

This document provides the Agenda Topics for each Training Tips Presentation.

- Find the date of the topic you are interested in, then open the presentation or recording for that date.

Notes of Training Tip Sessions

[List of Topics for each Session by Date](#)

August 2021

8/3 [\[Presentation\]](#) [\[Recording\]](#)

July 2021

7/13 [\[Presentation\]](#) [\[Recording\]](#) | 7/20 [\[Presentation\]](#) [\[Recording\]](#) | 7/27 [\[Presentation\]](#) [\[Recording\]](#)

June 2021

6/1 [\[Presentation\]](#) [\[Recording\]](#) | 6/8 [\[Presentation\]](#) [\[Recording\]](#) [\[Excel\]](#) | 6/15 [\[Presentation\]](#) [\[Recording\]](#) | 6/22 [\[Presentation\]](#) [\[Recording\]](#) | 6/29 [\[Presentation\]](#) [\[Recording\]](#)

May 2021

5/4 [\[Presentation\]](#) [\[Recording\]](#) | 5/11 [\[Presentation\]](#) [\[Recording\]](#) | 5/18 [\[Presentation\]](#) [\[Recording\]](#) | 5/25 [\[Presentation\]](#)

April 2021

4/6 [\[Presentation\]](#) [\[Recording\]](#) | 4/13 [\[Presentation\]](#) [\[Recording\]](#) | 4/20 [\[Presentation\]](#) [\[Recording\]](#) | 4/27 [\[Presentation\]](#) [\[Recording\]](#)

April 7, 2020

- Job Data Updates
 - Effective Dates
 - Position vs. Job Data Tab
- Appointment Extensions
- Submitting Position Update & Job Data Update Forms

April 14, 2020

- Extended Absences
 - Returning employees from leave
- TRS Resources
- Payroll Deadline Calendar
- Transferring Position to Another Department
- Additional Pay (repeat from 4/7)

April 21, 2020

- JED & Extended Absences
 - How by percent & by amounts impact transaction entry
- Position Update Form & Job Data Update Form
 - When Should They be Used?
 - New Position vs. Correcting Position
- Without Salary (WOS) Appointments
- Academic Post Doc Processing

April 28, 2020

- Academic Post Doc Processing
- Auto Termination Rules
- Changing Position Title Names

May 5, 2020

- Work Study & Using KFS Sub-Accounts
- Extending Appointment End Dates
 - Available Reports to Monitor
 - Reinstatements
- Missing Empl Records in Smart HR Templates
- Accrual Adjustments & Vacation Max Process

May 12, 2020

- COVID-19 Leave Process
 - TRS & UCPath Updates
- Comp Time Payouts
- Budget Distribution Updates
 - Reclassification, Promotions
 - Pay & Merit Increases
- Pre-Conversion Pay for Employees

May 19, 2020

- Short Work Break
- UCPath Security Training and Roles Wiki
- Template Transaction User Guide
- Pre-Conversion Pay for Employees
- Post Doc Anniversary Dates
- Update on COVID-19 Leaves

June 2, 2020

- Funding Corrections
- Changing Pay Frequencies
 - FLSA Changes / Mismatches
- Additional Pay Support
- New Off-Cycle Process

June 9, 2020

- Direct Retro Splits
- Grad Student Processing
 - WOS & Paid Appointments
 - Mass Hire Plans
- Short Work Break
- Summer Salary Quick Tips

June 16, 2020

- Direct Retro & Work Study
- Changing Salary Admin Plans
- UCPath Grad – WOS Jobs
- UCPC Discrepancies

June 23, 2020

- Terminations & Final Pay
- Fiscal Year End Funding
- Direct Retro Reminders- Work Study
- WOS Processing -BYA Salary Admin Plan

June 30, 2020

- Vacation Leave Accruals
- Retirement Process Update
- Appointment End Dates
- Short Work Break Benefits Billing
- Summer Salary Updates for July
- Bi-Weekly Dates for Additional Pay

July 7, 2020

- Summer Salary Management
- Funding Rollover
- Recall vs. Emeritus Appts.
- Using the Rehire vs. Reinstatement Template

July 14, 2020

- Short Work Break and Union Dues
- New Transaction Requirements for BX Employees
- Distributions: UCPath vs PPS
- Transferring Positions to another Department

July 21, 2020

- NSTP
- Funding Reallocation
- Template Transaction User Guide
- Inter-location One-Time Payments

July 28, 2020

- Emails in Smart HR Templates
- Effective Dates in UCPath
- Payroll Requests and Final Pay

August 4, 2020

- EEC vs. UCPath Tickets
- Summer Salary Changes
- Position Data Update Form
- Job Data Update Form

August 11, 2020

- International Grad Students
- Funding Entry and Earnings Distribution
- Past-Due & Unpaid Additional Pay

August 18, 2020

- Earn Code Change Form
- Using JED Values
- Summer Salary MCOP

August 25, 2020

- Mass Hire Process Support
- Personal Data Changes
- Summer Salary

September 1, 2020

- UCPath Transaction Key Reminders
- Earn Code List: Uses & Demo
- HR Worksite ID Requirement

September 8, 2020

- Pre-Hire Process
- Employee Relation Codes
- Earn Code List: Uses & Demo
- HR Worksite ID Requirement

September 15, 2020

- Intermittent Leave
- Checking Effective Dates & Expected Job End Dates

September 29, 2020

- Inter-Location Transfers
- How to Identify Transactions Not Saved Database.

October 6, 2020

- Approval Delegation and Changes to Date of Birth
- Budget Distribution Updates
- HR Worksite ID Update & Tracker Profile ID
- Kahoot Q&A

October 13, 2020

- New One-Time Payment Process
- Auto Terminations Prior to Payroll Cutoff
- Terminations with Future Dated Rows

October 20, 2020

- Overpayments
- Useful Reports to monitor Job End Dates and other key information
- Intra-Location Transfers & Promotions

October 27, 2020

- DOPE Report vs KFS GL Reconciliation Tips

November 2, 2020

- Chronological Events in UCPath (Effective Dates)
- Using CWR Templates

November 10, 2020

- Approval Workflow
- Overpayment Workflow
- Inter/Intra Location Transfers
- Funding End Dates & Salary Cost Transfers

November 17, 2020

- Position Updates
- One Time Payments & Additional Pay

November 24, 2020

- Extended Absences
- Over-Allocated Positions
- External System ID (Smart HR Template)

December 1, 2020

- Extending Employee End Dates for 12/31 (system overview)
- Viewing Patent Acknowledgement for Employees
- Viewing Employee Eligibility Hours (toward career status)

December 8, 2020

- Report Updates
- Post Docs Processing & Updates
- Anniversary Kahoot!

December 15, 2020

- Post Docs Processing & Updates
- FTE & Short Work Break

January 5, 2021

- Payroll Calendar Updates to PayPath Actions
- Communication Updates & Future Plans

January 12, 2021

- Post Doc Anniversary Dates
 - Entry considerations & reminders
- Tips for Paying Out Vacation Accruals

January 19, 2021

- HR Worksite ID Guidance for Positions
- Updating Reports-to

January 26, 2021

- Work Study Guidance & Best Practices
- Accrual Adjustment Process & Updates

February 2, 2021

- Off-Cycle Dashboard: Additional Information
- Accrual Adjustment Process: Follow-up

February 9, 2021

- Revised Post-Doc Salary Scales
- Grad Student Process Changes
- Employee Transfers

February 16, 2021

- Invalid KFS Account/Suspense Report
- Tips to prepare for Fiscal Year End (FYE)
- Using Workforce Job Summary

February 23, 2021

- Due Dates on Grad Student Processing
- Direct Retro Processing Schedule

March 2, 2021

- UCPath Training Resources
- Changes to Final Pay
- International Employee Forms

March 9, 2021

- Helpful tips on UCPC tickets
- Open Q&A

March 16, 2021

- Additional Pay – Tips on Effective Dates
- Retro Pay Matrix

March 30, 2021

- Update to Call-In Hours
- Suggestions on EEC tickets
- Tips on submitting a case to UCPC

April 6, 2021

- Onboarding & Tracker Requests– Kristie Heck
- Reinstatement Process Updates (+ Benefits)
- Paycheck view / access for Employees with Multiple Jobs

April 13, 2021

- Reporting Office Hours Update
- Multi-headcount Position Updates
- “Disappearing” Transactions?
- Survey

April 20, 2021

- Effective Date Hierarchy
- Funding Entry

April 27, 2021

- Final Pay Tips
- Person Search Match
- Department Re-Org Tips

May 4, 2021

- Year-End Close Reminders
- Graduate Student SWB
- Upcoming Topics

May 11, 2021

- Validate Overpayment
- Needs Assessment
- Process in UCPath
- Overpayment Recovery
- Uncollected Overpayments
- Time Constraints

May 18, 2021

- Fiscal Year End Tasks & Deadlines
- Retirement Processing Tips (time permitting)

May 25, 2021

- Retirement Processing Update
- Promotion Entry Process in PayPath Actions
- SWB (Short Work Break) Transactions for Grad Students

June 1, 2021

- CWR for Graduate Students
- NSTP Tips for Summer Salary
- Work Study Reminders

June 8, 2021

- Year-End Reminders
- DOPE Report Availability
- Upcoming Dates/Deadlines, Freezes
- Position and Job Data Forms

June 15, 2021

- New Paid Family Care & Bonding information
- Extended Absence Review

June 22, 2021

- UCPath Upgrade Project
- Student Work Study Title
- Early Entry Transactions
- Grad Students & CWR Appointments

June 29, 2021

- Staff / Academic Transfers
- NSTP Updates
- Holiday updates/changes
- Year End Reminders

July 13, 2021

- PFCB Follow Up
- EE Transfer: Exempt to Non-Exempt
- Funding Rollover FY22
- PayPath Transaction Lockdown
- Work Study Job Code Changes

July 20, 2021

- Multi Headcount & PayPath Actions
- JED & Extended Absences
- July/August Summer Salary (>1.0 FTE Processing)

July 27, 2021

- Update: Requesting UCPath Security Access
- Vacant Positions
- Fall Hiring
- Importance of Job Data

August 3, 2021

- UCPath Support Resources
- Methods to Search & Find Support