Training Tips
June 27, 2023
## HR Transaction Deadlines

<table>
<thead>
<tr>
<th>Payroll Type</th>
<th>Absence / Hire / +Pay / Retro Pay Transactions Due By</th>
<th>PayPath Entries / Approvals Due By</th>
<th>PayPath Blackout Period Ends</th>
</tr>
</thead>
</table>
| **Bi – Weekly** | Thurs. July 6 @ 3pm  
*(Check Date: 7/19/23)* | Tues. June 27 @ 5pm  
*(Check Date: 7/5/23)* | Fri. June 30 @ 6am |
| **Monthly** | Wed. July 19 @ 3pm  
*(Check Date: 8/1/23)* | Mon. July 24 @ 5pm  
*(Check Date: 8/1/23)* | Thurs. July 27 @ 6am |
# Finance Transaction Deadlines

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<tr>
<td><em>Monthly Check Date: 6/30/23</em></td>
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Note: Please utilize the **Payroll Processing** and **SCT calendars** on the UCI UCPath website for additional dates not listed here.
Quick Reminders I

Job End Date Monitoring
• New Job Ending Dashboard (RUCI217) that Matt shared last month, is available for reviewing those with upcoming expected job end dates.
• With many jobs ending in June great time to review all jobs with expected job end date in June to determine if they need to be extended or will end on the date in the system.
• We have recently seen instances of people being terminated incorrectly due to the wrong end date
Quick Reminders II

If needing/wanting to process Mass PayPath transaction please open an EEC ticket
UCPath> UCPath Mass Transactions Request > Transaction Type (PayPath)

HRIS team will provide instructions for the template and uploading and processing.
Depts. cannot process without working with EEC team
Quick Reminders III

Wage Implementation Planning Guide

• Please refrain from submitting future dated transactions during this time to avoid negative impacts on employees.
  • Monthly, do not process transactions with effective date of 7/1 or later
  • BW avoid transactions with effective date of 6/25 or later
• If future date transactions are in the system, job end dates expiring, or pending PayPath transactions, the Mass PayPath transaction will not process, and local HR will need to manually enter pay changes.
• HRIS will join this meeting in July and be available during drop-in center hours to assist with any data entry issues for pay increases
## Salary Changes

**UCPATH FREEZE for impacted employees:**

<table>
<thead>
<tr>
<th>Impacted Employees</th>
<th>Freeze Period</th>
<th>Eff Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Represented Staff-4.6%</td>
<td>6/27-6/30</td>
<td>7/1 MO; 6/25 BW</td>
</tr>
<tr>
<td>CX-3%</td>
<td>6/28-6/30</td>
<td>7/1 MO; 6/25 BW</td>
</tr>
<tr>
<td>DX, HX, H-3%, HX PA -8%</td>
<td>6/29-7/6</td>
<td>7/1 Mo; 7/9 BW</td>
</tr>
<tr>
<td>RX, TX -3.5%</td>
<td>7/6-7/10</td>
<td>7/1 Mo; 7/9 BW</td>
</tr>
<tr>
<td>K9-5%</td>
<td>7/6-7/10</td>
<td>7/9 BW</td>
</tr>
</tbody>
</table>
Academic Salary Changes

UCPATH Freeze: Friday, June 30, 2023 — Friday, July 7, 2023

Effective Date July 1 Monthly; July 9 B-W

• Non-represented non-faculty academics (99) – 4.6% range adjustment.
• Represented Academic Researchers (RA) – 4.5% range adjustment.
• Represented Librarians (LX) – 3% range adjustment.
• Represented Unit 18 Faculty (IX) – 3% range adjustment.
Quick Reminders IV

UCPath discovered an issue that causes the word “name” and not the data entered by initiators to display in the "Name" field for certain Smart HR templates.

- Do not use saved transactions that were created on or before June 16
- Do not clone or resubmit previously canceled transactions created on or before June 16

In these cases, create and submit new transactions.

UCPath will manually update affected transactions to display the correct information.

UCPath on 6/20 Removed the requirement to populate a value in the ExtSyst ID field to complete the rehire template.
Quick Reminders V

UCLC takes approximately 24 hours to register completion of a course

Please wait 2 days before contacting us about a course that you completed
Future BW Training Tips Meetings

- July 11
- July 25
- Aug. 8
- Aug. 22
Agenda

- Future Dated Transactions
- Year-End Deadline Reminders
- Lived Name Update
- New UCPath Job Aids
- Q&A
Future Dated Transactions
Future Dated Transaction & Impacts

• Future dated transactions are used to schedule job updates that will take effect at a specified future date.

• However, if these changes are not synchronized properly with other departments, related processes or modules, it can result in data inconsistencies.

• For example, if a future dated job change affects payroll calculations, and another subsequent pay impacting entry with a current date is entered, it can override the top of stack row and will result in incorrect pay calculations.
Review Job Data Prior to Entry

It is imperative to review all activity in the **Job Data** page and **Workforce Job Summary** page *prior to* making changes or updates to employee records.

- **Avoiding Duplicate Entries:** Reviewing transaction history helps prevent duplicate entries in the system and potential payroll errors.

- **Maintaining Data Integrity:** Job Data & Workforce Job Summary pages provide a record of past, current, and future dated activities and changes to employee records. By reviewing this history, you can ensure the integrity and quality of the data by identifying any conflicting or contradictory entries.

- **Detecting Errors or Irregularities:** Reviewing Job Data allows you to identify any errors, discrepancies, or irregularities in previous entries. It provides an opportunity to correct any mistakes or address inconsistencies quickly.

- **Ensuring Compliance:** Transaction history is often used to ensure compliance with internal policies, legal requirements, and other UC requirements. By reviewing the history, you can ensure that changes or updates to employee records are appropriate and compliant.
Avoid entering transactions too early

Best practice to not enter transactions more than a **month before** the effective date, unless there's a business reason for early entry.

Entering transactions too early causes issues with changes and subsequent transactions that are needed to be done by other groups, such as pay changes.
Year-End Reminders
Funding Rollover in Progress

• Funding entry freeze from 6/23 – 6/29.
• Funding Rollover process 6/24 – 6/29.
• Rollover Exception reports distributed to locations:
  o MCOP: 6/27 – 6/28
  o Non-MCOP: 6/30 – 7/3
Direct Retro FYE Deadlines

UCPath recently announced they are 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 listed below.

<table>
<thead>
<tr>
<th>Direct Retro Deadline</th>
<th>Direct Retro Data in DOPE Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 21, 5 p.m.*</td>
<td>July 6</td>
</tr>
<tr>
<td>**July 3, 5 p.m. *</td>
<td>July 10</td>
</tr>
<tr>
<td>July 7, 5 p.m. * (FINAL)</td>
<td>July 17 (after the fiscal year closes)</td>
</tr>
</tbody>
</table>

*High risk Direct Retros for contracts & grants funds must be submitted by 3 p.m. See guidance below for details.*

The later July 7 final deadline is positive news for campus, but it comes with some risk because the results of Direct Retros processed from July 4 to 7 will not be reflected in UCPath DOPE reports until after the fiscal year has closed. Departments cannot make adjustments after period 12 closes.
Guidance from Accounting Office

Pay attention to when data becomes available

- You won’t see Direct Retros from June 21 reflected in DOPE reports until after the July 3 deadline.
- Similarly, you won’t see July 3 transfers in reports until after the July 7 final deadline.
- Departments will need to finalize and align their budgets before June Period12 closes. Some final Direct Retros may not be viewable while departments are submitting Budget Adjustment/Appropriation Transactions. Be sure to include expected Direct Retro projections when aligning or distributing funding.

Direct Retros submitted and approved after the final deadline will not update accounts for Fiscal Year 2023.
Guidance from Accounting Office Cont’d

Take special care when processing Direct Retros from July 4 to 7

- They have the potential to create overdrafts that you will not see reflected in reports until after period 12 closes in KFS.
- Any errors will be difficult to correct.

Ensure payroll processors and other financial staff are working in close coordination

- The results of final Direct Retros won’t be available until after the fiscal year ends, so 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.
Lived Name Updates & Reminders
Lived Name Training Materials

- A recorded version of the **UCPath Name & Legal Name (ILT)** training is now available as an eCourse in **UCLC** and posted to the **UCI UCPPath website**.
  - Those with only **inquiry** roles: **Search for UCPath Lived Name Inquiry (6 minute video)**
  - Slides from the Initiator training are posted to website in Training presentations. (Training credit only provided through UCLC, slides for refresher only)
- Please note this training is **mandatory**. If you did not attend or have not yet taken the required training for your role, please go to UCLC and complete the eCourse or video training
- **Video available for all employees/managers on the change**
  - [Lived Name - What to Expect - Managers and Employees](#)
UCPath Module Accessibility

UCPath

[Image of the UCPath interface with a focus on the Workforce Administration module and sub-modules: Workforce Administration, Performance Administration, General Ledger Administration.]
Tile accessibility within modules will change accordingly.
Name Search Format

When performing a search in UCPath using a person's name, please use the **FIRST NAME LAST NAME** format and order.
Search Qualifiers

The **search qualifiers** in UCPath enable you to refine your search criteria and narrow down the results based on specific parameters.

These fields represent different attributes or characteristics of the data you are searching for. For example, when performing an employee search, you may use the name, department, and/or job title.
## Search Qualifier Definition & Uses

<table>
<thead>
<tr>
<th>Operand</th>
<th>Used For</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begins with</td>
<td>Retrieves records that start with the specified characters or values.</td>
</tr>
<tr>
<td>Contains</td>
<td>Retrieves records that contain any the specific characters or values entered in the search field.</td>
</tr>
<tr>
<td>Equals</td>
<td>Retrieves records that match the exact value you provide in the search field.</td>
</tr>
<tr>
<td>Greater Than</td>
<td>Retrieves records with values greater than the one you enter.</td>
</tr>
<tr>
<td>Less Than</td>
<td>Retrieves records with values smaller than the one you enter.</td>
</tr>
</tbody>
</table>
UCPath Job Aids Updates
New UCPath Help Site Folder

Academic

(Location Support for Academic Personnel):

• New job aid to provide an overview of how to manage transactions in UCPath for academic student employees
  • New job aid that provides steps for how to enter the averaged FTE for Unit 18 (IX) appointments
  • New guidelines with best practices for academic job end dates
Workforce Administration Changes

PayPath Transactions

• Updated matrixes and added a new matrix for “Summer Session Teaching: Graduate student employee in summer session (BX)” in the Summer Salary Processing Job Aid

Template Transactions- Part II

• Updated the Retirement Transaction Process for July 1 Retirement Date job aid to include Final TRM Pay Transaction process

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**Final Pay Transaction**

1. After submitting the retirement template transaction complete the final TRM- Terminal Vacation Pay request

2. Provide vacation usage not previously reported, nor submitted on the time files for the June 30th paycheck in the **Earnings Code** field.  
   • **Note**: Vacation usage submitted on time files for the June 30th paycheck do not need to be provided on the final pay request and will be factored into the final TRM pay out

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⚠️ Upon submission of a final pay request for non-represented voluntarily separating employees, Locations must request vacation payouts and any taxes not previously reported.
Benefit Eligibility & Triggers Job Aid

Recently updated

- Location users will find information outlining the key fields that determine if an employee is eligible for benefits and the benefit package for which they are eligible. The job aid is helpful in troubleshooting employee benefit issues and understanding what areas of an employee’s record trigger benefit eligibility changes.

- Find the updated job aid by navigating to: Help/FAQ > Location Users > Benefits > Location Support for Benefits > Job Aid: Benefit Eligibility & Triggers

Did You Know? Adding a dependent during a birth life event, requires two steps to ensure proper enrollment in eligible plans

1.) Add the dependent in UCPath
2.) Enroll the dependent in the appropriate benefit plans (medical, etc.)

Review the user guide for more details. UCPath > Help/FAQ > Self Service users > PHCMPOR112: Employee Actions: Benefits Information > Enter Birth Life Event
Two transactions are required for all inter-location transfers and some intra-location transfers.

- **Inter-location (BU) Transfers:** When an employee transfers from one business unit to another business unit, two transactions are required.
  - The releasing BU submits a **termination** transaction using reason code *Inter-location (BU) Transfer*.
  - The hiring BU submits a **hire** transaction using the appropriate *Transfer-Inter BU* reason code.

  Effective dates must match on the hire and termination transactions, and the transactions should be coordinated so they are submitted at the same time.

- **Intra-location Transfers:** When an employee is transferring from one position to another position within the same or related business unit, such as between campus and medical center.
  
  o **Scenario 1 – Same Employee Record**
    - If the employee is transferring within the same Employee record (Staff to Staff or Academic to Academic), then only one transaction is required.
    - The UC_TRANSFER (Intra-Business Unit Transfer- Staff Only or Intra-Business Unit Transfer- Academic Only) template is used to move the employee from one position to the other.

  o **Scenario 2 – Multiple Employee Records**
    - If the employee is transferring across different Employee Records, two transactions are required.
    - This scenario is used when an employee moves between academic and staff positions or when the departments want to keep the records separate.
    - The releasing BU should submit a **termination** transaction using reason code *Transfer – Intra Location*.
    - The hiring BU should submit a **hire or rehire** transaction using the appropriate *Transfer-Intra Location* reason code.
    - Effective dates must match on the hire and termination transactions, and the transactions should be coordinated so they are submitted at the same time.