



UCI UCPATH

Transactor Digest

June 9, 2022

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.

July 1 Retirement Processing and COLA Eligibility

Please review the job aids for both [retirement](#) and [Emeriti processing](#). For Emeriti, use Option 2 create a new employee record. To qualify for the *Inactive* Cost-of-Living Adjustment (COLA) increase, eligible UC Retirement Plan (UCRP) benefit recipients must have 1976 Tier service credit or Safety classification, and have at least a one business day break in service prior to the July 1 retirement date.

Refer to the updated [Retirement Processing for July 1 Retirement Date - COLA](#) job aid for terminology, examples, and guidance on processing this transaction in UCPATH.

Action Items:

- Submit retirement templates as appropriate

- Submit final pay requests for accrual payouts as appropriate
- Submit EEC ticket to Payroll for any adjustments needed for sick time that has been converted to service credit

Resources:

[Job Aid: Retirement Processing for July 1 Retirement Date - COLA](#)

[Job Aid: Emeriti Processing for July 1 Retirement Date](#)

[Simulation: Initiate Retirement Template Transaction](#)

Vacation Accrual Update

Please note the following information regarding vacation accruals:

- The temporary change to vacation accrual maximum ends June 30, 2022.
- If the employee submits usage for June in July and it brings them down enough to accrue in July, the system will grant them missing accruals.
- The system will always go back and recalculate the calendar that has usage submitted and then grant any accruals they may have lost for that time period if they were at max.

Note: The leave team will no longer be at the virtual Drop-In Center. If you have leave related questions, Philip will put you in touch with the appropriate leave individual to answer your questions, or you can open an [EEC ticket](#).

Expected Job End Date Monitoring

Utilize the Employee Roster Report to review employees with upcoming expected job end dates. Ensure that the employee's job should be terminated or update the end date to avoid cancellation of benefits and loss of access to systems resulting from an incorrect termination.

Direct Retro Reminders

Bundling of multiple paychecks on a single, simple direct retro transaction is allowed, but please adhere to the following guidelines and recommendations:

- Do not bundle more than five (5) checks in a single transaction. More than five checks cause the page performance to suffer by appearing non-responsive.
- If you encounter any type of error while saving or submitting a bundled SCT transaction, UNBUNDLE and submit them one paycheck at a time. This isolates the problem paycheck.
- DO NOT BUNDLE paychecks with work study, or funding that used the Salary Cap/MCOP worksheet. They must be submitted one paycheck at a time.
- Check the Campus Suspense (10002) and Department Default accounts now; do not wait until the last minute to process those SCTs.

Year-End Deadlines

Please note the dates below for year-end deadlines.

- All funding entry and funding updates should be entered by 6/23.
- Funding entry freeze from 6/24 – 6/30.
- Funding Rollover process 6/24 – 6/30.
- Rollover Exception reports distributed to locations:
- MCOP: 6/28 – 6/29
- Non-MCOP: 6/30 – 7/1
- When inputting new funding for next year, change the fiscal year from current year default; this needs to be done on the search screen
- Direct Retro transactions that are initiated but not submitted or approved need to be submitted or cancelled
- Last date for Direct Retros to be included for 2021/2022 must be fully approved by July 6 at noon- if the deadline is missed it will post to next fiscal year

Update on Out-of-State Tax eForm

A form is available on UCPATH in the [Forms Library](#) to determine the tax withholding for an employee who works in a state other than California. UCPC cannot take state tax information from the address in UCPATH because CA law requires that employees be taxed in CA unless they file a claim that they are residents of another state. Employees can complete the form, which categorizes them into one of four residential designations, to determine withholding.

Work Force Admin Transaction Metrics

UCPC is currently consistently processing hire transactions in three days or less.

Final Pay Request Comments

Please use the new comments template for submitting final pay requests. Copy and paste the bulleted text below into the “Initiator Comments” field of the final pay request and complete as appropriate. Use of this template will expedite final pay handling by eliminating unnecessary information while ensuring that necessary information is provided consistently.

- Last day on paid status: MM/DD/YYYY
- Termination Transaction ID:
- Auto Termination Date: (if applicable)

The last day on pay status is one day prior to Termination. Refer to the new [Termination and Final Pay](#) job aid for terminology, examples, and guidance on processing this transaction in UCPATH.

Resources:

[Initiate Voluntary Termination Template Transaction](#)

[Initiate Involuntary Termination Template Transaction](#)

[Submit Final Pay Request](#)

[Approve Final Pay Transaction](#)

Continuous Improvement Projects

The UCI UCPATH project team is continually engaging in projects to train, teach, support, and benefit transactional users – and to improve our processes, including the following:

Leave of Absence (LOA): We completed additional training resources for LOA; please click on the links below for further details.

[Training Tips](#) | [POC \(Points of Contact\)](#)

Finance Interface Training: We completed our first pilot with the Merage School of Business on Finance interfaces between UCPATH and KFS. The School of Computer Science is just completing their sessions. If your school is interested in this training, please email us at: ucpath@uci.edu

Reports and Dashboards - New reports and dashboards are frequently being added. See the newest addition: [KFS Suspense Account Audit Dashboard](#)

Upcoming Trainings & Resources:

- **Grad Student Appointments**

Virtual workshop to review transactions for Summer. For the recording and PPT presentation of this workshop, [click this link](#) and scroll down to UCPATH Support Documents > HR and HCM > Academics > Grad Student Summer Processing

Fall Hiring Process for Grad Students

- Virtual workshop in July to address Fall hiring processes | If interested, please email: ucpath@uci.edu

New Hire Learning labs

[Q2](#) labs have just been completed; watch the [UCPATH website](#) for new schedule | Register in [UCLC](#)

Keep updated about UCPATH's continuous improvement projects on DFA's Program, Development, and Execution (PDE) website at dfa.uci.edu/pde. For questions on

Continuous Improvement, please contact Georgana Thompson Simonowitz at georgant@uci.edu. For transaction questions, please contact the UCPATH Employee Experience Center (EEC) at eec@uci.edu or log in to our [Virtual Drop-in Center](#).

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#

Resources – UCI UCPATH Transactor Page

Remember to visit our [UCI UCPATH](#) website for access to transactor resources and guides to assist you in successfully navigating through UCPATH. Our website has links to job aids, training presentations and recordings, system notifications, transaction deadlines, and links to related websites such as the [Employee Experience Center](#).

Did You Know...?

Once an employees' benefits are terminated, retroactive corrections or updates will not immediately reinstate benefits.

- When retroactive changes are made to Job Data, the systematic re-evaluation of benefits can take up to 30 days
- When there is an immediate need for benefits reinstatement, call [\(855\) 982-7284](tel:855-982-7284) or submit a case with "Expedited Benefits" in the subject line.

Note: It is not necessary to contact QCU.

Did You Also Know...?

When a retiree is rehired, UCPATH has logic to reinstate sick hours.

- The system uses the action and effective date combination to determine when to reinstate sick hours
- Action and effective date is 181 days or more = no sick hours reinstated
- Action and effective date is 90-180 days = up to 80 sick hours reinstated
- Action and effective date is less than 90 days (89 days or fewer) = all sick leave reinstated
- If a retiree should not have their sick hours reinstated, an eForm should be submitted to UCPATH

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

Thank You!

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Questions? Email ucpath@uci.edu