

The banner features a background image of a modern building with a glass facade and a concrete structure, set against a clear blue sky. The text 'UCI UCPATH' is prominently displayed in white, with 'UCI' in a larger font. Below it, 'Transactor Digest' is written in a yellow font. A dark blue horizontal bar at the bottom of the banner contains the date 'June 22, 2023' and a subtitle in white italicized text.

# UCI UCPATH

## Transactor Digest

**June 22, 2023**

*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.

## Lived Name is Live - Updates and Reminders

Changes to UCPATH were deployed June 20 to comply with the University of California's [Gender Recognition and Lived Name Policy](#). **Please clear your [browser's cache](#) before logging into UCPATH.** Our [website](#) has more information under the "Latest Information" area. Key information includes:

- A person's Lived Name is labeled "Name" and their Legal name is labeled "Legal Name."
- Most transactions will display the Lived Name as "Name."
- The best method for ensuring a correct employee match is to utilize the employee ID; when in doubt, ask for the person's empl\_id.
- When talking or emailing someone, always use their "Name" - not their Legal Name.

If you have access to "Legal Name" in UCPATH and have not yet taken the required Lived Name training, please [register in UCLC](#) for training.

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- UCPATH Lived Name Training (Recording)
- Or, if you have inquiry only access - UCPATH Lived Name Training Inquiry

IMPORTANT NOTE: Some transactors may encounter an issue when opening a transaction; this is a known defect that UCPATH is working to correct. Please click the "Ok to continue" button and it will take you to the screen you were navigating to. UCPATH

Cognos reports have been adapted to display Name instead of Legal Name.

## **Fiscal Year-End Reminders and Tips**

UCPATH is extending the final deadline for processing Direct Retros (salary cost transfers) to Friday, July 7. The new schedule of deadlines for submitting Direct Retros is below:

<u>Direct Retro Deadlines</u>	<u>Direct Retro Data in DOPE Reports</u>
June 21, 5 p.m.*	July 6
July 3, 5 p.m.*	July 10
July 7, 5 p.m.* (FINAL)	July 17 (after the fiscal year closes)

*\*High risk Direct Retros for contracts & grants funds must be submitted by 3 p.m.*

Important reminders and tips:

- START NOW! Once the fiscal year is closed, expenses cannot be moved into accounts for the closed fiscal year.
  - Approve all funding entries by 6/22; the funding entry freeze is 6/23-6/29.
  - The results of Direct Retros processed from July 4 to July 7 will not be reflected in UCPATH DOPE reports until after the fiscal year has closed.
  - Departments cannot make adjustments after period 12 closes.
  - The deadline for direct retro submission is July 7 for expenses to hit Fiscal Year 2022-2023.
  - Take special care when processing Direct Retros from July 4-7; they have the potential to create overdrafts that will not be reflected in reports until after period 12 closes in KFS. Any errors will be difficult to correct.
  - Ensure payroll processors and other financial staff work in close coordination. The results of final Direct Retros will not be available until after the fiscal year ends, so
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you will need to estimate the impact of Direct Retros and make budget adjustments based on those estimates before Period 12 closes in KFS on July 14.

- Contracts and Grants Accounting will not approve any Direct Retros that do not include answers to the mandatory questionnaire.

## Non-Represented Salary Changes

Pending State budget approval, non-represented staff will receive a 4.6% across the board (ATB) pay increase. The new salary rates will be reflected on the August 1, 2023, paycheck for monthly paid employees, and on July 19, 2023, for bi-weekly paid employees. Please do not enter transactions for impacted employees who are eligible for Across-the-Board increases between 6/27 and 6/30.

*Mass Update Spreadsheet(s):*

- The 4.6% ATB adjustments will be processed centrally by UCI HR People Services.
- HR will use data as of June 8 for processing the pay increases.

All increases for active employees, including those on approved leave of absence, will also be processed centrally. New rates will **not** be applied to jobs ending prior to June 27 for bi-weekly and monthly employees. Please review Job End Dates in UCPath and process extensions, as necessary. Extensions must be completed by Monday, June 26.

## Graduate Student Year-End Summer Transactions

See the Graduate Student Transaction Review section within the [May 30 Tuesday Training Tips PPT presentation](#) for information on position management review, the rehire and concurrent hire process, concurrent action reasons, onboarding, terminations, short work break, non-UCI graduate student hires, and Graduate Division EEC support.

## Job End Date Monitoring

The [New Job Ending Dashboard \(RUCI217\)](#) is available for reviewing with upcoming expected job end dates.

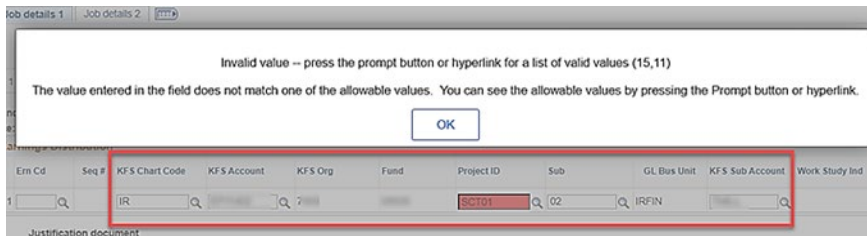
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- With many jobs ending in June, review jobs with expected job end dates to determine if they need to be extended or will end on the date in the system.
- Avoid having active jobs with expired end dates, including Academic and CWR. Expired job end dates can affect benefits and other systems, even if the job does not auto-term.

## ChartField Errors in UCPATH / Resolution Process

The following error message displays in UCPATH if any of the following chartfields are not valid based on the information sent to UCPATH from KFS.

- KFS Chart Code
- Account
- Project ID
- Sub
- KFS Sub Account



Verify that the ChartField information was entered correctly.

1. If entered correctly, follow up with the financial analyst in your department to ensure that the information is correct.
2. If the analyst verifies the information is correct, take a full-page screenshot showing the error message, the page you are on, and your entire ChartField String (all the KFS values)
3. Send an email with the above information to Accounting at [kfs@uci.edu](mailto:kfs@uci.edu)

## Reminder for Anyone Leaving UCI Employment

Remind retirees, students, and anyone leaving UCI employment to input their personal email into UCPATH before the end of their last day. Employees who retire or separate from the University can access pay statements and tax documents for up to 36 months via the Former Employee Portal.

*Before Retirement or Separation:*

- Employees should update their primary/home email address in UCPATH Online by navigating to the following page: **Employee Actions>Personal Information > Personal Information Summary > Email Address**
- Employees must list an email address that will be accessible to them after leaving their UC employment.

*Setting Up a Former Employee Portal Account after Separation:*

As a best practice, employees are asked to clear their cache to avoid receiving errors and stale requests:

- Navigate to: <https://ucseauweb.ucop.edu/iamseauweb/seRequestRegistration>
- Select: **University of California, Former Employees**
- Select: Create an Account
  - Enter your primary email address (updated above)
  - Enter the last four digits of your social security number
  - Click the “Send me a registration link” button
- The system will generate an email with further instructions that will walk the employee through completing the registration process and grant them access to the Former Employee Portal.
  - If the registration email is not received within an hour, the employee should check their Spam or Trash folders.

*Additional Information:*

- Employees without a social security number on file will not be able to gain access to the former employee portal.
  - If an employee needs additional support setting up their Former Employee Portal, they can contact UCPATH at 1-855-982-7284.
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## Direct Retro Tips and Reminders

Please note these tips and reminders for Direct Retros:

- Direct retros in an Initiated status should be completed and submitted for approval, approved, or canceled.
- Work Study and MCOP direct retros must be submitted one paycheck at a time; you cannot bundle multiple paychecks in a single transaction.
- Make sure there are no expenses sitting in the Campus Suspense and Department Default accounts.
- When processing a direct retro, all accounts on the paycheck must be open even if they are not being updated.
- If an account is no longer open/active, please follow-up with Accounting & Fiscal Services (AFS) using the email [kfs@uci.edu](mailto:kfs@uci.edu).

## New UCPath Approver Training Videos

New AWE Videos are posted in the [Training Presentations section](#) of the [ucpath.uci.edu](http://ucpath.uci.edu) website's transactor page. Please share with approvers in your areas.

[Lesson 1: AWE Overview](#)

[Lesson 2: Position Management Approvals](#)

[Lesson 3: Funding Entry Approvals](#)

## Virtual Drop-In Center Hours

The virtual drop-in center for transactors is available Monday through Friday from 10 a.m. to 12 p.m. via Zoom. You can join any time during these hours for answers to UCPath questions. We are here to help.

- Zoom link: <https://zoom.us/j/8519035805>
- One tap mobile: +16699006833,,8519035805#

## Tuesday Training Tips Call-In Sessions

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All transactional users are invited to attend our bi-weekly Tuesday Training Tips call-in sessions on timely topics and lessons learned. Topics are published on [our website](#) the day before the meeting, and an agenda is emailed to transactors beforehand. Join us for sessions on 6/27, 7/11, 7/25, and 8/8.

- 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 this Transactor Digest or other UCPATH Alert emails, [subscribe](#) to our digital mailing list to receive updates.

**Thank You!**

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

UCI UCPATH

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