

UCI UCPath

Transactor Digest

July 31, 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, and more.

July 2024 UCPath Release Changes

UCPath implemented the following enhancements on July 15, 2024. View more [details and resources about these enhancements](#).

- **Gender Identity, Sexual Orientation, and Pronouns:** A modern design will better capture gender identity, sexual orientation, and pronouns for employees.
- **New Submit on Behalf of (SOBO) Case Submission Form:** Employees who submit inquiries on behalf of others no longer need to select a topic and category; the system will determine that based on information provided by the submitter for a more efficient and user-friendly process.
- **New Former Employee Portal:** The redesigned, streamlined portal includes enhanced security, is mobile-friendly, and includes features that are relevant to former employees, ensuring an intuitive experience. The following resources are available on UCNet:



- Job Aid: [UCPath Former Employee Portal](#)
- [UCPath Former Employee Portal: Frequently Asked Questions](#)
- **Deployment of Fluid Functionality in TAM:** Deployed for a more intuitive and user-friendly experience; this has minimal impact to UC Irvine as we move away from TAM.
- **Union Roster File and Union Dues File Redesign:** The I-254 union roster and I-257 union dues files have been redesigned to remove manual workarounds. NOTE: There is no impact to local transactors.
- **Rewrite Systemwide GL Assessments:** UCPath redesigned the systemwide assessments process to consolidate and streamline the generation of assessment information. UCPath now delivers assessment information monthly three to five business days following generation of summary and detail labor ledger results. This does not impact any UCI processes.

Gender Identity, Sexual Orientation & Pronouns Update



On July 15, UCPath introduced enhanced features that supports the university's diversity initiatives and align with the [Gender Recognition and Lived Name \(GRLN\)](#) policy.

Changes for Employees

- **Self-Identification:** Upon logging into UCPath, employees are guided to confirm, update, or decline self-identification details before accessing self-service features in UCPath.
- **Gender identity:** Updated terms for gender identity include selections like Woman, Transgender Woman, Man, or Transgender Man.
- **Sexual orientation:** Categories like Asexual are available, and the Gay or Lesbian selection has been separated into two distinct options.

- **Pronouns selection:** A new feature allows employees to select from a [list of pronouns](#) to be displayed alongside their name on certain pages in UCPATH.
- **Pronouns visibility:** Pronouns appear alongside employee names in UCPATH, and will only be visible to managers, HR administrators and UCPATH Employee Services on pages that display an employee's lived name.

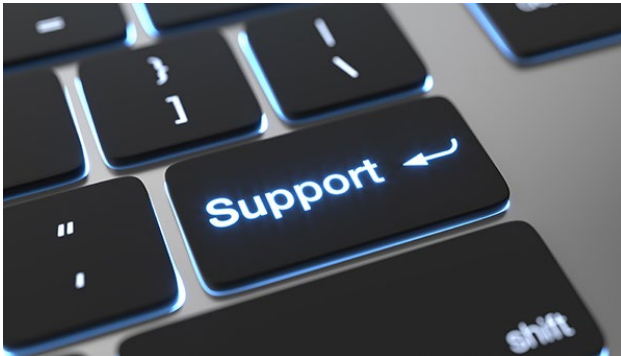
Changes for Transactors

- **UCPC Cases:** Pronouns will be displayed alongside the employee's name.
- **Pronoun visibility:** For users with enhanced UCPATH access, pronouns display when hovering over an employee's name on non-self-service pages. However, some UCPATH pages don't support the hover capability. Review this [UCPATH Online FAQs for Gender Identity, Sexual Orientation and Pronouns document](#) for a list of pages.

[View more details and resources](#) for this important update, including the following links:

- [Enter Voluntary Self-Identification Details](#)
- [Complete Guided Onboarding for Self-Identification Information](#)

Changes to SOBO Case Submission



For information on the changes in UCPATH to Submit on Behalf of (SOBO) Case Submissions, please view the [PowerPoint presentation](#) or recording of the June 25 virtual Training Tips Session on the transactor page of the UCI UCPATH website under Common Resources > Tues. Training Tips Archives > 6/25.

This information covers where to go on the dashboard, searching for and selecting an employee, review of open and closed cases, the Case Submission Form, knowledge articles, case contact details, Workforce Administration (WFA) cases, and more. Find additional resources at UCPATH: [Submit an Inquiry On Behalf of Employee \(SOBO\) to UCPATH](#).

Quick Reminders

- When terminating an employee who is on Short Work Break (SWB) or Leave of Absence, you do not need to bring them back from Leave or SWB before terminating.
 - If you owe them any missing pay, then you may need to return them to process the transaction.
- Expected Job End Dates need to be reviewed and adjusted as appropriate to avoid unplanned terminations.
 - Utilize the [Job Ending Dashboard](#) to monitor jobs ending in next month to determine if they need to be extended.
 - Be mindful that pay increases may not be processed on time if the job is not extended.
- Utilize the Off-Cycle Dashboard when needing to know status of Off-cycle transactions submitted. Located in UCPATH under Payroll Tasks.
- FLSA mismatch requirements apply even when one of the jobs is on Short Work Break.



EEC Cases

When opening EEC (Employee Experience Center) cases there are two main categories for UCPATH support:

- GL, Financial, SCT, DR, Funding, and Accounting tickets open to UCPATH Finance and Accounting Inquiry.
- HR Transactions, including Hire, Term, PayPath, Ext Abs, open to UCPATH Transactor Support Inquiry.

Updated Required Training Curriculum

The required training curriculum for transactors has been updated to include SCT401; it is posted to the UCI UCPATH website on the transactor page under the System Access (Security) and Training sections. Please review the current curriculum on the [website](#):

- System Access (Security) > How to Request Access to UCPATH
> [Required Training Based on Security Roles](#)
- Training > Getting Started > Training Curriculum / [Required Training by Role](#)



Subscribe to UCPATH Teams Announcement Channel

In Microsoft Teams, remember to [subscribe to our UCPATH Teams Announcement channel](#) to keep up to date with any system outages, changes, and other reminders. This often provides the fastest means of receiving important transactor information in real time.

New Calendars Posted on the UCI UCPATH Website

The new [GL Processing Calendar for Q3 2024](#) and the new [Salary Cost Transfer \(SCT\) Processing Calendar for Q3 2024](#) are now available on the UCI UCPATH [website](#). They are located on transactor page in the Funding & General Ledger section, under the Calendars menu.

Metrics for UC Irvine Campus and UCI Medical Center

Template Transaction Processing (June 2024)	Campus	Med Ctr
Smart HR Hires	1,953	175
Smart HR Other (Terminations, Transfers, etc.)	946	229
Transactions Canceled	138	12
Average UCPATH Processing Time	1.5 days	1.4 days

Off-Cycle Processing (June 2024)	Campus	Med Ctr
Transaction Volume	219	47
UCPATH Turnaround Time	5.8 days	5.3 days

Did You Know ... ?

Case submitters can reopen closed inquiries when further attention is needed.

Here are the functionalities:

- The original submitter can reopen their inquiries of any type.
- Cases can be reopened three times within one year of the original closure date.

The original case numbers, associated communications, and attachments are retained. For additional information, please refer to the [Reopen Closed Inquiry](#) job aid.

Having outdated employee or dependent addresses can affect access to care, claims payment, and plan enrollment.

Common errors include:

- Incorrect or missing suffix for street address,
- Apartment or unit number missing
- Incorrect zip code
- Not in the USPS Standardized format
- Same address for home and mailing fields
- Using copy/paste when entering address information
-



To review and/or correct an employee's address within UCPATH, please follow the following navigation path: *UCPath Home Screen > Employee Actions > Personal Information > Personal Information Summary > Home/Mailing Address > Change Home/Mailing Address*

For dependents, whose address is different than the employee's address, follow this navigation path: *UCPath Home Screen > Health and Welfare > Dependent Coverage > Dependent* (select "Dependent" to review address details).

Find Help & Resources: Transactor Support Web Page

UC Irvine's UCPATH transactors have a dedicated web page with information on how to find local and systemwide help and resources regarding transactions, opening cases, staying up to date on the latest information, and accessing frequently used forms and knowledge resources. To access this page:

- Go to UC Irvine's [UCPath transactor Web Page](#) (login / DUO required for access).
- Click on the Get Help / Support Resources icon.



- Click on subject boxes to display information or to access additional links. Documents will open in a separate browser window.

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 Aug. 6 and 20.



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

Discover 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 a UCPATH transactor topic? Let us know your topic for a future edition.
Send an email to ucpath@uci.edu*

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Questions? Email ucpath@uci.edu