UC San Diego

UCPath Quarterly Connect

Q2: August 28, 2025

Agenda

1. On the Radar
2. Roadmap Updates
3. Helpful Resources
4. Q&A

UCPath Quarterly Connect Schedule

TODAY!

June 5, 2025 — Q1

August 28, 2025 — Q2

November 20, 2025 — Q3

February 26, 2026 — Q4

⭐ Designed to prepare for the upcoming fiscal quarter

- Held on Thursdays, 11:00 am – 12:00 pm
- Recorded & posted on UCPath Media Library

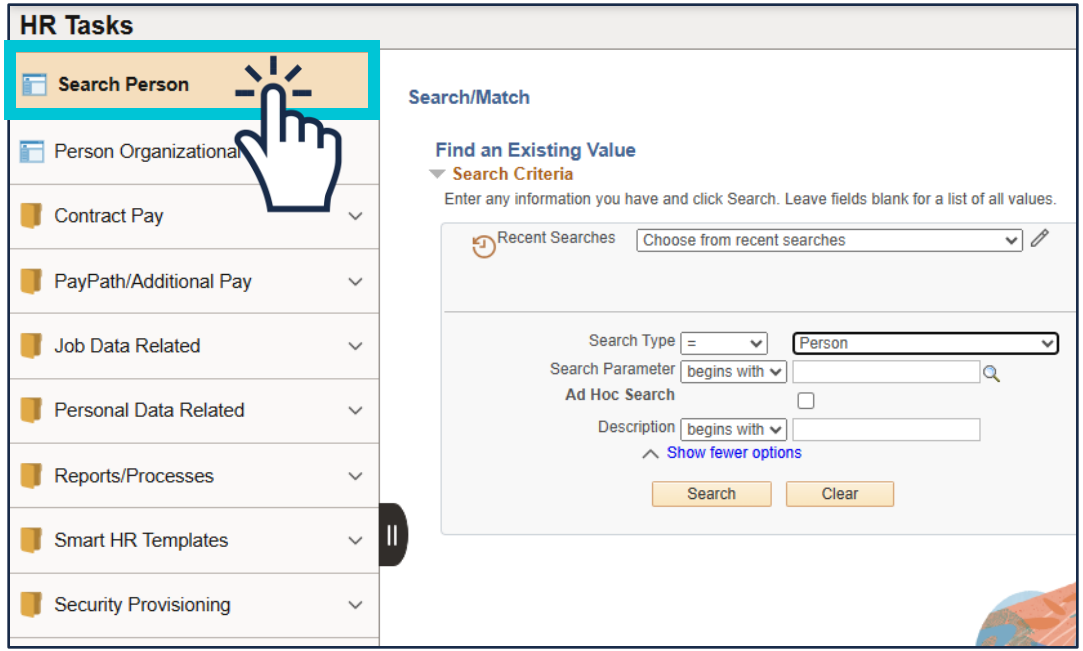
On the Radar

Hiring Best Practices

- Understand the employee's record in UCPath
- Determine which Template and Action Reason Code to use
- Understand deadlines
- Best practices for after transaction is submitted

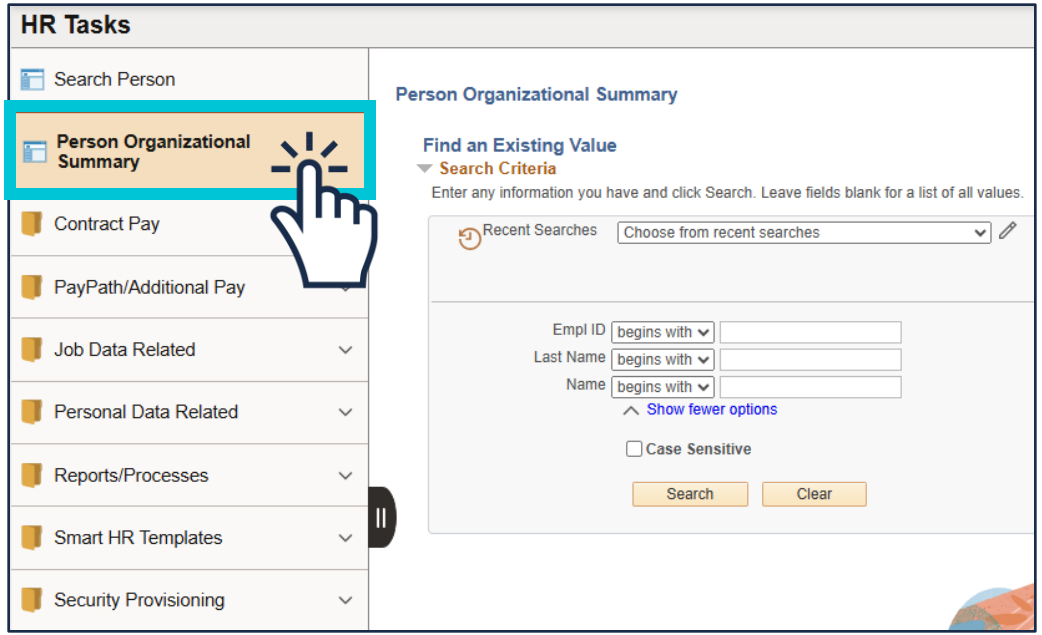
Understanding the Employee's Record in UCPath

- Perform **Search Person > Search/Match** to see if they already have an Employee ID



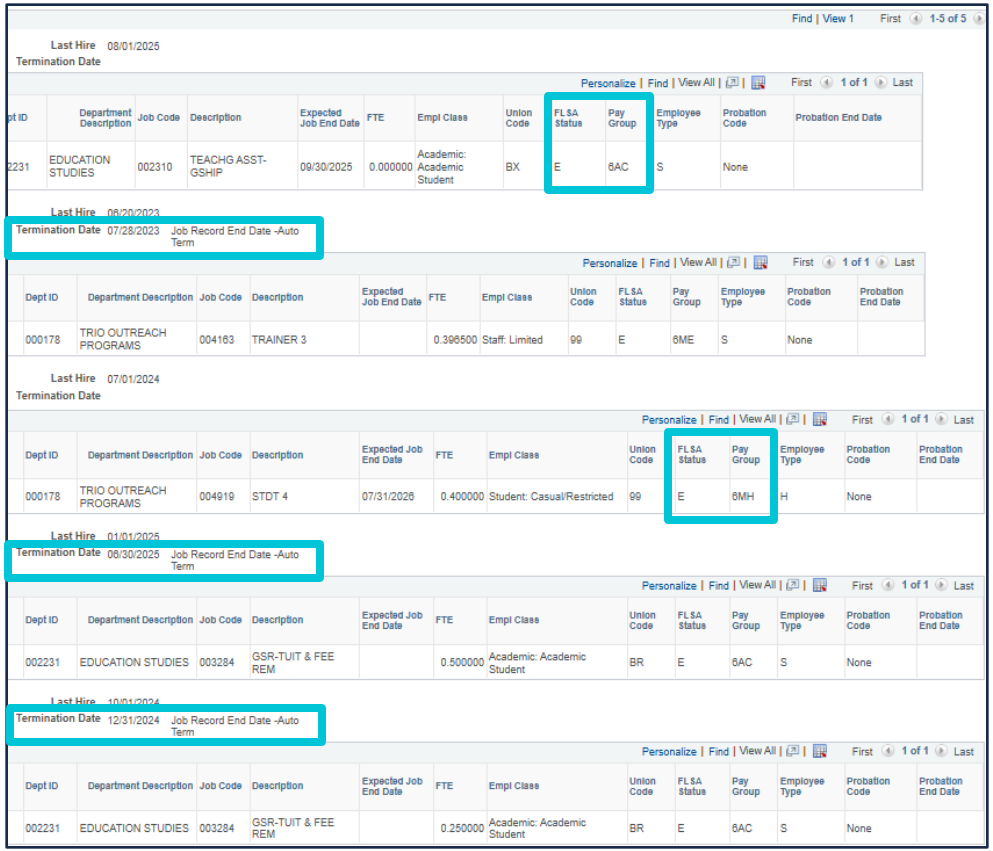
Understanding the Employee's Record in UCPath

- Check **Person Org Summary** to see what other EMP records and status



Understanding the Employee's Record in UCPath

- Note the FLSA and pay frequencies to see if you need to align (there's a job aid with instructions and contacts for help)
- **Resolving FLSA Conflicts**



Find | View 1 First 1-5 of 5

Last Hire 08/01/2025
Termination Date

Personalize | Find | View All | First 1 of 1 Last

pt ID	Department Description	Job Code	Description	Expected Job End Date	FTE	Empl Class	Union Code	FLSA Status	Pay Group	Employee Type	Probation Code	Probation End Date
2231	EDUCATION STUDIES	002310	TEACHG ASST-GSHIP	09/30/2025	0.000000	Academic: Academic Student	BX	E	6AC	S	None	

Last Hire 06/20/2023
Termination Date 07/28/2023 Job Record End Date -Auto Term

Personalize | Find | View All | First 1 of 1 Last

Dept ID	Department Description	Job Code	Description	Expected Job End Date	FTE	Empl Class	Union Code	FLSA Status	Pay Group	Employee Type	Probation Code	Probation End Date
000178	TRIO OUTREACH PROGRAMS	004163	TRAINER 3		0.396500	Staff: Limited	99	E	6ME	S	None	

Last Hire 07/01/2024
Termination Date

Personalize | Find | View All | First 1 of 1 Last

Dept ID	Department Description	Job Code	Description	Expected Job End Date	FTE	Empl Class	Union Code	FLSA Status	Pay Group	Employee Type	Probation Code	Probation End Date
000178	TRIO OUTREACH PROGRAMS	004919	STDT 4	07/31/2026	0.400000	Student: Casual/Restricted	99	E	6MH	H	None	

Last Hire 01/01/2025
Termination Date 06/30/2025 Job Record End Date -Auto Term

Personalize | Find | View All | First 1 of 1 Last

Dept ID	Department Description	Job Code	Description	Expected Job End Date	FTE	Empl Class	Union Code	FLSA Status	Pay Group	Employee Type	Probation Code	Probation End Date
002231	EDUCATION STUDIES	003284	GSR-TUIT & FEE REM		0.500000	Academic: Academic Student	BR	E	6AC	S	None	

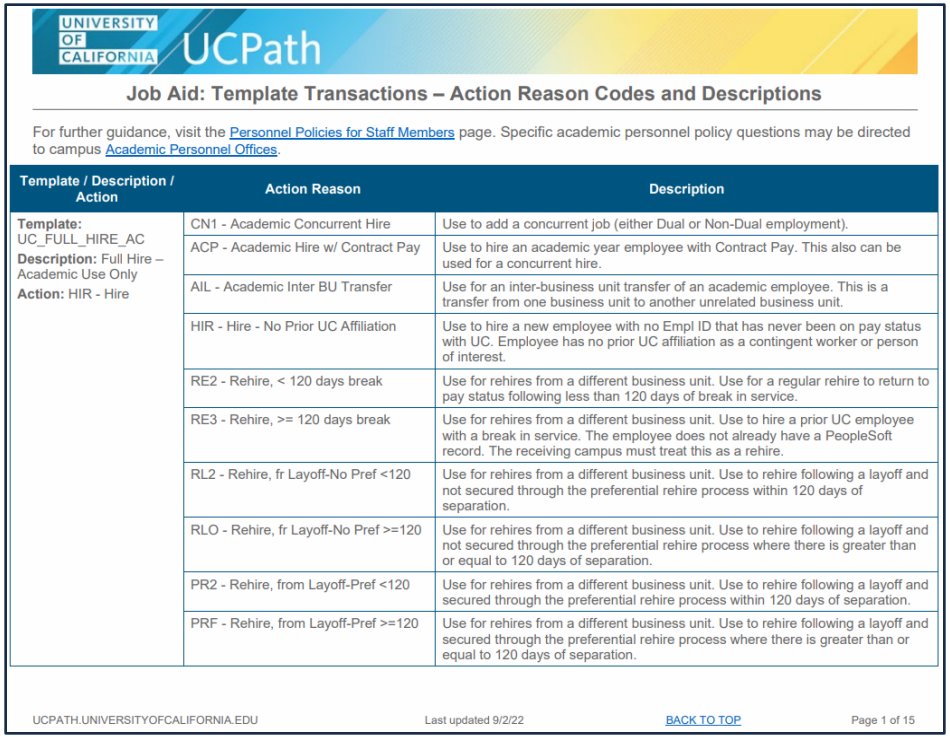
Last Hire 10/01/2024
Termination Date 12/31/2024 Job Record End Date -Auto Term

Personalize | Find | View All | First 1 of 1 Last

Dept ID	Department Description	Job Code	Description	Expected Job End Date	FTE	Empl Class	Union Code	FLSA Status	Pay Group	Employee Type	Probation Code	Probation End Date
002231	EDUCATION STUDIES	003284	GSR-TUIT & FEE REM		0.250000	Academic: Academic Student	BR	E	6AC	S	None	

Determining Which Template and Action Reason Code to Use

- Always read the **Templates Action and Reason Codes** job aids to determine which action reason code to use
- There is no substitute for reading the descriptions



UNIVERSITY OF CALIFORNIA UCPath

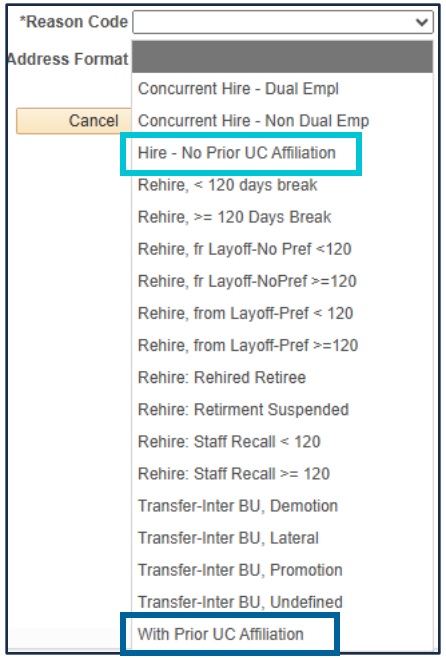
Job Aid: Template Transactions – Action Reason Codes and Descriptions

For further guidance, visit the Personnel Policies for Staff Members page. Specific academic personnel policy questions may be directed to campus Academic Personnel Offices.

Template / Description / Action	Action Reason	Description
Template: UC_FULL_HIRE_AC **Description:** Full Hire – Academic Use Only **Action:** HIR - Hire	CN1 - Academic Concurrent Hire	Use to add a concurrent job (either Dual or Non-Dual employment).
	ACP - Academic Hire w/ Contract Pay	Use to hire an academic year employee with Contract Pay. This also can be used for a concurrent hire.
	AIL - Academic Inter BU Transfer	Use for an inter-business unit transfer of an academic employee. This is a transfer from one business unit to another unrelated business unit.
	HIR - Hire - No Prior UC Affiliation	Use to hire a new employee with no Empl ID that has never been on pay status with UC. Employee has no prior UC affiliation as a contingent worker or person of interest.
	RE2 - Rehire, < 120 days break	Use for rehires from a different business unit. Use for a regular rehire to return to pay status following less than 120 days of break in service.
	RE3 - Rehire, >= 120 days break	Use for rehires from a different business unit. Use to hire a prior UC employee with a break in service. The employee does not already have a PeopleSoft record. The receiving campus must treat this as a rehire.
	RL2 - Rehire, fr Layoff-No Pref <120	Use for rehires from a different business unit. Use to rehire following a layoff and not secured through the preferential rehire process within 120 days of separation.
	RLO - Rehire, fr Layoff-No Pref >=120	Use for rehires from a different business unit. Use to rehire following a layoff and not secured through the preferential rehire process where there is greater than or equal to 120 days of separation.
	PR2 - Rehire, from Layoff-Pref <120	Use for rehires from a different business unit. Use to rehire following a layoff and secured through the preferential rehire process within 120 days of separation.
	PRF - Rehire, from Layoff-Pref >=120	Use for rehires from a different business unit. Use to rehire following a layoff and secured through the preferential rehire process where there is greater than or equal to 120 days of separation.

UCPATH.UNIVERSITYOFCALIFORNIA.EDU Last updated 9/2/22 BACK TO TOP Page 1 of 15

Determining Which Template and Action Reason Code to Use



Examples:

- Reason code: **No Prior UC Affiliation**
  - Description: Use to hire a new employee with no Empl ID that has never been on pay status with UC. Employee has no prior UC affiliation as a contingent worker or person of interest.
- Reason code: **With Prior UC Affiliation**
  - Description: Use to hire someone with prior UC affiliation as a contingent worker or person of interest and have never been on pay status with UC.

Understanding Deadlines

Learn how to read the Payroll Processing Schedule

- Employee Data Change Deadline
- 2025 UCPath Production Processing Schedule
- Review the Payroll Processing Schedule

*** Employee Data Change		
• Mass Hire	• Retro Pay	• Union Enrollment
• HR template	• Leave Transaction	
This includes Recurring Additional Pay entered via PayPath and Self Service Transactions Links via the E-330 batch load process.		

Pay Cycle	Check Date	Pay Period Dates		Run ID Schedule	Location								Pay Confirm
					• Employee Data Change *** (3:00 PM) (Mass Hire, Retro Pay, HR Template, Leave Transaction, Union Enrollment) After 3:00 PM changes will not be processed for current pay cycle	Manage HR Approvals Lockout - Stop Processing (5:00 PM)	Stop Processing: • PayPath • Position Mngt • Manage Job (5:00 PM)	Resume Processing All (6:00 AM)	Campus		Med Center Only		
		Begin	End						• Inbound Files Due **** (2:30 PM) • Msg Error Log Distribution (11:00 PM)	• Location Corrections To Msg Error Log (2:00 PM) • E-703 Funding Upload	• Inbound Files Due **** (5:00 PM) • Msg Error Log Distribution (11:00 PM)	• Location Corrections To Msg Error Log (2:00 PM)	

Best Practices for After Transaction is Submitted

Check UCPC's Work and Push Back if Necessary

- Ask UCPC to provide the correct information if your transaction is pushed back or denied

Review Job Data After Transaction is Processed

- Review key fields and make sure you see the expected results

Reminders from our Partners

- Student Employment Office (SEO)
- Graduate Division & Postdoctoral Affairs (GEPA)
- Academic Personnel Services (APS)

Reminders from SEO

1. Student employees may work up to **19.5 hours total**
2. FTE **may not exceed 50%** during the academic year
3. If a student employee's units are not updated automatically in UCPath, refer to **How to Troubleshoot Student FICA/DCP Deductions KBA**
4. Work-study will be available starting **9/22/2025**

Reminders from GEPA: Graduate Academic Titles

Instructional Titles and Job Codes

- Associate Instructor (001506)
- Reader (002850)
- Teaching Assistant (002310)
- Tutor (002860)

Research Titles and Job Codes

- Graduate Student Researcher (003266, 003284, 003285, 003286, 003287, 003262, 003263, 003264)
- Fellow (003141)
- Trainee (003151)

Reminders from GEPA: Hiring Best Practices

- **Select the Appropriate Title and Appointment Percentage**
  - Review list of graduate academic titles to ensure correct appointment
  - Refer to the details in the Graduate Student Employment Policy & Procedures manual for hiring guidelines and more
  - Summer appointment periods may vary, refer to Summer Session and Graduate Student Employment: Summer Session Pay for full details
- **Obtain Pre-Approval and Confirm Eligibility**
  - Obtain pre-approval from the Academic Home Department and confirm eligibility to work in a Graduate Academic Title
- **Complete Onboarding**
  - Complete onboarding paperwork via the Onboarding tool (preferred and recommended way)

So You Want to Hire a Graduate Student?

Reminders from GEPA: Hiring Best Practices (cont.)

- **Submit Appointment in IA System**
  - Review the Graduate Student Researchers in the IA System – Process Guidance and email ats@ucsd.edu to access the IA system
- **Process Hire in UCPath**
  - Refer to UCPath job aids for details on training, access, and more.
  - Additional information can be found on the UCPath for Graduate Student Employment Collab page
- **Request Fee Remissions**
  - See instructions for details on requesting fee remissions.
  - Only the Academic Home Department can request a fee remission; you will need to coordinate with the Academic Home Department to submit the fee remission request in the Financial Support Request Tool

Reminders from GEPA: Postdoctoral Scholar Admin

Postdoc Anniversary Date

- The Anniversary Date field in UCPath should be the initial University of California postdoctoral scholar effective date, plus one year, and so on.

Salary Grade

- Should reflect the postdoc's current level (i.e. L0, L1)

Compensation Rate Code

- UCANNL, UCFELM, UCFELL, UCPDPD, UCPDMO, UCHRLY

No Off- Scale Coding

- Enter the total annual rate; do not separate the annual base rate with the off-scale increment

Job Expected End Date

- Should reflect the appointment end date from the appointment letter, regardless of work authorization expiry

Benefits

- Play close attention to a GSR transitioning to a PD

Reminders from APS: Range Freezes

- 10/1/25 Range Freezes: Do not make job updates during the freeze periods!
  - **Professorial Titles:** 9/8/25 - 9/12/25
  - **Postdocs (PX):** 9/15/25 – 9/19/25
  - **Graduate Student Titles (BX/BR): TBD** (watch for an update from GEPA)

Tracker I-9

Thank you all for efforts to clean up Missing and Incomplete I-9s. Keep it up!

- ✅ Ensure I-9 is completed **at hire**
- ✅ Monitor visa and work authorization end dates **monthly** and take action if end dates are near
- ✅ **Concurrent Hire:** Coordinate with other department. If their job is on SWB, you are now the home department and the I-9 will need to be transferred to your worksite.
- ✅ Consult with your I-9 Coordinator as needed

Patent Acknowledgement Compliance

- UCPath Center has stated that missing patent dates are another Federal audit risk
- Be sure your onboarding process includes instructions to your employees to log in to UCPath to enter the required information
- Run the **Oath and Patent Acknowledgements Report** monthly and follow-up with non-compliant employees
- Cleanup lists will be sent to the departments soon, along with the Patent Job Aid

Benefits Highlights

- Rehired Retirees
- Rehired Retirees – Benefits Eligibility in UCPath
- Open Enrollment 2025 Highlights

Rehired Retirees

Legal Framework & Best Practices

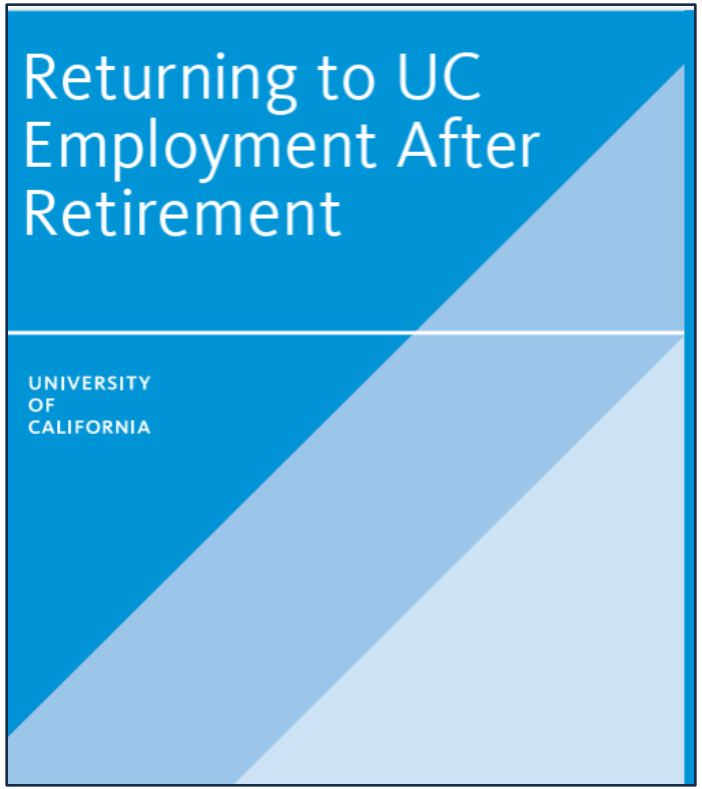
- The UC Retirement Plan (UCRP) is governed by the Internal Revenue Code.
- Failure to follow plan requirements can jeopardize the tax status of the plan.
- The University *cannot* discuss rehire prior to employee's separation/retirement.
  - Agreeing to rehire before separation is prohibited by the IRS. *("Sham transaction")*
  - Retirees *cannot* be rehired until they have had a 30-day (**ideally 90-day**) break in service.

New Returning Retiree Policy (7/1/25)

- Rehire should occur after 26 weeks (from UC separation date) to mitigate downstream impact on Medicare/Retiree Medical.
- Rehired appointment must be **less than 43%** for **12 months or less**.
  - For more information, please visit UCNet: Guidelines for the Rehire of Returning Retirees

Rehired Retirees: Benefits Eligibility in UCPath

- Path will derive eligibility based off:
  - Rehire timeline
  - Appointment duration | percentage
  - Ongoing measurement period (ACA)
- Extending Retiree's appointment **after 7/1/2025** may trigger a new eligibility.
- In the event Mid-Level benefits are triggered with a 26-week employment break: (Appointment is under 43% - 12 months max)
  - Create a case to have UCPath audit eligibility.
  - **Timely action is critical.**
  - **Important!** Retroactive UCPath transactions require **a separate case** to ensure benefits continuity and/or reinstatement in the system.



Open Enrollment 2025: Highlights

- Enrollment should be made via UCPath self-service.
  - Banner on UCPath home page linking to the OE module to enroll.
  - Employees experiencing tech issues can submit an eForm under **Benefits & Retirement > Forms**.
- **FSAs** require an *active enrollment* each year.
- Voluntary Disability and Supplemental Life Ins. Benefits are **not** open for enrollment. (Separate EOI form required)
- Employees should log into UCPath to review applicable premiums and elections accuracy.

Roadmap Updates

SCT 2 September Sprint

- **Key Dates**
  - User Acceptance Testing: 8/21 - 9/17
  - Go Live: 10/2
- **Sprint Scope**
  - UCSD Retirement of the Direct Retro Tool
  - Implement New Benefit Cost Transfer Tool
  - Retire Old Benefit Cost Transfer Tool
  - 13 Change Requests; 17 Bug/Defect Fixes

- **New Functionality Highlights**
  - **Copy forward SCT FAUs** entered from one earnings period to another when multiple earnings end dates are selected for SCT entry.
  - **No longer able to** choose cap rate with an effective date greater than the earn date of the transaction.
  - No longer able to enter SCTs on original & reversal checks - ***"This check is reversed. SCT's are restricted."***

September Sprint Completes SCT 2 Project!!

SCT 2 September Sprint

Cost Transfer Tool	13 Change Requests
Salary Cost Transfer (SCT)	1. Restrict SCT entry on Reversal Checks 2. Retire DR tool for UCSD 3. Facilitate faster SCT entry by copying and pasting the FAU within an earnings period and across multiple periods 4. User should be able to review the original Position Pool ID and Work-study Balance on SCT page 5. WS updates for Negative Balance: Leave AS IS transaction 6. Update conditions for mandatory questionnaire in SCT for Restricted fund usage to include any change to the expense on a restricted fund or project. 7. Reapply should be allowed in SCT for WS employees with negative Award balance and positive award amount 8. User should only be able to select cap rate based on earn end date, they should not be able to choose cap rate with an effective date greater than the earn date of the transaction. 9. Update E-715B to cleanup UC_HR_ACCTG_SCT after each process run for records older than 30 days or truncate for each run
Benefit Cost Transfer (BCT)	1. GAEL Assessment Redirect Logic is not applied to BCT process 2. Getting a Cost Center not effective error while submitting a BCT 3. BCT Page with multiple rows:-No indication or highlight on the row that errored out on 4. Benefit Cost Transfer does not account for all Fee Remission or RPNI deductions to be Transferred

SCT 2 September Sprint

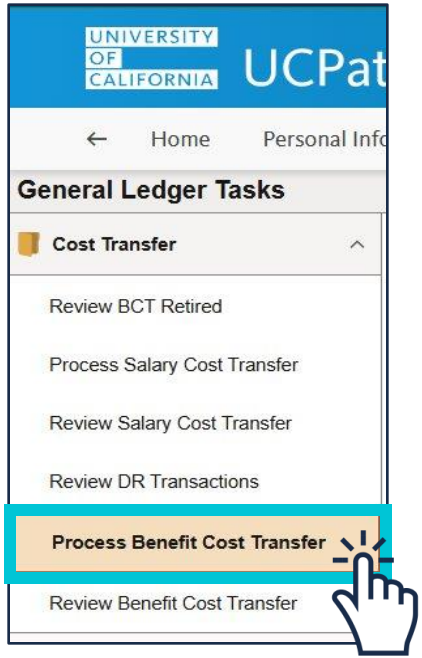
Cost Transfer Tool	17 Bug Fixes/Defects
Salary Cost Transfer (SCT)	1. Adding new unrestricted row removes all restricted specific fields from the page 2. Redistribution by percent of effort fails to calculate correctly. 3. Batch process produces lines with incorrect restatement flag 4. User should be able to perform SCT on already split check between WS and Dept. share 5. SCT with multiple WS options for on and off-cycle earnings on the same check and SCT batch process 6. Work-study Leave As Is - allow for new lines to have the same FAU as original "D" lines 7. Unable to review/view “Initiated” SCT (Salary Cap Rate Issue) 8. Error Handling: UC_SCT_JMP ran to no success due to single-row subquery returns more than one row. 9. "Net change (sum total of adjustment amount) is greater than original earnings for ERNCD REG. " 10. Added negative row, validated successfully 11. Preventative and Corrective - Unable to review/view “Initiated” SCT. (incorrect monthly comp rate on LL)
Benefit Cost Transfer (BCT)	1. Did not reinstate VLA that was not transferred 2. User Access for EEs with Department Change 3. Not posted due to missing earnings end date 4. BCT Comingle with SCT 5. Journal Missing from LL SUM & ACCTG_GL table (E-063) 6. Error message prompt "Not able to derive combination code based on the chartfield values specified. (32001,416)

Direct Retro Retirement

- UC San Diego was granted a one-time exception to extend the retirement of the Direct Retro Tool, with additional deadlines provided in July, August, and September
- New Direct Retro Deadlines:
  - **Thursday, September 11, 2025:** BW/MO **High-Risk** for posting in September
  - **NEW DATE: Wednesday, September 16, 2025:** BW/MO for **Non-High-Risk** for posting in September
- **Do not submit or approve** any Direct Retro transactions **between September 17 and September 30**. Transactions entered during this period will be deleted by UCPath Center during the deprecation process.
- Beginning October 2, 2025, users will only be able to view previously processed Direct Retros in UCPath.

Benefit Cost Transfer Tool Redesign

Coming on October 2, 2025, is the new Benefit Cost Transfer (BCT) tool. A BCT moves benefit expenses from one or more FAUs to another without transferring salary earnings expense.



Old BCT Tool Retirement

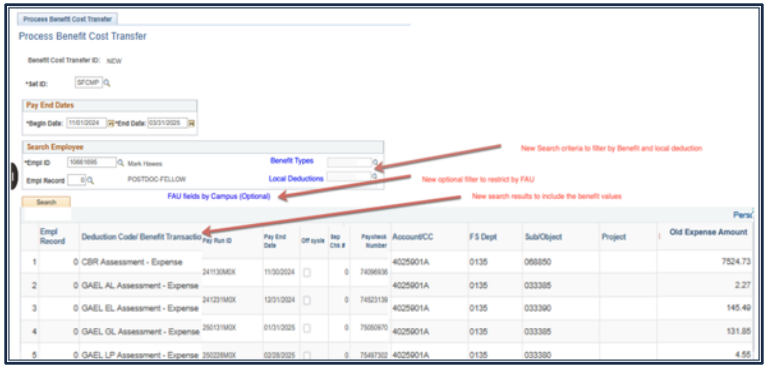
- Please review to approve or deny pending BCTs by **September 23, 2025**
- Paychecks **prior to 10/31/2021 are not eligible** for the new BCT Tool
- Follow local process to correct

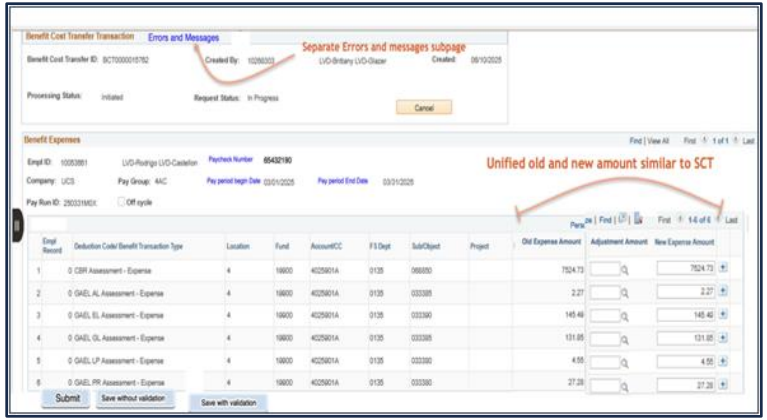
Redesigned BCT Functionality

- BCTs will use the **familiar SCT interface**
- Improves functionality to allow adjustments on **a per-transaction basis**
- Able to **filter transactions** by chartfield elements, expense types, and deduction codes
- Optimized processing for **faster transaction execution**

FAQ Benefit Cost Transfer (BCT)

Benefit Cost Transfer Tool Redesign





- **New Optional Filters** – Benefit Type prompt & Local Deduction prompt (FEEREM, GSHIP, etc).
- **New Filter** - FAU by campus (optional).
- **Search results** - list the benefit values by FAU & paycheck.
- **Result selection** – Add select all or deselect all functionality, optionally allow choosing only certain benefit type(s).
- **Transaction lock** – No BCT when SCT inflight, Restrict multiple BCTs for a paycheck at the same time
- **Errors and Warnings** subpage (tab) added to the main BCT page.
- **Benefit expenses** will be listed **by paycheck capturing the pay period begin & end date**.
- **Consolidate** both the old amount, new amount & adjustment to have **one unified entry & review window.**
- **Validation** – Validate (High risk, I-370 FAU validation) for before & after amount by benefit type or local deduction & combo code validation;
  - Location transactor to ensure local deduction distribution match earnings distribution.

***BCT *will not allow systemwide assessments* like RPNI (44), RPSA, OPEB etc.**

UCPath November Release

Project	Summary of Changes	Go-Live
Simplify GL Phase 1	The current GL solution regenerates & duplicates ledger detailed data. This project aims to redesign the existing solution to prevent data regeneration, duplication, & reduce the overall GL data footprint. **Phase 1** • Introduce new detailed sub-ledger table that locations will receive in RI with no operational impacts. **Phase 2** • Transition locations to the new sub-ledger table, retire detail ledger tables, archive GL tables. • Process SCTs daily.	**Phase 1** November 23, 2025 **Phase 2** November 2026

Local Roadmap Projects

- I-160 Tuition Remission
- Increased Labor Ledger Posting Frequency
- UCPath Access
- Job Aid to KBA Migration

I-160 File for Tuition Remission

Current State

- Manual processes such as spreadsheets and Manual Composite Interface journal file manage tuition remission, which can lead to errors and compliance issues

Future State

- The existing UCPath I-160 interface will align UCSD with established UC-wide processes to reduce manual effort
- I-160 mapping and configuration will lead to more accurate PPM posting to correct department FAUs, simplifying cost recovery

Project Key Highlights

- GEPA FSU currently reviewing student employee and remission payment data to update GSRTF rates for academic/fiscal years 2025 – 2026
- Project is technically focused with **minimal impact to end-user populations**
- **No changes to day-to-day processes** – follow best practices and guidelines when hiring and managing graduate student employees
- Refer to So You Wanna Hire a Graduate Student for more information
- Timeline subject to change, dependent on testing outcomes

Increased Labor Ledger Posting Frequency Project

Beginning later this year, labor ledger data posting frequency will increase from monthly to **weekly**.

What does this mean for me?

- Improved **timeliness** and **reliability** of payroll and cost transfer data across systems
- Faculty and fund managers will see more **accurate data in dashboards and reports** (DOPE Report, Faculty and Researcher Dashboard, UCPath-Oracle Salary Reconciliation and more)

Current Project Status

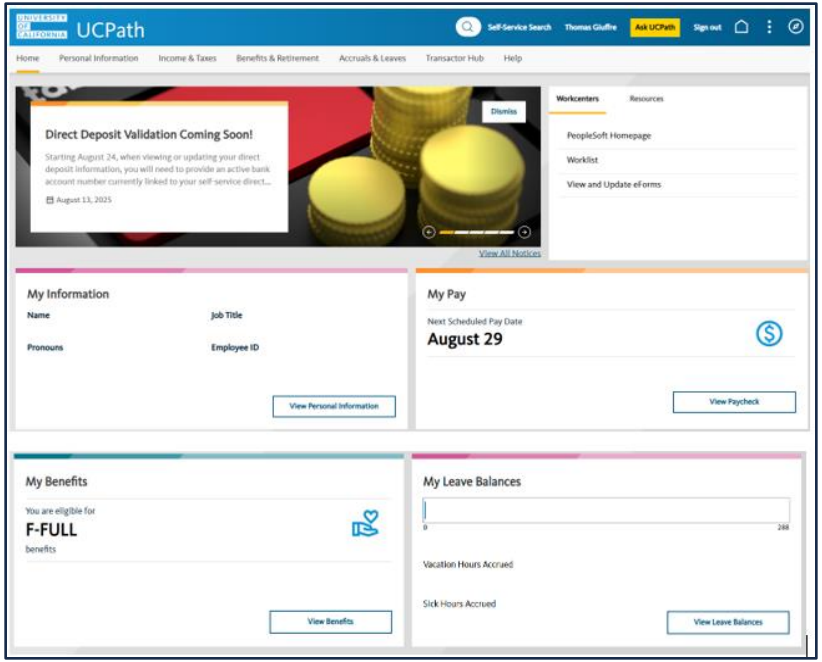
- **Currently awaiting user acceptance testing**
- Timeline subject to change depending on testing outcome
- More information to be shared once available

UCPath Access

- Access to UCPath
- Transactional Access Overview
- UCPath Access Management Form
- New UCPath Access Report in Business Analytics Hub

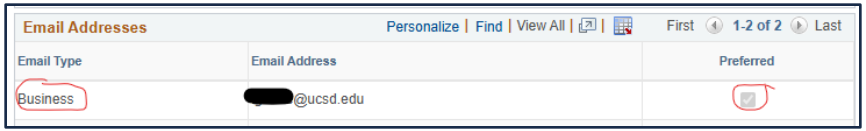
Access to UCPath for Active Employees

Access to UCPath is granted to all active UCSD employees (allows employees to view data pertaining to pay, taxes, benefits, etc.)



Notes:

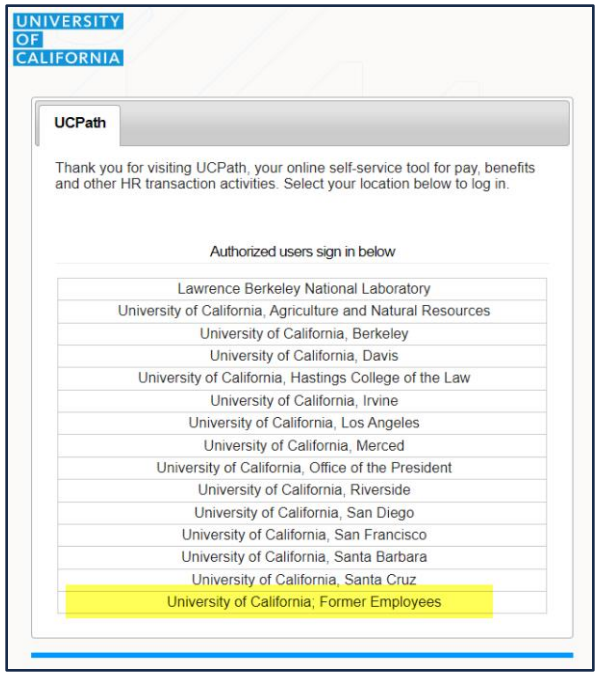
- If you are an **active UCSD employee** and cannot access the UCPath site, have your supervisor ensure that you have a **business email** and it is set to "Preferred".



- If student employees are having issues accessing UCPath, remind them to use their employee (not student) credentials.

Access to UCPath for Former Employees

Former employees will still be able to access UCPath to obtain Payroll and Tax Information but will need to log in via a different link.



- When you separate from UCSD, you will receive an email from the UCPath Center with instructions on how to access the UCPath portal for former employees.
- This is why it is important to have a personal email in UCPath.
  - If you did not receive the email, please call the UCPath Center for assistance: **855-982-7284 / 855-9-UCPATH**. They will be able to assist you with accessing the new portal.
- **Do not contact UCSD IT or HR Support desks. Only UCPath Center can help Former Employees obtain access to UCPath.**

Transactional Access

If your role at UCSD requires viewing data for other employees, initiating transactions for others, and/or approving submitted transactions, you will need enhanced transactional UCPath access, which is provisioned locally by the UCPath Access team at UCSD.

Elements of Transactional Access:

- **Roles:** What pages a user can view
- **Rows:** What data can be viewed with an employee's Role access
  - Example:
    - Single or multiple departments
    - VC levels
    - Combinations of VC and departments

- **Role Types**
  - Inquiry (view-only)
  - Initiator (transactions need to be approved)
  - Approver
  - Submitter (for various forms or interfaces)
  - Admin (can modify data without approval)

UCPath Access Management Form

- Use the UCPath Access Management Form to add, modify, or delete your UCPath enhanced/transactional access.
- Refer to the How to Request, Remove, or Modify Access to UCPath KBA for instructions on filling the form
  - Contains links to the Access Management Form, Roles and Access, and required UCPath training

KEY CONCEPTS

- Anyone can submit a request, but it will **always** route to the submitter's supervisor for approval
- Submitter and supervisor should ensure that the request matches the employee's job needs and that the necessary **UCPath training has been completed**.

UCPath Access Management Form

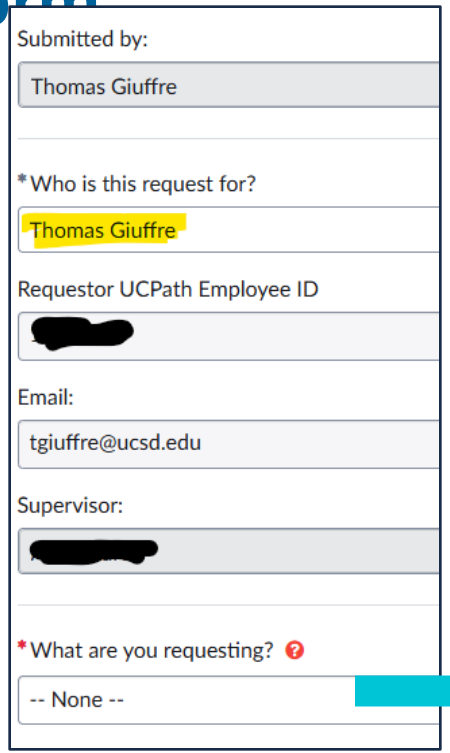
Before submitting the form, be sure you have done the following:

- ✅ Review the How to Request, Remove, or Modify Access to UCPath KBA
- ✅ Take all the necessary UCPath CORE Training in the UC Learning Center
- ✅ Know what Roles, Role Types, and Row security you will need for your role at UCSD

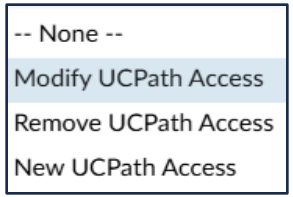
IMPORTANT NOTE

The UCPath Access Management Form is not intended to grant Employee Self-Service access (to view Pay, Benefits, etc.) nor Manager Self-Service (to access information pertaining to those who report to a position).

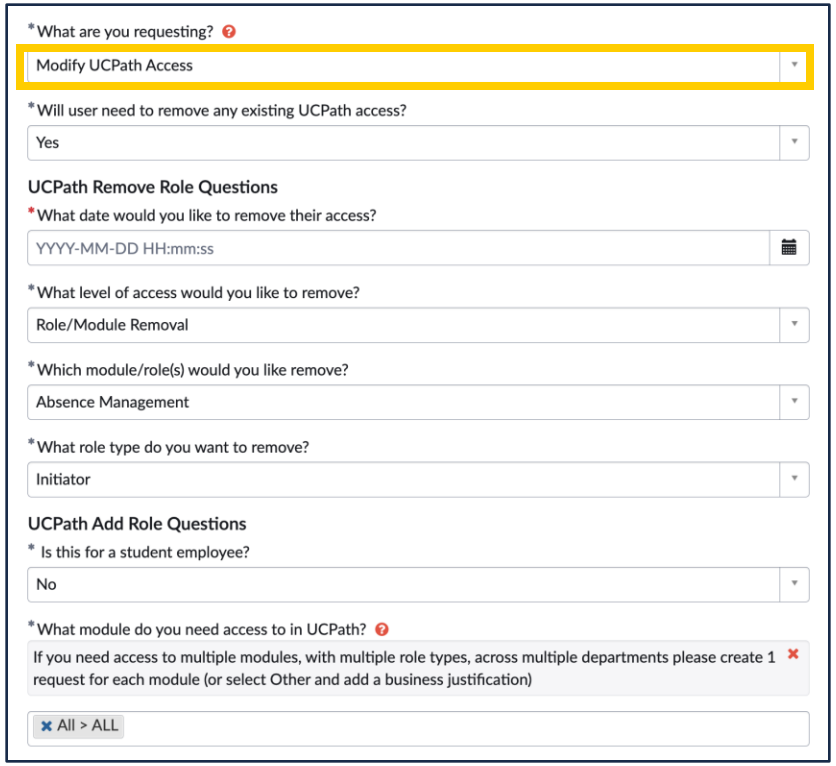
Completing the Access Management Form



1. Will display name of Submitter
2. Submitter or whoever Submitter selects
3. The values in these three boxes will change based on who the request is for. The Supervisor will approve this request.
4. Specify what type of request you are making



Modify UCPath Access Example

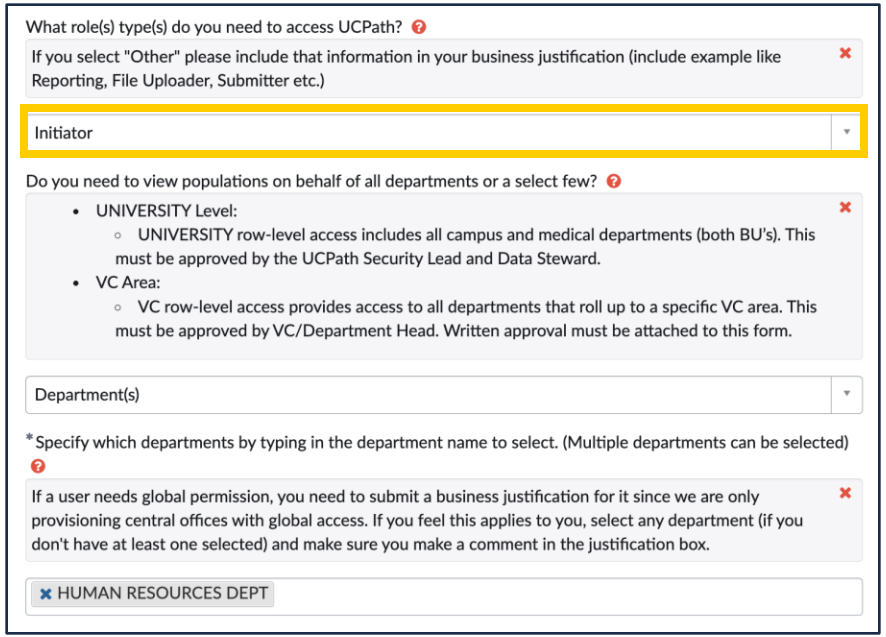


1. If the user selects **Add**, removing security will not be an option. If the user selects **Remove**, adding security will not be an option.

2. If you do not need to remove any existing access, all current security will remain and the following questions will be skipped.

3. If this is just a **Remove** request, there is a small window where the local UCPath Access team can remove enhanced security.
   - Once an employee becomes inactive at UCSD, we can no longer view security information.
   - Inactive employees will have all transactional access removed automatically and will only be able to access UCPath as a Former Employee.
   - Security removal is most important if employee is leaving their current role.

Modify UCPath Access Example



1

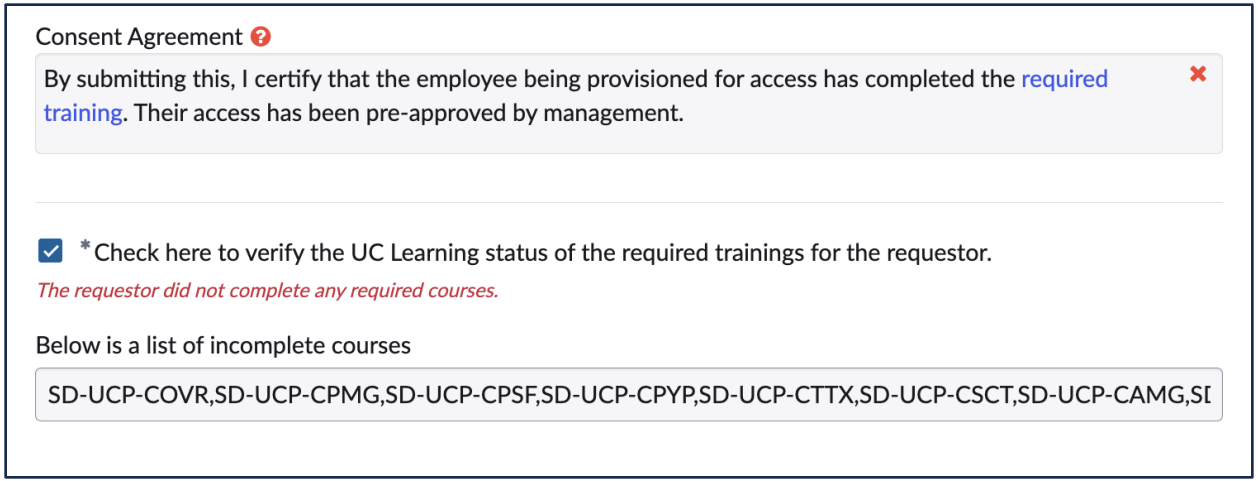
Currently, separate forms will have to be submitted if Initiator and Approver access is needed for some Roles, and Initiator for other roles.

2

Role/Role Type security cannot be differentiated from Row security.

- If you have access to multiple departments, and need Initiator and Approver for only certain departments, those Roles and Role Types must be applied to all departments.
- This is not a form and/or UCSD limitation, but a UCPath limitation.

Modify UCPath Access Example



There may be exceptions when training can be shown as incomplete, but the request is acceptable.

- For example, someone had been an Initiator for a role but is now requesting to be an Initiator and Approver.
- However, training is required if the employee previously only had Inquiry access, and/or took the training more than a few weeks ago.

Thank you to those who submitted the UCPath Access Survey

New UCPath Security Report

The new UCPath Security Report in the Business Analytics Hub can be provisioned to supervisors to provide the following information:

- **My Access:** All UCPath access categories for the logged-in user.
- **My Direct Reports' Access:** All the UCPath access categories for the people who report to the logged-in user.
- **Users Accessing My Department:** All UCPath access categories for all campus users who have been given specific access to the logged-in user's department.
- **About this Report:** Details the parameters regarding the report run.

New Security Report

- Data for the UCPath Security Report is provided once a month.
- When selecting this report to run, the user will see the most recent date of the data and their information. Select **Run** to obtain the results.

- User can see the information listed above by navigating the tabs listed at the bottom of the screen.
- Supervisors may request access via the UCPath Cognos Reports Access Request form.

Coming Soon: UCPath Job Aid to KBA Migration

- This Friday, the UCPath Job Aids will move to the Services & Support and Employee Center **Knowledge Base Articles!**
- **What to expect:**
  - ⭐ A **new format** to facilitate updates
  - ⭐ Regrouped content and new titles **to help you know which one to use**
  - ⭐ Enhanced **ability to search** for UCPath guidance
- Register to join the next monthly UCPath Transactions Office Hours on September 4, 2025! We will spend the first 10 minutes go over how to find new KBAs and search for UCPath guidance.
- Additional Office Hours will be held September 8 through September 12, 2025 from 12:00 pm to 1:00 pm. Check out the UCPath Events Calendar to add to your calendar!

What's Changing?

Current State

Difficult to keep Job Aids updated

- UPKs with system steps and simulations are not linked
- Not easily accessible to SMEs to update

Difficult to find or determine which Job Aids to use

- Too many Job Aids and titles require you to know which transaction type
- Job Aid page search functionality is lacking, harder to find specific information
- TritonGPT cannot search PDFs

Future State

KBAs will be updated faster and aligned to UCPC

- UPKs will be **directly linked within KBAs**
- KBAs are **easier for SMEs to update**

UCPath transactional guidance will be easier to find

- KBAs are titled and grouped by **Employee Lifecycle**
- KBA **search functionality is superior**, easier to find specific information
- KBAs are **readable by TritonGPT**

UCPath Job Aid to KBA Migration Update

Phase 1

- All content except Academic and Funding/SCT moving to KBA
- All Job Aids will remain in current form on the Job Aids page

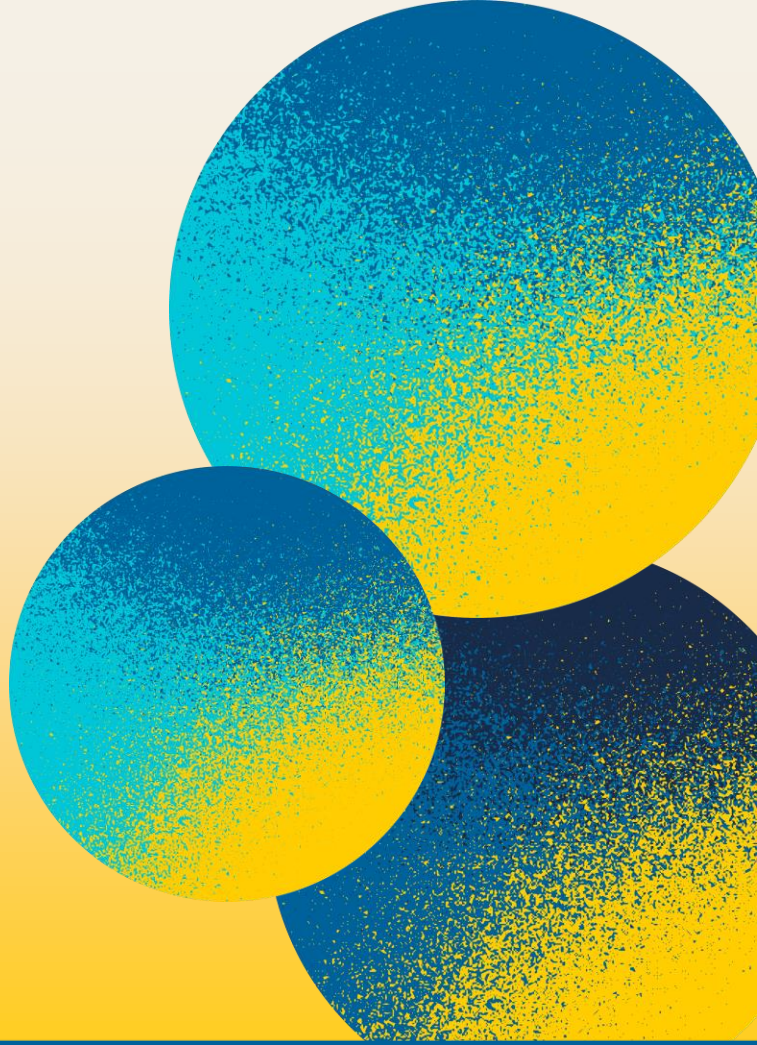
Phase 2

- Academic content moving to KBA
- All Job Aids will remain in current form on the Job Aids page

Phase 3

- Funding/SCT content moving to KBA
- At this point, all links on Job Aids page will be replaced with links to KBAs

Helpful Resources



UCPath Best Practices

UC San Diego

1 Review Person Org Summary

- Ensure you have a complete understanding of the employee's **active and inactive Positions**
- Identify departments for **transaction collaboration**

2 Pay close attention to dates

- Effective dates indicate the first day a status applies (hired, terminated, etc.)
- Transactions should be submitted and locally approved by the **Employee Data Change Deadline** for the pay cycle to affect payroll

3 Review available resources

Critical UCPath Reports

Quick Reference: **Critical UCPath Reports**

CRITICAL UCPATH REPORTS

This quick reference document identifies reports each department should monitor as well as reports that can assist in troubleshooting pay issues. While many additional reports exist for your reference, these support the timely entry of pay-impacting UCPath transactions as well as the timely resolution of pay-impacting issues.

Note: New reports and updates are continuously made, for the most up to date listing of reports and descriptions refer to the Business Analytics Hub.

How to Access Reports:

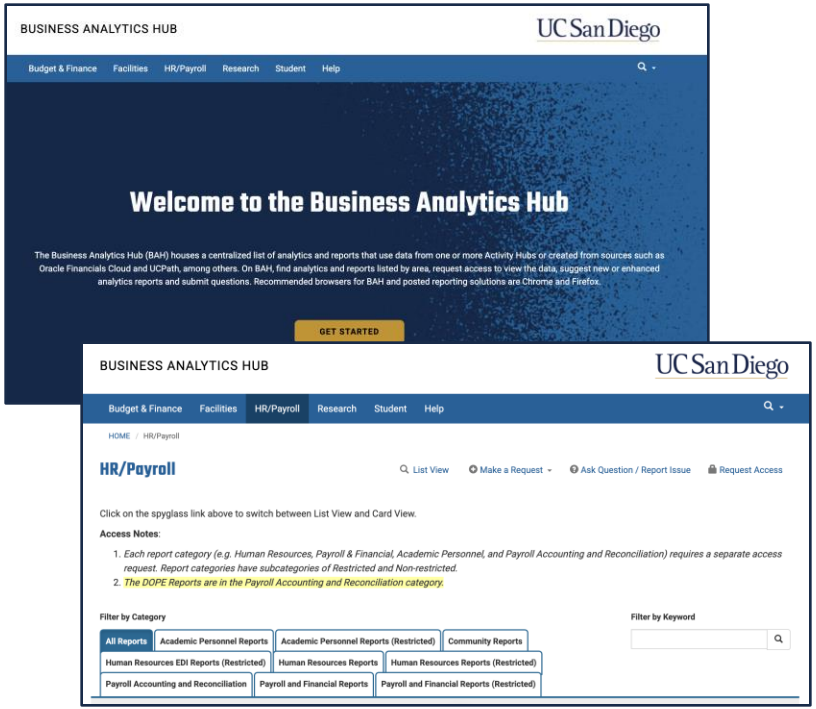
Use the HR/Payroll Tab on the Reports Dashboard to view report titles and descriptions, as well as launch reports. Access must be requested to each report category, and VPN is required to run reports. To request access submit the UCPath Cognos Report Access Request

Note: 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.

Reports to Monitor

Report Name	Description	Report Category
FLSA Mismatch	Identifies employees with conflicting FLSA statuses with multiple jobs, including mismatches between Job Code and Job data. Monitor to ensure FLSA mismatches are resolved in a timely manner.	Human Resources Reports
Hours on Pay Status Report	Identifies employees who have met the requirement for Career status and/or benefits eligibility. Monitor this report to help ensure timely benefits enrollment. Also monitor this report to review job record for End Dates that must be removed due to change to Career status. See the *Known Issue: Intra-Location Transfers and Job End Dates* quick reference	Human Resources Reports
Hours towards	Identifies newly eligible academic (faculty and non-faculty) employees who have reached/approaching 750/1000 hours	Human Resources

Business Analytics Hub



UCPath Support – We're Here!

Stay Informed and Connected

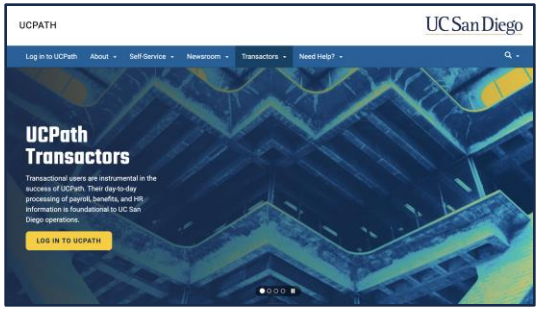
- Subscribe to **UCPath Communications**
- Join the **UCPath Community of Practice**

Get Personalized Support

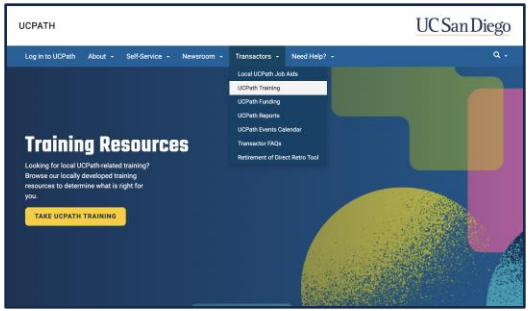
- Join our Monthly **Office Hours**
- Book a **1:1 Transaction Support Appointment**
- Register for **On-The-Job Training**

UCPath Website

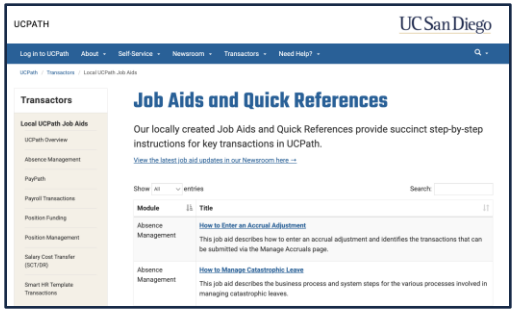
UCPath Transactors Page



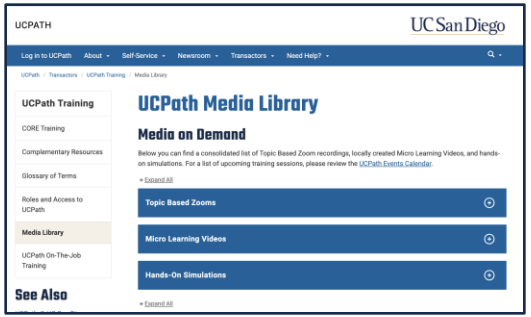
UCPath Training Page



UCPath Job Aids Page



UCPath Media Library




UC San Diego
UC Path

Q&A

Q&A

- **When an undergraduate student has a work study, is it necessary or not that the filled position needs to be updated to non-work study in UCPath when their work study amount has runs out? I have not changed the position into a non-work study before but I noticed in DOPES that our department funding gets charged 100% once the work study amount runs out.**
    - We recommend that you remove the Position Pool ID when a student no longer has a work-study award. The funding may pay correctly, but the reporting might have errors if you leave the Position Pool ID on there.

Q&A

- **Do the freeze periods for Academic Range Adjustments on October changes also include FEs and SCTs?**
  - No, the freeze only applies to job changes (not funding changes, SCT).
- **Can UCPath lock out users who do not complete the Patent to ensure people do this? Departments are being asked to do a lot of cleanup and don't have resources to support this. Assistance from systems and central units for creative solutions would be great.**
  - UCPC has no plans to lock users out. They expect campus departments to manage onboarding compliance, including follow-up with new hires and cleanup.

Q&A

- **Why is UCPath canceling benefits before a returning retiree has reached the 12 months? Can you elaborate more on the downstream impacts related to their benefits?**
  - UCPath will derive benefits eligibility for returning retirees based off their rehire date and appointment percentage/duration upon rehire. (They are also looking at the hours worked over a 12-month look back period, also referred to as Standard Measurement Period - SMP).
  - If a returning retiree returns to UC employment too soon, or if their appointment exceeds 43% / 12-months, this will trigger Mid Level eligibility in UCPath. Mid-Level benefits in Path will negatively impact retiree''s Medicare/Retiree Health benefits. The concern here isn't so much UCPath cancelling their benefits, but rather Mid Level benefits in Path (upon rehire) disrupting Retiree's medical and Medicare enrollments (outside of UCPath).

Q&A

- **Will the 2026 benefits costs for union-represented employees be published? Last year union rep employees could not find their costs (just that it increased by X amount from the prior year, but if they were switching medical they could not find the new costs anywhere).**
  - UCOP typically publishes medical premium rates for policy-covered (i.e. non represented) employees a couple of weeks prior to Open Enrollment official kick off date. For represented employees, caps on premiums increases/decreases should also be released at the same time. Please note, however, that union negotiations may still be ongoing early Fall, hence the delay in releasing the applicable premium rates for represented EEs.

Q&A

- **Regarding the weekly labor posting… when during the week would be the deadline in order for a SCT to be posted the following week?**
  - The deadlines would remain the same for SCT's per UCPath's processing calendar. They are planning on processing SCT's more frequently in the future.
- **As a shared service, the Academic Resource Center often receive GSR hire requests directly from the hiring department, who may not be the same as the student's home department. Is there an expectation for written approval from the home department to the GSR hiring department in order to proceed?**
  - Yes, the home department should still provide express approval to hire the student in order to ensure that academic eligibility is met, and that there is no issue of over-employment.

Q&A

- **Can you explain when to use Search Person and when to use Person Org Summary?**
  - You can skip the search/match only if you are sure you know the person's Employee ID.