



UCI UCPATH

Transactor Digest

January 24, 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, call-in center hours, and more.

See What We Do - Read our 2023 Year in Review

The UCI UCPATH team is pleased to present our [2023 Year in Review infographic](#), where we highlight some of our accomplishments from this past year. We appreciate the opportunity to locally serve everyone involved in UCPATH and related systems, and look forward to a busy, productive 2024.

Q1 Processing Schedules Available

- **Q1 2024 Payroll Processing Schedule** - The [2024 Payroll Processing Schedule](#) is now available on the transactor page of the UCI UCPATH website under Common Resources.
- **Q1 2024 GL Processing Calendar** - The [General Ledger \(GL\) Processing Calendar for Q1 of 2024](#) is now available on the transactor page of the UCI UCPATH website under the Funding & General Ledger section.

- **Q1 2024 SCT Direct Retro Processing Calendar** - The [Salary Cost Transfer \(SCT\) Direct Retro Processing Calendar for Q1 of 2024](#) is available on the transactor page of our website under the Funding & General Ledger section. Please note that Direct Retros will now be processed only once a month by UCPATH.

Our Emails are Changing to ZotMail: Update Outlook Rules if Needed

The UCI UCPATH team is changing our email delivery system to Zotmail beginning February 1, 2024. Please watch for our emails in case they go into other folders if an Outlook Rule is set up for Zotmail emails. Our emails include:

- The monthly Transactor Digest e-newsletter
- Bi-weekly Training Tips agenda emails
- Alerts and informational messages as needed

Security: UCPATH Access Request Form Changes

Based on UCI UCPATH community user experience at the campus, the [UCPATH Access Request Form](#) has been further streamlined for efficiency and quick processing. These changes were introduced in November 2023.

On the new form, the roles have been grouped by transactor's function in the department and their responsibilities. Identification of roles with function and responsibility is aimed to guide supervisors in selecting roles and keeping requests to appropriate roles that are needed for the job. [Review a sample of the new form.](#)

While there are resources available for understanding exactly what access the UCPATH KSAMS grants, the presence of guidance directly on the form helps to understand the access needs, as well. Additionally, a quick snapshot of training courses for roles that require training is now on the form. The form can be accessed on the UCPATH System Access (security) [website](#).

Payroll Adjustment Form: Key Information

The following situations should be processed via a payroll adjustment form:

- Corrections to an issued paycheck that may result in data correction.
- Overpayment or a refund, including corrections to earning codes, pay dates, hours or rates not triggering retro pay.
- Different scenario examples can be found at [UCPath.uci.edu](https://ucpath.uci.edu).

When completing the form, note that the hourly rate is calculated as the monthly pay/ hours. When completed, the [payroll adjustment form](#) should be submitted to UCPC in a case with Subject: Payroll Adjustment Required, Topic: Payroll, Category: Submit a payroll form. If unsure how to complete the form, submit an [EEC](#) ticket to payroll and they will review and provide guidance.

Looking Ahead: Roadmap Projects Deploying in March and July

March 2024 Projects:

- New employee UCPC case submission form and ability to reopen cases: This will simplify the process by not requiring users to choose a category, and providing the ability to reopen closed cases.
- UCPath annual upgrade: No new features, but this project adopts the latest Peoplesoft version.
- Replace PayPath Phase II: UCI will deploy new [Manage Job](#) functionality to a limited group of transactors following required training .

July 2024 Projects:

- Gender Identity and Pronouns: The project incorporates changes to UCPath gender selections and provides the ability to choose by which pronouns an individual would like to be addressed.
- New SOBO Case Submission Form: This incorporates the same changes made in March, but now will be available for those who submit on behalf of someone else.
- Improve Accrual Management
- Rewrite GL Assessments
- Streamline security for Former Employee Portal

Please check the UCPath website for updates on [projects](#) as they become available.

Important Security Reminder: Tax Statements

UC does not send 1095-C or W-2 statements by email or text. If you receive an email or text with a link or an attachment for viewing these statements, it is a phishing scam designed to gain private information. DO NOT OPEN ATTACHMENTS OR CLICK ON LINKS that claim to provide access to your 1095-C or W-2. To access your electronic tax documents always visit [UCPath online](#) using a safe/known link.

Additional Tax Information

Please note that February 15, 2024, is the deadline to claim exemption from withholding. The IRS requires that you complete a new W-4 form each year if you are claiming exemption from tax withholding. If you wish to claim exemption from withholding in 2024, you must make this choice on [UCPath online](#) before February 15, 2024.

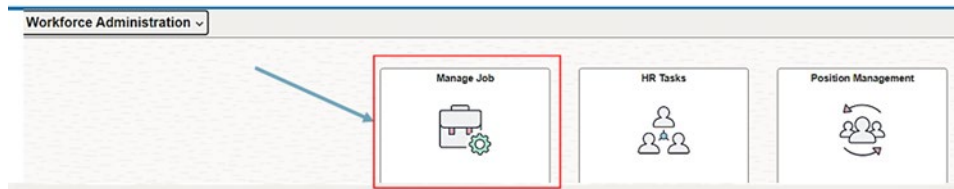
Expired Funding

There may be funding that expired at the end of 2023. Please check to ensure that new funding is in place on the Funding Entry page in UCPath to avoid expenses hitting your department default account. The UCPath Job Distribution Report can be used to locate expired funding.

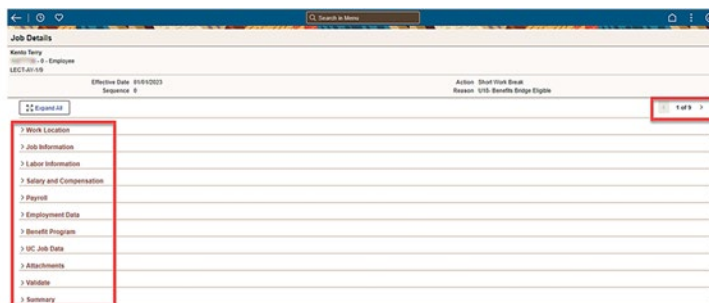


Job Data Modernization

In June 2023, the new Manage Job tile was added to UCPATH for anyone with PayPath security role. This is similar to Workforce Job Summary and Job Data and is a view-only role. We encourage you to use this functionality to prepare for future changes that will make use of this look and feel. While existing job data stays available, we encourage you to use the Manage Job tile to learn more about how the information is displayed.



Job data tabs and link are on the left and job data rows are on the right, click arrows to open and move from row to row.

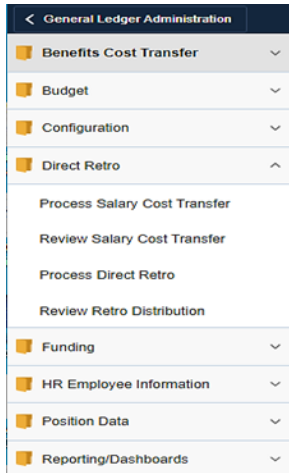


Multiple Components of Pay (MCOP) Documents on Website

Updated versions of Salary Cap / MCOP Funding Worksheet and the MCOP - COHS job aid are posted on the [UCI UCPATH transactor website](#) under Funding > Funding Resources (Guides, Forms, etc.).

Salary Cost Transfer Access

Remember that your Salary Cost Transfer (SCT) access should match your Direct Retro access. SCT menu options are under the Direct Retro folder. Both options will appear for a limited time until Direct Retros eventually get phased out.



Did You Know...?

All employees must sign UC's patent acknowledgment. To verify or sign this, employees can navigate to the Patent Acknowledgement page in [UCPath online](#).

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 February 6, February 20, and March 5.

- 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. A 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 our emails, please [SUBSCRIBE](#) to receive the monthly Transactor Digest and other UCI UCPATH emails.

Thank You!

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

UCI UCPATH

Questions? Email ucpath@uci.edu