



# UCI UCPATH

## Transactor Digest

**October 20, 2022**

*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, call-in center hours, and more.

## **Q4 Training Courses and Labs**

Sign up for new [Q4 training classes and labs](#) designed for new transactors to meet training requirements or for current transactors to refresh knowledge on important topics. All courses are “live” online on the dates and times noted; register through the [UC Learning Center \(UCLC\)](#). Classes will also be available on demand as e-learning videos via the UCLC. Please [view our training offerings](#) and then visit the [UCLC](#) to search and register for your courses of choice. Search example: “DRD301 Direct Retro”

Our Q4 training courses and labs will cover what you need to know about Navigation and Position Control, Funding Entry, PayPath Actions, Direct Retro, Extended Absence, Payroll Requests, and much more. We invite you to join us for these Q4 courses.

If you have new hires that need to be trained as UCPATH transactors and approvers, please view the [UCPATH System Access \(Security\)](#) section of our website and identify training requirements by role.

## Improved Navigation - Video and Job Aids

Improved navigation changes were deployed Oct. 15 to the UCPATH system to provide a more modern look and feel, as well as to streamline navigation for quicker and easier access. Please [review a short video](#) that provides an overview of these changes. Job aids are also available. For questions, we've expanded our [virtual drop-in center](#) hours Oct. 17 - Oct. 21 from 9 a.m. - Noon and 1:30-2:30 p.m.

- [Watch the improved navigation video.](#)
- [Review improved navigation job aids.](#)
- **Clear your browser cache** before logging into UCPATH.

## Revised UCPATH System Access/Security Web Page

Check out our revised [UCPATH System Access / Security web page](#) to learn how to request UCPATH system access, what security roles are available and how to request them, what training is required, and more.

## UCPATH Phone Service Introduces Virtual Agents

UCPATH recently introduced a virtual agent system to its phone service. The virtual agents will be able to answer some common questions and, over time, be updated to handle a broader range of questions. Employees calling UCPATH will experience the following:

- Callers will authenticate their identity and then be greeted by a virtual agent.
- The virtual agent will be able to answer some common questions regarding W2s, paychecks, vacation and sick accruals, direct deposit, employment verification, and Public Service Loan Forgiveness forms.

- If the virtual agent is unable to answer a caller's question, the caller will be transferred to a customer service agent and will be informed of the average wait time to speak to someone.

## UCPath Notice: Fax Number Change

As of September 30, 2022, UCPath has discontinued fax number 1-951-697-6839. Please send all fax correspondence to the published UCPath toll-free fax number: 1-855-982-2329.

## ACA Webinar Link on Website

The links to the presentation (PPT) and recording of the Affordable Care Act (ACA) Eligibility Refresher Webinar are now on our [UCI UCPath website](#) under *Latest Information*. This webinar covers Health & Welfare eligibility policies regarding Active Employee coverage.

## Transfer Reminders

When transferring an employee to or from UCI or from one job to another within UCI, keep the processes below in mind. Improper processing of transfers may have unwanted downstream impacts which may include accidental/ wrongful termination, missed pay, dropped benefits, and an unhappy employee.

### ***Inter-Location Transfer:***

If an employee is transferring from another location to UCI (or vice versa), or Med Center, create a new Employee Record.

- Hiring Dept submits **UC\_Conc\_Hire(AC) Template** FIRST.
- Terminating Dept submits Vol. Termination template AFTER.

### ***Intra-Location Transfer:***

If an employee changing jobs **within same** Department/School/or part of Promotion = Transfer existing record:

- Use the UC\_Transfer template.
- No Termination template required.

If an employee is transferring from one school/division to another:

- Hiring Dept submits **UC\_Conc\_Hire(AC) Template** FIRST.
- Terminating Dept submits Vol. Termination template AFTER

It is important to review the employee's UCPATH records (i.e., Person Org Summary) to identify if there are other active jobs for that employee.

- Timing of transaction entry & communication between schools / locations is **critical**.
- Hiring dept. should initiate a discussion with transferring dept. to ensure correct processing.
- Always review employee records prior to taking any actions in UCPATH.

## FLSA Reminders

Employees in UCPATH can only have one FLSA status and pay period. When hiring someone who already has one or more active jobs, please review to ensure that no mismatch will exist with the job you are hiring. If a mismatch, please review the [job aid](#) for how to resolve and the slides from the 10/4/22 Training Tips meeting.

## Salary Cost Transfer (SCT) Schedule

Please view the SCT schedule for Q4 2022 on the UCI UCPATH [transactor web page](#) under UCPATH Support Documents > GL and Finance > GL Calendar > Salary Cost Transfer (SCT) Processing Schedule Q4 2022.

## Direct Deposit Deactivation for Terminated Employees

Beginning mid-October UCPATH will deactivate direct deposits for terminated employees without active appointments after 60 days. This may impact graduate students or Lecturers who are on and off active status.

## **Continuous Improvement Efforts**

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

### ***Case Reduction Partnership***

The UCI UCPATH team is collaborating with the UCPATH Center, HR, and Payroll to reduce outstanding cases.

### ***Transactor Web Page Improvements in Process***

To make job aids, documents, resources, and support materials easier to find, we are redesigning our transactor web page. If you would like to contribute ideas on top topics or how you would like to see the information organized, please email us at [ucpath@uci.edu](mailto:ucpath@uci.edu). We welcome your feedback.

***Finance Workshops:*** The UCI UCPATH team completed workshops on UCPATH financial and General Ledger (GL) functionality with the Merage School of Business, the School of Computer Sciences, and the Executive Support team. If your school is interested in a workshop on UCPATH financial and GL functionality between UCPATH and KFS, please email us at [ucpath@uci.edu](mailto:ucpath@uci.edu).

## **Did You Know...?**

UCPATH does not allow effective sequencing in position data. Position data only allows one update per effective date, so if the appropriate effective date is already in use and requires another update on the position data record, it is necessary to submit a position update form to UCPATH.

- When an FTE change is required and the effective date in position is already in use, the UCPATH team must make the corrections in position data. Location teams should avoid using the "next available" date, which could result in negative impacts to pay, accruals, and benefit eligibility.
- Note that job data updates allow effective sequencing. To learn more about using PayPath tabs for position and job data updates, please refer to these job aids:
  - [UCPATH Task: Initiate Position Data Change PayPath Transaction \(Staff/Acad\)](#)
  - [UCPATH Task: Initiate Position Data + Job Data Change PayPath Transaction \(Staff\)](#)
  - [UCPATH Task: Initiate Position Data + Job Data Change PayPath Transaction \(Acad\)](#)

## Teams Channel for UCI Transactors

### *A New Communications Tool for You*

Add the **UCPATH Announcements** Microsoft Teams group to your Teams options to receive timely information relevant to transactors. The UCI UCPATH team recently sent an email to transactors introducing this channel; [click the link](#) to opt-in and join the group. If you do not have Microsoft, call the UCI OIT help desk and request to have MS TEAMS installed on your computer. After it's installed, [click the link](#) to opt-in and join the group.

## UCI UCPATH Transactor Web Page

Visit our [UCI UCPATH](#) website for access to transactor resources and guides to navigate through UCPATH. The website offers links to job aids, training presentations and recordings, system notifications, transaction deadlines, and related websites such as the [Employee Experience Center](#). We are updating this page for improved navigation and will announce when the revised page is ready and published.

## Tuesday Training Tips Call-In Sessions

All transactional users are invited to attend our bi-weekly Tuesday Training Tips call-in sessions to learn about timely topics, share lessons learned, and ask questions. Topics are published on our website the day before the meeting. Join us on 11/1, 11/15, 11/29, 12/13, and beyond.

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

## 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#

## Subscribe to Keep Informed

If you or someone you know is a transactor who doesn't already receive this e-digest, the Tuesday Training Tips Meeting agenda, or other UCPATH Alert emails, [click to subscribe](#) to our digital mailing list to receive all updates.

**Thank You!**

**UCI** Division of Finance and Administration | With U • For U

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

