



UCPath Quarterly Connect

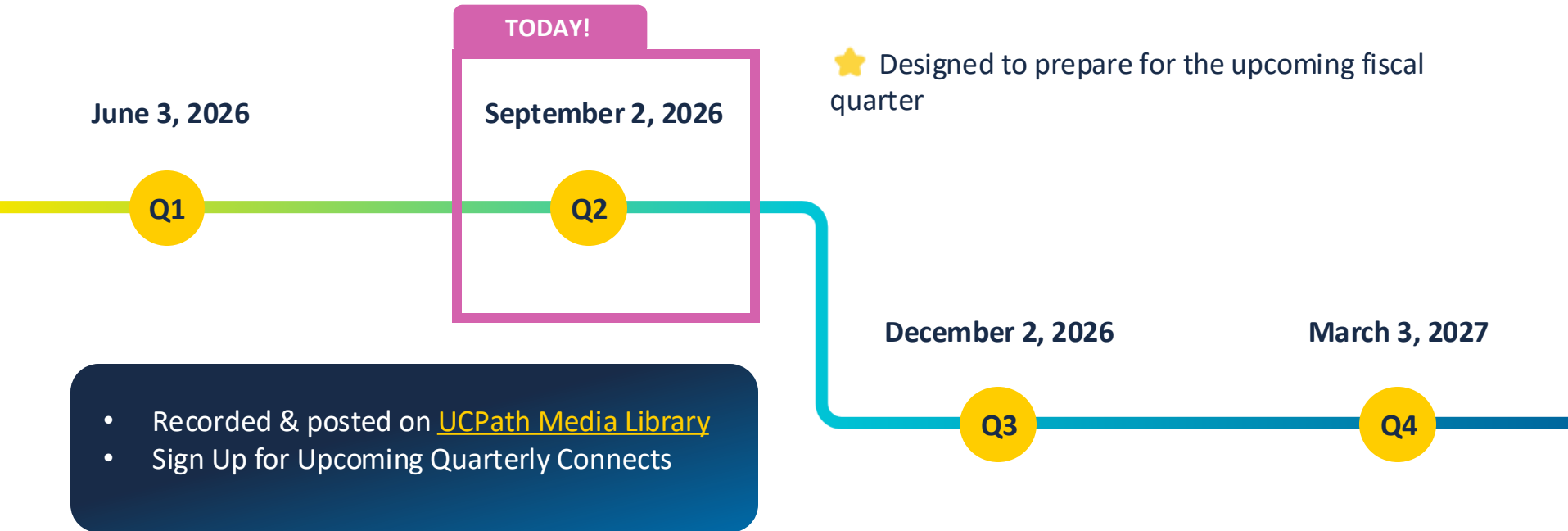
Q2: September 2, 2026



Agenda

- 1 On the Radar
- 2 Roadmap Updates
- 3 Tips, Tools & Reports
- 4 Q&A

UCPath Quarterly Connect Schedule



A stylized radar chart or sonar display is centered on the slide. It features a central point with several concentric circles and radial lines extending outwards. A thick, multi-colored arc (transitioning from cyan to yellow) is positioned near the outer edge of the chart. Two small dark blue dots are located on the left side of the chart. A larger, semi-transparent dark blue sector is visible on the right side of the chart.

On the Radar

Quarterly Connect Survey Results

Survey invite sent on June 26, 2026. Survey closed on July 10, 2026. **60 Respondents Total.**

Focus Areas for Improvement:

- ✓ Incorporate more **real-life, trouble-shooting scenarios**.
- ✓ Provide **agenda and supporting materials** before and after sessions.
- ✓ Enhance presentation pacing and engagement, while creating opportunities for Q&A and addressing highly specialized discussions separately.
- ✓ Continue enhancing **UC San Diego UCPATH documentation and knowledge resources** to provide greater clarity and understanding of UCPATH processes and responsibilities.

People Systems Enhancement Intake Form

People Systems Enhancement Form – Undergoing Pilot Testing

- One intake point for People Systems Enhancement Requests: Business Process Improvements or System Enhancement
- All submitted requests are captured for review and prioritization
- Anyone in the organization can submit, no need to know which workstream owns it
- Detailed responses help the right Workstream Lead pick it up faster

People Systems Enhancement Request

Submit a People Systems enhancement, HR Business Process enhancement, or HR Report suggestion

Submit an People System enhancement, HR Business Process enhancement, or HR Report suggestion for consideration and prioritization.

Please be as detailed as possible with your request.

* Indicates required

* Full Name

Ana Aguila

* Email

a6aguila@UCSD.EDU

* Select the enhancement type

-- None --

* What best describes your request?

-- None --

* Select the HR lifecycle or workstream applicable

* Summary of the proposed change(s), including system if applicable:

* Describe in detail the proposed change(s):

* What issue would this resolve or improve?

* How time-sensitive is this request?

-- None --

* Which other systems, if any, does this affect?

Child Care Leave Updates

Rosemarie Mirano-Del Mar
Work-Life Changes PSW Lead



Child Care Leave Updates

- Child Care Leave continues to be implemented across various bargaining units.
- **UC Office of the President (UCOP) is continuing to finalize contract language** and related implementation guidance.
- Additional direction remains pending regarding certain **UCPath system processes**.
- A [centralized resource](#) has been developed locally to support HR practitioners in understanding and administering **Intermittent Childcaring Leave** across the applicable bargaining units.
- [UCPath Processing Guidance and Workaround Steps](#) have been provided by UCOP, to better assist transactors.

CCL: UCPATH Processing Guidance

Processing Guidance: Unions HX, RX & TX



Standard Operating Principles

- **No Recharacterization Needed:** Leaves previously processed using the temporary workaround do *not* need to be retroactively adjusted.
- **Standard Entry Moving Forward:** Always select the new **Child Care Leave** type for all applicable upcoming leaves.
- **Post-JIRA Update:** Once JIRA UCP-194275 is completed, Child Care Leave can be entered in UCPATH effective retroactively to **11/20/2025**.



Interim Leave Splitting (Prior to UCP-194275)

If a leave starts prior to **3/1/2026**, locations must split the transaction into two distinct date segments in UCPATH:

📌 SPLIT LEAVE ENTRY EXAMPLE

1/10/2026 – 2/28/2026

Personal Leave (Notes: Child Care)

3/1/2026 – 5/1/2026

Child Care Leave

New Extended Absence Request

Extended Absence Details								JED Additional Earnings Codes	Job Overrides	Attachments
	*Start Date	*Expected Return Date	Actual Return Date	Leave	FMLA/CFRA/PDLL Leave	*Paid/Unpaid	*Last Date Worked			
1	08/04/2026	08/31/2026		Child Care Leave		Paid-Block				

CCL: UCPATH Workarounds

Interim Workaround Procedure: RP, SV, EX, SX & CX

 JIRA WA-741: Updated with union details & interim location processing steps

1. UC Location Action

SUBMIT WORKAROUND

- 1 Log in to UCPATH & navigate to **Request Extended Absence**.
- 2 Enter **Employee ID**, Start Date, Expected Return Date, & Last Day Worked.
- 3 Select Leave Type: **PERSONAL LEAVE**.
- 4 Click **Notes** and paste mandatory template text:
"Personal Leave submitted as workaround for CX, EX, SX, RP or SV employee qualifying for Additional Child Care Leave. Please process in Job Data as Additional Child Care Leave."

2. UCPATH Center Action

REVIEW & PROCESS

- 1 **Review:** Leave of Absence team confirms details via transaction notes.
- 2 **Quality Check:** Pushes back request to Location if edits are needed.
- 3 **Job Data Entry:** Enters leave as **Additional Child Care Leave** in Job Data.
- 4 **Approval & Notes:** Approves request with approval note:
"Personal Leave entered into Job Data as Paid/Unpaid Additional Child Care Leave, effective [Date] with Return Date [Date]. Workaround for CX, EX, SX, RP & SV."

CCL: Impacted Bargaining Units

CODE	BARGAINING UNIT	UNION	EMPLOYEE GROUP
HX	HealthCare Professionals	UPTE	Non-supervisory licensed health care practitioners providing clinical/medical services, primarily in UC medical and student health centers.
RX	Research Support Professionals	UPTE	Non-supervisory research support professionals providing specialized and complex scientific support for researchers.
TX	Technical	UPTE	Non-supervisory technical support employees who provide a broad range of technical services supporting academic and scientific research.
EX	Patient Care Technical	AFSCME	Employees primarily providing patient-support services at UC medical centers, with some positions on campuses.
SX	Service	AFSCME	Non-supervisory service employees providing custodial, transportation, and related support services.
CX	Clerical & Allied Services	Teamsters Local 2010	Non-supervisory clerical and related positions across UC campuses and medical centers.
RP	Research & Public Service Professionals	UAW	Professionals working in areas such as data collection/analysis, research programs, public service programs, grant administration, research centers, institutes, academic departments, and labs.
SV	Student Services & Advising	UAW	Professional staff working in student services and advising functions. This is one of the newer UAW-represented systemwide bargaining units.

Year-End Deadlines

Janelle Rose Mendoza

Time & Pay Advisory & Escalation Services



Year-end Payroll Adjustments

Submit all known current year payroll adjustments by **October 16, 2026** to confirm processing by December 31, 2026.

Payroll Adjustment Types

PAY & EARNINGS

- Death Pay Calculations & Adjustments
- Earnings Overpayments
- Overpayment Cancellations
- Reclassification of Earnings
- Paycheck Reversals

TAX & COMPLIANCE

- FICA Adjustments
- NRA Adjustments
- Before-Tax & Taxable Deduction Adjustments

DATA CORRECTIONS

- Duplicate / Merged Records

SUBMISSION DEADLINE

OCTOBER 16, 2026

- Early submission improves turnaround time before year-end.
- Timely processing helps ensure accurate Forms W-2.
- Late adjustments may require additional year-end processing.
- Requests received after deadline will continue to be processed but may not be completed before year-end.

Mid-Month Project-Task Override Enhancement

Matt Frankos

Payroll Financial Management



Mid-Month Project-Task Override

How to Avoid a "Mid-Month" Project-Task from Routing to the Default Project

- ❖ What is a "mid-month" Project-Task?
- ❖ Local Configuration to Prevent Defaulting
- ❖ Updating UCPATH Funding Entry
- ❖ What do I do if I don't make Funding Entry Updates?

Mid-Month Project-Task Override

What is a "mid-month" Project-Task?

A "mid-month" Project-**Task** is a project with a **Task** that has an end date on a day other than the **end** of a month.

Example:

Project	Task	Project Start Date	Project End Date	Task End Date
2017965 - SP Frouin NASA Goddard 80NSSC21K1661	1	04/13/2021	07/11/2024	07/11/2024

Local Configuration to Prevent Defaulting

On **July 1, 2026**, a local configuration change was made to override Project-Tasks with end dates that are on a day other than the **end** of a month

- This allows payroll transactions to pass our chartstring validation and not be routed to a default project when payroll is processed
- However, this means that payroll expenses beyond the project-task end date will be charged to the "mid-month" project-task **unless** you make changes to **Funding Entry** in **UCPath**

Consider the example where project 2017965-1 expired on 7/11/24:

- If **no** changes were made to **Funding Entry** -payroll expenses from **7/1-7/31/24** would be charged to project 2017965-1 for a monthly employee

Updating UCPATH Funding Entry

Use the **Funding End Date** field in UCPATH Funding Entry to prevent a chartstring from being charged beyond a specific date.

- Enter the **Funding End Date** to match the **Project-Task End Date**
- Create a new Funding Entry with an Effective Date **equal** to the day after the Project-Task expires:
 - This will allow payroll to be charged proportionally to the "mid-month" Project-Task and to the new Funding source

Consider again the earlier example where project 2017965-1 expired on 7/11/24:

If project 2017965-1 had a **Funding End Date** of **7/11/24** and a **New Funding Entry** with an **Effective Date** of **7/12/24**, then payroll would be allocated as follows:

- **7/1-7/11** expensed to **Project 2017965-1**
- **7/12-7/31** expensed to **New Funding Source**

Mid-Month Project-Task Override



What do I do if I don't make Funding Entry Updates?



You will need to perform a **Salary Cost Transfer (SCT)** in UCPATH for the portion of payroll expenses that should not have been charged to the mid-month project.

Resources

KB0035980 -

[How to Create and Update Position Funding in UCPATH](#)

KB0035981 -

[How to Move Payroll Expenses in UCPATH](#)

Student Employment Reminders

Tod Oliviere & Diana Vargas-Garcia
Student Employment Office



SEO Reminders: Fall Hires

- **Triton Student System (TSS) Update**
- **Limit on Student Employee Hours: 19.5 hours total**
- **FTE Guidance: May not exceed 50% during academic year**
- **Work-Study: Available beginning 9/21/2026**

Roadmap Updates



UCPath FY27 Project Roadmap

Fall 2026 –
Fall 2027

Final Pay: Complete post-pilot scope changes & onboard remaining locations.

March 2027
Release

Improve Accrual Management Phase 2: Improve UCPath leave accrual accuracy for employees on short work break, with mid period AM eligibility group changes, and being processed for final pay.

UCPath Annual Upgrade: Upgrade from PUM 49 to PUM 55; PeopleTools 8.61.17 to 8.62.06.

August 2027
Release

Manage Job Phase 3: Advances effort to replace PayPath functionality through supported transaction capabilities, aligning validations, and improving processing standards with Manage Human Resources and Direct Entry.

Mass Compensation Improvements: Streamline mass compensation processing to improve efficiency, accuracy, and stakeholder experience. Enhance the current manual process used by the UCPC WFA team.

Simplify GL Phase 2: Streamline detailed ledger tables from 5 to 1 & eliminates data replication.

UCPath March 2027 Release

Project	Summary of Changes	Go-Live
Improve Accrual Management: Phase 2	Project Objective: Improve the UCPath leave accrual accuracy for employees on short work break, with mid period AM eligibility group changes, and being processed for final pay . Phase 2 Scope includes the following scenarios: • Employees with at least one record for a short work break. • Employees that have a change in AM Eligibility Group, Union, or Class Indicator, mid pay period, accruing cycles only. • Improve display of absence balance page by itemizing appointments (if multiple) in the pay period. • Technical changes to improve performance and troubleshooting.	March 22, 2027
Annual Upgrade	Project Objective: To upgrade UCPath to the latest version of PeopleSoft and PeopleTools (PUM 55 / Tools 8.62.07) to keep the system current, secure, and positioned to adopt new capabilities.	March 22, 2027

UCPath August 2027 Release

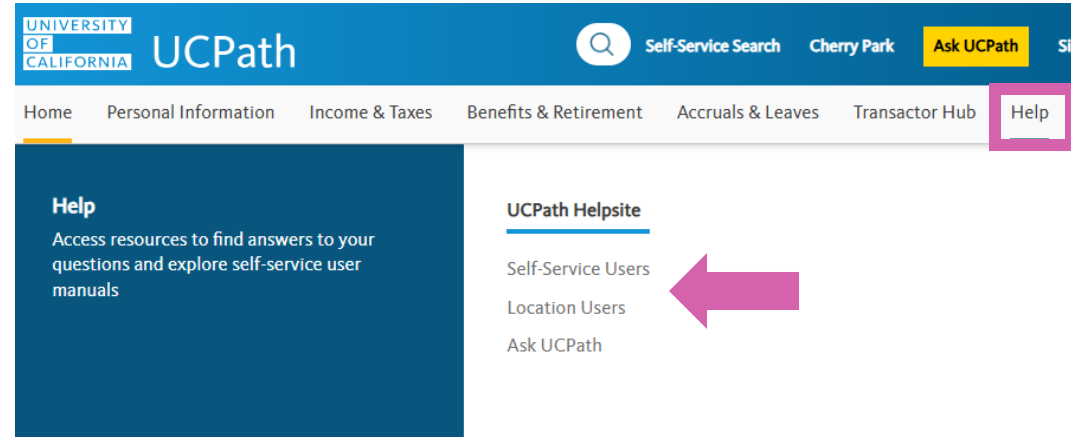
Project	Summary of Changes	Go-Live
Simplify GL Phase 2	Project Objective: To streamline detailed ledger tables from five to one to reduce data footprint and improve reporting and reconciliation. This project will also automate benefit cost recovery and SCT processing daily. • Reduce GL Data Reprocessing & Duplication, • Retire the GL Processing Calendar, • Resolve 20+ Pending Changes & Defects.	July 5, 2027

UC San Diego UCPATH Salary Cost Transfer Defects

Defect (JIRA)	Description	Status
UCP-159344	E-713B Applied Split Funding Based on Max Effective Date Instead of Earn End Date	In Review

UCPath UPK Migration - New Look and Location for UCPATH Job Aids

Beginning September 1, links under the **Help** menu in the UCPATH portal will direct users to [ASK UCPATH knowledge search](#), where they can find job aids and other help resources. The new job aid format supports assistive technologies, and improved search capabilities make resources easier to find.



UCPath UPK Migration

What's Changing

- Links under the **Help** menu in the UCPath portal will direct users to the new location for UCPath help resources (ASK UCPath Knowledge base)
- Users can search for job aids and other help content directly within the ASK UCPath portal
- Job aids will display in a new HTML format.
- The new format supports assistive technologies and provides a more inclusive experience for accessing UCPath guidance

Why

- Legacy Oracle UPK software is end-of-life and relies on obsolete web templates. Moving to a modernized publishing engine allows UCPath to maintain standardized, clean, and easily maintainable documentation across the entire system.
- Replaces rigid, multi-layered folder trees (UPK topic folders) with a modern, indexed enterprise search engine (ASK UCPath Knowledge base).
- Legacy UPK output failed modern digital accessibility standards. Moving to standard HTML5 aligns with UC systemwide WCAG 2.1 AA.

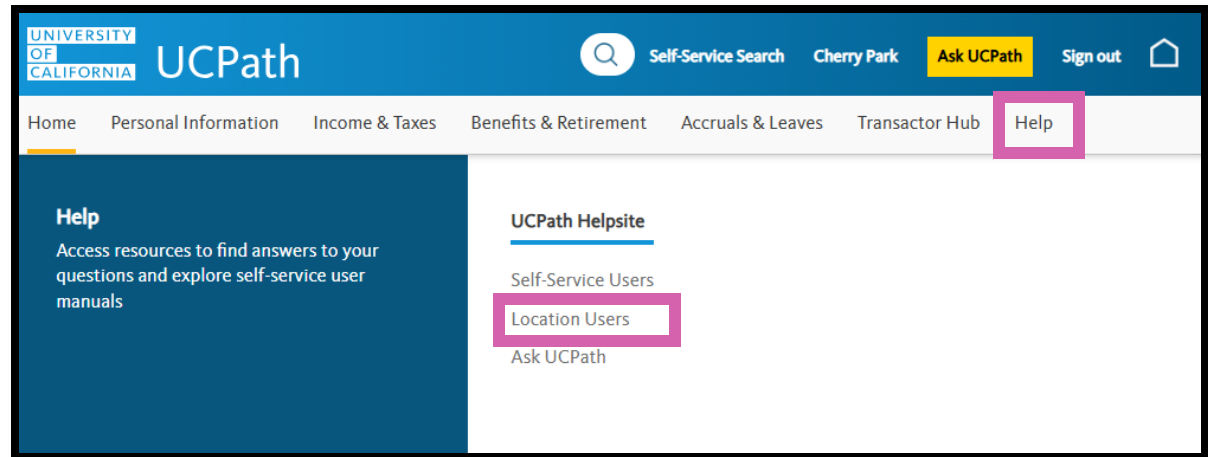
What this means

- The previous UCPath help site links will no longer be available after September 1, 2026.
- The UPK site will remain available via the [UPK - UCPath Help for Self Service](#) link until October 1, 2026.
- Remove all bookmarks and bookmark new link: [Link to Ask UCPath knowledge articles moved from UCPath Transactor Help Site](#)
- Practice exploring UCPath resources through the Help menu in the UCPath portal.

- [illegible]

How to access the new UCPATH UPK articles

- Login to UCPATH
- Click the Help menu option
- Click on Location Users from the dropdown
- [Direct Link to Ask UCPATH Knowledge Base](#)



Ask UCPATH Knowledge Base

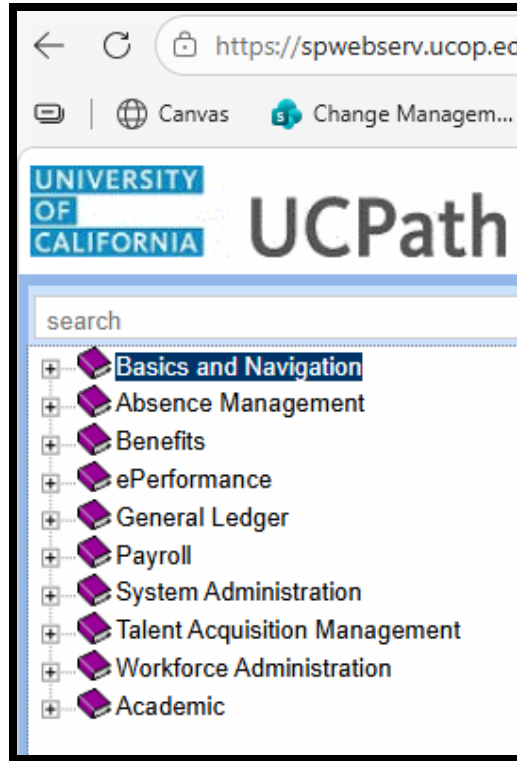
- Browse by topic or search by keywords

The screenshot displays the UCPath Knowledge Base interface. At the top, the header includes the University of California logo, the UCPath title, a search bar, and navigation links like 'Self-Service Search', 'Cherry Park', 'Ask UCPath', 'Sign out', and a home icon. Below the header is a navigation menu with links: Home, Personal Information, Income & Taxes, Benefits & Retirement, Accruals & Leaves, Transactor Hub, and Help.

A search bar with the placeholder text 'How can we help?' is highlighted with a pink box. Below the search bar, the 'Topics' section is also highlighted with a pink box. It shows a search bar and a list of categories: 'All Categories', 'UCPath Help site (554)', and 'Location Users (PS Modules) (457)'. The 'Location Users (PS Modules) (457)' category is expanded, showing sub-topics like 'Workforce Administration (... (147) >', 'TAM (PS Module) (80) >', 'Payroll (PS Module) (69) >', 'Absence Management (PS M... (47) >', 'Basics and Navigation (PS M... (37) >', 'General Ledger (PS Module) (37) >', 'ePerformance (PS Module) (11) >', 'Benefits (PS Module) (10) >', 'System Administration (PS M... (10) >', and 'Academic (8) >'. The 'Knowledge Type' section shows options: 'How_To (4)', 'Job_Aid (449)', and 'Videos (4)'. The 'Audience' section shows options: 'Employee/Manager (9)' and 'Manager:Super User (1)'. The main content area displays search results for 'UCPath Help site / Location Users (PS Modules) x'. It shows 'Results 1-10 of 457 in 0.19 seconds' and a table of results. The first result is 'PAY300 FAQ Final Pay Activity Guide' with a summary and keywords. The second result is 'PAY200 Settlement/Separation Agreement and Severance Agreement Process' with a summary and keywords. The third result is 'WFA250 Template Transactions – Action Reason Codes and Descriptions' with a summary and keywords. The fourth result is 'ABM200 Extended Absence Request Leaves and Description' with a summary and keywords. A 'Details' link is visible for each result. A 'Clear All Filters' link is also present. A chat icon is visible in the bottom right corner.

Ask UCPATH | Topics

- UPK file structure replicated in Ask UC Path knowledge base
- Not in the same order but the topics are all there!



Topics

< All Categories

< UCPath Help site (971)

Location Users (PS Modul... (902)

Workforce Administrati... (268) >

TAM (PS Module) (164) >

Payroll (PS Module) (126) >

Absence Management (... (85) >

General Ledger (PS Mo... (81) >

Basics and Navigation (... (73) >

ePerformance (PS Mod... (59) >

System Administration (... (18) >

Benefits (PS Module) (16) >

Academic (5) >

- Show less

Your Voice Matters!

- Help UCPATH Center improve their articles!
- Provide feedback on articles in the feedback box on the top right side of the article
- They won't know what is helpful to us unless we tell them!

The screenshot shows a web interface for UCPATH. At the top, there is a navigation bar with links for "Inquiries", "Submit An Inquiry", and "More". Below this is a search bar. The main content area displays an article titled "Billing Matrix" with a subheading "Conditions for Unpaid" and a brief description "in UCPATH.". A feedback form is overlaid on the right side of the article, highlighted with a pink border. The form includes a "Was this article helpful?" section with thumbs up and thumbs down icons, each followed by a "0". Below this is a "Choose a general reason" dropdown menu with the text "-- Choose a general reason --". A "Description" text area contains the placeholder text "Please, leave us some feedback...". A "Submit" button is located at the bottom of the form.

by Inquiries Submit An Inquiry More ▾

Search

Billing Matrix

Conditions for Unpaid
in UCPATH.

Was this article helpful? 0 0

Choose a general reason

-- Choose a general reason -- ▾

Description

Please, leave us some feedback...

Submit

Local Roadmap Projects

UCPath Resource Alignment



UCPath Resource Alignment

What's Changing

- Local UCPath KBAs now link directly to UCPath Center (UCPC) system instructions.
- Local CORE trainings will gradually transition to UCPC Web-Based Trainings (WBTs) as they become available.
- UC San Diego will continue to provide campus-specific guidance, support, and supplemental resources.

Why

- More current resources
- Better accessibility
- Greater consistency across the UC system
- Less duplication of content
- We are aligning with the source that owns and maintains UCPath system guidance

What this means

- Access the most current system instructions
- Less confusion about which resource is correct
- Consistent guidance across the UC system
- Improved accessibility and usability
- Local guidance remains available when campus-specific information is needed

Using the New KBAs

Overview

- What the transaction is
- When to use it

Before you begin

- Local guidance
- Important considerations

Steps to take in UCPath

- Direct links to UCPC system instructions

What to do after

- Actions you may need to take after submitting the transaction

KB0035841 Subscribed Actions

How To Process Transfers in UCPath

about a month ago • 598 Views • ★ ★ ★ ★ ★

UC San Diego is committed to making knowledge articles accessible for all, including individuals with disabilities. If you are unable to access this content due to a disability, please [report a digital accessibility concern here](#).

OVERVIEW

A **Transfer** is when an employee moves from one job to another via open recruitment. **Smart HR Templates** are used to transfer employees in UCPath. There are two ways to transfer an employee:

1. Transfer an employee using their current active **Empl Record** (this process requires **one template**)
2. Transfer an employee using a **new Empl Record** (this process requires **two templates** and creates a new Empl Record so the previous department can retain access to their Empl Record)

If the current department is not planning to terminate the current job (e.g., they are planning to extend it or put the job on Short Work Break), follow the Concurrent Hire Process (See KBA: [HOW TO PROCESS HIRES, REHIRES AND CONCURRENT HIRES IN UCPath](#))

For Academic specific guidance refer to: [UCPath Academic Job Aids and Resources](#)

When to use

- **One Template Process** (uses the **UC_TRANSFER** template):
 - Moving to another job in the same Department
 - Health Sciences/Medical Center Departments to Campus Departments
- **Two Templates Process** (uses the **Concurrent Hire** and **Voluntary Termination** templates with appropriate Transfer Action Reason codes):
 - UC San Diego to a different UC location
 - A different UC location to UC San Diego
 - Campus Departments to Campus Departments
 - Campus Departments to Health Sciences/Medical Center Departments
 - TES to Campus Departments
 - Staff to Academic (not Academic Student)
 - Academic (not Academic Student) to Staff
- **Two Template Process, where a break in service is required** (use the **Voluntary Termination Template** and **Full Hire Template with Action Reason Code Rehire, <120 days break**):
 - Campus Department to TES (a break in service is required for Campus to TES transactions in order to

Your Voice Matters!

UCPC owns and maintains:

System instructions

Knowledge resources

Web-Based Trainings

As we rely more on UCPC resources, your feedback becomes even more valuable

Tell UCPC what's confusing

Identify missing information

Share improvement ideas

Help shape future resources

What to expect next...

Training Alignment Roadmap

- Access provisioning remains unchanged for now
- Advance notice will be provided before any course and access updates
- Local CORE training modules will be replaced by UCPC WBTs as UCPC releases them

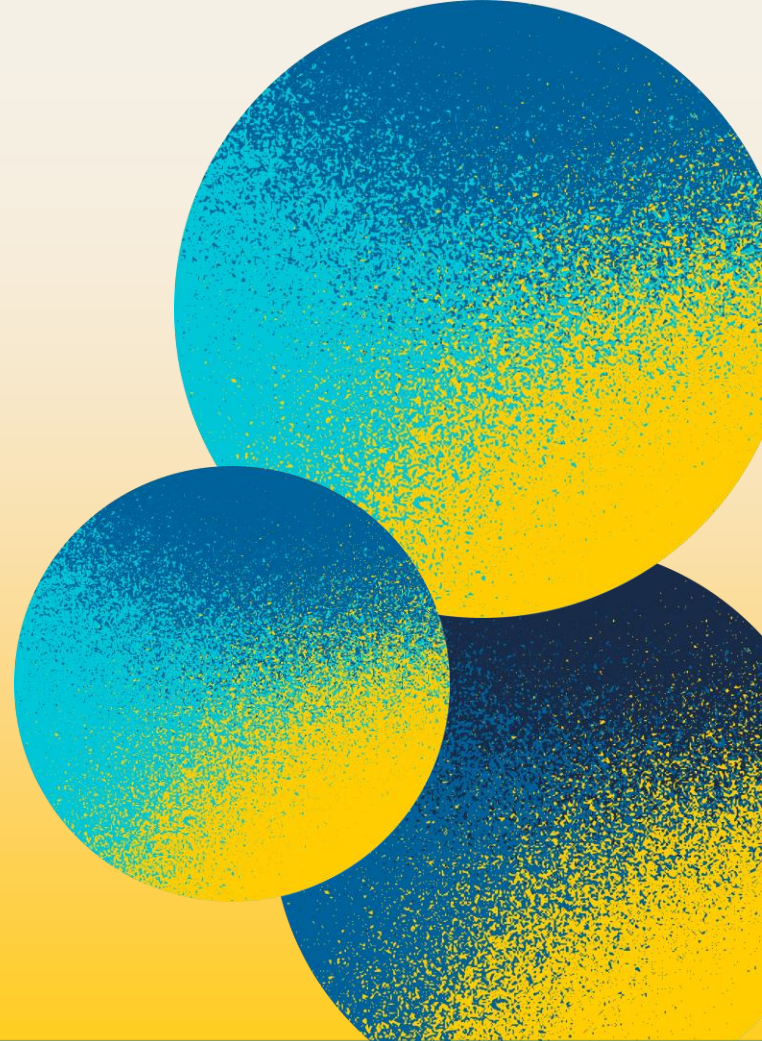
Our Commitment

- We will continue providing:
 - Campus-specific guidance
 - Supplemental resources
 - Communications and support throughout the transition

Ultimate Goal

- Make it easier to find, trust, and use UCPath resources

Tips, Tools & Reports



BAH Reports Showcase: Jobs with Approaching End Dates

- Navigation
- Search Parameters
- Excel: Reviewing the Tabs
- Resources

Jobs with Approaching End Dates Report

- URL: Bah.ucsd.edu
- Navigation: HR/Payroll > Human Resources Reports tab or Payroll and Financial Reports tab > Jobs with Approaching End Dates Report
- Filter by Keyword: Jobs with approaching end dates
- This reports lists all jobs with approaching end dates
- Click **Launch** to open the report

BUSINESS ANALYTICS HUB

UC San Diego

The screenshot displays the UC San Diego Business Analytics Hub interface. The top navigation bar includes tabs for Budget & Finance, Facilities, **HR/Payroll** (highlighted), Research, Student, and Help. Below the navigation bar, the page title is "HR/Payroll". A search bar on the right allows filtering by keyword, with "jobs with" entered. The page contains two report cards, both titled "Jobs with Approaching End Dates Report". The left card is for the "HR tab" and the right card is for the "Payroll tab". Both cards describe the report as a risk mitigation tool to prevent payroll over-payments. Each card has a "View Details" link and a "Launch >" button.

HR/Payroll

[List View](#) [Make a Request](#) [Ask Question / Report Issue](#) [Request Access](#)

Cognos Chrome Fix: Chrome has released new updates that resolve known issues with Cognos. Please update your Chrome to the most recent version. Click on the spyglass link above to switch between List View and Card View.

Access Notes:

- Each report category (e.g. Human Resources, Payroll & Financial, Academic Personnel, and Payroll Accounting and Reconciliation) requires a separate access request. Report categories have subcategories of Restricted and Non-restricted.
- The **DOPE Reports** are in the **Payroll Accounting and Reconciliation** category.

Filter by Category

All Reports	Academic Personnel Reports	Academic Personnel Reports (Restricted)	Community Reports
Human Resources EDI Reports (Restricted)	Human Resources Reports	Human Resources Reports (Restricted)	
Payroll Accounting and Reconciliation	Payroll and Financial Reports	Payroll and Financial Reports (Restricted)	

Filter by Keyword

jobs with

Jobs with Approaching End Dates Report (HR tab)

This report is a risk mitigation tool which will help prevent payroll over-payments.

[View Details](#) [Launch >](#)

Jobs with Approaching End Dates Report (Payroll tab)

This report is a risk mitigation tool which will help prevent payroll over-payments.

[View Details](#) [Launch >](#)

Search Parameters

Required Fields:

- VC Area
- Expected Job End Date Range
(leaving the defaulted values will set a range of today to 30 days from now)

IBM Cognos Analytics | Jobs with Approaching End Dates Report

UC San Diego | Jobs with Approaching End Dates Report

Expected Job End Date Range	VC Area	Search by Department ID - Name	Business Unit
Leaving both fields at their default dates will set a range of today to 30 days from now. From: Aug 26, 2025 To: Aug 26, 2025	☐ CHANC - CHANCELLOR ☐ VCAA - VC-ACADEMIC AFFAIRS ☐ VCADV - VC-ADVANCEMENT ☐ VCFA - VC-FINANCE AND ADMINISTRATION ☐ VCHSH - VC-HEALTH SCIENCES-HEALTH ☐ VCHSS - VC-HEALTH SCIENCES-SCHOOLS ☐ VCMS - VC-MARINE SCIENCES ☐ VCOMCP - VC-OPS MGMT & CAP PROGRAMS ☐ Vcot - VC-ORG TRANSFORMATION ☐ VCRES - VC-RESEARCH ☐ VCSA - VC-STUDENT AFFAIRS Select all Deselect all	Keywords: Input keywords here Select all No Results Starts with any of these keywords ☒ Case Insensitive	Choices: ☐ UC San Diego Campus - SDCMP ☐ UC San Diego Medical Center - SDCMED Select all Deselect all

Search Parameters (continued)

Additional Fields to filter by:

- Dept ID
- Business Unit
- Employee Status
- Employee ID
- Reports To
- Employee Class
- Union Name
- Job Code

The screenshot displays the IBM Cognos Analytics interface for a report titled "Jobs with Appro... Dates Report". The interface includes a top navigation bar with the report title and a search icon. Below the navigation bar, there are six filter panels arranged in a grid:

- Employee Status:** A list of checkboxes for various status categories: Active, Deceased, Paid Leave of Absence, Retired, Short Work Break, Terminated, Terminated With Pay, and Unpaid Leave of Absence. At the bottom of the list are "Select all" and "Deselect all" links.
- Search by Employee Name - ID:** A search panel with a "Keywords:" section containing an input field and a search icon, and a "Choices:" section. Below the input field is a "Select all" link. At the bottom, there is a "Starts with any of these keywords" dropdown, a "Case Insensitive" checkbox, and "Select all" and "Deselect all" links.
- Search by Reports to Employee Name - Position Number:** Similar to the previous search panel, with a "Keywords:" section, a "Choices:" section, a "Select all" link, a "Starts with any of these keywords" dropdown, a "Case Insensitive" checkbox, and "Select all" and "Deselect all" links.
- Search by Employee Class:** A list of checkboxes for various employee classes: Academic: Academic Student - 11, Academic: Contingent Worker - 14, Academic: Deans/Faculty Admin - 22, Academic: Emeriti - 21, Academic: Faculty - 9, Academic: Medical Residents - 24, Academic: Non Faculty - 10, Academic: Post Docs - 23, Academic: Recall - 3, Staff: Career - 2, Staff: Contingent Worker - 13, and Staff: Contract - 1. At the bottom are "Select all" and "Deselect all" links.
- Union Name - Code:** A list of checkboxes for various union codes: A% - Variable by Campus BU - A%, Academic Researchers - RA, Academic Senate - San Diego - A6, Academic Student Employees - BX, Clerical & Allied Services - CX, Comms, Mktg & Sales Profs - CM, Graduate Student Researchers - BR, No Union Code - CWR - ZZZ, Non-Represented - 99, Non-Senate Academic Research - FX, and Non-Senate Instructional - IX. At the bottom are "Select all" and "Deselect all" links.
- Search by Job Code - Description:** A search panel with a "Keywords:" section containing an input field and a search icon, and a "Choices:" section. Below the input field is a "Select all" link. At the bottom, there is a "Starts with any of these keywords" dropdown, a "Case Insensitive" checkbox, and "Select all" and "Deselect all" links.

At the bottom of the interface, there is a "Run" button.

Exporting to Excel

The image shows the IBM Cognos Analytics interface. On the left, a dropdown menu is open, showing options: HTML, HTML, PDF, Excel (highlighted with a pink box), Excel Data, CSV, and XML. The main window displays a report titled "Jobs with Approaching End Dates Report". The report is in Protected View. Below the report title, there is a table with the following columns: Employee Name, Employee ID, Employee Record, Pay Period End Date, and Employee Name Current. The table contains data for various employees, including those with SDCMP and VCFA codes. At the bottom of the report, there are three tabs: "Employee Name Order" (highlighted with a pink box), "Job Expected End Date Order", and "About this Report".

Employee Name	Employee ID	Employee Record	Pay Period End Date	Employee Name Current
1				Employee Name Current
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				
22				
23				
24				
25				

Report Tabs

Tab	Description
Employee Name Order	Alphabetical by Employee Name
Job Expected End Date Order	In Order of by Expected Job End Date
About this Report	Parameters of the Report

Resources

- How to Manage Appointment End Dates in UCPATH
 - https://support.ucsd.edu/services?id=kb_article_view&sysparm_article=KB0035427
- Employee Classification and Job End Dates
 - https://support.ucsd.edu/services?id=kb_article_view&sysparm_article=KB0035470
- How to Reinstate an Employee Terminated in Error
 - https://support.ucsd.edu/services?id=kb_article_view&sysparm_article=KB0035443

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HR/Payroll

🔍 List View

➕ Make a Request

Request a New Report

Enhance a Report

Contribute a Report

🗨 Ask Question / Report Issue

🔒 Request Access

Click on the spyglass link above to switch between List View and Card View.

Access Notes:

- Each report category (e.g. Human Resources, Payroll & Financial, Academic Personnel, and Payroll Accounting and Reconciliation) requires a separate access request. Report categories have subcategories of Restricted and Non-restricted.
- The DOPE Reports are in the Payroll Accounting and Reconciliation category.**

Email: ucpathreports@UCSD.EDU

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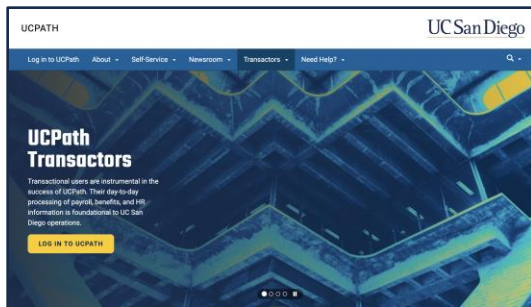


Get Personalized Support

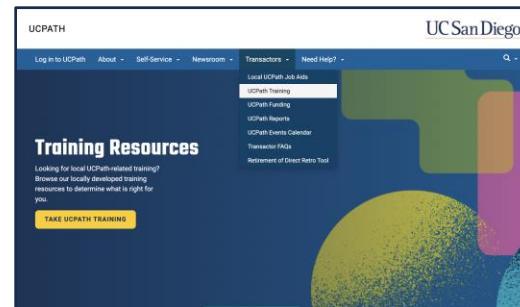
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UCPath Website

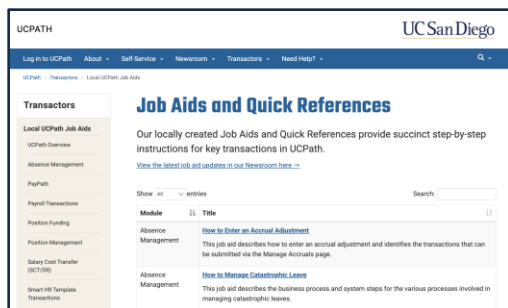
UCPath Transactors Page



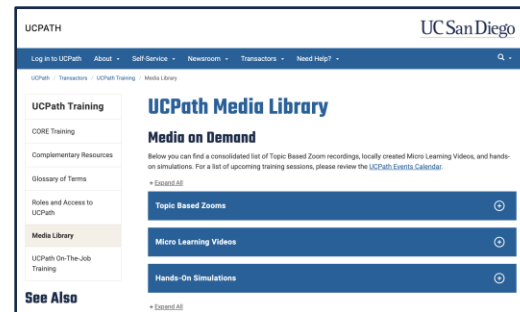
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UCPath Media Library



Register for the Next QC!

Wednesday, December 2, 2026
11:00 am - 12:00 pm

[Register on Zoom](#)



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Q&A