

The banner features a background image of a modern building with a glass facade and a concrete structure. The text 'UCI UCPATH' is prominently displayed in white, with 'UCI' in a larger font. Below it, 'Transactor Digest' is written in a smaller, yellow font. The date 'September 27, 2023' is centered in white, and a descriptive tagline is at the bottom.

# UCI UCPATH

## Transactor Digest

**September 27, 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.

### **2023-2024 Work-Study Program Guidelines**

UCPATH Initiators, please review the final [2023 - 2024 Work-Study Program Guidelines](#) from Sergio Ramirez in the Office of Financial Aid & Scholarships. Follow this information for specific guidance on hiring and administering Work Study students for this year.

If you have any questions or comments, please contact the Work-Study Coordinator at 949-824-5339 or email [FinAid-WorkStudy@uci.edu](mailto:FinAid-WorkStudy@uci.edu). If you have questions about using UCPATH to process work-study payroll adjustments, please contact the [Employee Experience Center \(EEC\)](#). Please share this information with your Business/Fiscal Officer or any colleague that may benefit from it. Thank you.

### **Change to Virtual Call-In Center**

The UCI UCPATH support team will discontinue the Virtual Call-in Center effective 10/1/2023. Please open an [Employee Experience Center \(EEC\)](#) ticket (UCPATH Transactor

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Support Inquiry or Finance & Accounting Inquiry) for any questions that you would have asked the virtual call-in center.

The UCI support team will continue to respond to those EEC tickets, either through the case or reaching out to set up an appointment time to discuss. This is expected to be more efficient for both transactors and the support team.

As a reminder, in addition to the points of contact within your Division, there are many resources on [ucpath.uci.edu/transactors](https://ucpath.uci.edu/transactors), in UCPATH Help/FAQ, and on [Ask UCPATH](#) (type in a question in the 'How can we help?') to address many questions quickly.

## **New Transactor Web Page - Now Live!**

The transactor web page has been redesigned from transactor input and is now live. Go to [ucpath.uci.edu](https://ucpath.uci.edu) and click on the "Access Transactional User Materials" button, or go directly to [ucpath.uci.edu/transactors](https://ucpath.uci.edu/transactors) for job aids, transaction deadlines, support resources, and more. As a new security measure, you may need to login with your UCInetID and DUO.

Please visit the redesigned page and explore all the resources there. You can also view a ["crosswalk" document](#) to compare where information was on the former web page compared to the new page. Improvements include:

- Updated navigation, content, and visuals to find job aids, tools, help, and resources more easily.
- Enhanced security: visitors may need to log in and use the DUO to reach the transactor page.
- Incorporation of the "voice" and needs of transactors from a survey, two focus groups, and discussions in Tuesday Training Tips sessions.
- A feedback survey on the landing page to receive web requests and comments.

## **Training Updates**

### **Salary Cost Transfer Training Schedule**

Virtual training for UCPATH New Salary Cost Transfer Functionality will take place this fall, with classes spanning October 23 - December 8. Please review the [virtual training schedule](#) and register for a session starting October 3 via the [UC Learning Center \(UCLC\)](#).

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### **Miscellaneous Training Reminders:**

- Training for newly hired transactors should be taken via our recorded training in [UCLC](#), followed by participation in refresher sessions. Training taken in UCLC via the recorded sessions will satisfy needs for security access.
- Watch for announcements of future refresher training classes.
- When you register for any courses in UCLC, please add the class to your calendar. UCLC does not automatically add to your calendar unless you request it to.
- If there are immediate training needs or if your division has questions, please reach out to [ucpathtraining@uci.edu](mailto:ucpathtraining@uci.edu).

## **Quick Reminders**

Below are some reminders to keep in mind:

- As you are processing new hires, be mindful of updating locations and cubicle fields.
- Note that once a UCPC case is closed, they no longer see any communication from you on that case. Please open a new case and reference the previous case number.
- The Salary Cap/MCOP worksheet is required when an employee's funding uses a capped fund, and their salary is over-the-cap.
- If a termination transaction has been processed for a future date and the employee has decided not to leave before the effective date, process a job data update form asking to remove the termination row. If the effective date has passed, then use rehire reinstatement transaction.

## **Transfer Coordination**

### ***INTRA-Location Transfer Overview:***

- Intralocation transfers are initiated when an employee transfers from one position to another within the same department or Division within UCI and a new employee record is not needed.
    - The HIRING department initiates the UC-Transfer template.
    - No termination template is required.
    - A separate transfer template is available for academic and staff.
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- Intralocation transfers between UCI Departments or Divisions that require a new employee record.
  - Current Dept.: Submits Voluntary Termination template with reason code Transfer- Intra Location.
  - Hiring Dept.: Submits concurrent hire template with reason code Transfer- Intra Location

***INTER-Location Transfer Overview:***

- Interlocation transfers are initiated when an employee transfers from one UCPath campus to another UCPath location without a break in service (e.g., an employee transferring from UCLA to UCI).
- Two separate templates must be initiated:
  - Concurrent Hire Template: Initiated by the HIRING business unit with the reason code Inter BU Transfer
  - Voluntary Termination Template: Initiated by the CURRENT business unit with the reason code Inter BU Transfer
- Transactions must be done at the same time.
- Hire Effective Date and Termination Effective Date must be the **same**.

Coordination for ALL Transfer Types:

- Hiring Business Unit:
  - Reaches out to the employee’s current business unit to discuss the hire date for transfer and determine the transfer process.
  - Submits Conc. Hire template.
- Current Business Unit: Submits Termination template.
- If you are unable to reach someone at the employee’s HR office, please contact the appointed Transfer Coordinator for that school or department. [Transfer Coordinator lists](#) are available on [UCNet](#).

## **Using the UC Rehire Templates**

The UC Rehire templates are used to hire employees with prior UCI working history (usually with a gap in service). Follow these tips and important information to use these templates.

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- You may select an existing inactive UCI employee record to rehire the employee or create a new employee record. If you select an existing employee record, it must match the new job type (i.e., staff to staff, academic to academic, etc.)
- If the employee's only terminated employee record is at a different UC location, you must use the UC\_Full\_Hire template with the appropriate rehire reason code.
- When submitting a rehire transaction, only use an existing employee record if the previous job was in your school/department.
- Rehiring an existing record that did not previously belong to your business unit will cause the previous department to lose access to that employee record entirely.
- If necessary, please create a new record.

## Graduate Student Information

Please review the job aid on [GSR Fellow or Trainee Job Setup-Payroll Components](#) if you haven't already. Besides this job aid, there is also one for Managing Transactions for Student Employees (ACAD) in the new Academic Section.

## W-2 Season Reminders

W-2 season is approaching quickly and your help is necessary to ensure that employees receive accurate W-2 forms on time. Please remind departments to:

- Submit retroactive job and additional pay updates promptly.
- Quickly reconcile and submit overpayments and earning adjustments that will impact the 2023 W-2.
- Encourage employees to review and update their email address and sign up for paperless W-2 and 1095-C in UCPATH online.

Employees can access the following new Employee Self-Service training materials in the [UCPATH self-service help site](#):

- PHCMPOR111: Employee Actions: Payroll Information: Added "Income" to the ***Update My Out-Of-State Income Tax Withholding*** simulation title and updated the Home Address step
  - A new simulation, titled "***Change Existing Out-Of-State Income Tax Withholding***" that explains how to change to a new out-of-state income tax withholding.
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## Did You Know...?

As of August 2023, UCPATH expanded the use of the eBenefit Enroll forms to postdoctoral scholars, medical residents, and graduate students who are eligible for FSA plans. The Employee Benefit Category option has been added as a new drop-down menu to the Benefits Enrollment eForm. Once an employee selects one of the below options, the appropriate eBenefit form will display:

- Faculty/Staff Benefits
- Graduate Student Benefits
- Medical Resident Benefits
- Postdoctoral Scholar Benefits

## Did You Also Know...?

When making changes to a position or job, please ensure the pay and compensation “frequency” fields are aligned to avoid negative downstream impacts.

- Pay Frequency is used to calculate the overall compensation rate for pay.
- Pay Frequency and Compensation Frequency are on the “Job Data” tab in PayPath and in the “Salary and Compensation” section in the Manage Job page.
- Compensation Frequency is used to define the compensation rate code (H = Hourly, A = Annual)
- The frequency fields on the “Compensation” tab in Job Data determine the pay schedule and how the overall compensation rate is calculated.
- When submitting position or job code updates, the Frequency will default from the Job Code table. Transactors must review the “Frequency” and “Pay Components” to ensure they are correct.

## Tuesday Training Tips Call-In Sessions

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 10/3, 10/17, and 10/31.

- The Zoom # for these sessions will be: <https://zoom.us/j/6485693025>
  - One tap mobile:+16699006833,,6485693025#
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## Find Resources on the New 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. The redesigned transactor web page was deployed on September 6, 2023.

## 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)