UCPath Online
Self Service – Employee Actions
Trainer Introduction

Kathleen Cool
Title: Principal Trainer
Department: HR | UCPath
Years @ UC: 1 year
Previous Experience: 10+ years of experience in instructional design and training in higher education. Taught Information System Management at the undergraduate and graduate levels.
Housekeeping

- Cell Phones
- Breaks
- Restrooms
Learning Topics (1 of 5)

- **UCPath Help Site**
  - Accessing UCPath Online
  - Accessing the UCPath Online Help Site

- **UCPath Portal Basics**
  - Clear Your Web Browser’s Cache
  - Disable Pop-Up Blocker
  - Set Up Security Questions and Answers
  - Submit Inquiry
  - Submit Inquiry on Behalf of Employee
  - Monitor Inquiries
Learning Topics (2 of 5)

- Reopen Inquiry
  - Employee Actions: Personal Information
    - Update My Legal Name
    - Add Preferred Name
    - Update My Address
    - Update My Phone Number
    - Update My Emergency Contact
  - Enter Voluntary Self-Identification of Ethnic Groups
  - Update Disclosure Forms
  - Review Patent Acknowledgement and Amendment
Learning Topics (3 of 5)

- Enter Voluntary Self-Identification of Disability
- Enter Voluntary Self-Identification of Veteran Status
- Update My Current Profile Education
- Update My Current Profile Qualifications
- Opt In to Verification of Employment Data File: Student
- Opt Out of Verification of Employment Data File: Faculty, Academic Personnel and Staff
- Generate Employment Verification Summary

- Employee Actions: Benefits Information
  - Enroll in Benefits
  - Enter Adoption Life Event
Learning Topics (4 of 5)

- Enter Birth Life Event
- Enter Marriage Life Event
- Enter Divorce Life Event
- Benefits Changes for AD&D, Disability or Life
- View Benefits Summary
- View Dependent Summary

➤ Employee Actions: Payroll Information
  - Review My Leave Balances
  - Update My Direct Deposit
  - Add or Delete Direct Deposit
Learning Topics (5 of 5)

- Review My Online Paystub
- Update My Federal Withholding (W-4)
- Update My California Tax Withholding (DE-4)
- Update My Out-Of-State Tax Withholding
- Enroll to Receive Online W-2
- Review My Online W-2
- Request W-2 Reissue

- Additional Courses
- Additional Resources
Accessing UCPath Online

To access UCPath:

1. Go to R'Space
2. Click the Authorized Apps tab
3. Click on the UCPath Portal link
4. Select University of California, Riverside
5. You will be prompted to sign in to UCPath using your UCR credentials
Accessing the UCPath Online Help Site

The UCPath Help for Portal and Self Service website is where you can find UCPath resources such as,

a. How-to-videos
b. Interactive simulations
c. Job aids
In this section, you will find information on how to clear your web browser’s cache, disable your browser’s pop-up blocker, set up security questions and answers, submit, submit on behalf of an employee, monitor, and reopen an inquiry to UCPath via the UCPath website.
Clear Your Web Browser’s Cache

Best practice when using the UCPath Online Help Site and UCPath is to clear cache at least once a week. Clear the cache on each workstation that you use to access UCPath. If multiple people use the same workstation, each person should clear browser cache. Cache files are specific to each user on each workstation. Complete the following steps for each browser you use to access UCPath.

- Internet Explorer
- Mozilla Firefox
- Google Chrome
Disable Pop-Up Blocker

Completely disabling the pop-up blocker can leave your browser vulnerable to malicious software and intrusive ads. It is recommended that you add sites you want to allow to your exceptions list, such as UCPath and the UCPath Online Help Site, and keep your browser’s pop-up blocker enabled.

To add the UCPath website and UCPath Online Help Site as an exception to your pop-up blocker settings, complete the following steps for each browser you use to access UCPath or the UCPath Online Help Site.

- Internet Explorer
- Mozilla Firefox
- Google Chrome
Set Up Security Questions & Answers

Menu Navigation: Employee Actions > Security Question Setup

Use this task to set up security questions and answers. These questions provide increased security to protect against unauthorized access or changes to your financial, health benefits and personal information in UCPath.

Click here for a downloadable Job Aid (PDF) on how to set up Security Questions & Answers
Submit Inquiry

Menu Navigation: Help / FAQ > Ask UCPath Center
Dashboard Navigation: Ask UCPath Center

Use this task to submit an inquiry to UCPath Center via the UCPath website

Click here for a downloadable Job Aid (PDF) on how to submit an inquiry to UCPath Center.
Submit Inquiry on Behalf of Employee

Menu Navigation: Help / FAQ > Ask UCPath Center
Dashboard Navigation: Ask UCPath Center

Use this task to submit an inquiry on behalf of another employee to UCPath Center via the UCPath website.

Click here for a downloadable Job Aid (PDF) on how to submit an inquiry to UCPath Center on behalf of another employee.
Monitor Inquiries

Use this task to reopen a closed inquiry via the UCPATH website. A case can be reopened only once and only within five days of closure.

Click here for a downloadable Job Aid (PDF) on how to monitor the status of an existing inquiry.
Reopen Inquiry

Menu Navigation: Help / FAQ > Ask UCPath Center
Dashboard Navigation: Ask UCPath Center

Use this task to review the status of an existing inquiry via the UCPath website.

Click here for a downloadable Job Aid (PDF) on how to monitor the status of an existing inquiry.
Employee Actions: Personal Information

In this section, you will find information on how to update and/or add personal information. Personal information includes updating your legal name, adding a preferred name (such as a nickname), updating your address, phone number and emergency contact information. It also includes updating disclosure forms, reviewing the Patent Acknowledgement and Amendment, entering voluntary self-identification of disability and veteran status, updating your current profile education and qualifications, as well as opting in or out of Verification of Employment Date File, and generating an Employment Verification Summary.
Update My Legal Name

Menu Navigation: Employee Actions > Personal Information > **Personal Information Summary**
Dashboard Navigation: Personal Information > **Personal Information Summary**

Use this task to update your name in UCPath online. You must update your name with the appropriate Federal agencies before you enter you name change in UCPath.

Click here for a downloadable Job Aid (PDF) on how to update your legal name.
Add Preferred Name

Menu Navigation: Employee Actions > Personal Information > **Personal Information Summary**
Dashboard Navigation: Personal Information > **Personal Information Summary**

Use this task to add a preferred name to your personal information.

**Note:** Currently, the preferred name appears only in the UCPath Dashboard.

[Images of UCPath dashboard showing how to add a preferred name]

Click here for a downloadable Job Aid (PDF) on how to add a preferred name.
Update My Address

Menu Navigation: Employee Actions > Personal Information > **Personal Information Summary**
Dashboard Navigation: Personal Information > **Personal Information Summary**

Use this task to update your address in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to update your address.
Update My Phone Number

Menu Navigation: Employee Actions > Personal Information > **Personal Information Summary**
Dashboard Navigation: Personal Information > **Personal Information Summary**

Use this task to update your home phone number and/or add a new telephone number in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to update and/or add a new phone number.
Update My Emergency Contact

Menu Navigation: Employee Actions > Personal Information > **Personal Information Summary**
Dashboard Navigation: Personal Information > **Personal Information Summary**

Use this task to update your emergency contact(s) in UCPath online.

Click [here](#) for a downloadable Job Aid (PDF) on how to update your emergency contact(s).
Enter Voluntary Self-Identification of Ethnic Groups

Menu Navigation: Employee Actions > Personal Information > **Personal Information Summary**
Dashboard Navigation: Personal Information > **Personal Information Summary**

Use this task to voluntarily enter race and ethnic group information in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to enter voluntary self-identification of ethnic groups.
Use this task to update your disclosure preferences in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to update disclosure forms.
Review Patent Acknowledgement and Amendment

Menu Navigation: Employee Actions > Personal Information > Patent Acknowledgement

Use this task to review your patent acknowledgement in UCPath online.

[Images of UCPath dashboard and Patent Acknowledgement form]

Click here for a downloadable Job Aid (PDF) on how to review your patent acknowledgement.
Enter Voluntary Self-Identification of Disability

Menu Navigation: Employee Actions > Personal Information > Disability Status
Dashboard Navigation: Personal Information > Disability Status

Use this task to voluntarily enter disability information in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to enter voluntary self-identification of disability.
Enter Voluntary Self-Identification of Veteran Status

Menu Navigation: Employee Actions > Personal Information > Veteran Status
Dashboard Navigation: Personal Information > Veteran Status

Use this task to voluntarily enter veteran status information in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to enter voluntary self-identification of veteran status.
Update My Current Profile Education

Menu Navigation: Employee Actions > Personal Information > My Current Profile
Dashboard Navigation: Personal Information > My Current Profile

Use this task to update your education in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to update your education.
Update My Current Profile Qualifications

Menu Navigation: Employee Actions > Personal Information > My Current Profile
Dashboard Navigation: Personal Information > My Current Profile

Use this task to update your honors, awards, licenses or certifications in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to update your qualifications.
Opt In to Verification of Employment Data File: Student

Menu Navigation: Employee Actions > Personal Information > My Current Profile
Dashboard Navigation: Personal Information > My Current Profile

Use this task to opt in to the verification of employment data file if you are a student.

**Note:** Student are not included in the daily update sent to UC’s external partner that performs employment verification activities.

Click here for a downloadable Job Aid (PDF) on how to opt in to the verification of employment data file if you are a student.
Opt Out of Verification of Employment Data File: Faculty, Academic Personnel and Staff

Menu Navigation: Employee Actions > Personal Information > My Current Profile
Dashboard Navigation: Personal Information > My Current Profile

Use this task to opt in to the verification of employment data file if you are a member of faculty, academic personnel or staff.

Note: Faculty, academic personnel and staff are automatically included in the daily update sent to UC’s external partner that performs employment verification activities.

Click here for a downloadable Job Aid (PDF) on how to opt out of the verification of employment data file if you are faculty, academic personnel or staff.
Generate Employment Verification Summary

Menu Navigation: Employee Actions > Income and Taxes > Verification of Employment

Use this task to generate your employment summary, including dates of employment and earnings.

Click here for a downloadable Job Aid (PDF) on how to generate your employment summary.
Employee Actions: Benefits Information

In this section, you will find information on how to enroll in benefits as well as enter different types of life events such as adoption, birth, marriage, and divorce. The section also includes information on benefits changes for AD&D, disability or life, as well as how to view your benefits and dependent summaries.
Enroll in Benefits

Menu Navigation: Employee Actions > Health and Welfare > Enroll in Benefits
Dashboard Navigation: Health and Welfare > Enroll in Benefits

Use this task to enroll in benefits in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to enroll in benefits.
Enroll in Benefits - Medical

1. To add Medical coverage, click the Edit button.
2. In the Select an Option section, choose your Medical plan or waive coverage. Click the Select Plan button.

To enroll dependents within the selected plan, use the Enroll Your Family Member section. Dependents already entered in UCPath will appear in the Dependent list. You can also add or modify dependents during the enrollment process.

Click here for a downloadable Job Aid (PDF) on how to enroll in benefits.
Enroll in Benefits - Dental

1. To add Dental coverage, click the Edit button.
2. In the Select an Option section, choose your Dental plan or waive coverage. Click the Select Plan button.

To enroll dependents within the selected plan, use the Enroll Your Family Member section. Dependents already entered in UCPath will appear in the Dependent list. You can also add or modify dependents during the enrollment process.

Click here for a downloadable Job Aid (PDF) on how to enroll in benefits.
Enroll in Benefits - Vision

1. To add Vision coverage, click the Edit button.
2. In the Select an Option section, choose your Vision plan or waive coverage. Click the Select Plan button.

To enroll dependents within the selected plan, use the Enroll Your Family Member section. Dependents already entered in UCPath will appear in the Dependent list. You can also add or modify dependents during the enrollment process.

Click here for a downloadable Job Aid (PDF) on how to enroll in benefits.
Enroll in Benefits – Legal Services

1. To add Legal Services, click the Edit button.

2. In the Select an Option section, choose your Legal Services plan or waive coverage. Click the Select Plan button.

To enroll dependents within the selected plan, use the Enroll Your Family Member section. Dependents already entered in UCPath will appear in the Dependent list. You can also add or modify dependents during the enrollment process.

Click here for a downloadable Job Aid (PDF) on how to enroll in benefits.
Enroll in Benefits – Supplemental Life

1. To add Supplemental Life coverage, click the Edit button.
2. In the Select a Plan section, choose your Supplemental Life plan or waive coverage. Click the Select Plan button.

Click here for a downloadable Job Aid (PDF) on how to enroll in benefits.
Enroll in Benefits – Basic Dependent Life

1. To add Basic Dependent Life coverage, click the Edit button.
2. In the Select an Option section, choose to enroll in the plan or accept the default option to not enroll in Basic Dependent Life. When selected, your dependent(s) appear in the Your Covered Dependents. You can modify dependents by clicking the Add/Review Dependents button.

Click here for a downloadable Job Aid (PDF) on how to enroll in benefits.
Enroll in Benefits – Supp Dependent Life (Spouse)

1. To add Supplemental Dependent Life for your spouse coverage, click the Edit button.
2. In the Select a Plan section, choose your Supplemental Life plan or waive coverage. Click the Select Plan button.

Click here for a downloadable Job Aid (PDF) on how to enroll in benefits.
1. To add Supplemental Dependent Life for your child(ren) coverage, click the Edit button.
2. In the Select a Plan section, choose to enroll in the plan or accept the default option to not enroll in expanded dependent life. When selected, your dependent(s) appear in the Your Covered Dependents. You can modify dependents by clicking the Add/Review Dependents button.

Click here for a downloadable Job Aid (PDF) on how to enroll in benefits.
Enroll in Benefits – Employee & Dependent AD&D

1. To add Employee & Dependent AD&D coverage, click the Edit button.
2. In the Select a Plan section, choose your coverage level or waive coverage. You can then add a Coverage Amount. Your dependent(s) appear in the Your Covered Dependents list. If necessary, click the Add/Review Dependents button to create or modify dependents.

Click here for a downloadable Job Aid (PDF) on how to enroll in benefits.
Enroll in Benefits – Voluntary Short Term Disability

1. To add Voluntary Short Term Disability Coverage, click the Edit button.
2. Review the Voluntary Short Term Disability plan information before you make your selection. In the Select a Plan section, choose to enroll in the plan or accept the default option to not enroll in Voluntary Short Term Disability.

Click here for a downloadable Job Aid (PDF) on how to enroll in benefits.
Enroll in Benefits – Voluntary Long Term Disability

1. To add Voluntary Long Term Disability Coverage, click the Edit button.
2. Review the Voluntary Long Term Disability plan information before you make your selection. In the Select a Plan section, choose to enroll in the plan or accept the default option to not enroll in Voluntary Long Term Disability.

Click here for a downloadable Job Aid (PDF) on how to enroll in benefits.
Enroll in Benefits – Flex Spending - Health

1. To add Flex Spending - Health, click the Edit button.
2. In the Select an Option section, choose to enroll in the plan or accept the default option to not enroll in Health FSA. Once you choose to enroll in the plan, you will be asked to enter the Annual Contribution Amount.
Submitting Benefits Selection

1. After you complete all benefit selections, click the Submit button at the bottom of the Current Enrollment Summary section to finalize your choices. After you submit your choices, you cannot change your selections.

2. If you receive any errors or warnings, review the message and correct your errors by returning to the Current Enrollment Summary page.

Click here for a downloadable Job Aid (PDF) on how to enroll in benefits.
Enter Adoption Life Event

Menu Navigation: Employee Actions > Health and Welfare > Life Events / Benefit Changes
Dashboard Navigation: Health and Welfare > Life Events / Benefit Changes

Use this task to submit an adoption life event in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to submit an adoption life event.
Enter Birth Life Event

Menu Navigation: Employee Actions > Health and Welfare > Life Events / Benefit Changes
Dashboard Navigation: Health and Welfare > Life Events / Benefit Changes

Use this task to submit a birth life event in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to submit a birth life event.
Enter Marriage Life Event

Menu Navigation: Employee Actions > Health and Welfare > Life Events / Benefit Changes
Dashboard Navigation: Health and Welfare > Life Events / Benefit Changes

Use this task to submit a marriage life event in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to submit a marriage life event.
Enter Divorce Life Event

Menu Navigation: Employee Actions > Health and Welfare > Life Events / Benefit Changes
Dashboard Navigation: Health and Welfare > Life Events / Benefit Changes

Use this task to submit a divorce life event in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to submit a divorce life event.
Use this task to add, change or waive accidental death and dismemberment (AD&D) insurance, voluntary disability and/or life insurance.

Menu Navigation: Employee Actions > Health and Welfare > Life Events / Benefit Changes
Dashboard Navigation: Health and Welfare > Life Events / Benefit Changes

Click here for a downloadable Job Aid (PDF) on how to submit benefits changes for AD&D, Disability or Life.
Use this task to view your benefit elections in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to enroll in benefits.
**View Dependent Summary**

Menu Navigation: Employee Actions > Health and Welfare > **Dependent Coverage**
Dashboard Navigation: Health and Welfare > **Dependent Coverage**

Use this task to view and edit dependent summary information in UCPath online.

[Images of UCPath interface showing dependent coverage summary and personal information]

**Click here for a downloadable Job Aid (PDF) on how to enroll in benefits.**
In this section, you will find information on how to review your leave balances (both with and without sabbatical credit). You will also find information on how to update, add or delete your direct deposit, review your online paystub, update your W-4, DE-4 and/or out-of-state tax withholding. Also provided is information on how to enroll to receive your W-2 online, review your W-2 online and request a reissue of your W-2.
Review My Leave Balances (With Sabbatical Credit)

Menu Navigation: Employee Actions > Leave Balances
Dashboard Navigation: If you have vacation or sick leave balances, your current balances appear in the View Leave Balances widget.

Use this task to review your leave balances in UCPath online. This example includes sabbatical credit.

Click here for a downloadable Job Aid (PDF) on how to review your leave balances (with sabbatical credit).

Also of interest is the How UCPath Displays Leave Balances Job Aid (PDF).
Review My Leave Balances (Without Sab. Credit)

Menu Navigation: Employee Actions > Leave Balances
Dashboard Navigation: If you have vacation or sick leave balances, your current balances appear in the View Leave Balances widget.

Use this task to review your leave balances in UCPATH online. This example includes only sick and vacation.

Click here for a downloadable Job Aid (PDF) on how to review your leave balances (without sabbatical credit).

Also of interest is the How UCPATH Displays Leave Balances Job Aid (PDF).
Update My Direct Deposit

Menu Navigation: Employee Actions > Income and Taxes > Direct Deposit
Dashboard Navigation: Income and Taxes > Direct Deposit

Use this task to update your direct deposit in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to update your direct deposit.
Add or Delete Direct Deposit

Menu Navigation: Employee Actions > Income and Taxes > Direct Deposit
Dashboard Navigation: Income and Taxes > Direct Deposit

Use this task to add or delete your direct deposit in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to update your direct deposit.
Review My Online Paystub

Menu Navigation: Employee Actions > Income and Taxes > View Paycheck
Dashboard Navigation: Income and Taxes > View Paycheck

Use this task to review your online paystub in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to review your online paystub.
Update My Federal Withholding (W-4)

Menu Navigation: Employee Actions > Income and Taxes > Federal Withholding (W-4)
Dashboard Navigation: Income and Taxes > Federal Withholding

Use this task to update your Federal withholding (W-4) in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to update your Federal withholding (W-4).

For additional information on how to claim tax exemption, download the UCPath Online Job Aid (PDF).

For additional information on how to view a Federal tax over withheld refund, click here (PDF).
Update My California Tax Withholding (DE-4)

Menu Navigation: Employee Actions > Income and Taxes > CA State Withholding (DE-4)
Dashboard Navigation: Income and Taxes > CA State Withholding (DE-4)

Use this task to update your California tax withholding (DE-4) in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to update your California tax withholding (DE-4).
Update My Out-Of-State Tax Withholding

Menu Navigation: Employee Actions > Income and Taxes > Out-Of-State Withholding (W-4)
Dashboard Navigation: Income and Taxes > Out-Of-State Withholding (W-4)

Use this task to update your out-of-state tax withholding in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to update your out-of-state tax withholding.
Enroll to Receive Online W-2

Menu Navigation: Employee Actions > Income and Taxes > Enroll to receive online W-2
Dashboard Navigation: Income and Taxes > Enroll to receive online W-2

Use this task to enroll to receive online W-2 or W-2C form in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to receive online W-2 or W-2C form.

For additional information on your UCPath W-2, click here to download a PDF Job Aid.
Use this task to review your online W-2 or W-2C form in UCPath online.

Click here for a downloadable Job Aid (PDF) on how to review your online W-2 or W-2C form.

For additional information on your UCPath W-2, click here to download a PDF Job Aid.
Request W-2 Reissue

Menu Navigation: Employee Actions > Income and Taxes > **W-2 Reissue Request**
Dashboard Navigation: Income and Taxes > **W-2 Reissue Request**

Use this task to request a reissue of the W-2 or W-2C form in UCPath online.

[Image of UCPath interface for W-2 Reissue Request]

**Click here for a downloadable Job Aid (PDF)** on how to request reissue of W-2 or W-2C form.

For additional information on your UCPath W-2, **click here to download a PDF Job Aid**.
Click on the hyperlink below to register for and take the corresponding online course in the LMS.

• **PHCMPOR120: UCPath Manager Actions**
Training Resources

http://fomucpath.ucr.edu/training/resources.html
Your Feedback Please

https://tinyurl.com/ucrfomucpathfeedback
Thank You