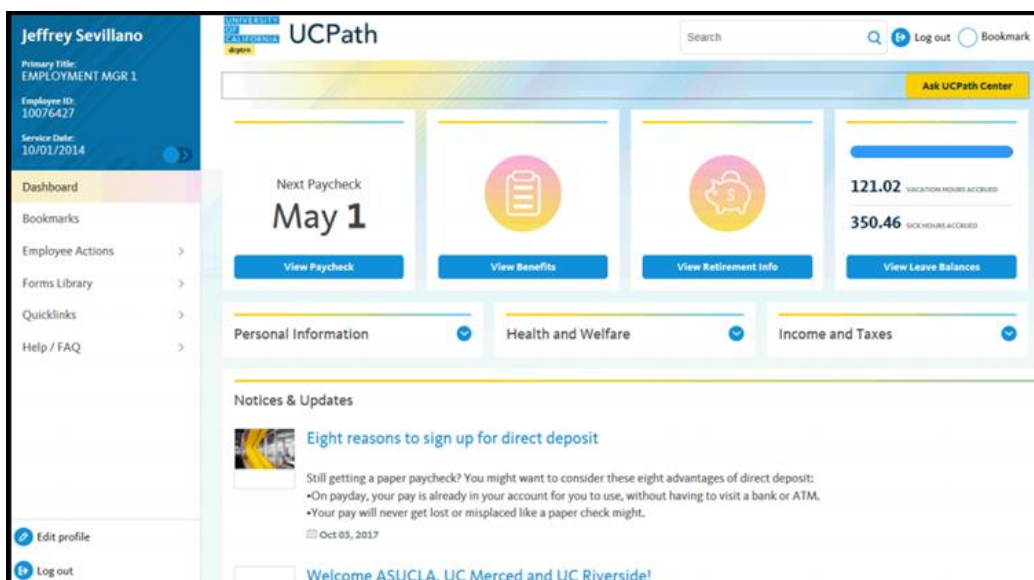


Submit Case on Behalf of Another Employee with Public or Private Comments

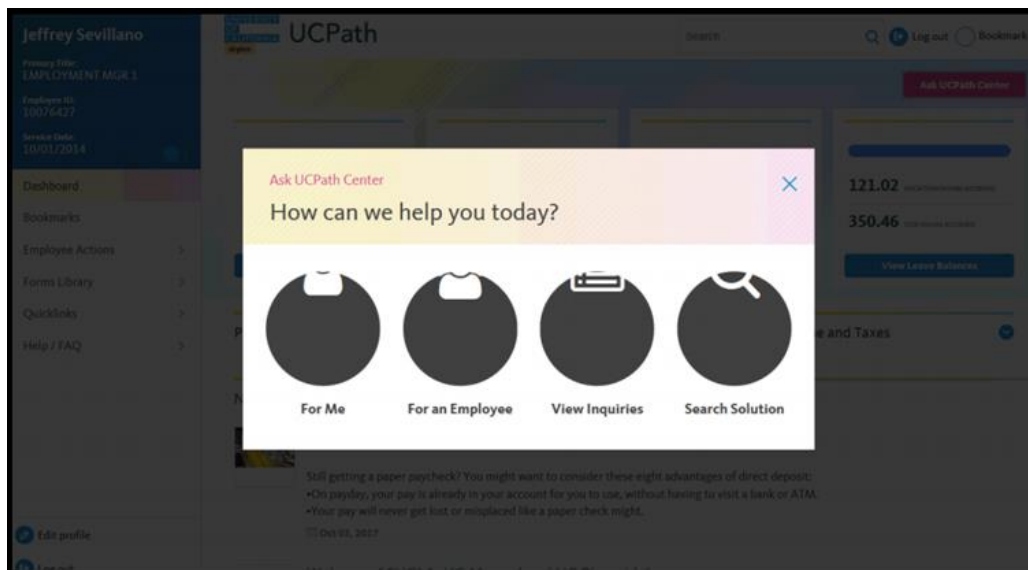
Designated staff who have operational responsibilities in the areas of Human Resources, Academic Personnel, and Business & Financial Services are authorized to submit an inquiry on behalf of another employee to the UCPath Center in order to help resolve questions or issues.

Task: Use this job aid to learn how to submit an inquiry on behalf of another employee via the [UCPath](#) website. You can try the task on the [UCPath Help Site for Self-Service Actions](#).

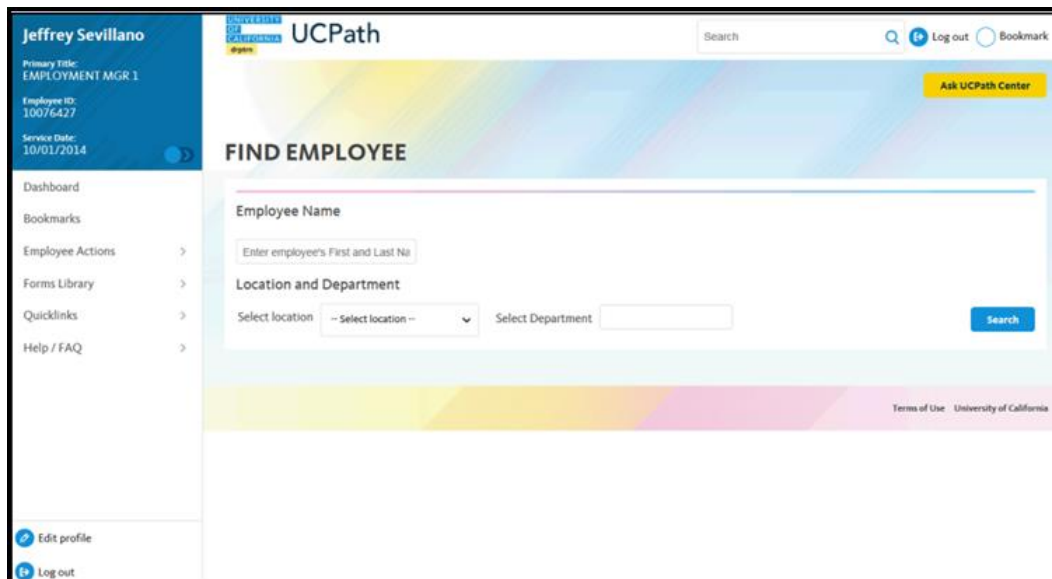
Navigation: From the [UCPath](#) online dashboard, click on *Ask UCPath Center*, or from the menu, go to *Help / FAQ > Ask UCPath Center*.



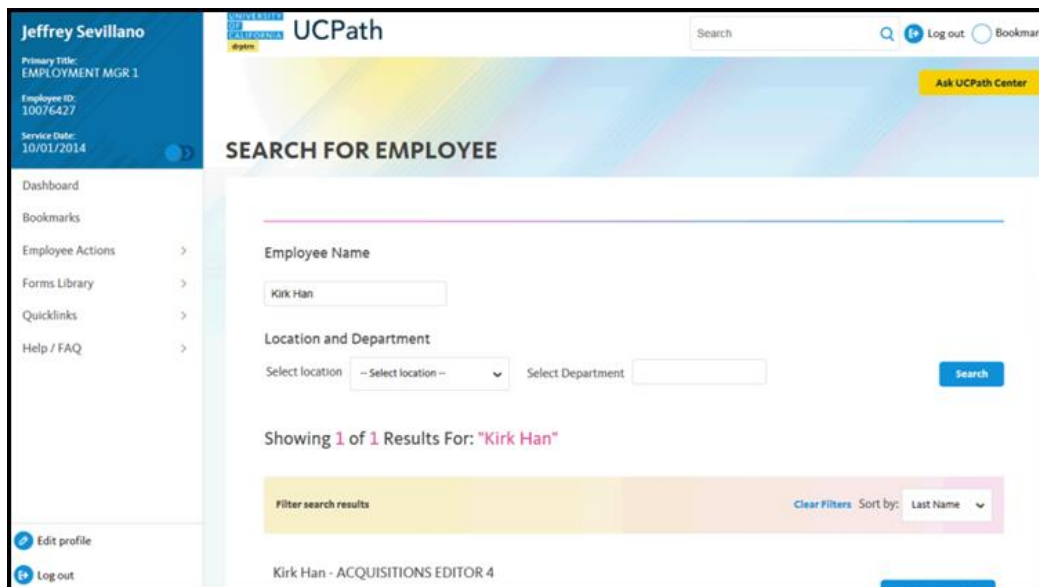
1. Click the **Ask UCPath Center** link.



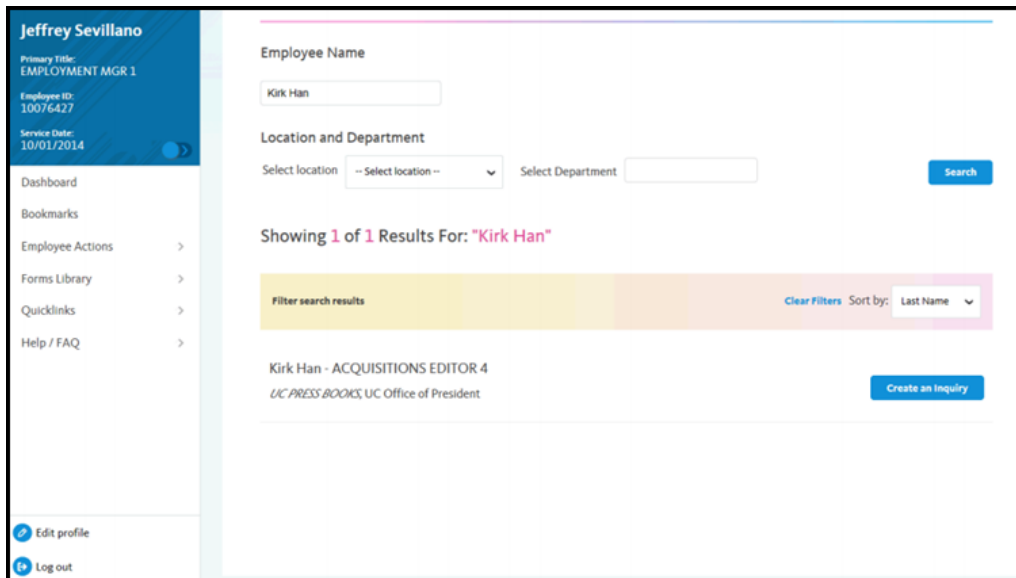
2. If you are authorized to submit an inquiry for an employee, the **Ask UCPATH Center, How can we help you today?** pane appears. In this example, submit a payroll question for an employee. Click the **For an Employee** button.



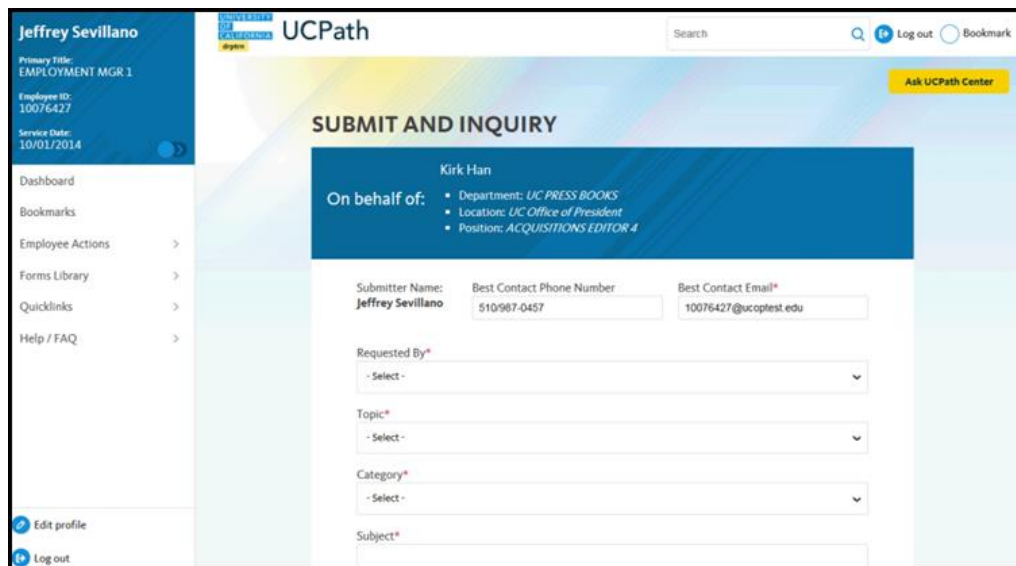
3. On the **Find Employee** page, search for the employee by name or by location and department. For this example, enter **Kirk Han** in the **Employee Name** field.



4. UCPATH returned one result. Click the scroll bar.



5. Click the **Create an Inquiry** link.



6. Your work phone number and email automatically populate from your Salesforce record. You can override with a different number or email by clicking in the field(s) and entering new information.

7. Click the button to the right of the **Requested By** field.

8. Select the option that best describes your relationship to the employee. For this example, click the **COE** list item.

9. Click the button to the right of the **Topic** field.

10. Choose the topic area associated with your inquiry. In this example click the **Payroll** list item.

11. Click the button to the right of the **Category** field.

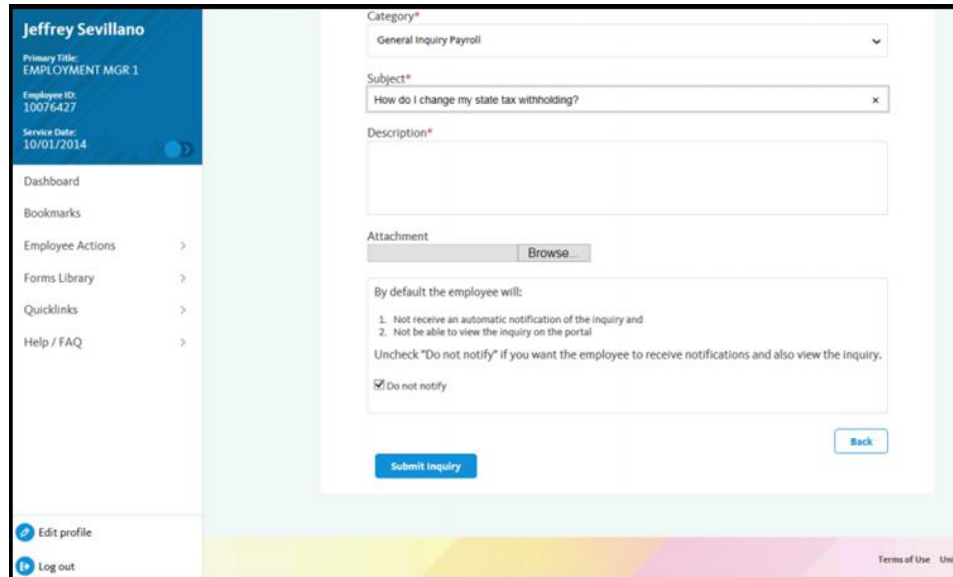
12. A list of categories associated with the selected topic appears. Choose the category associated with the inquiry. In this example the employee wants to decrease his state tax withholding. A question about state tax

withholding is considered a general inquiry. For this example, click the **General Inquiry Payroll** list item.

13. Click in the **Subject** field.

14. Enter the desired information into the Subject field. For this example, enter **How do I change my state tax withholding?**

15. Click the scroll bar.



The screenshot shows a web interface for submitting a general inquiry. On the left is a user profile sidebar for Jeffrey Sevilano, EMPLOYMENT MGR 1, with Employee ID 10076427 and Service Date 10/01/2014. The main form area includes a 'Category*' dropdown menu set to 'General Inquiry Payroll', a 'Subject*' text field containing 'How do I change my state tax withholding?', and an empty 'Description*' text area. Below these is an 'Attachment' section with a 'Browse...' button. A section titled 'By default the employee will:' contains two numbered items: '1. Not receive an automatic notification of the inquiry and' and '2. Not be able to view the inquiry on the portal.' Below this is the instruction 'Uncheck "Do not notify" if you want the employee to receive notifications and also view the inquiry.' and a checked checkbox labeled 'Do not notify'. At the bottom of the form are 'Submit Inquiry' and 'Back' buttons. The footer of the page includes 'Edit profile', 'Log out', and 'Terms of Use'.

16. Click in the **Description** field.

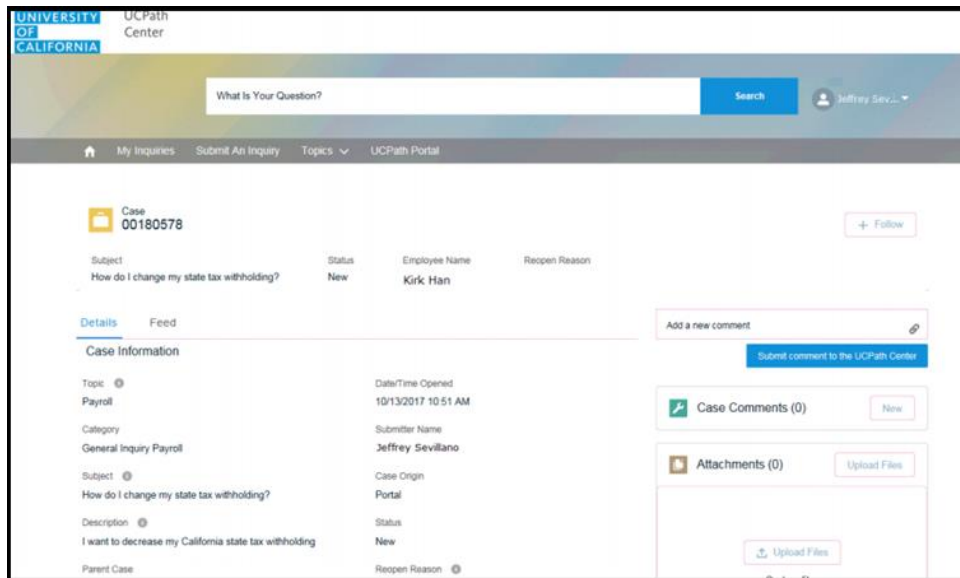
17. Enter the desired information into the **Description** field. For this example, enter I want to decrease.

18. In this example, the full **Description** was completed on your behalf.

19. You can add an attachment when entering on behalf of others. More attachments can be added after you save the initial entry. Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV.

20. By default the **Do not notify** check box means that the employee will receive no notifications and cannot view the inquiry. If you want the employee to receive notifications and see the inquiry online, deselect the check box.

21. Click the **Submit Inquiry** button.



22. A case number will be assigned to the inquiry. You can review the inquiry in the **Details** sections.

23. The submitter's name appears.

24. When adding comments to the case, select the **Public** check box to make the comment **public**.



25. When adding comments to the case, uncheck the **Public** check box to make the comment **private**.

