

# UCPath Biweekly Newsletter

Stay up-to-date on  
all things UCPath!

UC San Diego

**June 12, 2024 – June 26, 2024**

Welcome to our biweekly communication to keep you up-to-date on all things UCPath.

## Announcements

**UCPath Biweekly Newsletter Schedule:** The next newsletter will be sent on **06/26**

### Reminder!



- The next Default Day is: **07/02**
- The next UCPath Transactions Office Hours is: **06/13 @ 9:00 am - 10:00 am**
- Make sure to review your [paycheck](#) and [Direct Deposit information](#) in UCPath
- Join the [UCPath Community of Practice](#)
- Looking for UCPath metrics? View the [UCPath Metrics Dashboard](#)
- Register for a [UCPath On-The-Job Training session](#) today!
- Today's UCPath Projects: July Release Topic Based Zoom is now posted on our [UCPath Media Library](#).
  - [Watch recording](#)
  - [View PowerPoint slides](#)

### Did You Know?

#### July 1 Retirements and COLA Eligibility

As a reminder, to qualify for the inactive cost of living adjustment (COLA) increase, eligible UC Retirement Plan (UCRP) benefit recipients must have 1976 Tier service credit or safety classification and have at least one business day break in service before a July 1 retirement.

Refer to the job aids below for terminology, examples, and guidance on processing this transaction in UCPath.

- **Job Aid:** [Retirement Processing for July 1 Retirement Date - COLA](#)
- **Job Aid:** [Emeriti Processing for July 1 Retirement Date](#)

- **Quick Reference:** [Processing Final Pay for 7/1 Retirees](#)

**Action Items:**

- Submit retirement templates
- Submit final pay payroll requests (E-078) for retirees by the following deadlines:
  - **Monthly July 1** pay date: **Monday, June 17, 2024 @ 3:00 pm**
  - **Biweekly July 17** pay date: **Wednesday, July 3, 2024 @ 5:00 pm**
- Submit Accruals and Service Adjustment eForms to adjust sick time that has been converted to service credit towards retirement

[Read the full communication here.](#)

**Deadlines Approaching! Fiscal Year-End Funding Entry Freeze**

The Fiscal Year End Funding Entry Freeze begins on **Friday, June 21, 2024 @ 8:00 am through Thursday, June 27, 2024 @ 12:00 pm**. Do **not** approve any Funding Entry during this period as it may interfere with the FYE rollover processes.

All funding transactions must be locally approved by **Thursday, June 20, 2024**.

**Direct Retro Local Approval Deadlines:**

- **Wednesday, June 19 @ 8:00 p.m.:** BW/MO **High-Risk** for posting in June
- **Thursday, July 4 @ 5:00 p.m.:** BW/MO **Non-High-Risk** for posting in June

**Salary Cost Transfer Local Approval Deadlines:**

- **Wednesday, June 19 @ 8:00 p.m.:** BW/MO **High-Risk** for posting in June
- **Sunday, July 7 @ 8:00 p.m.:** BW/MO **Non-High-Risk** for posting in June

Refer to the [Fiscal Year End Funding Rollover Quick Reference](#) for more information.

**Action Required: Job Record End Date Monitoring**

There are currently **6917 employee records** and **1051 contingent worker (CWR) records** at UCSD that have **June 30, 2024 or earlier** end dates that are **not** set to auto-terminate.

June 30, 2024 – Job End Date is Valid?	End Job Automatically Box Checked?	Action to Take:
Yes	Yes	No action needed. Job will auto-terminate, as planned
Yes	No	Action Required: Submit termination
No	Yes	Action Required: Submit appropriate transaction
No	No	Action Required: Submit appropriate transaction

Please run the **Jobs With Approaching End Dates Report** in Cognos. Extend or terminate Employee records as appropriate. CWR assignments may be extended (UC\_EXT\_CWR template) or "completed" (UC\_COM\_CWR template). [Read the full communication here](#).

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### UCPath July Release is 1 Month Away!

The UCPath Projects: July Release is scheduled to go-live in July 15, 2024. Are you prepared for the changes?

- Review what's coming with the Gender Identity and Pronouns project by watching the [UCPath July Release: Gender Identity and Pronouns video](#).
- Submitters with SOBO (Submit on Behalf On) access will see a new interface in the Ask UCPath portal.
- The UCPath Former Employee Portal will be updated with a new interface and security login methods via multi-factor authentication to improve the user experience for former employees.

[Watch the recording](#) of the UCPath Projects: July Release Topic Based Zoom here.

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### Payroll Adjustment Backlog Update

Currently, UCPath Center has completed more than 1,000 corrected W-2s (W-2Cs) and is completing about 200 W2-Cs from the 2023 tax year. In [April](#), UCPath Center provided information about previously unreported payroll adjustment requests from 2023:

- The remaining 285 adjustments are targeted for completion by June 30, 2024.
- 28 adjustments require 2021/2022 corrections, pending the opening of prior-year payroll calendars, which has been requested.
- To handle increased volume and prepare for year-end requests, UCPath Center reassigned five resources and onboarded six additional temporary resources.

Employees will receive an email notification when their corrected W-2C is available in UCPath. Those who opted for printed documents will receive a hard copy via U.S. Mail. UCPath Center will continue to process adjustments in the order received and provide monthly updates until the backlog is resolved. The next update will be provided by June 28, 2024.

The above information and more can be found in our [Newsroom](#).

## Job Aids, Quick References & KBA Updates

**Always** access Job Aids through [website links](#) to ensure you are using the most recent versions.

### Local Job Aid & Quick Reference Updates as of 06/12/24

- [How to Process Faculty Administrator 1/12 Payments](#)
  - Additional guidance added by Academic Personnel Services (APS)

### Knowledge Base Article Updates as of 06/12/24

- [How to Troubleshoot Student FICA/DCP Deductions](#)

# Upcoming Payroll Deadlines

The [Payroll Processing Schedule](#) is your official source for Payroll Deadlines & Non-transaction Days.

Use this [Job Aid](#) to understand the terminology and deadlines.

**\* Dates with an asterisk indicate payroll processing deadlines adjusted for holiday processing.**

## June Biweekly 2 06/18/24 Paycheck

- **06/06 at 3:00 pm (Th):** Employee Data Change Deadline
- **06/11 at 5:00 pm (T):** PayPath Transaction Deadline
- **06/11 at 5:01 pm – 06/14 at 6:00 am (F):** Non-transaction days for PayPath - BW2
- **06/12 at 7:00 pm (W):** Deadline for Funding Transactions
- **06/17 (M):** UCPATH LL-DOPE & UCPATH GL Post Confirm Complete

## June Monthly 07/01/24 Paycheck

- **06/17 at 3:00 pm (M):** Employee Data Change Deadline
- **06/21 at 5:00 pm (F):** PayPath Transaction Deadline
- **06/21 at 5:01 pm – 06/27 at 6:00 am (Th):** Non-transaction days for PayPath - MO
- **06/25 at 7:00 pm (T):** Deadline for Funding Transactions
- **06/28 (F):** UCPATH LL-DOPE & UCPATH GL Post Confirm Complete

## July Biweekly 1 07/03/24 Paycheck

- **06/20 at 3:00 pm (Th):** Employee Data Change Deadline
- **06/25 at 5:00 pm (T):** PayPath Transaction Deadline
- **06/25 at 5:01 pm – 06/28 at 6:00 am (F):** Non-transaction days for PayPath - BW1
- **06/26 at 7:00 pm (Th):** Deadline for Funding Transactions
- **07/01 (M):** UCPATH LL-DOPE & UCPATH GL Post Confirm Complete

## Upcoming Pay Confirm Dates: 06/13, 06/26, 06/27, 07/11, 07/25

UCPC does NOT process Off-cycle, DR/SCT, or Pay Requests on Pay Confirm dates.

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**Please note** that there will be **separate** deadlines for Direct Retro (old tool) processing and Salary Cost Transfer (SCT, new tool) processing each month:

## Direct Retro\* Approval Deadlines for UC San Diego Fin. Acctg Posting

- **06/19 @ 8:00 p.m. (M):** BW/MO **High-Risk** for posting in June
- **07/04 @ 5:00 p.m. (Th):** BW/MO **Non-High-Risk** for posting in June

**Salary Cost Transfer\* Approval Deadlines  
for UC San Diego Fin. Acctg Posting**

- **06/19** @ 8:00 p.m. (W): BW/MO **High-Risk** for posting in June
- **07/07** @ 8:00 p.m. (Sun): BW/MO **Non-High-Risk** for posting in June

**\*Direct Retro & SCT Note:** A DR or SCT that is final approved **after** the DR or SCT deadline, but **before** the end of the calendar month, may result in a mismatch between Acctg Period and Run ID.

**Local News: Upcoming Projects & More**

**Coming Soon: UCPath July Release**

July 2024 will mark the release of the following projects in the UCPath system: **Gender Identity and Pronouns**, the **New SOBO Case Submission Form**, and updates to the **UCPath Former Employee Portal**. A summary of the July Release projects can be found below:

**Gender Identity and Pronouns**

The goal of the Gender Identity and Pronouns project is to capture gender identity, sexual orientation, and pronouns in the UCPath system to align with the [Gender Recognition and Lived Name Policy](#). This project will:

- Update system options for Gender Identity and Sexual Orientation as some values are outdated
- Allow system to collect Employee pronouns
- Implement Oracle delivered solution for consistency and scalability for future delivered changes

UCPath July Release:  
**Gender Identity and Pronouns**



Watch the [UCPath July Release: Gender Identity and Pronouns video](#) below for an overview of the changes.

## New SOBO Case Submission Form

The new SOBO (Submit on Behalf Of) Case Submission Form portion of the Enhance Ask UCPATH Initiative will simplify, standardize and improve the case management user experience for Submitters by creating an intuitive case submission form. For more information, view the Enhance Ask UCPATH Initiative project space [here](#).

## Former Employee Portal Updates

In addition to the above projects, the UCPATH Former Employee Portal will be updated to improve the user experience for former employees. The changes include the inclusion of multi-factor authentication for added security and a new Fluid interface.

[Click here to view all ongoing UCPATH projects →](#)

## Reports

- **New Report: UC San Diego Org Chart Listing Report** – Human Resources Non-restricted
  - The UC San Diego Org Chart List Report displays the UCPATH [Reports-To] Position based hierarchy for all active employees. All Primary and Secondary positions are included. The report can display a single employee, a manager and their team, a Department, or VC, or even the entire University. This non-traditional Org Chart report is well-suited for downloading to Excel where you can easily filter on the multiple reporting levels.
  - Report data is currently updated weekly via spreadsheet upload. However, this will become nightly once a new EAH view is available from the BIA Team. The new view will also improve report performance time which is currently slower than average.
  - Please note, some UCPATH [Reports-To] data may incorrectly show active employees reporting to either inactive positions or even employees who are fully separated from the University. These issues are highlighted on the main report page and fully listed on the “Inactive Reports To” page.
- **Employee Lookup Report** – Human Resources Restricted
  - Name Prompt search improved to include variations on special characters.
- **Employee Roster Report** – Human Resources Non-restricted
  - Name Prompt search improved to include variations on special characters.
- **UC Learning Center - Required Training Status** – Human Resources Non-restricted
  - BUS-49 Cash Handling Training activity list update
- **UC Learning Center - Required Training Status Report for Supervisors** – Human Resources Non-restricted
  - BUS-49 Cash Handling Training activity list update
- **UC Learning Center - Training Activity Completions Report** – Human Resources Non-restricted
  - BUS-49 Cash Handling Training activity list update
- **Employee Roster Report** – Human Resources Non-restricted
  - Added Job Automatically End Flag field

## Where Can I Get Transactor Support?

# Bring Your Questions to an Office Hours Session:

## UCPath Transactions Office Hours

**Monthly** on the **second Thursday**,  
9:00 am - 10:00 am



Add to Outlook



Add to Google

## **Graduate Student Employment**

See [Graduate Student Employment Collab page](#)

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## Book a 1:1 "How-To" Appointment:

- [UCPath HR Transactions](#): Mondays – Fridays
- [Payroll Financial Management](#): Weekly on Wednesdays
- [Campus Timekeeping](#): Weekly on Fridays

## **Reporting 1:1 Sessions**

Request a session at [ucpathreports@ucsd.edu](mailto:ucpathreports@ucsd.edu)

## **UCPath Training Environment Access**

Request access at [ucpathproject@ucsd.edu](mailto:ucpathproject@ucsd.edu)

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## Attend a Topic-Based Zoom:

Find previously posted PowerPoints & recordings [here](#).

Add the Topic Based Zooms directly to your calendar [here](#)!

- **Stay tuned for upcoming Topic Based Zoom sessions!**

It is a best practice to review, on a regular basis, the list of UC-Wide System Updates.  
This list is updated **periodically** and available on our [System Updates Webpage](#).



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