

A stone wall sign for the University of California, Irvine, set against a backdrop of green trees and a clear blue sky. The sign features the university's name in large, dark, serif letters. To the left of the main text is a circular seal of the university. The foreground is filled with tall, green grasses.

University of California, Irvine



Welcome!
We will start at 10am

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

A stone wall sign for the University of California, Irvine. The sign is made of light-colored rectangular stones and features the university's name in large, dark, serif letters. To the left of the main text is a circular seal of the University of California. The sign is set against a background of green trees and a clear blue sky. In the foreground, there is a field of tall, green grasses.

University of California, Irvine

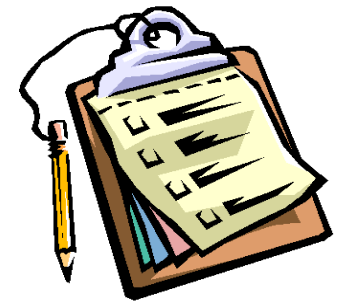
UCPath Training Workshop:

Name & Legal Name in UCPath

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

Workshop Agenda

- Intro to Name & Legal Name in UCPath
- Recommended Employee Search Practices
- Identifying Name vs. Legal Name
- Name Requirements for Onboarding & Hiring
- Use Case Scenarios & Demo
- New UCPath Search Functionality
- Job Data Modernization Overview



Intro to Name & Legal Name in UCPath



Training on Understanding Policy and Name

The LGBT Resource Center is working with the Gender Recognition & Lived Name (GRLN) Steering Committee to prepare training for transactors to:

- Explain the policy, why it's important and how to apply to our processes
- Key definitions & understanding gender identity & expression
- Usage of Name as primary communication
- Sensitivity of Legal Name

You will be notified when this training is available in UCLC

Today's training is to talk about the UCPath portion of the Lived Name project

UC Gender Recognition & Lived Name Policy

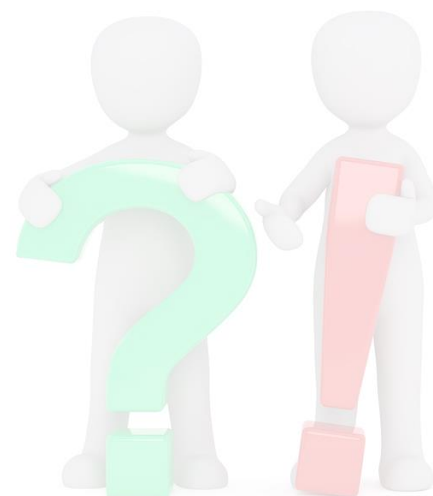
The new presidential policy ensures that all students, employees, alumni, and affiliates are identified by their accurate gender identity and lived name on university-issued identification documents and in UC's information systems, such as UCPath.



What is Lived Name?

A lived name is a **self-chosen or personal and/or preferred professional** name used instead of a legal name and can be one's first name, middle name and/or last name or surname.

Lived names are to be used whenever possible during university business and education. The **legal name** of university students, employees, alumni and affiliates, if different than the individual's lived name, **must be kept confidential** and must not be published on documents or displayed in IT Resource systems that do not require a person's legal name.



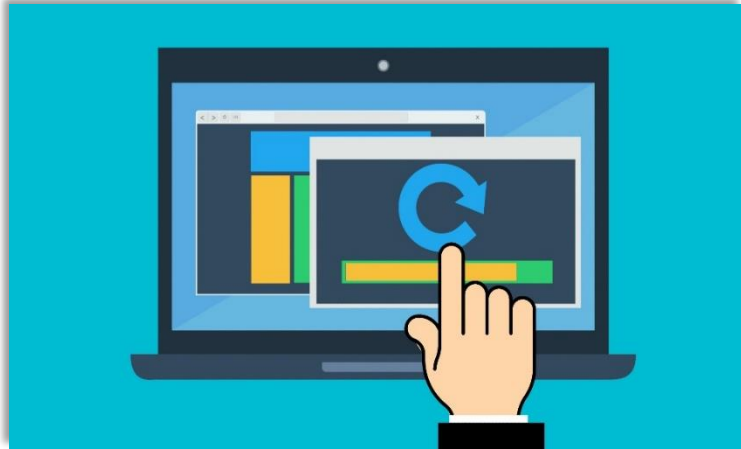
What is Changing?

NEW

HR initiators in each division, as well as employees via employee self-service can easily change and update the displayed Name and Legal Name in UCPATH.

Key Changes

1. Search pages in UCPATH have been updated to display *Legal Name* & *Lived Name* data. (Fields are labeled as *Name* or *Legal Name*.)
2. Name & Legal Name information is required during onboarding.
3. Employees' *Lived Name* will appear across all UC Directories.
4. Access to Legal Name and other types of employee personal information will be limited to certain UCPATH security roles.



Name Conversion



The
“Name” field currently
shown in UCPATH will
be converted and
labeled **Legal Name**
field.



“Preferred Name” will
be converted
to **Name**.



Employees *without* a
“Preferred Name” in
UCPATH will display
the same *Name* and
Legal Name in
UCPATH.

Change Impacts

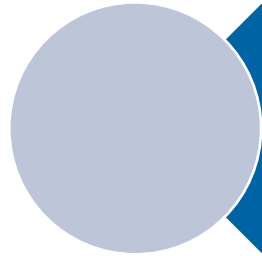
- UCI Directory will display **Name** only; similar to current display of Preferred Name.
- DocuSign forms for Onboarding will request both **Name** and **Legal Name**.
- **Legal Name** will be copied into the Name field, if a separate Name is not provided.
- Access to Legal Name will be limited based on assigned security role(s) and should always be protected and kept confidential.
- When addressing employees use their Lived Name (Name).



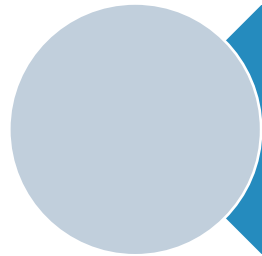
Recommended Employee Search Pages



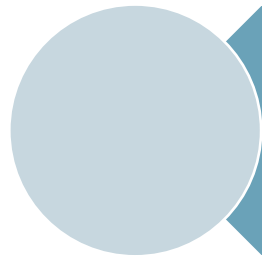
Method 1: Person Org Summary



Will display employee's lived name as 'Name'.

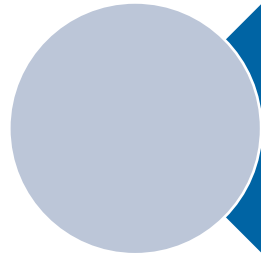


Continue to use as primary search page for employee records.

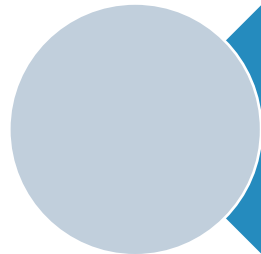


Can search employee data across all UC locations.

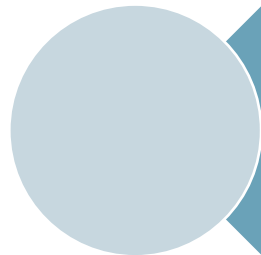
Method 2: Modify a Person



Will only display employees within your security group. Displays both (Lived) Name and Legal Name



Useful when you have an Employee ID and want to confirm the name



Displays Name change history (Must check *"Include History"* box)

Method 3: Person Search Match

- Record Search from all UC Locations
- Limited Data Criteria- SSN, DOB, Legal Name
- Lived Name not searchable

Identifying (Lived) Name vs. Legal Name



Modify a Person

Navigation: Peoplesoft Homepage > Workforce Administration Module > HR Tasks > Personal Data Related > **Modify A Person**

Use for Search: Confirm name, see name changes

Search Criteria: Name & Legal Name

Searchable Population: People within your Dept. / Security Role

The screenshot shows the HR Tasks navigation menu on the left, with 'Personal Data Related' highlighted in a red box. The main area displays the 'Person Organizational Summary' and a 'Find an Existing Value' search dialog, also highlighted in a red box. The search criteria are as follows:

Field	Operator	Value
Empl ID	begins with	
Name	contains	LEGGETT
Legal First Name	begins with	
Legal Middle Name	begins with	
Legal Last Name	begins with	

Additional search options include 'Case Sensitive' (unchecked) and 'Include History' (checked). The search results show 1 row with the name 'LEGGETT'.

Modify a Person – Sample Data

Find an Existing Value

▼ Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches: Choose from recent searches [dropdown] [edit icon]
Saved Searches: Choose from saved searches [dropdown] [edit icon]

Empl ID | begins with [input]
Name | begins with [input] LVDWENDYLVDLEG
Legal First Name | begins with [input]
Legal Middle Name | begins with [input]
Legal Last Name | begins with [input]

Case Sensitive Include History

Search Clear Save Search

Click Include History to see name changes

▼ Search Results

1 rows - Name "LVDWENDYLVDLEG"

Empl ID	Name	Legal First Name	Legal Middle Name	Legal Last Name	
10279550	LVD-Wendy LVD-Leggett	Wen-Jen	Min	Leggett	>



Biographical Details Contact Information Regional UC Personal Data

LVD-Wen-Jen LVD-Leggett Person ID 10279550

Legal Name/Name Find | View All First 1 of 2 Last

Effective Date 02/16/2022

Name LVD-Wen-Jen LVD-Leggett View Legal Name/Name



Name is **First Name Last Name**

- May be easiest to use "contains" instead of "begins with" in the drop down

View Legal Name/Name

Legal Name/Name - Name Format

Name Prefix

Legal First Name Wen-Jen

Legal Middle Name Min

Legal Last Name Leggett

Legal Name Suffix

First Name LVD-Wen-Jen

Middle Name LVD-Min

Last Name LVD-Leggett

Name LVD-Wen-Jen LVD-Leggett

Legal Name Wen-Jen Leggett

PS Format - Legal Name Leggett,Wen-Jen Min

OK Cancel

Job Data Page

Navigation: PeopleSoft Homepage > Workforce Admin. Module > HR Tasks > Job Data Related > **Job Data**

Use for Search: Name or Legal Name

Search Criteria: Name & Legal Name (Job Data file will display Name only)

Searchable Population: People within your Dept. / Security Role

The screenshot displays the PeopleSoft HR Tasks interface. On the left, a navigation menu is visible with the 'Job Data Related' option highlighted in red. The main content area shows the 'Person Organizational Summary' page, with the 'Job Data' section selected. Below this, there is a search form titled 'Find an Existing Value' with the following fields:

- Empl ID: begins with
- Empl Record: =
- Name: contains legget
- Legal First Name: begins with
- Legal Middle Name: begins with
- Legal Last Name: begins with
- HR Status: =
- Business Unit: begins with
- Position Number: begins with
- Department: begins with
- Job Code: begins with

At the bottom of the search form, there are checkboxes for 'Case Sensitive' and 'Include History', and buttons for 'Search', 'Clear', and 'Save Search'. Below the search form, the search results section shows '2 rows - Name "legget"'. A red box highlights the search criteria section and the search results section.

Note: for Name field search; use First Name Last Name order, ex: Joe Smith

Workforce Job Summary Page

Use for Search: Searching for summary of job changes for employees in your dept./school.

Search Criteria: Name & Legal Name (Workforce Job Summary will display Name only)

Searchable Population: People within your Dept. / Security Role

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Saved Searches

Empl ID

Empl Record

Name

Legal First Name

Legal Middle Name

Legal Last Name

Organizational Relationship

HR Status

Business Unit

Position Number

Department

Job Code

Payroll Status

Case Sensitive Include History

Search Results

2 rows - Empl ID "10279550"

Person Org Summary

Navigation: PeopleSoft Homepage > Workforce Admin. Module > HR Tasks > Person Organizational Summary Page

Use for Search: To find if a person has other jobs at UCI or any UC

Search Criteria: (Lived) Name

Searchable Population: All UC Employees

The screenshot shows the 'HR Tasks' menu on the left with 'Person Organizational Summary' highlighted in a red box. The main window displays the search interface for 'Person Organizational Summary'. The search criteria section includes fields for 'Empl ID', 'Last Name', and 'Name', each with a 'begins with' dropdown and a text input field. The 'Empl ID' field contains '10279550'. Below the search criteria are 'Recent Searches' and 'Saved Searches' dropdowns, a 'Case Sensitive' checkbox, and 'Search', 'Clear', and 'Save Search' buttons. The search results section shows '2 rows - Empl ID "10279550"'. A table displays the results with columns for Empl ID, Empl Record, HR Status, Business Unit, Job Code, Job Code Description, Last Name, and Name. The 'Name' column is highlighted in a red box, showing 'LVD-Megan LVD-Morua' for both rows.

Person Organizational Summary

Find an Existing Value

Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches: Choose from recent searches | Saved Searches: Choose from saved searches

Empl ID: begins with 10279550
Last Name: begins with
Name: begins with

Case Sensitive

Search Clear Save Search

Search Results

2 rows - Empl ID "10279550"

Empl ID	Empl Record	HR Status	Business Unit	Job Code	Job Code Description	Last Name	Name
10279550	0	Inactive	IRCMP	007596	HR GENERALIST 3	LVD-Morua	LVD-Megan LVD-Morua >
10279550	1	Active	IRCMP	007596	HR GENERALIST 3	LVD-Morua	LVD-Megan LVD-Morua >

Search for People / Person Search Match

Navigation: PeopleSoft Homepage > Workforce Admin Module > HR Tasks > Search for People

Use for Search: If hire has previous UC Employee ID

Search Criteria: Legal Name, DOB, SSN

Searchable Population: All UC employees

Search Criteria Setup:

1. Select Search Type: “=” **Person**
2. Click **Search**
3. Select Search Result Code: **Person Search**
4. Enter 2 (two) pieces of Employee Personal Information (*i.e., Legal Name, Legal Last Name, DOB, SSN*)
 - *Note: If SSN is available no second item is required.*

Person Search Match Setup Example

1 Search Person

2 Search/Match Find an Existing Value

Search Criteria

Search Type = Person

Search Parameter begins with

Ad Hoc Search

Description begins with

Search Clear Save Search

3

Search Type	Search Parameter	Ad Hoc Search	Description
Person	PERSON_SEARCH	N	Person Search
Person	PSRS_HIRE	N	Prepare For Hire

4

Search Criteria

Search Type Person

Search Parameter PERSON_SEARCH

Search Result Rule

Search Result Code PERSON_RESULTS

User Default

Search Fields	Value
National Id	
First Name Search	
Last Name Search	
Date of Birth	

Name Type Displayed: Legal Name

Searches for match on first 3 letters of Legal Name

Person Search Results

1. Results tab displays DOB and Employee ID
2. Results 2 tab displays Last 4 SSN
3. Additional Information tab contains hyperlink to Person Org, opens new page showing Name
 - Carry ID button will allow you to retain the ID for other pages

Search Results

Search Type Person Ad Hoc Search
Search Parameter PERSON_SEARCH Person Search
Result Code PERSON_RESULTS Person Results

Search Results Summary

Number of ID's Found 1
Search Order Number 20 Legal Name, Bday & NID

Search Results

Results	Results2	Additional Information
1	Carry ID	10279550 Person Organizational Summary

Search Results

Search Type Person Ad Hoc Search
Search Parameter PERSON_SEARCH Person Search
Result Code PERSON_RESULTS Person Results

Search Results Summary

Number of ID's Found 1
Search Order Number 20 Legal Name, Bday & NID

Search Results

Results	Results2	Additional Information
1	Carry ID	10279550 PRI Megan Morua 01/01

Search Results

Results	Results2	Additional Information
1	Carry ID	10279550 *****8172

Searches by Page

UCPath Page	EE Population
Person Organizational Summary	All UC employees
Workforce Job Summary	People within your Dept. / Security Role
Job Data	People within your Dept. / Security Role
Modify a Person	People within your Dept. / Security Role
Search for People	All UC employees
UCPath Search Tool	People within your Dept. / Security Role

This is a sample of a tool to use to understand which pages display which name in their search criteria. The entire document is located in the appendix of this training and on our website at ucpath.uci.edu.

Page Name	Page Navigation (Fluid)	Search Criteria
Activities	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > Activities	Name
Admin Verification of Employment	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > Admin Verification of Employment	Legal Name
Emergency Contact	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > Emergency Contact	Name
Gender Identity	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > Gender Identity	Name
Identification Data	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > Identification Data	Name
Job Data	Main Menu > PeopleSoft Homepage > HR Tasks > Job Data Related > Job Data	Both
Maintain POI Relationship	Main Menu > PeopleSoft Homepage > Person of Interest > Maintain POI Relationship	Name
Maintain Teleworkers	Main Menu > PeopleSoft Homepage > HR Tasks > Job Data Related > Maintain Teleworkers	Name
Modify a Person	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > Modify a Person	Both
PayPath Actions	Main Menu > PeopleSoft Homepage > HR Tasks > PayPath & Additional Pay > PayPath Actions	Name

Note: The **Name** field can refer to **Lived Name**, **Preferred Name** or **Legal Name**

Name Requirements for Onboarding & Hiring



Name Requirements for Onboarding

This will be the new DocuSign that employee will complete. The document will include the opportunity for the employee to provide both their Legal and Lived names.

UC IRVINE DATA ENTRY FORM

Fields marked with an asterisk () are required information.*

*Legal First: <i>Legal Name (Name as written on Social Security Card)</i>	Legal Middle:	*Legal Last:
<u>Please provide us how you would like your name to appear or display in our UC systems and reports below.</u>		
First:	Middle:	Last:

*Prior University of California Affiliation? <i>(Any record for employee, contingent worker, contractor, volunteer, etc. at any UC: UCI, UCLA, UCSD, etc.)</i>	
*Prior/Current UC Irvine Student?	UCI Student ID Number:
<u>If you have answered yes, please provide all prior names you may have used in the past in the space below.</u>	

*Date of Birth: <i>(Enter using this format: mm/dd/yyyy.)</i>	
*Social Security Number: <i>(Enter nine digits for the SSN, with preceding zeroes as needed and without dashes. If SSN is still in process, enter "000000000". You will have another opportunity to enter SSN via HR Employee Self Service system (UCPath).</i>	*Confirm Social Security Number:

Name Fields: UC Full Hire Template

Current Information Entered

Template: UC_FULL_HIRE Name:
Effective Date: 03/03/2023 Action/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation)
Employee ID: NEW Employee Record:

Personal Data | Job Data | Earns Dist | Employee Experience

Employee Information

Primary Name - English

*First Name Middle Name
*Last Name Name Suffix

If only the Legal name is provided, then Legal Name will populate the (Lived) Name field upon submission.

Future Information Entered

Template: UC_FULL_HIRE Name:
Effective Date: 03/03/2023 Action/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation)
Employee ID: NEW Employee Record:

Personal Data | Job Data | Earns Dist | Employee Experience

Employee Information

Name - Legal Name/Name

*Legal First Name Legal Middle Name
*Legal Last Name Legal Suffix 
First Name Middle Name
Last Name

When Lived Name is provided; the transactor is required to enter it in the hire template.

Note: Accuracy is critical for both names.

Transaction Details Page

For Concurrent Hire and Rehire Template transactions

Smart HR Transactions

Enter Transaction Details

The following transaction details are required.

Template Staff Concurrent Hire/Inter Location Transfer

Organizational Relationship Employee

*Empl ID ←

*Effective Date

Action Hire

*Reason Code

*Address Format

Lived name appears here

Note: This name may appear different than name provided, confirm the correct Employee ID #

Concurrent Hire & Rehire Template

Personal Data tab has fields for Legal and (Lived) Name.

Smart HR Transactions

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC_CONC_HIRE Name: LVD-Megan LVD-Morua
Effective Date: 05/19/2023 Action/Action Reason: HIR/TIL (Transfer - Intra Location)
Employee ID: 10279550 Employee Record:

Personal Data Job Data Earns Dist

Employee Information

Name - Legal Name/Name

*Legal First Name	<input type="text" value="Megan"/>	Legal Middle Name	<input type="text"/>
*Legal Last Name	<input type="text" value="Morua"/>	Legal Suffix	<input type="text"/>
First Name	<input type="text" value="LVD-Megan"/>	Middle Name	<input type="text"/>
Last Name	<input type="text" value="LVD-Morua"/>		

If a Lived Name has been provided in the hire process, it should be added in this template

CWR Template

CWR templates contain fields for both Legal Name and (Lived) Name entry when creating the CWR affiliation.


[Click here to Hide Header Details](#)

Template: UC_ADD_CWR **Name:**
Effective Date: 05/01/2023 **Action/Action Reason:** ADD/ADD (Add Contingent Worker)
Employee ID: NEW **Employee Record:**


[Personal Data](#) [Job Data](#)

Employee Information

Name - Legal Name/Name

*Legal First Name	<input type="text"/>	Legal Middle Name	<input type="text"/>
*Legal Last Name	<input type="text"/>	Legal Suffix	<input type="text"/> 
First Name	<input type="text"/>	Middle Name	<input type="text"/>
Last Name	<input type="text"/>		

Birth Information

Date of Birth 



Break Time

Please take a 10-minute break 😊

Use Case Scenarios & Demo



Use Case 1: Legal or Lived Name?

Efrain is an HR Analyst at the School of Arts and is in the process of hiring Joey Costa, who will be transferring from UC Riverside to UCI in June.

After reviewing the hire details, Efrain is not sure if the name “Joey Costa”, is the person’s Legal or Lived name. How does Efrain find out?

Use Case 1: Legal or Lived Name (Cont.)

Step 1: Check Person Org Summary to search for Joey Costa

Person Organizational Summary

Find an Existing Value

▼ Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Saved Searches

Empl ID

Last Name

Name

[Show fewer options](#)

Case Sensitive



Step 2: If a match is found, collect Employee ID to proceed with Transfer.

Use Case 1: Legal or Lived Name (cont. II)

Step 3: If a match does not appear, check Person Search Match and use personal information provided, such as DOB along with First Initial and Last Name.

After performing the search, Efrain notices that “***Johanna***” is the employees lived name, but Joey is their Legal Name.

May also try Person Org for Last Name only and/or with J in first name as ways to find Johanna

Use Case 2: Full Hire – New Employee (no prior UC)

Scenario:

Dottie Martin used the online portal to apply for a position at UCI. Dottie was selected as the final candidate and accepted the position. Dottie has never worked for any UC location.

- The department transactor uses **Person Org Summary (Shows Name)** to research and verify that Dottie Martin does not have an employee record in UCPath.
- The department transactor submits a request to On-Boarding using the name Dottie Martin.
- On-Boarding receives the request from the hiring department and conducts a search in UCPath in **Person Org Summary (Shows Name)** for Dottie Martin. No record is found, and the on-boarding process continues. A DocuSign packet is sent to Dottie Martin.

Full Hire – New Employee (no prior UC)

Scenario, cont'd:

- Dottie receives the DocuSign packet. The Information Form in the packet asks for both Legal Name and Name (Lived). Dottie completes the information with her legal name as Darinda Teresa Martin Smith and Name as Dottie Martin.
- The DocuSign packet is returned to the department.
 - *When Dottie comes in for the onboarding appointment, a Talent Representative will verify the name on the employment documents match Tracker I-9. When the Talent Representative enters Dottie's information for LiveScan it is entered as what is listed on either their identification card or, legal employment documents.*
- The department transactor receives the DocuSign packet and should complete a **Person Search Match (Legal)** to verify the received name. No information is found.
- Enters on the Full_Hire template both names:
 - Legal Name: Darinda Teresa Martin Smith
 - Name: Dottie Martin

Use Case 3: Re-Hire – New Employee (Prior UC)

Scenario:

Benjie Reyes used the online portal to apply for a position at UCI. **Benjie Reyes** was selected as the final candidate and accepted the position. **Benjie** has had previous UC employment as a student assistant at UC Santa Cruz—however this information was not included in Benjie’s resume.

- The department transactor uses **Person Org Summary (Lived Name)** to determine whether Benjie Reyes has an employee record in UCPATH. A record for Benjie Reyes is found – the department takes note of the employee ID number and the **Lived Name: Benjie Reyes**.
- The department transactor submits a request to On-Boarding using the name Benjie Reyes and includes the Employee ID number.
- On-Boarding receives the request from the hiring department and conducts a search in UCPATH in **Person Org Summary (Lived Name)** for Benjie Reyes. **A DocuSign packet is sent to Benjie Reyes.**

Re-Hire – New Employee (Prior UC)

Scenario, cont'd:

- Benjie receives the DocuSign packet. The Data Entry Form in the packet asks for both Legal Name and Name (Lived). Benjie completes the information with the **legal name as Benjamin Reyes and Name as Benjie Reyes.**
- The DocuSign packet is returned to the department.
 - *When Benjie comes in for the onboarding appointment, a Talent Representative will verify the name on the employment documents match Tracker I-9. When the Talent Representative enters Benjie's information for LiveScan it is entered as what is listed on either their identification card or, legal employment documents.*
- The department transactor receives the DocuSign packet and should complete a **Person Search Match (Legal)** to verify the received name. Department once again verifies that the employee has both a Legal and Lived name.
- Enters on the Full_Hire template with reason of Re-Hire:

Legal Name: Benjamin Reyes

Name: Benjie Reyes

Key Searching Points

- In previous scenario, the assumption is that Benjie had a preferred name in UCPath when employed at Santa Cruz, which was converted to 'Name' during conversion to new Lived Name functionality on June 16, 2023.
- If that was not the case, and the name was Benjamin in UCPath, he may have been found by using Last name and first 3 letters of first name in Pers Org.
- Additionally, the search match would find a match, since it looks at first 3 letters for potential matches.
- This points to the importance of trying both Person Org and Search match to determine if a person exists in UCPath and confirming with the information in DocuSign.
- This is critical to avoid duplicate employee IDs.

Use Case 4: Pay a Stipend, Confirm Name with Employee ID#

You are ready to pay someone a stipend. You have their employee ID.

When you go to PayPath to do the transaction and enter their employee ID, the name that comes up is not a name you recognize. You want to confirm that this is the correct person.

Employee ID: 10279550 PayPath Search

▼ Search Results

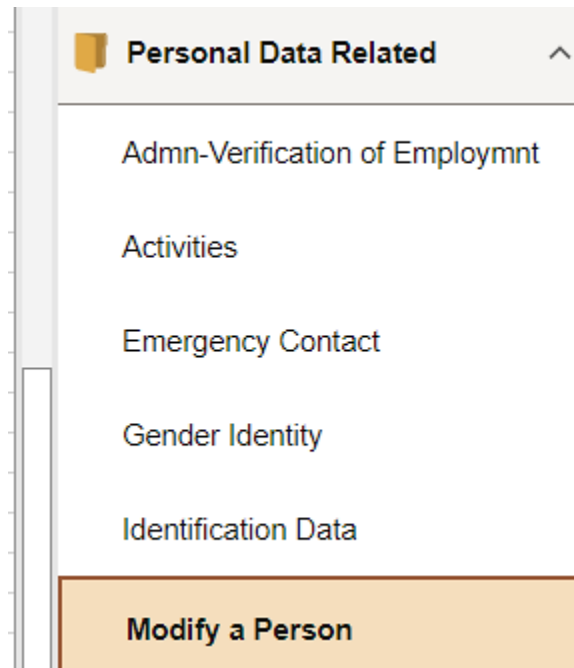
1 rows - Empl ID "10279550"

Empl ID	Empl Record	Name	Business Unit	Position Number	Department	Department Description	Job Code	Job Code Description	Employee Classification	Description	Employee Status	
10279550	1	LVD-Wendy LVD-Leggett	IRCMP	40282388	IR8200	DFA AVC Pgrm Dev & Execution	007596	HR GENERALIST 3	2	Staff: Career	Active	>

Use Case 4: Pay Stipend...(cont.)

PayPath shows **LVD-Wendy LVD-Leggett**, but you know the person as **LVD-Wen-Jen LVD-Leggett** and you are not sure if it is the same person and you want to make sure you are paying the right person the stipend.

Go to **Modify a Person** in the Personal Data Section of HR Tasks



Use Case 4: Pay Stipend...(Cont.)

Personal Information

Find an Existing Value

▼ Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Saved Searches

Empl ID

Name

Legal First Name

Legal Middle Name

Legal Last Name

Case Sensitive Include History

This provides current name and legal name. You still don't see the name that you are looking for LVD-Wen-Jen

Click the box **Include History** in the lower right-hand corner

Click on the Arrow to take you to the details.

▼ Search Results

1 rows - Empl ID "10279550"

View All | First 1 of 1 Last

Empl ID	Name	Legal First Name	Legal Middle Name	Legal Last Name	
10279550	LVD-Wendy LVD-Leggett	Wen-Jen	Min	Leggett	>

Use Case 4: Pay Stipend...(Cont.)

Now we see the name we were looking for LVD-Wen-Jen was the previous lived name recently changed to LVD-Wendy

LVD-Wendy LVD-Leggett

Person ID 10279550

Legal Name/Name	Find View 1	First	1-3 of 3	Last
Effective Date 03/20/2023 Name LVD-Wendy LVD-Leggett	View Legal Name/Name			
Effective Date 02/16/2022 Name LVD-Wen-Jen LVD-Leggett	View Legal Name/Name			
Effective Date 10/24/1990 Name Wen-Jen Leggett	View Legal Name/Name			

New UCPath Search Functionality



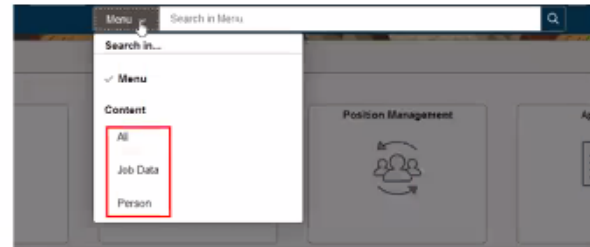
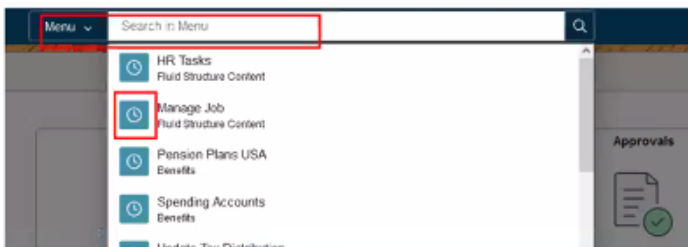
UCPath Search Functionality

UCPath Upgrade

Global Search

- Defaults to search on Menu
 - Displays recently visited or navigated to pages
- Allows you to search for employees using the All (Global), Person, or Job Filters

Enhanced
Search
options



Keyword Search

- Search suggestions are displayed immediately
- As you type, suggestions are updated
 - Clicking on any suggestion navigates directly to that item

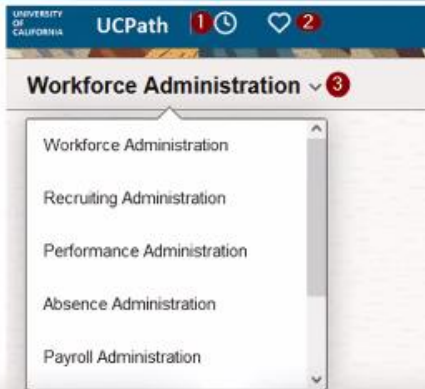


UCPath Search Functionality

UCPath Upgrade

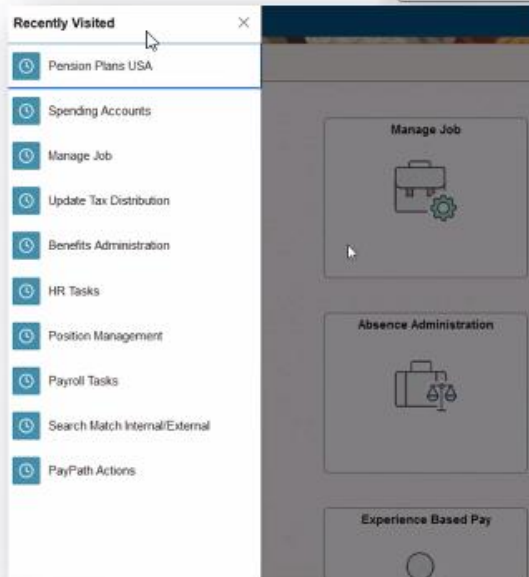
Quick Access Bar

- Recently Visited (1)
- Favorites (2)
- Homepage Selector (3)

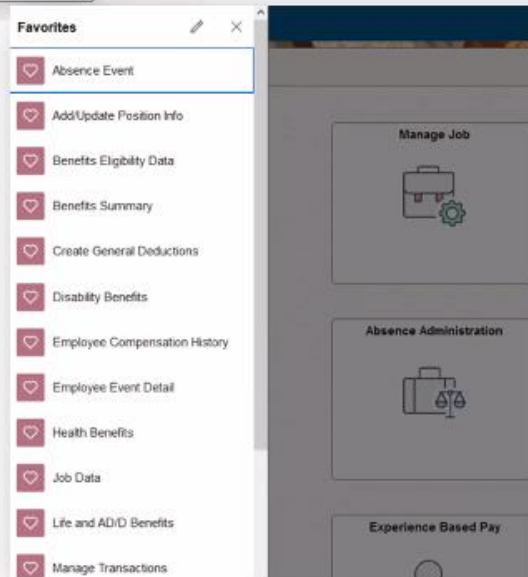


3-
Homepage
Selector

1-
Recently
Visited



2-
Favorites

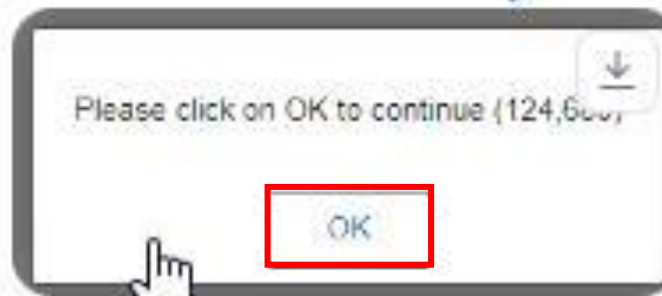


12

Potential System Error

There is an issue in the June 20th release that transactors may encounter that is random and not page specific. UCPath is waiting on a fix from Oracle which will not be available until after go-live.

If you encounter this error, click OK.



You may encounter multiple times and will need to refresh the page each time. It should not impact any work you are doing.

Job Data Modernization – Overview

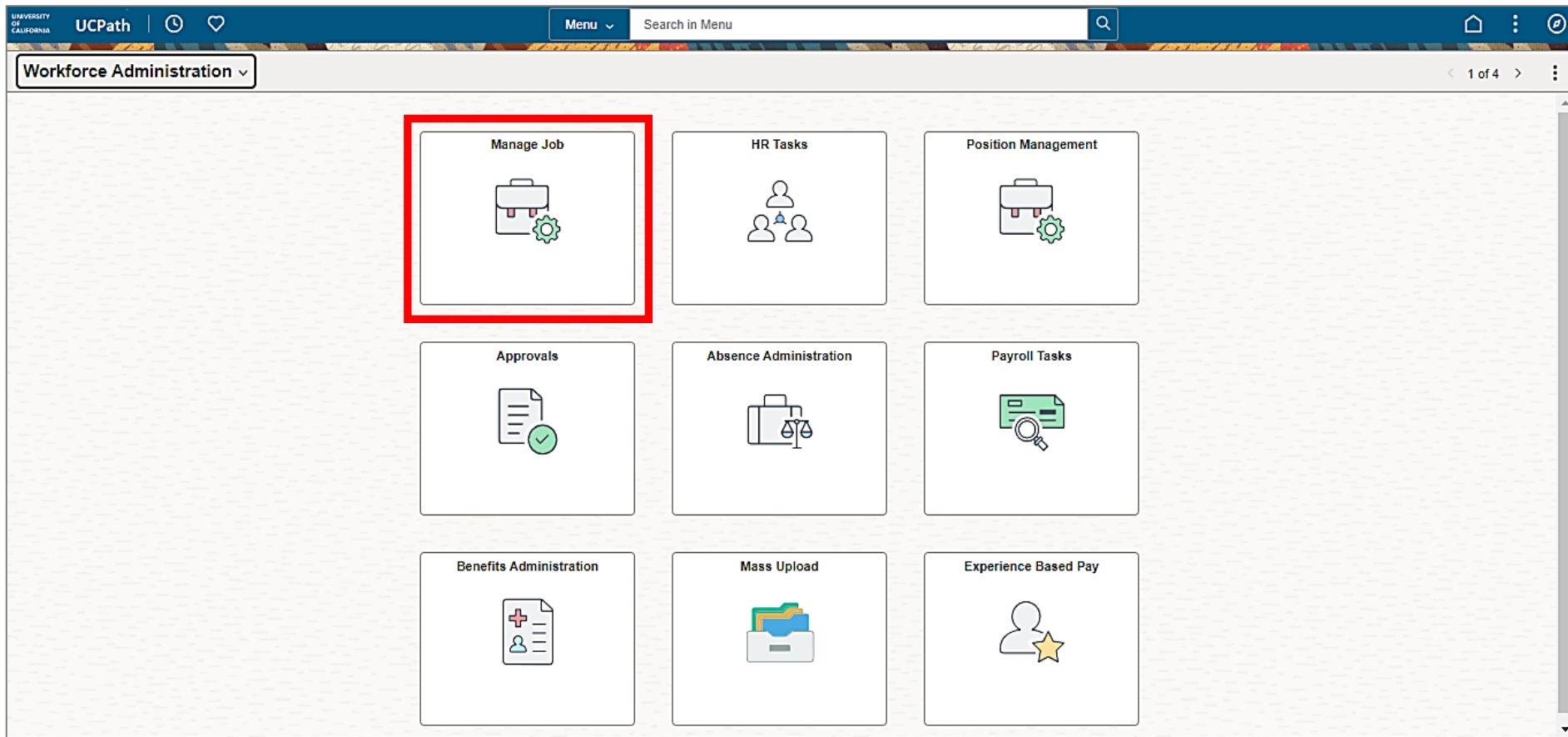


Job Data Modernization

- While we have been focusing on Lived Name; another change in this deployment is a new tile called **Manage Job**.
- As part of a move toward more delivered Oracle look and feel, a new read-only **Manage Job** tile has been added to the Workforce Administration home page.
- This is Phase 1 of future updates that are coming, focusing on Job Data Modernization.
- You are encouraged to become familiar with the new views as these will become more prevalent in future upgrades.
- Existing Job Data will continue to be available; you are not required to use the new **Manage Job** tile at this time.

Workforce Administration Page

Manage Job: new tile on the Workforce Administration page with read-only access to job data information in a new layout



Updated Search page

My Saved Searches – save frequently searched criteria

The screenshot shows a web interface for 'Manage Job' with a search section titled 'Search Existing'. A dropdown menu labeled 'My Saved Searches' is highlighted with a red box. Below it, a grid of search criteria is also highlighted with a red box. Each criterion includes a label, a dropdown menu for the search operator, and an input field. The criteria are: Empl ID (operator: begins with), Empl Record (operator: =), Name (operator: begins with), Legal Last Name (operator: begins with), Legal First Name (operator: begins with), Legal Middle Name (operator: begins with), HR Status (operator: begins with), Payroll Status (operator: begins with), Position Number (operator: begins with), Business Unit (operator: begins with), Department (operator: begins with), and Job Code (operator: begins with). Below the grid is an 'Include History' checkbox. At the bottom, there are three buttons: 'Search', 'Clear', and 'Save Search', with the 'Save Search' button highlighted by a red box. A 'Basic Search' link is visible at the bottom left of the page.

Manage Job

Search Existing

Search Criteria

My Saved Searches

Empl ID	begins with		HR Status	begins with	
Empl Record	=		Payroll Status	begins with	
Name	begins with		Position Number	begins with	
Legal Last Name	begins with		Business Unit	begins with	
Legal First Name	begins with		Department	begins with	
Legal Middle Name	begins with		Job Code	begins with	

Include History

Search Clear Save Search

Basic Search

Search Results

Check the **Include History** checkbox so all job data rows are displayed when the employee is selected.

Manage Job

Search in Menu

Empl ID begins with [] HR Status begins with Active

Empl Record = 0 Payroll Status begins with Short Work Break

Name begins with [] Position Number begins with []

Legal Last Name begins with [] Business Unit begins with IRCMP

Legal First Name begins with [] Department begins with []

Legal Middle Name begins with [] Job Code begins with []

Include History

Search Clear Save Search

Click the Continue button to access job data for an employee.

Basic Search

Search Results

HR Status: Active +3 more | Details

Empl ID	Empl Record	Name	Legal Last Name	Legal First Name	Legal Middle Name	Payroll Status	Organizational Relationship	Position Number	Business Unit	Department	Job Code	Business Title	
[]	0	Kento Terry	TERRY	KENTO	D	Short Work Break	Employee	[]	IRCMP	[]	001632	LECT-AY-1/9	>
[]	0	Kwang Mel	MEL	KWANG	Anna	Short Work Break	Employee	[]	IRCMP	[]	001632	LECT-AY-1/9	>
[]	0	Ricardo Curtis	CURTIS	RICARDO		Short Work Break	Employee	[]	IRCMP	[]	001632	LECT-AY-1/9	>

106 rows

Job Details Page for Selected Employee

- Job Data tabs and links on the left, click arrow to open
- Job Data rows on the right, click the arrow to move from row to row

Job Details

Kento Terry
- 0 - Employee
LECT-AY-1/9

Effective Date 01/01/2023
Sequence 0

Action Short Work Break
Reason U18- Benefits Bridge Eligible

Expand All

1 of 9

- > Work Location
- > Job Information
- > Labor Information
- > Salary and Compensation
- > Payroll
- > Employment Data
- > Benefit Program
- > UC Job Data
- > Attachments
- > Validate
- > Summary

Job Data With a Different Layout

Same employee information in the current job data tabs and links with a different layout.

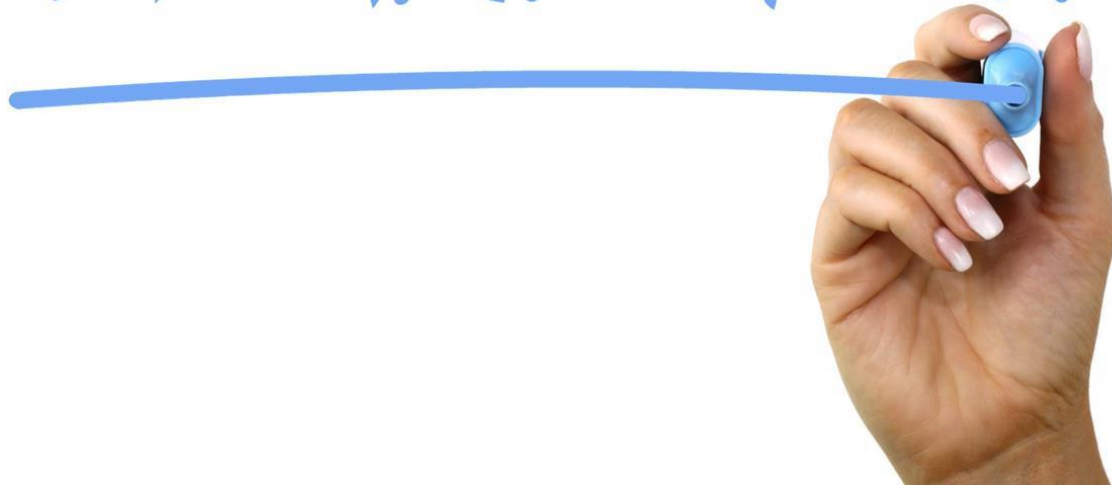
The screenshot shows a web interface for job details. At the top, there is a navigation bar with a search menu and a home icon. Below the navigation bar, the page is titled "Job Details" and shows the name "Kento Terry" and employee ID "LECT-AY-1/9". The effective date is "01/01/2023" and the sequence is "0". The action is "Short Work Break" and the reason is "U18- Benefits Bridge Eligible". There is an "Expand All" button and a "1 of 9" indicator. The "Work Location" section is expanded and highlighted with a red box. It contains the following data:

HR Status	Active	Payroll Status	Short Work Break
Job Indicator	Primary Job	Status	Completed
Position Number	LECT-AY-1/9	Override Details	No
Position Entry Date	10/01/2022	Position Managed Record	No
Regulatory Region	USA United States	Company	UCS University of California
Business Unit	IRCOMP UC Irvine Campus	Department Entry Date	10/01/2022
Department	IR8077 Political Science	Establishment ID	UCI UC Irvine
Location	C-9346 Social & Behavioral Sci		
Date Created	11/28/2022		
Last Start Date	10/01/2022	Expected Job End Date	12/31/2023
End Job Automatically	Yes	Expected Return Date	10/01/2023
Override Last Date Worked	No	Last Date Worked	12/31/2022

Below the red box, there is a "Job Information" section and a "Leave Information" section.

Questions?
Reach out to POC or Drop-In Center

THANK YOU





UCPath Page Information for Lived Name Search Criteria for individual Pages

Appendix & Resources



Absence Management Pages

Page Name	Page Navigation (Fluid)	Search Criteria
Administer Extended Absence	Main Menu > PeopleSoft Homepage > Absence Administration > Extended Absence > Administer Extended Absence	Name
Extended Absence Trans History	Main Menu > PeopleSoft Homepage > Absence Administration > Extended Absence > Extended Absence Trans History	Name
Request Extended Absence	Main Menu > PeopleSoft Homepage > Absence Administration > Extended Absence > Request Extended Absence	Name
Manage Accruals	Main Menu > PeopleSoft Homepage > Absence Administration > Manage Accruals/Balances > Manage Accruals	Name
Manage Accrual Transactions	Main Menu > PeopleSoft Homepage > Absence Administration > Manage Accruals/Balances > Manage Accrual Transactions	Name
Admin - Review Absence Balance	Main Menu > PeopleSoft Homepage > Absence Administration > Manage Accruals/Balances > Admin-Review Absence Balance	Name
Absence Event	Main Menu > PeopleSoft Homepage > Absence Administration > Extended Absence > Absence Event	Name
Career & Benefits Elig Hours INQ	Main Menu > PeopleSoft Homepage > Absence Administration > Manage Accruals/Balances > Career & Benefits Elig Hours INQ	Name

Note: The **Name** field can refer to **Lived Name**, **Preferred Name** or **Legal Name**

Payroll Pages

Page Name	Page Navigation (Fluid)	Search Criteria
General Deduction Entry Update	Main Menu > PeopleSoft Homepage > Payroll Tasks > Deductions > General Deduction Entry Update	Legal Name
Review Paycheck	Main Menu > PeopleSoft Homepage > Payroll Tasks > Paycheck > Review Paycheck	Legal Name
Review Paycheck Summary	Main Menu > PeopleSoft Homepage > Payroll Tasks > Paycheck > Review Paycheck Summary	Legal Name
Self Service Transaction Links	Main Menu > PeopleSoft Homepage > Payroll Tasks > Payroll Transactions > Self Service Transaction Links	Name
Update Employee Tax Data	Main Menu > PeopleSoft Homepage > Payroll Tasks > Employee Payroll Information > Update Employee Tax Data	Name

Note: The **Name** field can refer to **Lived Name**, **Preferred Name** or **Legal Name**

Benefits Pages

Page Name	Page Navigation (Fluid)	Search Criteria
ACA Employee Eligibility	Main Menu > PeopleSoft Homepage > Benefits Administration > ACA/Benefits Eligibility > ACA Employee Eligibility	Name
Arrears/Frequency Override	Main Menu > PeopleSoft Homepage > Benefits Administration > Benefit Enrollment > Arrears/Frequency Override	Name
Assign to Benefit Program	Main Menu > PeopleSoft Homepage > Benefits Administration > Benefit Enrollment > Assign to Benefit Program	Name
Benefits Summary	Main Menu > PeopleSoft Homepage > Benefits Administration > Review Employee/Dependent Info > Benefits Summary	Name
Disability Benefits	Main Menu > PeopleSoft Homepage > Benefits Administration > Benefit Enrollment > Disability Benefits	Name
Health Benefits	Main Menu > PeopleSoft Homepage > Benefits Administration > Benefit Enrollment > Health Plan Enrollment	Name
Life and AD/D Benefits	Main Menu > PeopleSoft Homepage > Benefits Administration > Benefit Enrollment > Life and AD/D Plan Enrollment	Name
Retirement Plans	Main Menu > PeopleSoft Homepage > Benefits Administration > Benefit Enrollment > Retirement Plans	Name
Savings Management	Main Menu > PeopleSoft Homepage > Benefits Administration > Benefit Enrollment > Benefits Savings Management	Name
Savings Plans	Main Menu > PeopleSoft Homepage > Benefits Administration > Benefit Enrollment > Savings Plans	Name

Note: The **Name** field can refer to **Lived Name**, **Preferred Name** or **Legal Name**

Benefits Pages, cont'd.

Page Name	Page Navigation (Fluid)	Search Criteria
Simple Benefits	Main Menu > PeopleSoft Homepage > Benefits Administration > Benefit Enrollment > Simple Benefits	Name
Spending Accounts	Main Menu > PeopleSoft Homepage > Benefits Administration > Benefit Enrollment > Spending Accounts	Name
Update Dependent/Beneficiary	Main Menu > PeopleSoft Homepage > Benefits Administration > Review Employee/Dependent Info > Update Dependent/Beneficiary	Name

Note: The **Name** field can refer to **Lived Name**, **Preferred Name** or **Legal Name**

Employee Self-Service Pages

Page Name	Page Navigation (Fluid)	Search Criteria
Direct Deposit	Main Menu > Employee Actions > Income and Taxes > Direct Deposit	Name
View Paycheck	Main Menu > Employee Actions > Income and Taxes > View Paycheck (Note: the Pay Stub will show Legal Name)	Name/ Legal Name
CA State - W4	Main Menu > Employee Actions > Income and Taxes > CA State - W4	Legal Name
Federal Withholding	Main Menu > Employee Actions > Income and Taxes > Federal Withholding	Legal Name
Life Event/Benefits Changes	Main Menu > Employee Actions > Health and Welfare > Life Events/Benefits Changes	Name
Enroll in Benefits	Main Menu > Employee Actions > Health and Welfare > Benefits Enrollment	Name
Disability	Main Menu > Employee Actions > Personal Information > Disability	Name
Email Addresses	Main Menu > Employee Actions > Personal Information > Email Addresses	Name
Emergency Contact	Main Menu > Employee Actions > Personal Information > Emergency Contacts	Name
Employee Disclosure	Main Menu > Employee Actions > Personal Information > Employee Disclosures	Name

Note: The **Name** field can refer to **Lived Name**, **Preferred Name** or **Legal Name**

Employee Self-Service Pages, cont'd.

Page Name	Page Navigation (Fluid)	Search Criteria
Ethnic Groups	Main Menu > Employee Actions > Personal Information > Ethnic Groups	Name
Gender Identity	Main Menu > Employee Actions > Personal Information > Gender Identity	Name
Home and Mailing Address	Main Menu > Employee Actions > Personal Information > Home and Mailing Address	Name
Veteran Status	Main Menu > Employee Actions > Personal Information > Veteran Status	Name
My Current Profile	Main Menu > Employee Actions > Learning and Development > My Current Profile	Name
Name Change	Main Menu > Employee Actions > Personal Information > Name Change	Name
Patent Acknowledgment	Main Menu > Employee Actions > Personal Information > Patent Acknowledgment	Name
Patent Amendment	Main Menu > Employee Actions > Personal Information > My Patent Amendment	Name
Personal Information Summary	Main Menu > Employee Actions > Personal Information > Personal Information Summary	Name
Phone Numbers	Main Menu > Employee Actions > Personal Information > Phone Numbers	Name

Note: The **Name** field can refer to **Lived Name**, **Preferred Name** or **Legal Name**

Employee Self-Service Pages, cont'd.

Page Name	Page Navigation (Fluid)	Search Criteria
Add Dependent	Main Menu > Employee Actions > Personal Information > Personal Information Summary	Legal Name
Leave Balances	Main Menu > Employee Actions > Leave Balances	Name

Note: The **Name** field can refer to **Lived Name**, **Preferred Name** or **Legal Name**

Manager Self-Service Pages

Page Name	Page Navigation (Fluid)	Search Criteria
My Historical Profile	Main Menu > Manager Actions > My Historical Profile	Name
Current Team Profiles	Main Menu > Manager Actions > Current Team Profiles	Name
View Compensation History	Main Menu > Manager Actions > View Compensation History	Name
View Employee Information	Main Menu > Manager Actions > View Employee Information	Name
View Employee Absence Balance	Main Menu > Manager Actions > View Employee Absence Balance	Name

Note: The **Name** field can refer to **Lived Name**, **Preferred Name** or Legal Name

Workforce Administration Pages

Page Name	Page Navigation (Fluid)	Search Criteria
Activities	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > Activities	Name
Admin Verification of Employment	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > Admin Verification of Employment	Legal Name
Emergency Contact	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > Emergency Contact	Name
Gender Identity	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > Gender Identity	Name
Identification Data	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > Identification Data	Name
Job Data	Main Menu > PeopleSoft Homepage > HR Tasks > Job Data Related > Job Data	Both
Maintain POI Relationship	Main Menu > PeopleSoft Homepage > Person of Interest > Maintain POI Relationship	Name
Maintain Teleworkers	Main Menu > PeopleSoft Homepage > HR Tasks > Job Data Related > Maintain Teleworkers	Name
Modify a Person	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > Modify a Person	Both
PayPath Actions	Main Menu > PeopleSoft Homepage > HR Tasks > PayPath & Additional Pay > PayPath Actions	Name

Note: The **Name** field can refer to **Lived Name**, **Preferred Name** or **Legal Name**

Workforce Administration Pages, cont'd.

Page Name	Page Navigation (Fluid)	Search Criteria
Person Checklist	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > Person Checklist	Name
Person of Interest - Add	Main Menu > PeopleSoft Homepage > Person of Interest > Person of Interest - Add	Name
Person Organizational Summary	Main Menu > PeopleSoft Homepage > HR Tasks > Person Organizational Summary	Name
Person Profiles	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > Person Profiles	Name
Search for People (Search/Match)	Main Menu > PeopleSoft Homepage > HR Tasks > Search for People (Search/Match)	Legal Name
Security Clearance	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > Security Clearance	Name
Smart HR Transaction Status	Main Menu > PeopleSoft Homepage > HR Tasks > Template Based Hire > Smart HR Transaction Status	Name
SS Smart HR Transactions	Main Menu > PeopleSoft Homepage > HR Tasks > Template Based Hire > SS Smart HR Transactions	Name
Transaction Status	Main Menu > PeopleSoft Homepage > HR Tasks > Template Based Hire > Transaction Status	Name
UC Employee Experience Admin	Main Menu > PeopleSoft Homepage > Experience Based Pay > Enter Experience Folder > UC Employee Experience Admin	Name

Note: The **Name** field can refer to **Lived Name**, **Preferred Name** or **Legal Name**

Workforce Administration Pages, cont'd.

Page Name	Page Navigation (Fluid)	Search Criteria
UC Employee Experience Page	Main Menu > PeopleSoft Homepage > Experience Based Pay > Enter Experience Folder > UC Employee Experience Page	Name
UC Employee Review	Main Menu > PeopleSoft Homepage > HR Tasks > Job Data Related > UC Employee Review	Name
UC External System IDs	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > UC External System IDs	Name
UC Patent Inquiry	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > UC Patent Inquiry	Name
Update Contract Pay NA	Main Menu > PeopleSoft Homepage > HR Tasks > Contract Pay > Update Contract Pay NA	Name
Workforce Job Summary	Main Menu > PeopleSoft Homepage > HR Tasks > Job Data Related > Workforce Job Summary	Both

Note: The **Name** field can refer to **Lived Name**, **Preferred Name** or Legal Name

General Ledger Pages

Page Name	Page Navigation (Fluid)	Search Criteria
Funding Entry	Main Menu > PeopleSoft Homepage > General Ledger Administration Homepage > General Ledger Tasks > Funding > Funding Entry	Name
Funding Entry Inquiry	Main Menu > PeopleSoft Homepage > General Ledger Administration Homepage > General Ledger Tasks > Funding > Funding Entry Inquiry	Name
Process Direct Retro	Main Menu > PeopleSoft Homepage > General Ledger Administration Homepage > General Ledger Tasks > Direct Retro > Process Direct Retro	Name
Review Retro Distribution	Main Menu > PeopleSoft Homepage > General Ledger Administration Homepage > General Ledger Tasks > Direct Retro > Review Retro Distribution	Name
Process Benefits Cost Transfer	Main Menu > PeopleSoft Homepage > General Ledger Administration Homepage > General Ledger Tasks > Benefits Cost Transfer > Process Benefit Cost Transfer	Name
Review Benefits Cost Transfer	Main Menu > PeopleSoft Homepage > General Ledger Administration Homepage > General Ledger Tasks > Benefits Cost Transfer > Review Benefit Cost Transfer	Name

Note: All General Ledger pages are found within the [General Ledger Administration](#) Homepage