PayPath Transactions
Part 2
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</table>
Training Logistics

Safety & Housekeeping

• Emergency evacuation procedures
• Restrooms
• Course duration:
• Breaks

Classroom Etiquette

• Please turn off cell phones
• No email or web surfing
• Return from breaks on time
• Please use trash receptacles in the room
Parking Lot

• Parking Lot
  • Capture any questions or concerns that cannot be addressed during class
  • Provide follow up to all attendees of this class
Course Agenda

1: Combination Changes

2. Retroactive PayPath Transactions
Course Objectives

By the end of this course, you should be able to:

• Initiate Various PayPath Combination Transactions
• Understand How To Process Retroactive Transactions using PayPath
As a recap from Part 1 of this course, **PayPath** is a set of online pages in UCPath designed to streamline updates to employee data (position, job and additional pay).

**PayPath** provides intuitive, compliant functionality that is designed to meet UC's academic and staff requirements. These pages offer a one-stop-shop for processing various types of transactions and the flexibility to submit multiple actions in a single transaction.

- **PayPath** integrates changes to positions, jobs and additional pay, providing a tight integration between Human Resources (HR) actions and funding requirements.
  - **PayPath** cannot be used to hire, terminate, transfer or place employees on a leave of absence.
The following types of transactions are processed for staff and academic employees using **PayPath Actions**.

### PayPath Actions Transactions

- Position Data Changes
- Job Data Changes
- Additional Pay

- Position data changes can be made only for positions that have a single active incumbent.
  - New or vacant positions must be created/updated using a **Position Control Request**.
- **PayPath Actions** is not used to hire, terminate, transfer to a new position or place employees on a leave of absence.
All **PayPath Actions** transactions are routed for approval using the Approval Workflow Engine (AWE).
The AWE approval routing for a **PayPath Actions** transaction is based on:

- Security role tied to the PayPath Initiator (for example: Central vs. Department).
- Approval routing configuration by Location (Business Unit). For example, number of approval levels required.

AWE security role assignment and approval routing configuration is determined by each Location’s business process.

Note that AWE will only be triggered once when a PayPath transaction is submitted, even if all 3 pages have updated data.

As soon as the transaction has been approved the changes are visible in the system (except for Additional Pay which needs to be processed by UCPC)
## Timing and Deadlines

The UCPath Production Processing Schedule is used to reference when tasks performed by locations and/or the UCPath Center teams are needed to complete a payroll. This schedule will be standard across all locations.*

### Pay Period Dates

<table>
<thead>
<tr>
<th>Pay Cycle</th>
<th>Check Date</th>
<th>Pay Period Dates</th>
<th>Run ID Schedule</th>
<th>Location</th>
<th>UCPath Center</th>
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<tbody>
<tr>
<td>MO</td>
<td>Mon 07-29</td>
<td>06-30-19</td>
<td>I-178: Parking Deductions</td>
<td>Friday following Thanksgiving Day</td>
<td>Tue 07-20-19</td>
</tr>
<tr>
<td>B1</td>
<td>Wed 07-24</td>
<td>06-30-19</td>
<td>I-618: Flat Dollar Amount.</td>
<td>New Year Holiday</td>
<td>Mon 07-29-19</td>
</tr>
<tr>
<td>B2</td>
<td>Wed 07-24</td>
<td>06-30-19</td>
<td>I-178: Parking Deductions</td>
<td>Friday following Thanksgiving Day</td>
<td>Tue 07-20-19</td>
</tr>
<tr>
<td>MO</td>
<td>Thu 07-25</td>
<td>07-31-19</td>
<td>I-353: Batch Load One-Time Payments</td>
<td>New Year Holiday</td>
<td>Fri 07-26-19</td>
</tr>
<tr>
<td>B1</td>
<td>Wed 08-07</td>
<td>07-31-19</td>
<td>I-178: Parking Deductions</td>
<td>Friday following Thanksgiving Day</td>
<td>Wed 07-24-19</td>
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<tr>
<td>B2</td>
<td>Wed 08-07</td>
<td>07-31-19</td>
<td>I-178: Parking Deductions</td>
<td>Friday following Thanksgiving Day</td>
<td>Wed 07-24-19</td>
</tr>
<tr>
<td>MO</td>
<td>Fri 08-09</td>
<td>08-31-19</td>
<td>I-353: Batch Load One-Time Payments</td>
<td>New Year Holiday</td>
<td>Wed 08-07-19</td>
</tr>
<tr>
<td>B1</td>
<td>Wed 08-14</td>
<td>08-31-19</td>
<td>I-178: Parking Deductions</td>
<td>Friday following Thanksgiving Day</td>
<td>Wed 08-07-19</td>
</tr>
<tr>
<td>B2</td>
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<td>08-31-19</td>
<td>I-178: Parking Deductions</td>
<td>Friday following Thanksgiving Day</td>
<td>Wed 08-07-19</td>
</tr>
<tr>
<td>MO</td>
<td>Fri 08-16</td>
<td>09-30-19</td>
<td>I-353: Batch Load One-Time Payments</td>
<td>New Year Holiday</td>
<td>Wed 08-07-19</td>
</tr>
<tr>
<td>B1</td>
<td>Wed 09-01</td>
<td>09-30-19</td>
<td>I-178: Parking Deductions</td>
<td>Friday following Thanksgiving Day</td>
<td>Wed 08-07-19</td>
</tr>
<tr>
<td>B2</td>
<td>Wed 09-01</td>
<td>09-30-19</td>
<td>I-178: Parking Deductions</td>
<td>Friday following Thanksgiving Day</td>
<td>Wed 08-07-19</td>
</tr>
<tr>
<td>MO</td>
<td>Fri 09-03</td>
<td>10-31-19</td>
<td>I-353: Batch Load One-Time Payments</td>
<td>New Year Holiday</td>
<td>Wed 08-07-19</td>
</tr>
<tr>
<td>B1</td>
<td>Wed 09-08</td>
<td>10-31-19</td>
<td>I-178: Parking Deductions</td>
<td>Friday following Thanksgiving Day</td>
<td>Wed 08-07-19</td>
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<tr>
<td>B2</td>
<td>Wed 09-08</td>
<td>10-31-19</td>
<td>I-178: Parking Deductions</td>
<td>Friday following Thanksgiving Day</td>
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<tr>
<td>MO</td>
<td>Fri 09-10</td>
<td>11-30-19</td>
<td>I-353: Batch Load One-Time Payments</td>
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<td>MO</td>
<td>Fri 09-17</td>
<td>12-31-19</td>
<td>I-353: Batch Load One-Time Payments</td>
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<tr>
<td>B1</td>
<td>Wed 10-02</td>
<td>12-31-19</td>
<td>I-178: Parking Deductions</td>
<td>Friday following Thanksgiving Day</td>
<td>Wed 08-07-19</td>
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<tr>
<td>B2</td>
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<td>12-31-19</td>
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<td>Friday following Thanksgiving Day</td>
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<td>MO</td>
<td>Fri 10-04</td>
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<td>I-353: Batch Load One-Time Payments</td>
<td>New Year Holiday</td>
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<td>B1</td>
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<td>I-178: Parking Deductions</td>
<td>Friday following Thanksgiving Day</td>
<td>Wed 08-07-19</td>
</tr>
<tr>
<td>MO</td>
<td>Fri 10-11</td>
<td>02-28-20</td>
<td>I-353: Batch Load One-Time Payments</td>
<td>New Year Holiday</td>
<td>Wed 08-07-19</td>
</tr>
<tr>
<td>B1</td>
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<td>02-28-20</td>
<td>I-178: Parking Deductions</td>
<td>Friday following Thanksgiving Day</td>
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<td>I-178: Parking Deductions</td>
<td>Friday following Thanksgiving Day</td>
<td>Wed 08-07-19</td>
</tr>
</tbody>
</table>

### Run ID Check Dates

- **Pay Cycle**
  - MO: Monday
  - B1: Monday
  - B2: Monday
  - MO: Monday
  - B1: Monday
  - B2: Monday
  - MO: Monday
  - B1: Monday
  - B2: Monday
  - MO: Monday
  - B1: Monday
  - B2: Monday
  - MO: Monday
  - B1: Monday
  - B2: Monday

- **Run ID Schedule**
  - I-178: Parking Deductions
  - I-618: Flat Dollar Amount.
  - I-156: FICA (Payroll)
  - E-703 Funding
  - E-703: Match Load One-Time Payments
  - I-176: Parking Deductions
  - E-703: One-Time General Deductions
  - E-601: Tuition Reimbursement
  - 1011: Regular Time Entry

- **Location**
  - UCPath Center
  - Pay Confirm
  - AM Post Confirm
  - GL Post Confirm

- **Pay Statements on UCPath**

- **Location**
  - UCPath Center

- **Run ID**
  - I-178: Parking Deductions
  - I-618: Flat Dollar Amount.

- **Date adjusted due to holiday payroll processing.
- Indicates 5pm deadline.
- Included in nightly batch.
- Indicates 10am deadline.

### Note:

- Direct Retro process (aka Salary Cost Transfer) runs daily except the scheduled Payroll Confirm and GL Post Confirm dates.
- 31x128 across all locations.*
- **Timing and Deadlines**
  - The UCPath Production Processing Schedule is used to reference when tasks performed by locations and/or the UCPath Center teams are needed to complete a payroll. This schedule will be standard across all locations.*
  - The UCPath Payroll Processing Schedule is stored on UCpath online. To access it, navigate to: Quick links -> Payroll Calendars for MO or BW and Schedules

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*Deadlines for time & attendance or pay file processing for Medical Centers may differ from deadlines for other UC locations.
Please refer to the PayPath Transactions Part 1 course for additional information on:

- Position Changes
- Job Data Changes
- Additional Pay
- Key Concepts & Vocabulary
Before navigating to UCPath pages, use the **Person Org Summary** page to view a summary of an employee’s current organizational relationships, including HR and payroll status, primary job assignment and other current job assignment details.

This page displays current employee information for all organizational relationships: Employee, Contingent Worker (CWR) and Person of Interest (POI).

- An employee may have more than one organizational relationship concurrently. For example, the person may be an employee at one UC Location and a CWR at another.

This page does not have row-level security. If you have access to this page, you can view job assignment information for all employee records across all locations.

*This page does not display historical or future-dated employment details.* See **Workforce Job Summary** to view employee’s within your row-level security.
Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > Person Organizational Summary

If there is more than one row of data, click the View All link to view all current information.
Things to Remember ...

- Position Data and Job Data changes can be entered in a single PayPath transaction; however, they must have the same Effective Date.
Things to Remember ...

- When a position data change is entered, a new row is automatically inserted in the **Job Data** page and displays the updated position data fields.

**Position Data Change**

**Job Data Change**
Things to Remember …

- You can enter multiple **Additional Pay** entries with different details in the same transaction.
- Certain details in the **Earnings Code**, **Effective Date** and **Payment Details** will have specified criteria when stacking transactions.
Things to Remember ...

- All **Job Data** fields that are controlled by **Position Data** appear as display-only.
- After a PayPath transaction is submitted for approval (Pending Approval status), you cannot enter another PayPath transaction for that employee record until the pending transaction has been processed by Location AWE.
- PayPath transactions do no require UCPC approval. Transactions are written to the database upon Location approval. Transactions may take an additional business day to appear in ODS/Reports.
Lesson 1

Combination Changes
Lesson Objectives

In this lesson you will learn how to:

• Initiate Various PayPath Combination Changes
Combination Changes – Overview

There are many circumstances where a combination of changes are needed between position, job data and additional pay.

The following slides provide direction for additional practice on some of the common combination changes.
Initiate Position Data + Job Data Change PayPath Transaction

- Watch as your instructor demonstrates how to initiate a combination change PayPath transaction in UCPath.
- Follow along using the UCPath Help topic.
  - **Academic**: Open the UCPath Help site and refer to the *Initiate Position Data + Job Data Change PayPath Transaction (Acad)* topic.
  - **Academic Health Sciences Compensation Plan (HSCP)**: Open the UCPath Help site and refer to the *Initiate Position Data + Job Data Change PayPath Transaction (Acad HSCP)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *Initiate Position Data + Job Data Change PayPath Transaction (Staff)* topic.
- Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.
Exercise 1

Initiate Position Data Change PayPath Transaction

- This is your opportunity to practice this task on your own.
  - **Academic**: Select the *Initiate Position + Job Data Change PayPath Transaction (Acad)* topic.
  - **Academic (HSCP)**: Select the *Initiate Position + Job Data Change PayPath Transaction (Acad HSCP)* topic.
  - **Staff**: Select the *Initiate Position + Job Data Change PayPath Transaction (Staff)* topic.
  - Ask your instructor for assistance, if needed.

**Navigation:**

PeopleSoft Menu

> UC Customization
> UC Extensions
> PayPath Actions
Instructor Demo

Initiate Job Data Change + Additional Pay PayPath Transaction

- Watch as your instructor demonstrates how to initiate a combination change PayPath transaction in UCPath.
- Follow along using the UCPath Help topic.
  - **Academic**: Open the UCPath Help site and refer to the *Initiate Job Data Change + Additional Pay PayPath Transaction (Acad)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *Initiate Job Data Change + Additional Pay PayPath Transaction (Staff)* topic.
- Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.
Exercise 2

Initiate Job Data Change + Additional Pay PayPath Transaction

• This is your opportunity to practice this task on your own.
  • **Academic:** Select the *Initiate Job Data Change + Additional Pay PayPath Transaction (Acad)* topic.
  • **Staff:** Select the *Initiate Job Data Change + Additional Pay PayPath Transaction (Staff)* topic.
• Ask your instructor for assistance, if needed.

**Navigation:**

*PeopleSoft Menu*
  > UC Customization
  > UC Extensions
  > PayPath Actions
Instructor Demo

Initiate Position Data + Job Data + Additional Pay Change PayPath Transaction

- Watch as your instructor demonstrates how to initiate a combination change PayPath transaction in UCPath.
- Follow along using the UCPath Help topic.
  - **Academic**: Open the UCPath Help site and refer to the *Initiate Position Data + Job Data + Additional Pay Change PayPath Transaction (Acad)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *Initiate Position Data + Job Data + Additional Pay Change PayPath Transaction (Staff)* topic.
- Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.
Exercise 3

Initiate Position Data + Job Data Change (2) + Additional Pay PayPath Transaction

• This is your opportunity to practice this task on your own.
  • **Academic**: Select the *Initiate Job Data Change + Additional Pay PayPath Transaction (Acad)* topic.
  • **Staff**: Select the *Initiate Job Data Change + Additional Pay PayPath Transaction (Staff)* topic.
• Ask your instructor for assistance, if needed.

**Navigation:**

PeopleSoft Menu
> UC Customization
> UC Extensions
> PayPath Actions
Instructor Demo

Initiate Job Data FTE Override PayPath Transaction

- Watch as your instructor demonstrates how to initiate a job data FTE override PayPath transaction in UCPath.
- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *Initiate Job Data FTE Override PayPath Transaction (Staff/Acad)* topic.
- Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.
Exercise 4

Initiate Job Data FTE Override PayPath Transaction

- This is your opportunity to practice this task on your own.
- **Academic or Staff:** *Initiate Job Data FTE Override PayPath Transaction.*

- Ask your instructor for assistance, if needed.

**Navigation:**

PeopleSoft Menu
- UC Customization
- UC Extensions
- PayPath Actions
Lesson 2

Retroactive PayPath Transactions
In this lesson you will learn how to:

- Initiate a Retroactive Data Change
- Impacts of Effective Date
Retroactive Transactions

Overview

• Retroactive transactions are used to initiate an action or to correct a previous action. The **Effective Date** of a retroactive transaction is prior to the Effective Date of the transaction.

• Retroactive transaction may result in the need for a pay adjustment. The UCPC will evaluate the transaction and process the pay adjustment, if necessary.

• Retroactive pay adjustments are processed on the employee’s regular **on-cycle** pay period.
Process Overview – Retro Pay

Retro pay adjustments and overpayments are processed at the UCPath Center.
• Retro pay is not considered missed pay and is processed on-cycle
• Transactions that result in overpayment are processed via Payroll Requests. More details provided in the Payroll Requests course.

The UCPath Center defines these types of transactions as follows:

<table>
<thead>
<tr>
<th>Adjustment Type</th>
<th>Overview</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retro Pay</td>
<td>A pay adjustment that occurs as a result of a retro transaction that impacts prior earnings.</td>
<td>A retro pay increase is entered for an employee. A retro pay adjustment is triggered in UCPath to pay the difference in rates from what was paid and what should have been paid.</td>
</tr>
<tr>
<td>Overpayment (reviewed in Payroll Requests)</td>
<td>A pay adjustment that occurs as a result of an employee receiving more earnings than he/she was entitled to. An overpayment can also be the result of a retroactive transaction.</td>
<td>A retroactive unpaid leave of absence effective date is entered for an employee, and they have already been paid for the period after the effective date. The result is an overpayment and has to be recovered from the employee.</td>
</tr>
</tbody>
</table>
## Process Overview

### Responsibilities by party in the Retro Pay process:

<table>
<thead>
<tr>
<th><strong>Employee</strong></th>
<th><strong>Location</strong></th>
<th><strong>UCPath Center WFA</strong></th>
<th><strong>UCPath Center Benefits</strong></th>
<th><strong>UCPath Center Payroll</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Monitors his/her pay regularly to identify any issues</td>
<td>- Submits Job Data and/or Additional Pay transaction via PayPath or Smart HR template</td>
<td>- Approves Job Data and Additional Pay Requests submitted via Smart HR Template* and commits them to UCPath</td>
<td>- Ensures that eligibility and enrollments are updated if retro transaction results in changes</td>
<td>- Reviews pay requests in Retro module for validity and provides the Loaded Retro Results report to locations</td>
</tr>
<tr>
<td>- Initiates Inquiries for pay issues</td>
<td>- Reviews retro reports and reaches out to the UCPath Center with any issues</td>
<td></td>
<td>- Makes premium adjustments based on enrollment changes</td>
<td>- Processes inbound files via on-cycle and off-cycle payrolls</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Ensures that eligibility and enrollments are updated if retro transaction results in changes</td>
<td>- Manually manages vendor interface submissions for retro enrollment dates</td>
<td>- Manages the overpayment recovery process</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Retro transactions to Job Data trigger a retro transaction for accruals</td>
<td></td>
</tr>
</tbody>
</table>

*Changes submitted via PayPath are not reviewed by WFA.*
Here are some examples of PayPath Actions that do not result in a retroactive pay:

- Reports To (Position Data)
- Department Location (Position Data)
- Probation Code/Probation End Date (Job Data)
Here are some examples of PayPath Actions that result in a retroactive pay:

- Job Code – Promotion/Reclassification (Position Data)
- Salary Admin Plan (Position Data)
- FTE (Position or Job Data)
- Compensation Rate (Job Data)
- Change of Effective Date or Pay Period Amount (Additional Pay)
The effective date for a change on the Position Data page cannot be the same as the original effective date or a previously used effective date. This change can only be made by UCPC via Case Management.
Initiate Retroactive PayPathTransaction

- Watch as your instructor demonstrates how to initiate a retroactive additional pay transaction in UCPath.
- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *Initiate Retroactive Additional Pay PayPath Transaction (Staff/Acad)* topic.
- Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.
Exercise 5 A/B

Initiate Retroactive PayPath Transaction

• This is your opportunity to practice this task on your own.
  • Use your PayPath Workbook to compete the following tasks:
    • (A) Initiate retroactive PayPath transaction with no impact to pay
    • (B) Initiate retroactive PayPath transaction with impact to pay.

• Ask your instructor for assistance, if needed.

Navigation:
PeopleSoft Menu
  > UC Customization
  > UC Extensions
  > PayPath Actions
Lesson Objectives Review

Having completed this lesson, you should now be able to:

- Initiate various PayPath combination transactions.
- Process Retroactive Transactions in PayPath.
As the Location PayPath Initiator, you initiate position data change, job data change and additional pay transactions, which are workflowed to Location PayPath Approver(s) for approval.

**PayPath Actions** allows historic, current or future updates in **Position Data** and **Job Data**.

The position data change **Effective Date** cannot be the same date as any existing effective date for the employee in the **Position Information** component because there is no sequence field for same-date actions.

**Job Data** changes can be made independent of a position data change. However, if a position data change is made, PayPath automatically updates the **Job Data** page to display the new position information.

Retroactive transaction may result in the need for a pay adjustment. The UCPC will evaluate the transaction and process the pay adjustment, if necessary.

Refer to the **PayPath Transactions – Action Codes, Reason Codes and Descriptions** job aid for a description of all **Action** and **Action Reason** code combinations.
Key Takeaways

- Multiple **position data** and **job data** changes with the same **effective date** can be entered in a single PayPath transaction.
- Multiple **additional pay** entries with different **effective dates** can be entered in a single PayPath transaction.
- When a position change is entered, a new row is automatically inserted in the **Job Data** page and displays the updated position data information.
- All **job data** fields that are controlled by **position data** appear as display-only.
- After a PayPath transaction is submitted for approval (Pending Approval status), you cannot enter another PayPath transaction for that employee until the pending transaction has been processed by all Approvers.
- Use the UCPath Payroll Processing Schedule to reference when transactions will be processed by UCPC.
Parking Lot

• Review parking lot
  • Have all questions been answered during our class?
  • Are there any new questions to add to the list?
Where to Get Help

1. Your training materials are available to use as reminders for navigation, codes, and page processing information.
   - UPKs
   - Job Aids
   - Presentation decks

2. Who do you ask for Help now?
   - Continue to do so. Specially trained users (Points of Contact, POCs) are ready to help you within your departments and divisions.
   - Many of the POCs are those you have already worked with.

3. You or the POC contacts the Employee Experience Center (EEC or Service Now) via phone or website to view knowledge base articles and/or open a ticket.

4. The **UCPath Help** site is your last level of support. Search for conceptual content, job aids or step-by-step instructions for UCPath tasks.
   - From the UCPath portal homepage, expand the **Help / FAQ** section on the left side of the page, click the appropriate link.
   - From any UCPath page or component, click the **Help** link in the upper right corner of the page to find help topics specific to the page/component.

UCI UCPath - Training
THANK YOU

UCPath Training
Appendix
Review Business Process Guides related to Workforce Administration transactions and discuss changes associated with the transition to the new processes:

- WFA.03 Job Data Changes
- WFA.06 Job Earnings Distribution
- WFA.07 Job Record End Date Monitoring
- WFA.50 Position Management
- WFA.55 PayPath
Below is a list of UCPath pages that may need to be completed as part of the hire process. It includes the steps listed in the onboarding overview plus some additional pages related to the hire process.

<table>
<thead>
<tr>
<th>Page</th>
<th>Purpose</th>
<th>Navigation</th>
<th>Course</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Control Request</td>
<td>Create/ Update a Position</td>
<td>PeopleSoft Menu &gt; UC Customizations &gt; UC Extensions &gt; Position Control Request</td>
<td>Position Control ILT</td>
</tr>
<tr>
<td>Funding Entry</td>
<td>Add or update position funding.</td>
<td>PeopleSoft Menu &gt; Set Up HCM &gt; Product Related &gt; Commitment Accounting &gt; UC Customizations &gt; Funding Entry</td>
<td>Funding &amp; Budget Distribution ILT</td>
</tr>
<tr>
<td>Budget Distribution Page</td>
<td>Assign permanently budgeted portions of the position.</td>
<td>PeopleSoft Menu &gt; Set Up HCM &gt; Product Related &gt; Commitment Accounting &gt; Budget Information &gt; UC Customizations &gt; Budget Distribution</td>
<td>Funding &amp; Budget Distribution ILT</td>
</tr>
<tr>
<td>Person Profile</td>
<td>Update employee’s qualifications, education, oath &amp; patent signature dates and UC Student Status.</td>
<td>PeopleSoft Menu &gt; Workforce Development &gt; Profile Management &gt; Profiles &gt; Person Profile</td>
<td>Template Transactions Part 1 (this course)</td>
</tr>
<tr>
<td>Security Clearance Page</td>
<td>Update different types of Security Clearances for an employee. For example, I9 completion.</td>
<td>PeopleSoft Menu &gt; Workforce Administration &gt; Personal Information &gt; Security Clearance</td>
<td></td>
</tr>
<tr>
<td>Employee checklist</td>
<td>Update or add a new checklist for an employee.</td>
<td>PeopleSoft Menu &gt; Workforce Administration &gt; Personal Information &gt; Organizational Relationships &gt; Person Checklist</td>
<td>Template Transactions Part 1 (this course)</td>
</tr>
</tbody>
</table>