UCI UCPath
Transactor Digest

March 20, 2024

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.

Ask UCPath Enhancements / Case Assist Implementation Postponed

UCPath has postponed the rollout of Employee Case Assist, which was originally slated for the March release. UCPath requires more time to improve testing outcomes and will provide a new implementation timeline as soon as possible.

March / April Release Updates

March Deployments and Functionality Completed:

- Manage Job Transactions – Phase 2
- Automation of Disability Insurance (ST and LT) Reinstatements – This occurs when someone returns from a Leave of Absence (LOA)
- UCPath Annual Upgrade

April Deployments and Functionality Planned:

- Experian Employee Credit Monitoring (available April 1)
- Ability to reopen closed UCPC cases (April 15)

Monitor and Subscribe to Job End Date Monitoring Dashboard

Job Ending Dashboard (RUCI217) should be monitored regularly especially as we approach the end of the quarter. As we approach the end of the Winter quarter, please review to ensure that employees are extended if appropriate to avoid unnecessary terminations that require a reinstatement.

New Report: UCPath FTE Dashboard

A new UCPath report has been developed that provides a quarterly snapshot of FTE and salaries. The default report view shows the latest completed quarter (snapshots are available for October, January, April, and June). Multiple years can also be selected to see the trends over the past few years. The report was developed in collaboration with the Budget Office, the Office of Information Technology, and the Office of Academic Planning and Institutional Research and is intended to support budgeting and financial planning.

The report is published on ZotPortal, under UCPath Decision Support > Budget/FTE.

UCI Decision Support

Reports are available to assist departments in reviewing and auditing their employment data. Some frequently used are:

- Employee Rosters Report
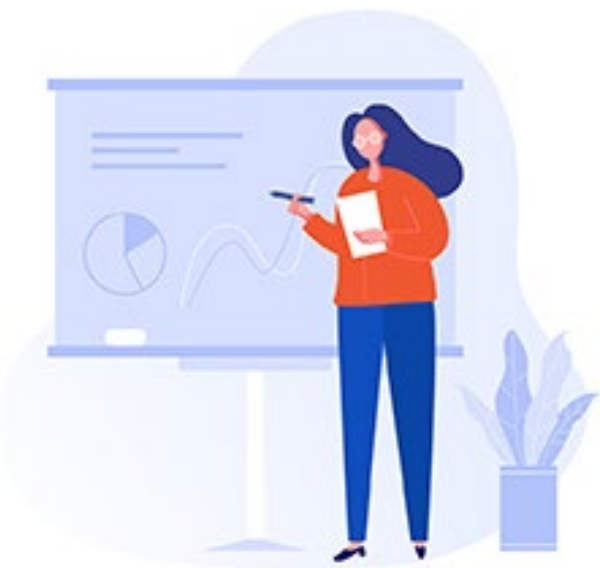- Job Distribution Report
- Position Funding Audit Report

The FLSA Mismatch Audit is recommended to review as it is not unusual for students to acquire additional employment that may create a mismatch.

Job Data – Manage Job

Manage Job shows current and historical employment data. This information can assist in researching employment activities. The Manage Job title is available on the PeopleSoft Homepage, with tabs that display employee information. Each tab can be opened separately, or you can use the "Expand All" option to open all the tabs at once. Currently, the information is available as "Read-Only". Find out more about Manage Job data from our Tuesday Training Tips PowerPoint presentations, which are archived on the UCI UCPath website on the Transactors page > Common Resources > Tues. Training Tips Archive.

- **3/5:** Presentation: Manage Job – UC Job Data and Labor Information
- **2/20:** Presentation: Job Data Usage – Salary and Payroll Tabs
- **2/6:** Presentation: Job Data Usage – Work Location and Job Information
- **1/9:** Modernized Job Data

Academic Recall

For Hiring Academic Recall, please note the following:

- Use of Concurrent template or reason may incorrectly trigger employee benefits review and have implications with the Redwood (RASC) interface and how CBR is applied.
- Recommend using Full/Rehire *Template* with ACA – Academic Recall *Action Reason*:
  - This will not trigger employee benefits eligibility review.
  - Properly identifies these appointments in the UCPath interface files with Redwood (RASC).
  - This may trigger I-9 requirement for those with active Emeritus. AP is discussing this issue.

> ### *New Q2 2024 GL Processing Calendar*
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> *The new Q2 2024 GL Processing Calendar has been added to the Transactor web page of the UCI UCPath website under the Funding & General Ledger (GL) section. Please reference this calendar as needed.*

Check Your Junk Mail for UCI UCPath Emails

Please check your junk mail or Outlook rules folders for UCI UCPath emails. Since the UCI UCPath team recently 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.

Did You Know … ?

Preferred Email

DID YOU KNOW ?

Please encourage new and current employees to add or update their primary (preferred) email address in UCPath. UCPath will send the following communications to the employees' primary (preferred) email address on file:

- During a leave of absence, UCPath may contact the employee about benefit premiums using the primary (preferred) email address.
- UCPath may use the primary (preferred) email address to send information about the UC Retirement Plan buyback process.
- UCPath sends new hire system notifications to the primary (preferred) email address following determination of benefits.

Hires without a birth date or Social Security number experience downstream impacts.

If the birth date of an employee is missing:

- UCPath cannot prepare self-service events allowing employees to make benefit enrollment elections.
- UCPath is unable to generate a paycheck.

Employees without an SSN will have a variety of issues, including:

- The vendors' inability to load their benefit enrollment elections (Delta Dental, VSP, Principal Health Net, and Anthem).
- Duplicate accounts with Fidelity when the SSN is updated.
- Safe Harbor participants will not be funded.
- Incorrect information with the Employment Development Department (EDD) for unemployment benefit purposes.

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 April 2, April 16, and April 30.

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

Find 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 some UCPath transactor topic? Let us know your topic for a future edition.
Send an email to ucpath@uci.edu