transactor website (login required for access)
- Check for resources in UCPath Help (UPKs)
- Open an Employee Experience Center (EEC) ticket with the appropriate team:
    a- Payroll and Time Reporting
    b- Benefits Administration
    c- UCPath Transactor Support
    d- General Ledger (GL) – UCPath Finance and Accounting Inquiry

e - UCPath Report Inquiry

f - UCPath Transaction Security Inquiry

Guidance for EEC Tickets

When opening an Employee Experience Center (EEC) ticket or contacting the EEC with questions about a ticket, please follow these guidelines:

- Provide appropriate level of detail to help the EEC understand the issue, including screen shots and transaction IDs or other supporting documentation.
- For urgent issues, include the word "URGENT" in the beginning of the description.
- Include the employee ID of the person that you are asking about, and the pay period of the issue.
- Include specific details of what you have questions about and what you are trying to accomplish.
- Summarize the key points; lengthy email chains make it challenging to find the critical information.
- If you have already spoken with someone else about the question and they have advised you to open an EEC ticket, please include that information.
- Include any related EEC or UCPC ticket numbers.

UCI Winter Administrative Recess & Winter Holidays

Per the announcement from Ramona Agrela, UCI Vice Chancellor and Chief Human Resources officer, UCI will observe this year's Winter Administrative recess & Winter Holidays based on the following schedule:

- Monday, Dec. 25: Paid Holiday
- Tuesday, Dec. 26: Paid Holiday
- Wednesday, Dec. 27: Vacation / Compensatory / PTO / Leave - no pay
- Thursday, Dec. 28: Vacation / Compensatory / PTO / Leave - no pay
- Friday, Dec. 29: Vacation / Compensatory / PTO / Leave - no pay
- Monday, Jan. 1: Paid Holiday
- Tuesday, Jan. 2: Paid Holiday

Please note that this schedule does not align with the posted [UCOP Holiday](#) or [UCPath Payroll Calendars](#); however, UCI timekeeping systems will correctly track holiday hours per UCI calendar.

Returning from Student Work Break (SWB)

Reminder: For Grad students to receive the appropriate fee remission, their return from SWB must be entered into UCPath as a future dated transaction before the fee remission deadline. For example, if a student is on a SWB and will be returning to active employment effective beginning of the quarter, enter the transaction to return them in UCPath in time to be approved and processed by the fee remission deadline.

NOTE: The fee remission system looks for the **effective date of the return,** does not look at the expected date of return.

2023 Year-End Overpayment Recovery Deadlines

The Internal Revenue Service (IRS) [states](#) that repayment of a payroll overpayment must occur in the same year as the overpayment. This repayment ensures that the employee's earnings and taxes for the current year are correctly reflected in their W-2 issued in January.

Important deadlines:

- Please submit adjustment requests for overpayments occurring from January 1 through November 15, 2023, **by November 17, 2023**. UCPath may not be able to process requests received after November 17, 2023, before year-end.
- Employees must repay the net amount of the overpayment (gross earnings less taxes and deductions) or agree to a repayment schedule **by December 29, 2023**. If payment is not received by December 29, 2023, the employee's W-2 will include the amount overpaid and applicable federal and state withholding taxes.

Tip: Send adjustment requests via the UCPath self-service transaction "Overpayment Adjustment (E-078)" as soon as the overpayment is identified.

What happens if I do not submit adjustments before the end of the year?
Overpayments not corrected before December 29, 2023, will be processed in 2024 as

prior-year overpayments, and the employee will owe unrecoverable taxes.

Location teams or employees holding paychecks for pay that is not due *must return them to UCPath immediately*. Employees may return uncashed checks to UCPath via case submission or U.S. mail, along with a note indicating that the check is related to an overpayment - do not reissue. UCPath will reverse the returned check to ensure that the employee's 2023 W-2 is correct.

Certain Payroll Adjustment Transactions Backlogged

UCPath has notified locations that certain payroll adjustment transactions are backlogged due to vacancies at the UCPC and unanticipated volume. UCPath is working to fill vacancies and reassigning other resources to address the backlog and expects to reduce it by 50% within 90 days. Affected transactions include:

- FICA/retirement adjustments
- Out-of-state adjustments
- Overpayments
- Earn Code reclassifications
- Check reissues

Did You Know...?

The system will automatically terminate an employee's job when the "End Job Automatically" checkbox is selected.

- The system will automatically enter a termination row the night of the expected job end date.
- Benefits will automatically terminate at the end of the month of the job end date.
- Examples:
    - A termination row with an effective date of 10/1 will have benefits terminate on 9/30.
    - A termination row with an effective date of 10/2 will have benefits terminate on 10/31.

- If an employee's job is terminated and subsequently reinstated, benefits will require a manual reinstatement. No case is needed to reinstate benefits. The UCPath team will reinstate the benefits when the job is reinstated.

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 10/31, 11/14, and 11/28.

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

Find Resources on the New 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. A redesigned transactor web page was deployed on September 6, 2023.

Subscribe to Keep Informed

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 updates.

Thank You!