

Use this task to navigate through the Ask UCPath site and submit an inquiry on behalf of another employee to UCPath.

**Dashboard Navigation:**

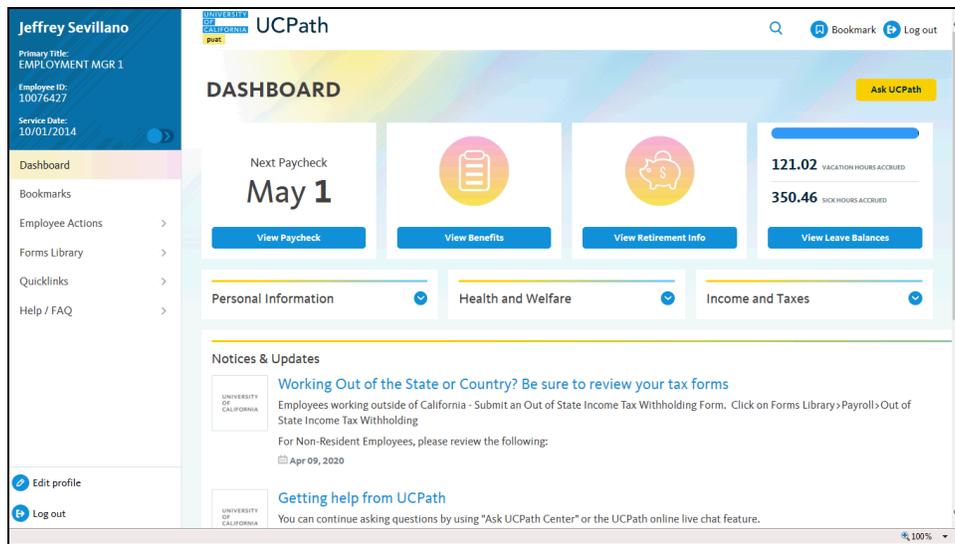
**Ask UCPath**

or

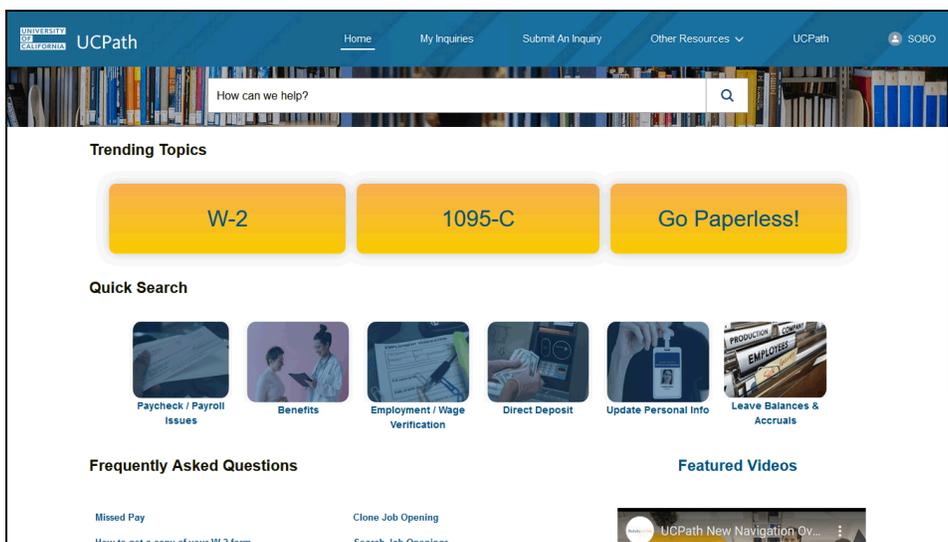
**Menu Navigation:**

Help / FAQ > **Ask UCPath**

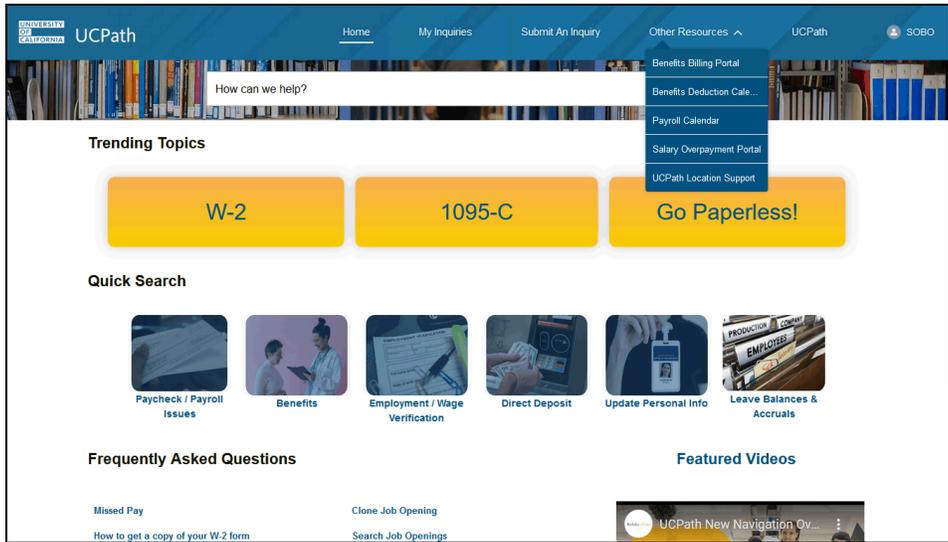
**Note:** This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.



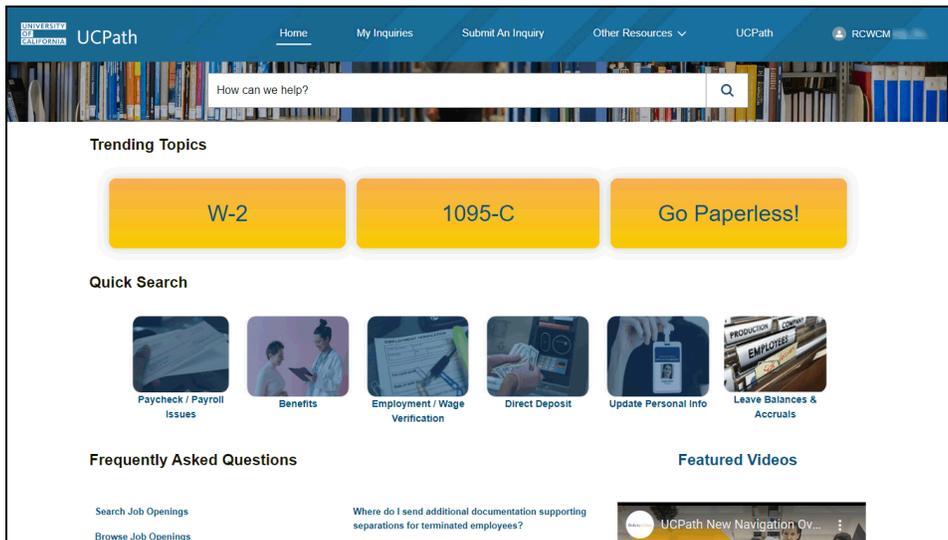
| Step | Action   |
|------|--|
| 1.   | <p>Click the <b>Ask UCPath</b> button.</p>  |



| Step | Action  |
|------|---|
| 2.   | <p>The <b>Ask UCPath</b> homepage appears. You can find various resources on this page to help you find answers to your questions without needing to submit an inquiry.</p> <p>Some available resources include articles, training resources, and other helpful information. Using these resources can save you time and help you find the information you need quickly and easily.</p> <p>Before we review how to submit an inquiry, let's go over all the available resources on <b>Ask UCPath</b>.</p> |
| 3.   | <p>The available resources on Ask UCPath may vary based on your role.</p> <p><b>Note:</b> As you click on links or access certain resources on Ask UCPath, you may be redirected outside the Ask UCPath page and prompted to log in with your single sign-on credentials. This is a standard security measure to ensure that only authorized individuals have access to sensitive information and systems.</p>  |
| 4.   | <p>Let's begin with the <b>Other Resources</b> section.</p> <p><i>We will return to the <b>My Inquiries</b> and <b>Submit an Inquiry</b> sections later in this tutorial.</i></p> <p>The <b>Other Resources</b> link provides you with a list of additional sites and resources that are commonly used.</p> <p>Click on the <b>Other Resources</b> link.</p>   |

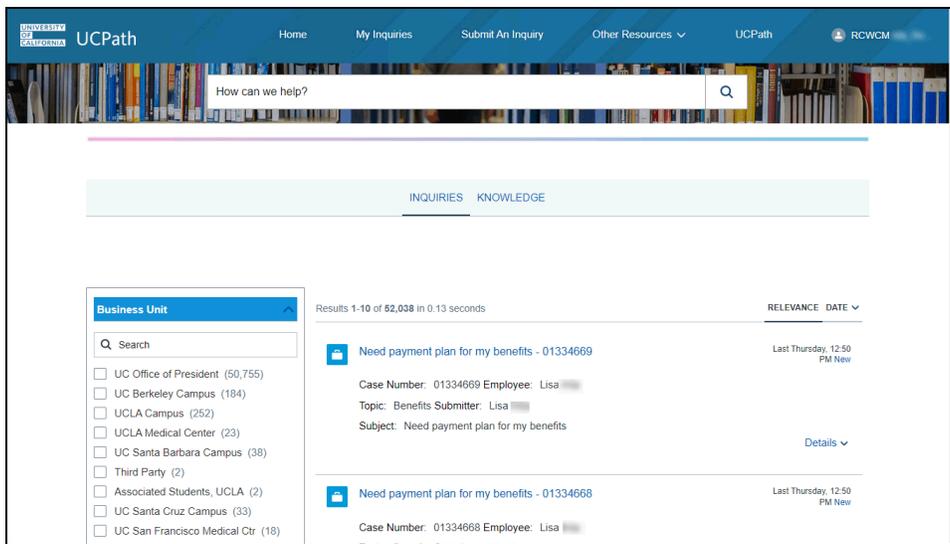


| Step | Action   |
|------|--|
| 5.   | <p>The list of <b>Other Resources</b> will vary based on your role.</p> <p>For example, if you have access to the <b>Resource Center</b>, that link will be available to you as part of <b>Other Resources</b>.</p> <p><b>Note:</b> As you click on links or access certain resources on Ask UCPath, you may be prompted to log in with your single sign-on credentials.</p> |

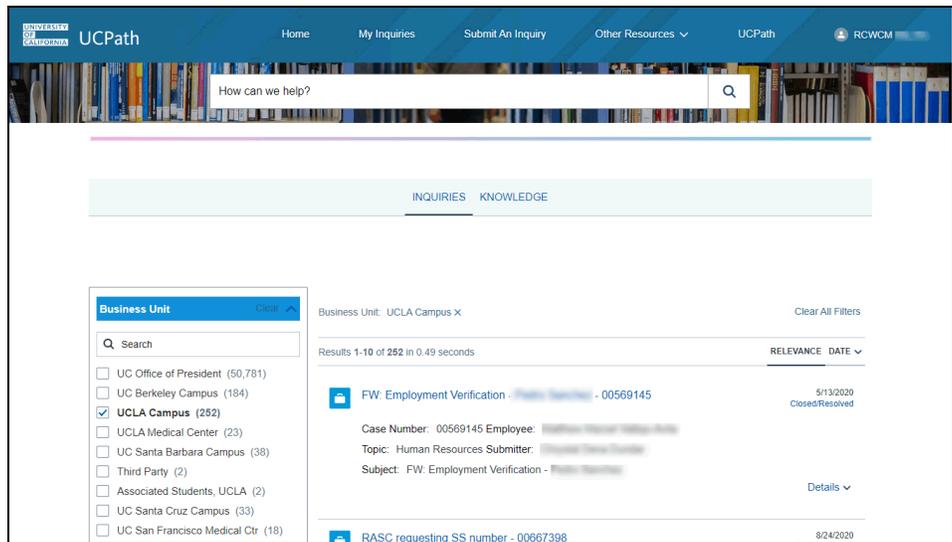


| Step | Action  |
|------|---|
| 6.   | The UCPath link will direct you to your UCPath Dashboard. |

| Step | Action  |
|------|---|
| 7.   | <p>Next, is the <b>How can we help?</b> search bar. You can search for topics related to UCPath using the search bar.</p> <p>Another helpful way to use the <b>How can we help?</b> search bar is if you have a large number of cases, you can search for specific criteria associated with the case or conduct a "global search".</p> <p>For this example, we'll search as if we are a Resource Center user with Case Management Access.</p> |
| 8.   | <p>Let's begin with a "global search."</p> <p>Leave the search field blank and click the <b>Lookup</b> button to the right of the <b>How can we help?</b> search field.</p>    |

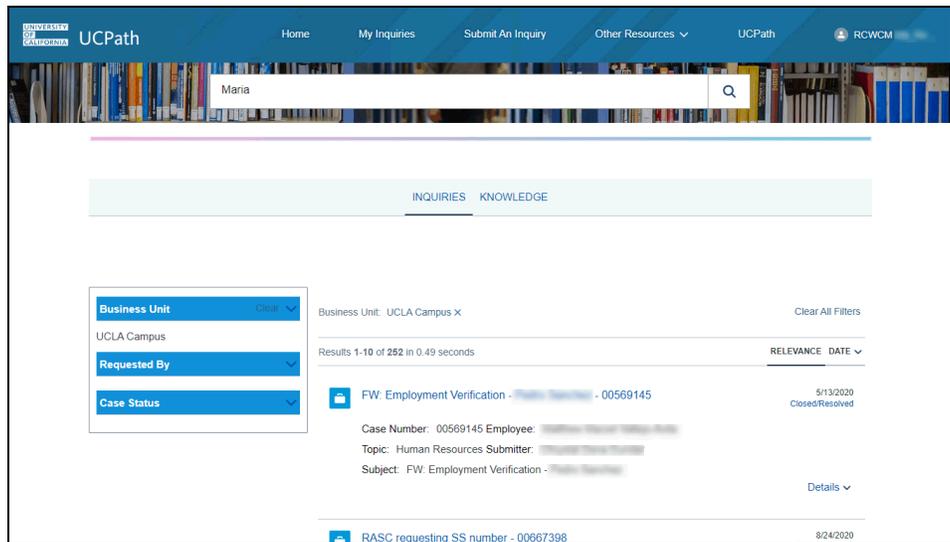


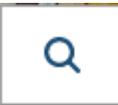
| Step | Action   |
|------|--|
| 9.   | <p>The "global search" results will display under the <b>Inquiries</b> tab. This will list all of the cases you are associated with and have access to view.</p>   |
| 10.  | <p>Use the <b>Business Unit</b> filters to narrow down your search.</p> <p>For this example, select the <b>UCLA Campus</b> check box.</p> <input type="checkbox"/> |

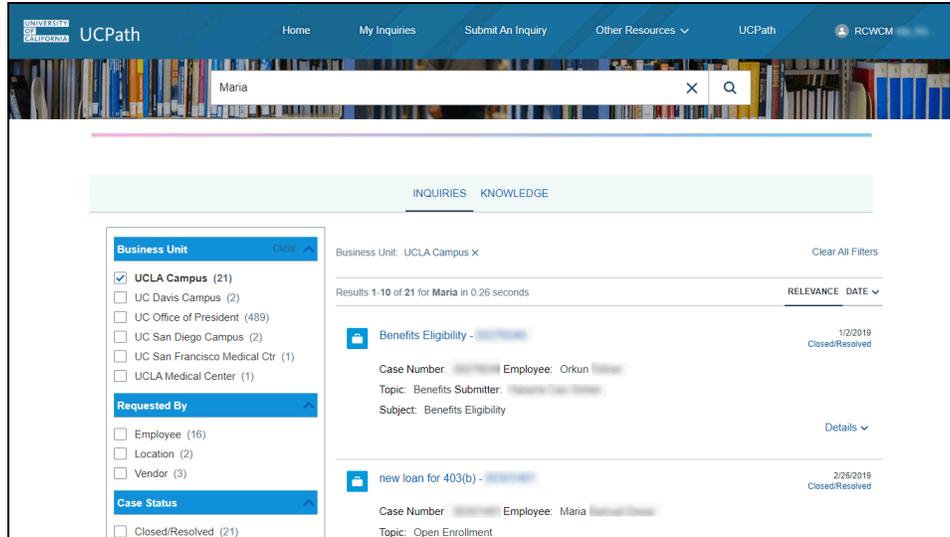


| Step | Action   |
|------|--|
| 11.  | The page now displays results from UCLA Campus.  |
| 12.  | To clear a filter, uncheck any selected filter checkboxes, or use the <b>Clear All Filters</b> to reset the page.<br><br>Click the <b>Clear All Filters</b> button.<br><br><a href="#">Clear All Filters</a>   |
| 13.  | Another option is to search by terms that may be found in the case. Such as a topic and/or a name. This is helpful when you need to narrow down the search results further.<br><br>For this example, let's search for an employee's first name.<br><br>Enter <b>Maria</b> in the <b>How can we help?</b> search bar. |

UCPath Task:  
Submit an Inquiry on Behalf of Employee (SOBO)  
to UCPath

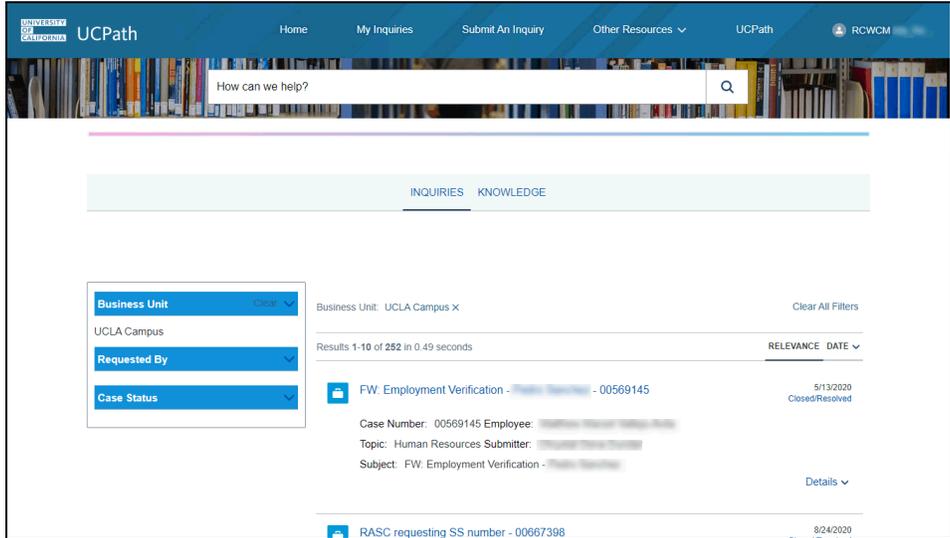


| Step | Action   |
|------|--|
| 14.  | Click the <b>Look Up</b> button.<br> |

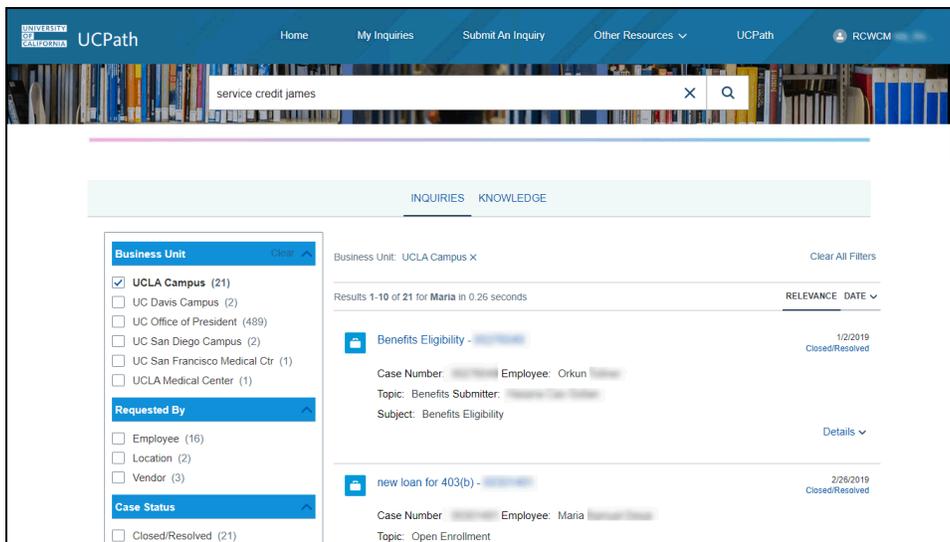


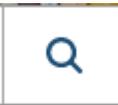
| Step | Action   |
|------|--|
| 15.  | <p><b>Note:</b> This is a general term search. Therefore, the results display all cases containing the name <b>Maria</b>.</p> <p>For example, the first search result listing contains an email with "Maria" in the case description. The following listing includes "Maria" as the employee's first name.</p> |

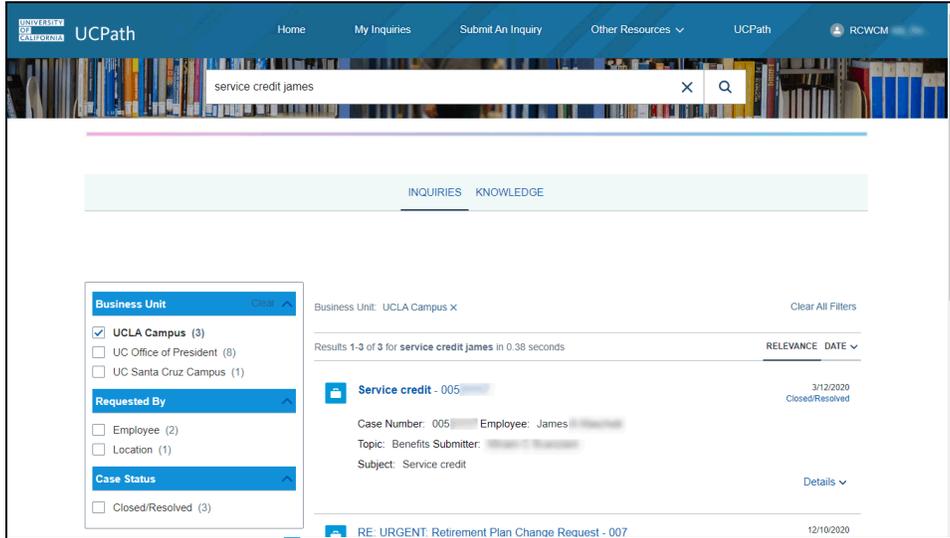
| Step | Action   |
|------|--|
| 16.  | Let's try another example. Click the <b>Clear</b> button.<br> |



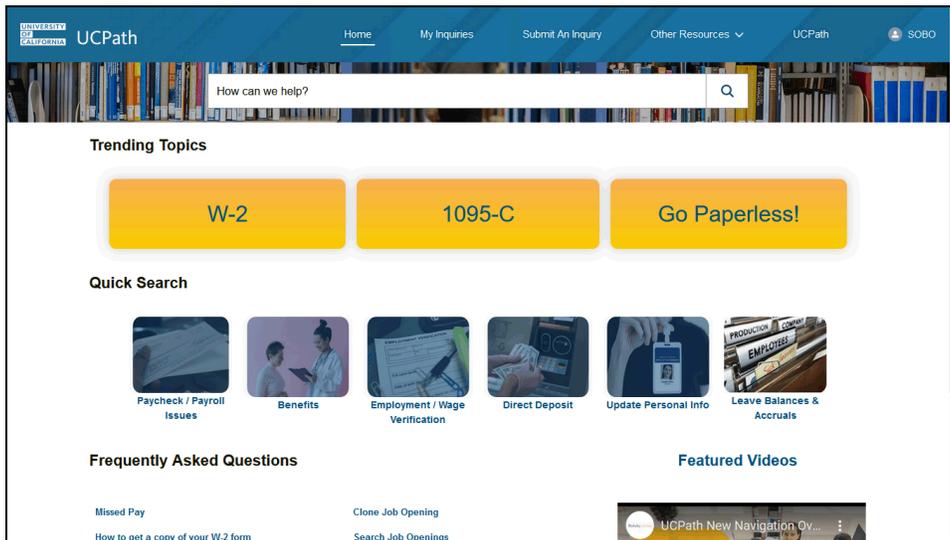
| Step | Action  |
|------|---|
| 17.  | For this example, let's search for both a topic and an employee's first name. Enter <b>service credit james</b> in the <b>How can we help?</b> field. |



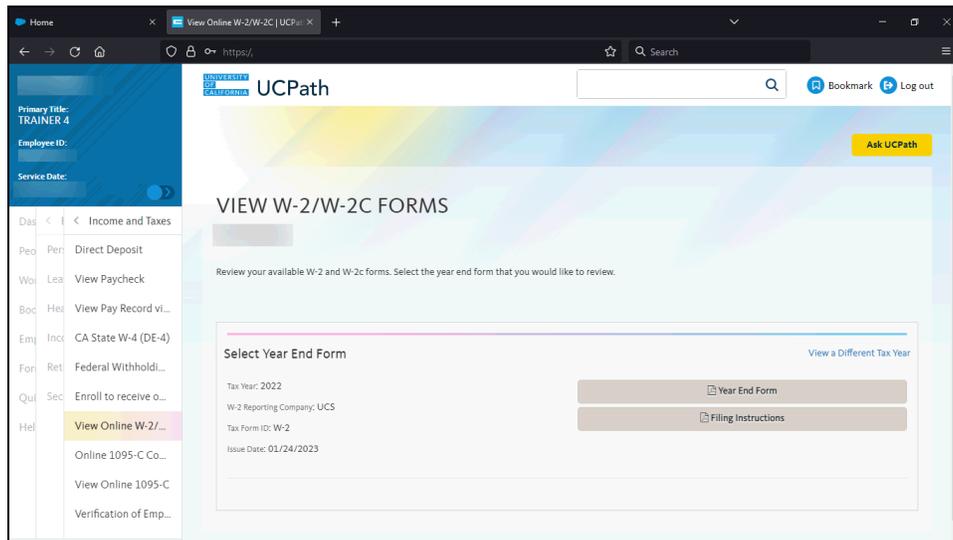
| Step | Action  |
|------|---|
| 18.  | Click the <b>Look Up</b> button.<br> |



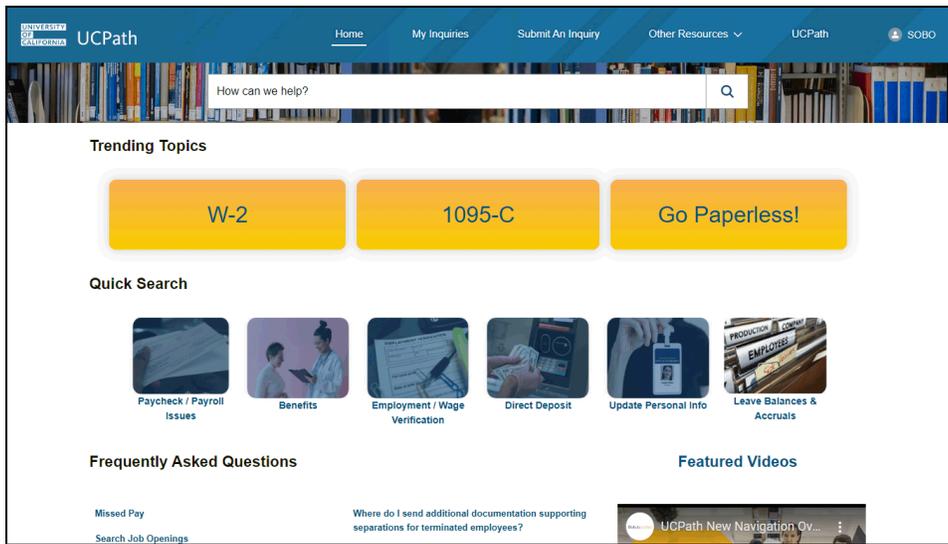
| Step | Action  |
|------|---|
| 19.  | For this example, the search results display a case that includes the topic of service credit and the name James.                                       |
| 20.  | To return to Ask UCPath homepage, click on the <b>Home</b> link.<br> |



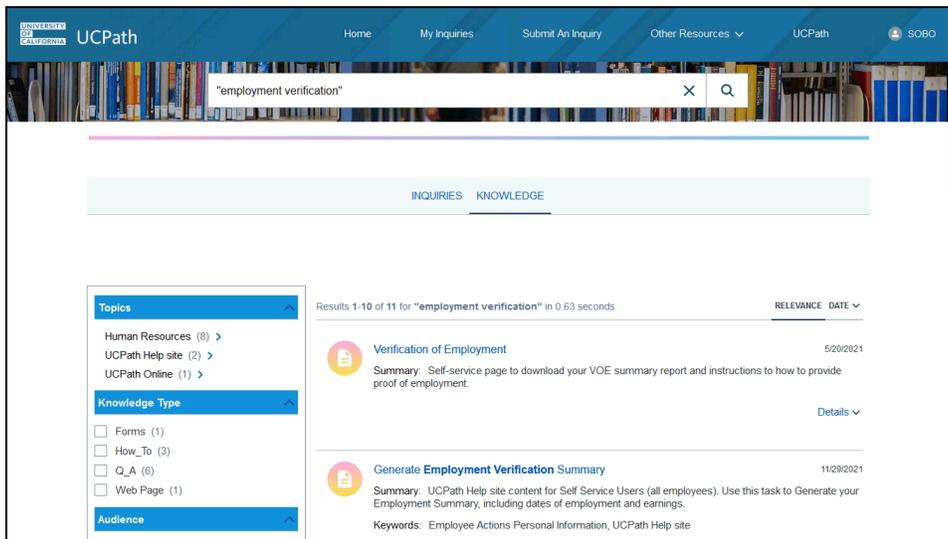
| Step | Action   |
|------|--|
| 21.  | <p>The <b>Trending Topics</b> section on the Ask UCPath homepage displays a list of topics that are currently popular or trending among users.</p> <p>By clicking on any of the trending topics, you can access additional information related to that topic.</p> <p>It's worth noting that the trending topics may change frequently, so it's a good idea to check back regularly to see if any new or updated resources are available.</p> |
| 22.  | <p>For this example, let's review the W-2 topic.</p> <p>Click on the <b>W-2</b> button.</p>    |



| Step | Action   |
|------|--|
| 23.  | <p>For this W-2 example, UCPath will open in a new browser tab, in which you may have to log in with your single sign-on credentials.</p> <p>You will be directed to the <b>View Online W-2/W-2C Forms</b> page on UCPath, where you can access an electronic version of your W-2 forms.</p> |
| 24.  | <p>To return to the Ask UCPath homepage, click on the <b>Ask UCPath</b> button.</p>   |

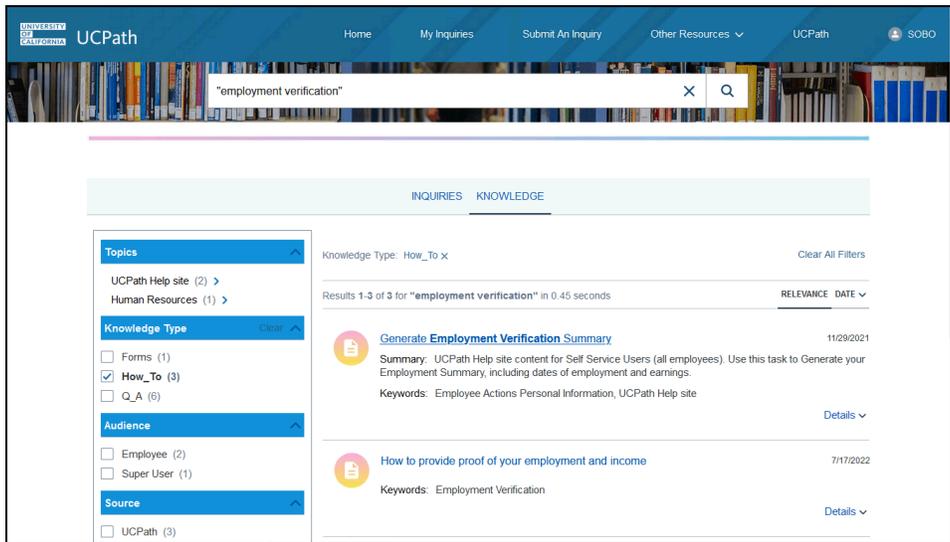


| Step | Action   |
|------|--|
| 25.  | The <b>Quick Search</b> section is designed to help users find information on the most commonly searched topics. |
| 26.  | For this example, click on the <b>Employment / Wage Verification</b> button.                                     |

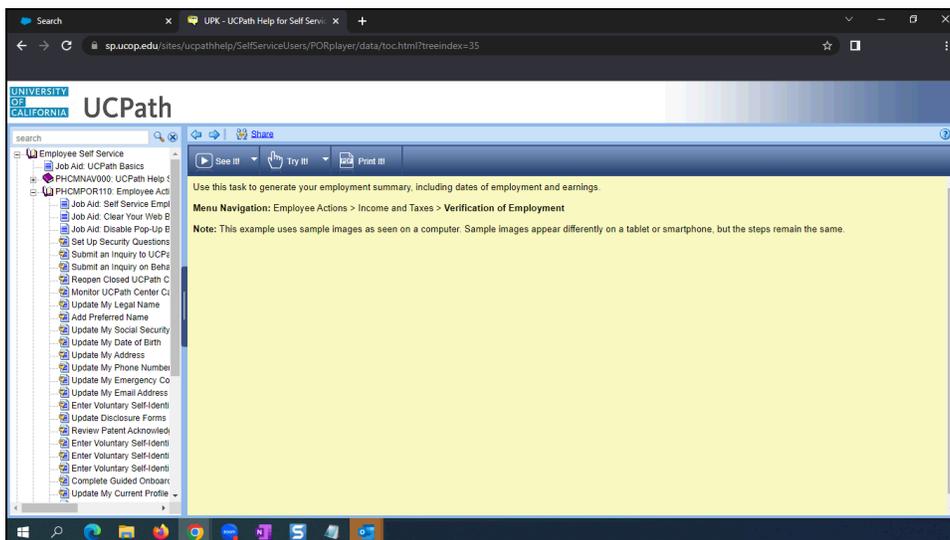


| Step | Action  |
|------|---|
| 27.  | The search results are listed under the <b>Knowledge</b> tab and provide a list of articles, forms, how-to tutorials, and web pages related to employment verification.<br><br>You can click on any of the links from the search results. |

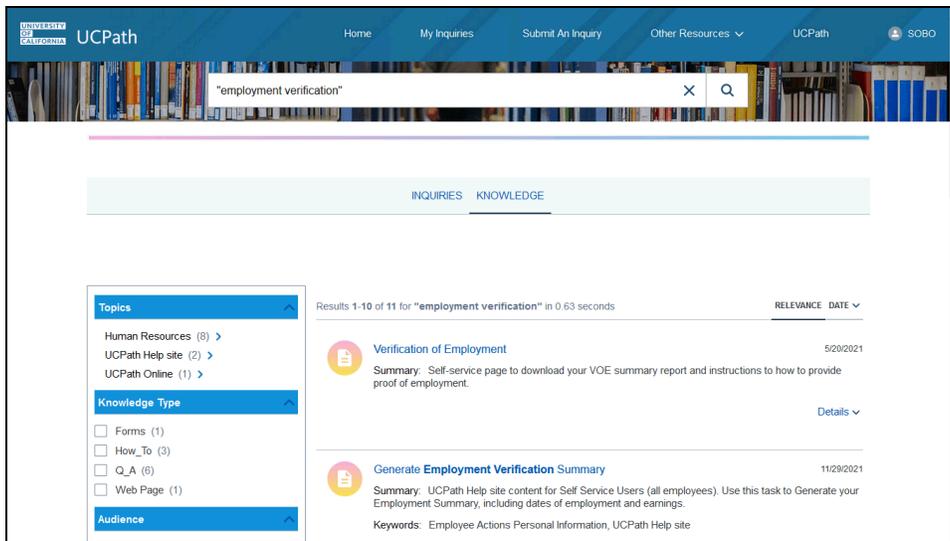
| Step | Action   |
|------|--|
| 28.  | <p>You can use any of the provided filters to further narrow down the search results.</p> <p>For this example, select the <b>How_To</b> check box to apply that filter.</p> <input type="checkbox"/> |



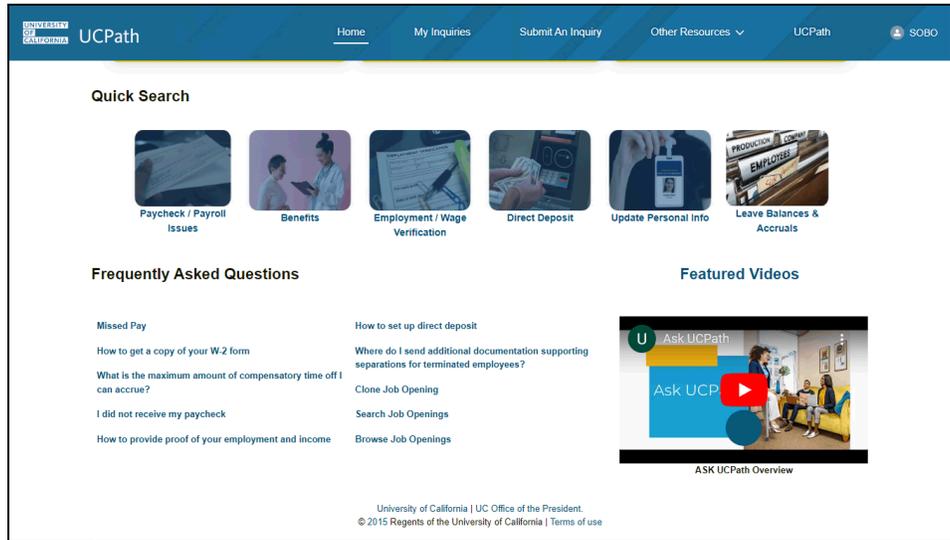
| Step | Action   |
|------|--|
| 29.  | <p>The search results were filtered to list the <b>How_To</b> resources related to employment verification.</p> <p>For this example, click on <b>Generate Employment Verification Summary</b>.</p> <p><a href="#">Generate Employment Verification Summary</a></p> |



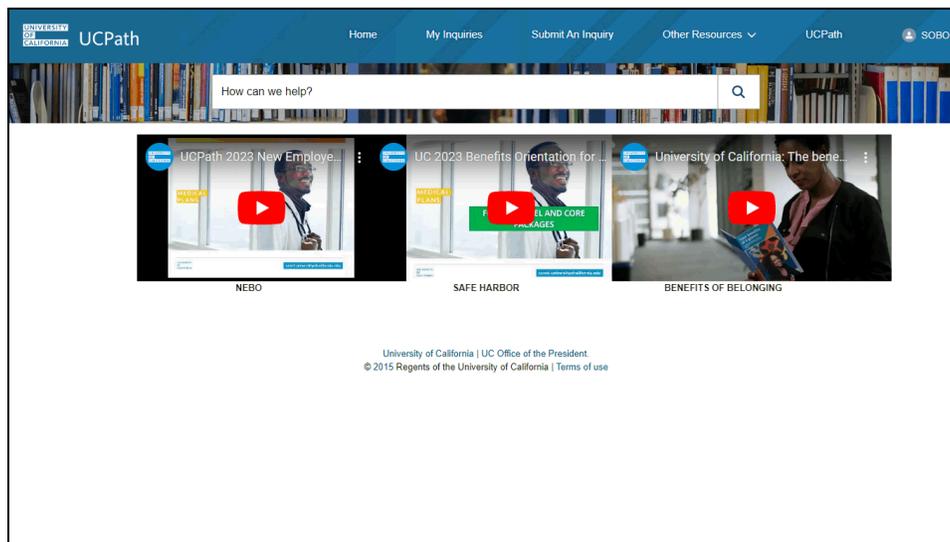
| Step | Action  |
|------|---|
| 30.  | <p>For this employment verification example, the <b>UCPath Help</b> site for Self Service Users will open in a new browser tab, in which you may have to log in with your single sign-on credentials.</p> <p>You will be provided access to a training simulation on how to <b>Generate Employment Verification Summary</b>.</p> <p>To return to the Ask UCPath homepage, click the <b>Close</b> button on the browser tab.</p>  |



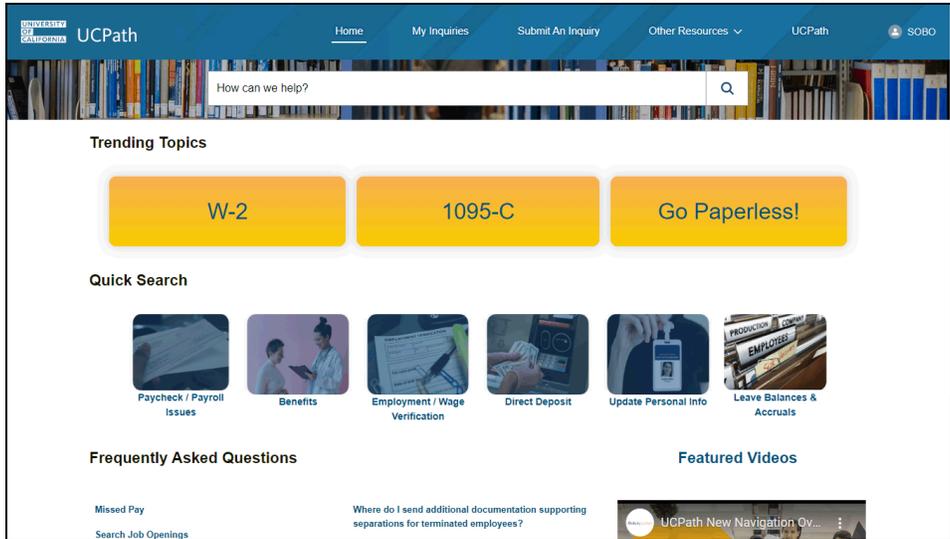
| Step | Action  |
|------|---|
| 31.  | <p>To return to the Ask UCPath homepage, click on the <b>Home</b> link.</p>  |
| 32.  | <p>Let's scroll to the bottom of the page.</p> <p>Click the scroll bar.</p>   |



| Step | Action   |
|------|--|
| 33.  | <p>The <b>Frequently Asked Questions</b> section lists the most commonly asked questions or topics based on current trends and user inquiries.</p> <p>By clicking on any of the links in the <b>Frequently Asked Questions</b> section, you can access additional information related to that topic.</p> |
| 34.  | <p>The <b>Featured Videos</b> section provides you access to videos on various topics.</p> <p>Click on the <b>Featured Videos</b> link to access additional videos.</p> <p><b>Featured Videos</b></p>  |



| Step | Action  |
|------|---|
| 35.  | <p>For this example, these are the videos that are currently available. The videos will change based on availability.</p> <p>Click on the <b>Home</b> link to return to the Ask UCPath home page.</p>  |



| Step | Action  |
|------|---|
| 36.  | <p>Now, let's return to the top toolbar and review the <b>Submit An Inquiry</b> section.</p> <p><b>Note:</b> You would use the same Submit An Inquiry link when submitting an inquiry for yourself and on behalf of an employee.</p> <p>Additionally, utilizing the resources available on the <b>Ask UCPath</b> site before submitting an inquiry can help you find the answer to your question more quickly.</p> <p>For this example, we will submit a payroll question for an employee.</p> <p>Click on the <b>Submit An Inquiry</b> link.</p>  |

The screenshot shows the 'Submit An Inquiry' page on the UCPath system. At the top, there is a navigation bar with 'Home', 'My Inquiries', 'Submit An Inquiry' (highlighted), 'Other Resources', and 'More'. Below the navigation bar, the page title is 'Submit An Inquiry'. There is a toggle switch for 'Employee ID / Name' with 'Employee ID' selected. Below this, there is a single text input field labeled '\*EMPLID'. A 'Next' button is located at the bottom right of the form area. At the bottom of the page, there is a footer with the text: 'University of California | UC Office of the President. Link http://ucop.edu/ © 2015 Regents of the University of California | Terms of use Link http://www.ucop.edu/terms/'

| Step | Action  |
|------|---|
| 37.  | <p>You will be redirected to the <b>Submit An Inquiry</b> page.</p> <p>Search for an employee by entering the employee ID in the <b>EMPLID</b> field.</p> <p><b>Note:</b> If you are submitting an inquiry for yourself, enter your employee ID in the <b>EMPLID</b> field.</p> |

The screenshot shows the 'Submit An Inquiry' page on the UCPath system. At the top, there is a navigation bar with 'Home', 'My Inquiries', 'Submit An Inquiry' (highlighted), 'Other Resources', and 'More'. Below the navigation bar, the page title is 'Submit An Inquiry'. There is a toggle switch for 'Employee ID / Name' with 'Name' selected. Below this, there are several input fields: '\*First Name', '\*Last Name', 'Select Business Unit' (a dropdown menu), and 'Department Name' (a search field with a magnifying glass icon). A 'Next' button is located at the bottom right of the form area. At the bottom of the page, there is a footer with the text: 'University of California | UC Office of the President. Link http://ucop.edu/ © 2015 Regents of the University of California | Terms of use Link http://www.ucop.edu/terms/'

| Step | Action   |
|------|--|
| 38.  | <p>You also have the option to search by name by clicking on the <b>Employee ID / Name</b> toggle button to enable the search fields.</p> <p><b>Note:</b> For the <b>First</b> and <b>Last</b> name fields, enter as many characters as possible to narrow down your search results.</p> |

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Submit an Inquiry on Behalf of Employee (SOBO)  
to UCPath

UNIVERSITY OF CALIFORNIA UCPath

Home My Inquiries Submit An Inquiry Other Resources More

Submit An Inquiry

Employee ID / Name  Employee ID

\* EMPLID

Next

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| Step | Action  |
|------|---|
| 39.  | For this example, enter <b>10003079</b> in the <b>EMPLID</b> field. |

UNIVERSITY OF CALIFORNIA UCPath

Home My Inquiries Submit An Inquiry Other Resources More

Submit An Inquiry

Employee ID / Name  Employee ID

\* EMPLID

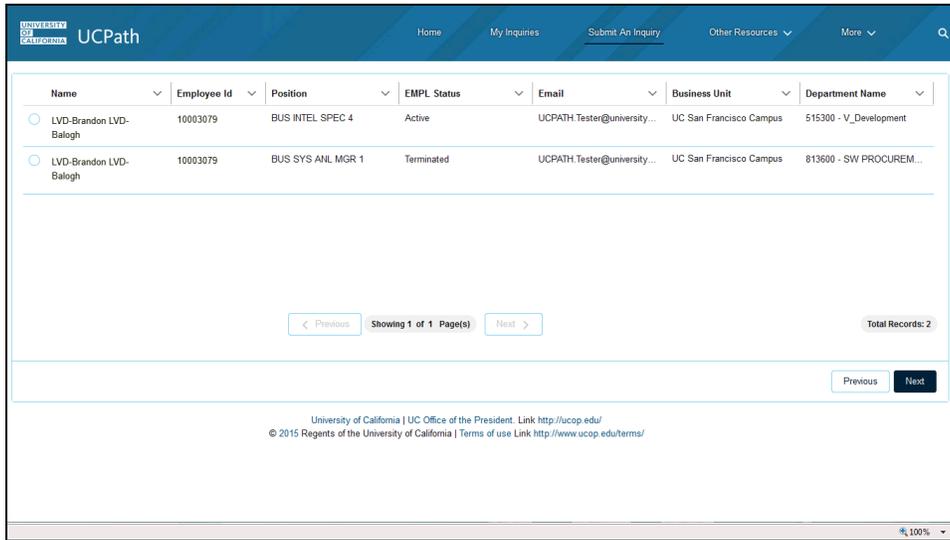
10003079

Next

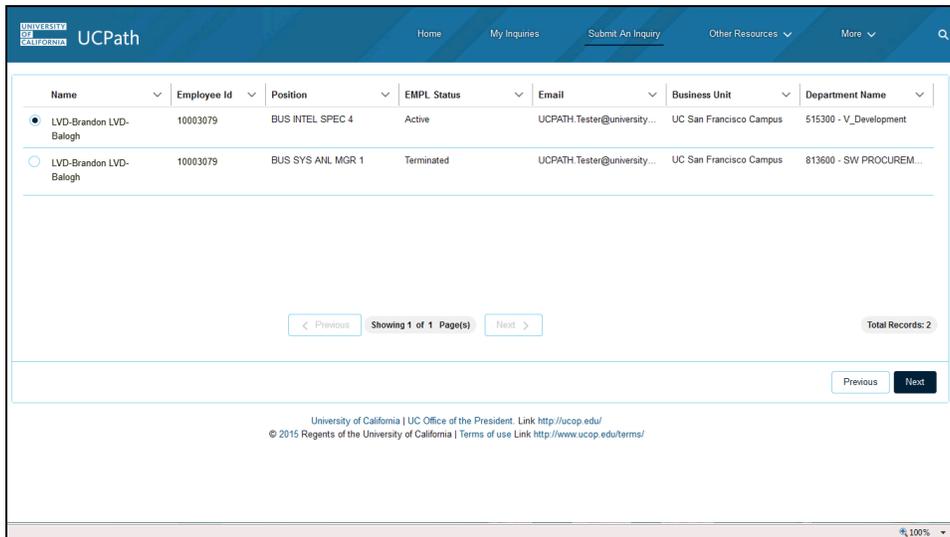
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| Step | Action                        |
|------|-------------------------------|
| 40.  | Click the <b>Next</b> button. |

Next



| Step | Action  |
|------|---|
| 41.  | <p>The search results will provide a list of all the employee records associated for the employee's ID.</p> <p>Since the inquiry is created under the employee ID it does not matter which employee record you select, they will each redirect you to the employee's open and closed inquiries page.</p> <p>Click the selection button next to the employee's name to proceed with submitting an inquiry.</p> |



| Step | Action   |
|------|--|
| 42.  | Click the <b>Next</b> button to continue.<br> |

**UCPath** Home My Inquiries Submit An Inquiry Other Resources More

Name: LVD-Brandon LVD-J LVD-Balogh  
Employee ID: 10003079

**These are Open and Closed Inquiries**

Is your question related to any of these? If yes please add your question/comment to your open inquiry or proceed with reopening your closed inquiry.

| OPEN INQUIRIES      |            |                          |                           | CLOSED INQUIRIES - ELIGIBLE TO REOPEN |            |                |                           |
|---------------------|------------|--------------------------|---------------------------|---------------------------------------|------------|----------------|---------------------------|
| Date/Time Opened    | CaseNumber | Topic                    | Subject                   | Date/Time Opened                      | CaseNumber | Topic          | Subject                   |
| 5/24/2024, 01:08 PM | 02614021   | Leave Balances           | vacation balance          | 6/02/2023, 05:00 PM                   | 02291151   | UCPath Online  | How can I get a copy...   |
| 5/23/2024, 03:23 PM | 02613991   | Payroll                  | How can I get a copy...   | 11/22/2023, 12:00 AM                  | 02378141   | Leave Balances | Backpay for 12/1/22 to... |
| 5/24/2024, 02:11 PM | 02614028   | Workforce Administrat... | Position End Date Up...   | 10/18/2023, 04:45 AM                  | 01836539   | Benefits       | vacation balance          |
| 5/24/2024, 02:12 PM | 02614029   | Workforce Administrat... | Position End Date Up...   | 9/29/2023, 02:55 AM                   | 01884635   | Payroll        | LACMP/FR.082 Refun...     |
| 3/27/2024, 02:03 PM | 02464407   | Benefits                 | Backpay for 12/1/22 to... | 10/08/2023, 08:55 AM                  | 01884636   | Payroll        | Backpay for 12/1/22 to... |

View All

**No, I need help with something else.**

Previous Submit An Inquiry

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| Step | Action  |
|------|---|
| 43.  | You will be redirected to the employee's Open and Closed Inquiries page.<br><br>It's important to review the employee's open and closed inquiries to determine if an inquiry has already been submitted for your question.<br><br><b>Note:</b> The ability to add a case comment, close or reopen inquiries is limited to the ones you have submitted on the employee's behalf. |

**UCPath** Home My Inquiries Submit An Inquiry Other Resources More

Name: LVD-Brandon LVD-J LVD-Balogh  
Employee ID: 10003079

**These are Open and Closed Inquiries**

Is your question related to any of these? If yes please add your question/comment to your open inquiry or proceed with reopening your closed inquiry.

| OPEN INQUIRIES      |            |                          |                           | CLOSED INQUIRIES - ELIGIBLE TO REOPEN |            |                |                           |
|---------------------|------------|--------------------------|---------------------------|---------------------------------------|------------|----------------|---------------------------|
| Date/Time Opened    | CaseNumber | Topic                    | Subject                   | Date/Time Opened                      | CaseNumber | Topic          | Subject                   |
| 5/24/2024, 01:08 PM | 02614021   | Leave Balances           | vacation balance          | 6/02/2023, 05:00 PM                   | 02291151   | UCPath Online  | How can I get a copy...   |
| 5/23/2024, 03:23 PM | 02613991   | Payroll                  | How can I get a copy...   | 11/22/2023, 12:00 AM                  | 02378141   | Leave Balances | Backpay for 12/1/22 to... |
| 5/24/2024, 02:11 PM | 02614028   | Workforce Administrat... | Position End Date Up...   | 10/18/2023, 04:45 AM                  | 01836539   | Benefits       | vacation balance          |
| 5/24/2024, 02:12 PM | 02614029   | Workforce Administrat... | Position End Date Up...   | 9/29/2023, 02:55 AM                   | 01884635   | Payroll        | LACMP/FR.082 Refun...     |
| 3/27/2024, 02:03 PM | 02464407   | Benefits                 | Backpay for 12/1/22 to... | 10/08/2023, 08:55 AM                  | 01884636   | Payroll        | Backpay for 12/1/22 to... |

View All

**No, I need help with something else.**

Previous Submit An Inquiry

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| Step | Action   |
|------|--|
| 44.  | Click <b>View All</b> to display the scroll bar and review all the employee's open and closed inquiries.   |
| 45.  | If you still need help with your question, you can proceed by clicking on <b>Submit An Inquiry</b> .<br><br><div style="text-align: center; border: 1px solid black; padding: 5px; width: fit-content; margin: 0 auto;"> <span style="background-color: #004a7c; color: white; padding: 5px 15px; border-radius: 3px;">Submit An Inquiry</span> </div> |

| Step | Action                                    |
|------|---|
| 46.  | You will be directed to the inquiry form. |

| Step | Action   |
|------|--|
| 47.  | The employee's <b>Name</b> and <b>Employee ID</b> appear in the left corner of the form and remain on the page as you complete your inquiry. If you are submitting an inquiry for yourself, your <b>Name</b> and <b>Employee ID</b> will be displayed. |

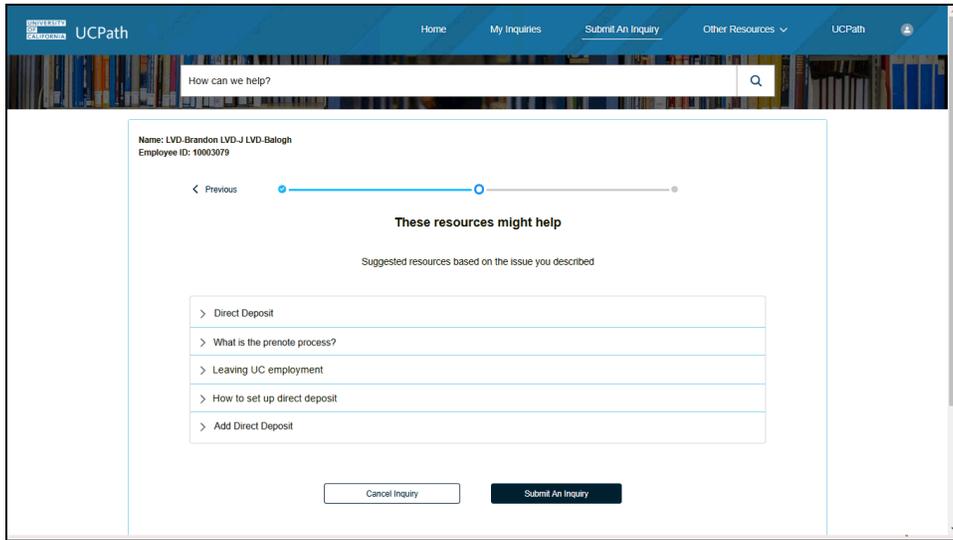
| Step | Action  |
|------|---|
| 48.  | If at any point you decide not to submit a case, you can select the <b>Cancel Inquiry</b> option to exit the process and return to the Ask UCPath homepage. |

| Step | Action  |
|------|---|
| 49.  | <p>Let's continue with the case submission. Begin by entering what UCPath can assist you with.</p> <p>For this example, type <b>Employee's direct deposit start date</b>.</p> |

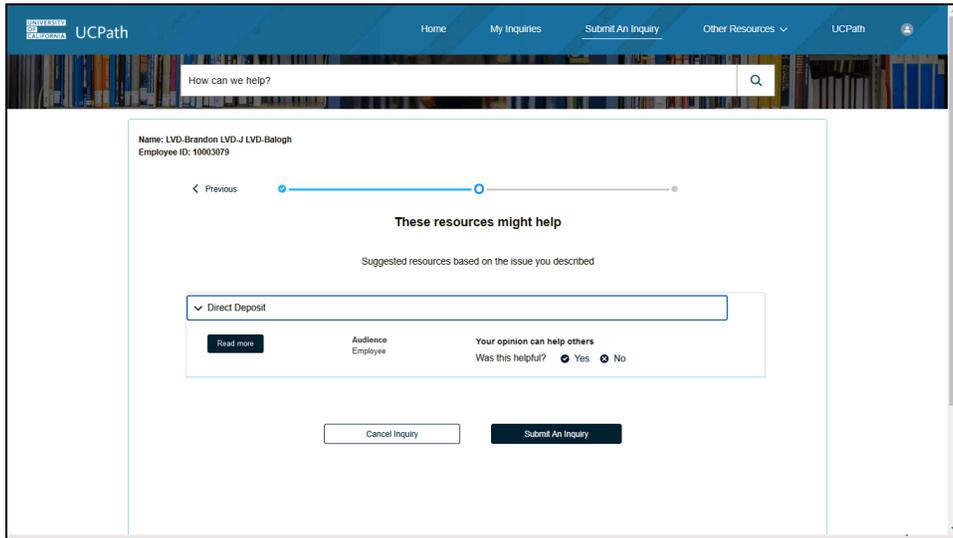
| Step | Action  |
|------|---|
| 50.  | Click in the <b>Description</b> field.  |
| 51.  | <p>Next, you'll want to provide a detailed description of your issue. If you do not know what to write, there are tips located beneath the description box.</p> <p>For this example, enter <b>Only one of the employee's two active direct deposits happened on his last check. Why didn't the direct deposit to his savings account also happen?</b></p> |

| Step | Action  |
|------|---|
| 52.  | <p>Once you have provided a detailed description, the progress indicator will change to green, accompanied by a check mark.</p> <p><b>Note:</b> You can still submit your inquiry if the progress indicator does not turn green, but we encourage you to provide as much information as possible to ensure proper handling of your inquiry.</p> |

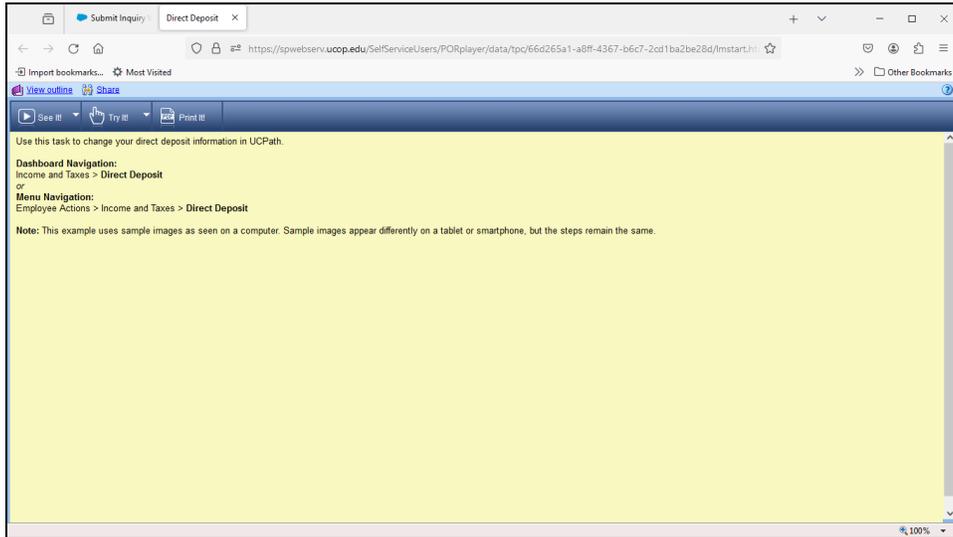
| Step | Action  |
|------|---|
| 53.  | <p>Once you have completed all the fields, click on <b>Next</b> to continue.</p> <div style="text-align: center; margin-top: 10px;">  </div> |



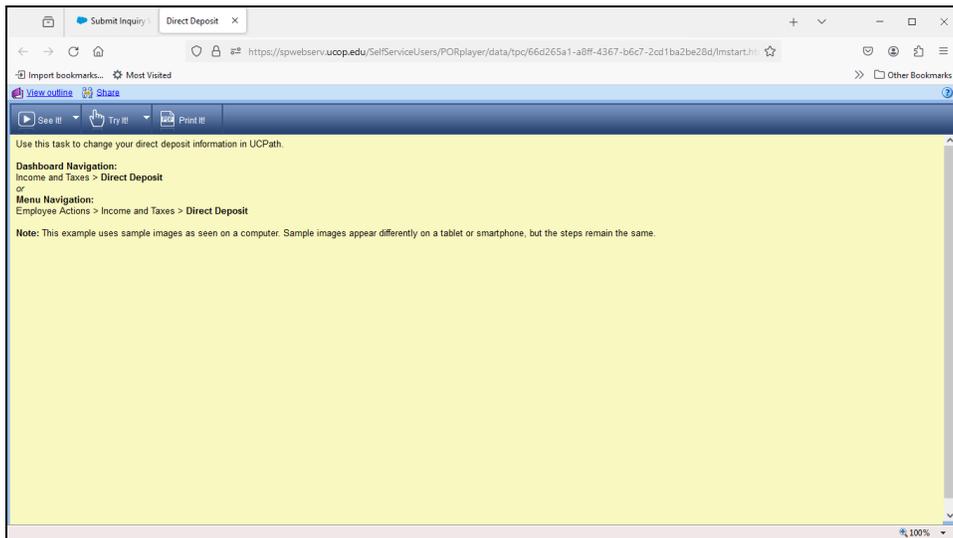
| Step | Action  |
|------|---|
| 54.  | <p>You will then be redirected to the resources page.</p> <p>Based on the information you provided, suggested resources will populate to assist you in resolving your question.</p> <p>Select the name of the resource you would like to view.</p> <p>For this example, select <b>Direct Deposit</b>.</p> |



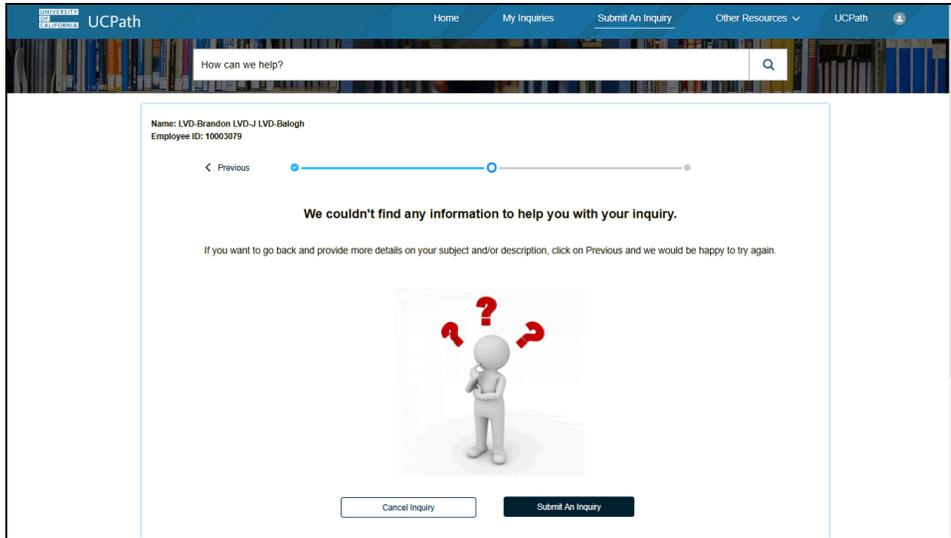
| Step | Action  |
|------|---|
| 55.  | Click <b>Read more</b> .<br> |



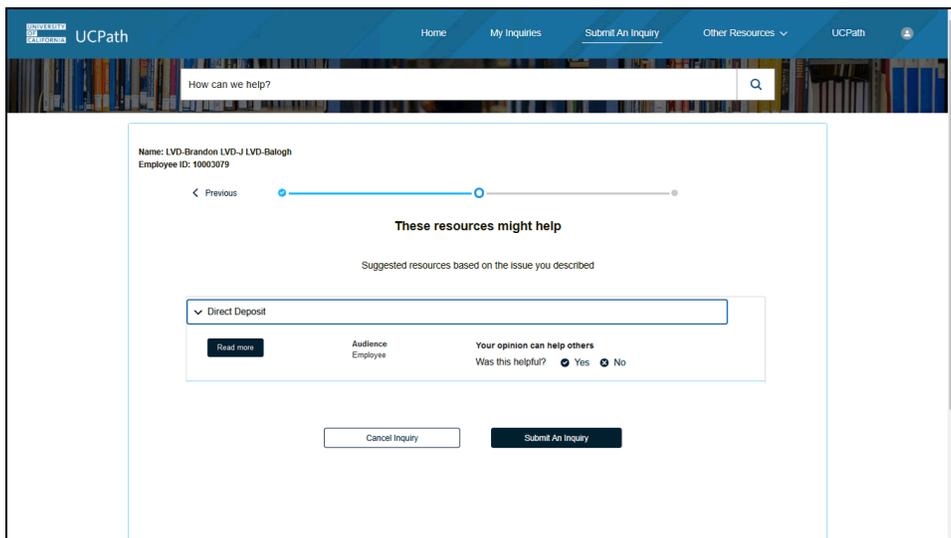
| Step | Action  |
|------|---|
| 56.  | The selected resource will open in a new browser tab. |



| Step | Action  |
|------|---|
| 57.  | <p>When you are finished reviewing the resource, you can go back to the Submit An Inquiry tab.</p> <p>Click on the <b>X</b> to close out your current tab.</p> <p>✕</p> |



| Step | Action   |
|------|--|
| 58.  | <p><b>Note:</b> If there are no resources related to your question, you will see this page. You may choose to go back and provide additional details in your description.</p> <p>For this example, we will proceed with submitting an inquiry.</p> |



| Step | Action  |
|------|---|
| 59.  | Click <b>Submit an Inquiry</b> .<br><br> |

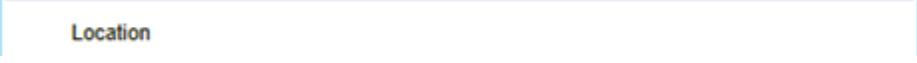
| Step | Action  |
|------|---|
| 60.  | Your <b>Best Contact Email</b> and <b>Phone Number</b> automatically default from your record. You can update them by clicking in the fields.<br><br><b>Note:</b> The phone number field is a text field that will not format with dashes or slashes. |

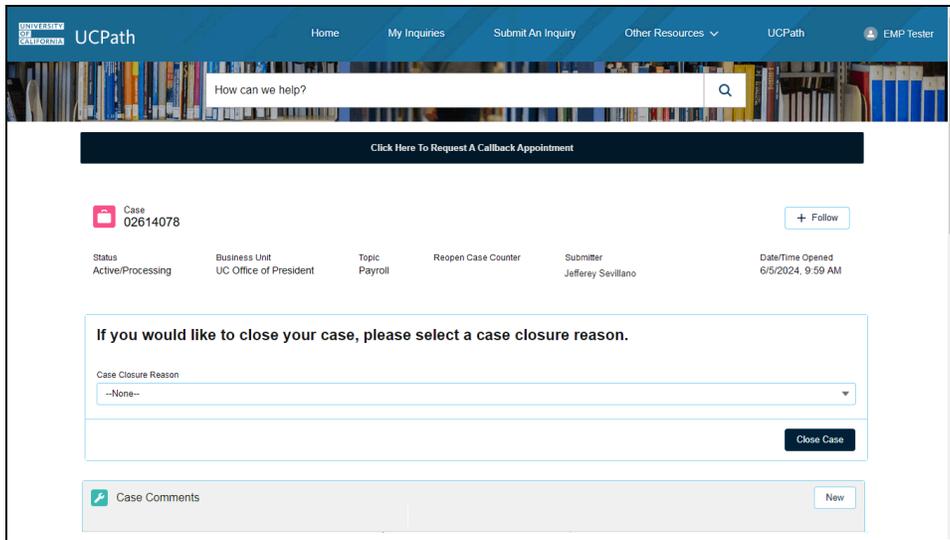
| Step | Action  |
|------|---|
| 61.  | <p>The <b>Is this a QCU Case</b> checkbox will appear for authorized QCU submitters, based on the subject and description of your inquiry related to payroll and benefits.</p> <p><b>Note:</b> This checkbox should only be selected for the following reasons:</p> <p><b>QCU Escalation Reasons:</b></p> <ul style="list-style-type: none"> <li>- Urgent issue with Payroll file prior to Pay Confirm</li> <li>- Stop pay line before pay confirm to avoid overpayment</li> <li>- Check or ACH pull from bank file to avoid gross overpayment</li> <li>- Missed pay resulting in financial hardship for an employee</li> <li>- Cancel off-cycle request or retro payment trigger to avoid overpayment</li> <li>- Expedite off-cycles submitted &gt;3 days ago and urgent processing is needed</li> <li>- Benefits terminated in error</li> </ul> |

| Step | Action  |
|------|---|
| 62.  | <p>The <b>WFA Escalation</b> checkbox will appear based on the subject and description of your inquiry.</p> <p>Select the <b>WFA Escalation</b> checkbox if your inquiry requires escalation based on the following reasons:</p> <p><b>WFA Escalation Reasons:</b></p> <ul style="list-style-type: none"> <li>- Time sensitive transaction that affect the current pay period and cause pay and/or benefits impacts</li> <li>- Hire Date change that will prevent a pay and/or benefit impact</li> <li>- Request to cancel a transaction that will cause a pay and/or benefit impact</li> <li>- Cases previously submitted with the Topic: Workforce Administration, Category: Quality Care Unit</li> </ul> |

| Step | Action  |
|------|---|
| 63.  | Click the button to the right of the <b>Requested By</b> field. |

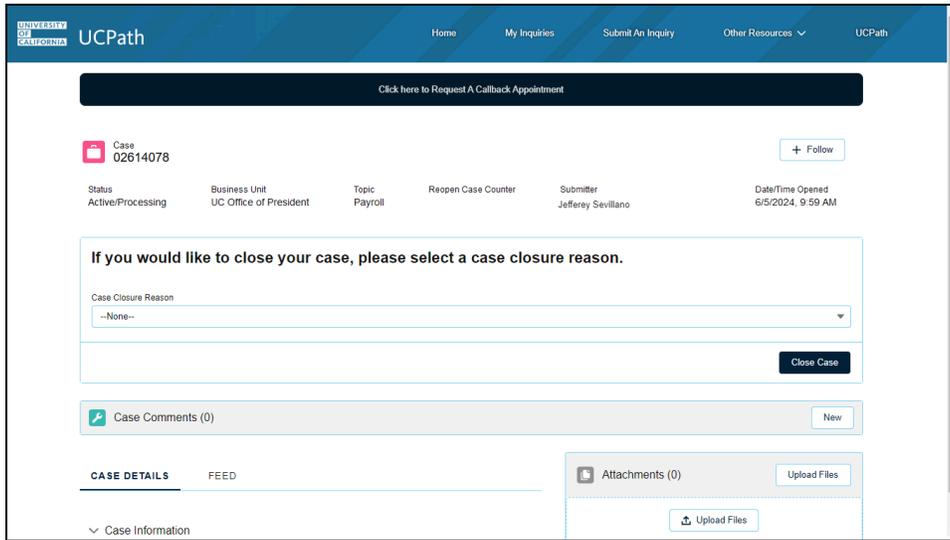
| Step | Action   |
|------|--|
| 64.  | Select the option that best describes your association to the employee.<br><br><b>Note:</b> If you are submitting a inquiry for yourself, select <b>Employee</b> in the <b>Requested By</b> field. |

| Step | Action   |
|------|--|
| 65.  | For this example, click the <b>Location</b> list item.<br>   |
| 66.  | By default, the <b>Do Not Notify</b> checkbox is selected, which means the employee will not receive notifications and cannot view the inquiry in UCPath.<br><br>To enable notifications and allow the inquiry to be viewed, deselect the checkbox.      |
| 67.  | You have the option to upload or drag and drop files. Attachments can be included when submitting on behalf of others and can also be added to an inquiry after submission.<br><br>Accepted formats include MS Office suite, PDF, JPG, TIFF, PNG or WAV. |
| 68.  | Click the <b>Submit Inquiry</b> button.<br>   |



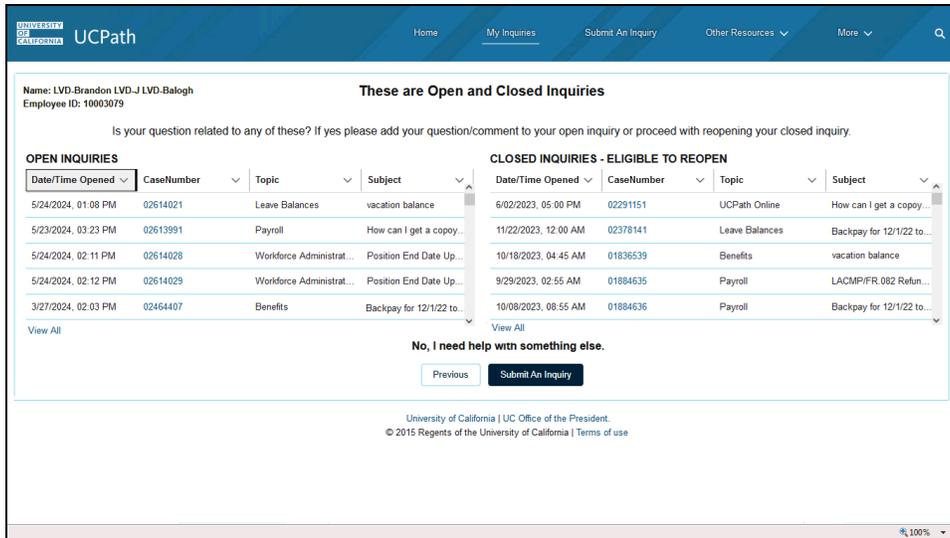
| Step | Action  |
|------|---|
| 69.  | After submitting your inquiry, you will see the case details page confirming your submission. |

**UCPath Task:**  
**Submit an Inquiry on Behalf of Employee (SOBO)**  
**to UCPath**

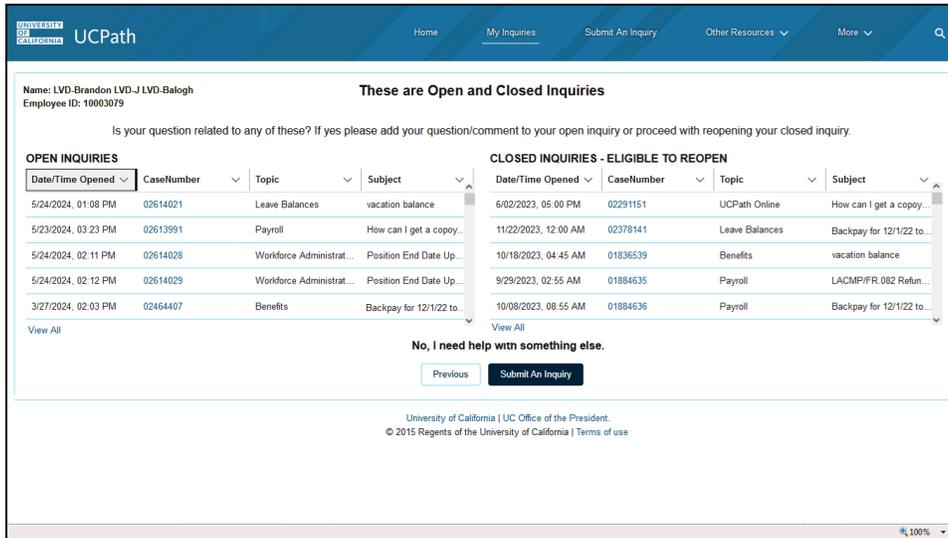


| Step | Action                                 |
|------|--|
| 70.  | Click on the <b>My Inquiries</b> link. |

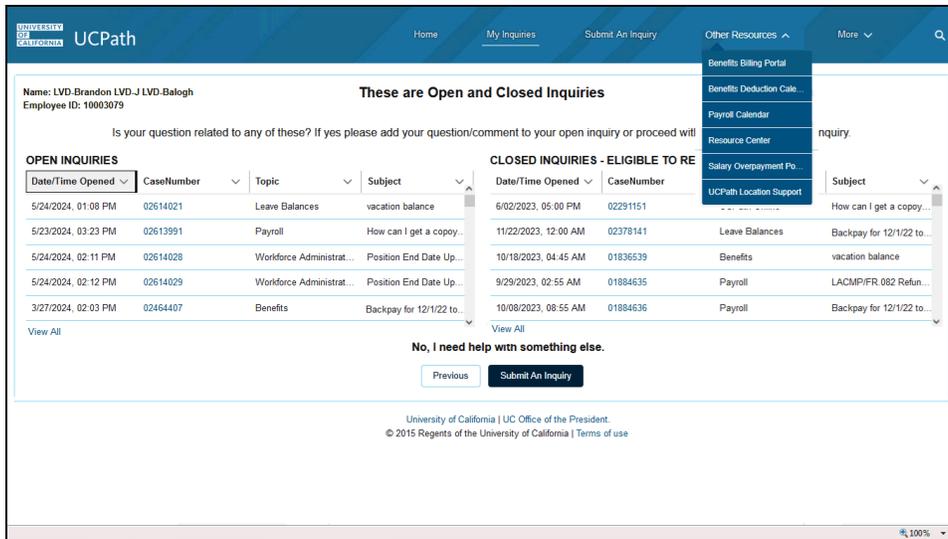




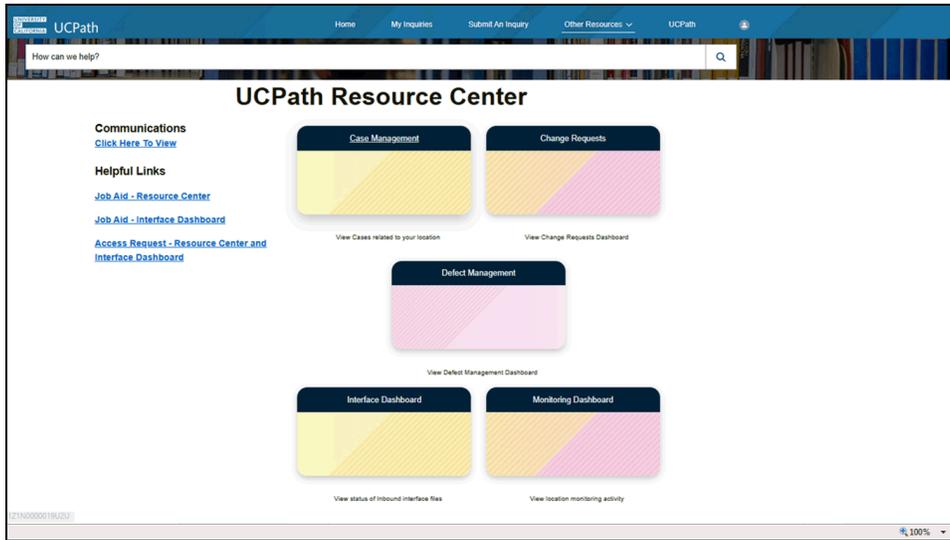
| Step | Action   |
|------|--|
| 71.  | On the <b>My Inquiries</b> page, you can access a list of all the inquiries you are associated with. |



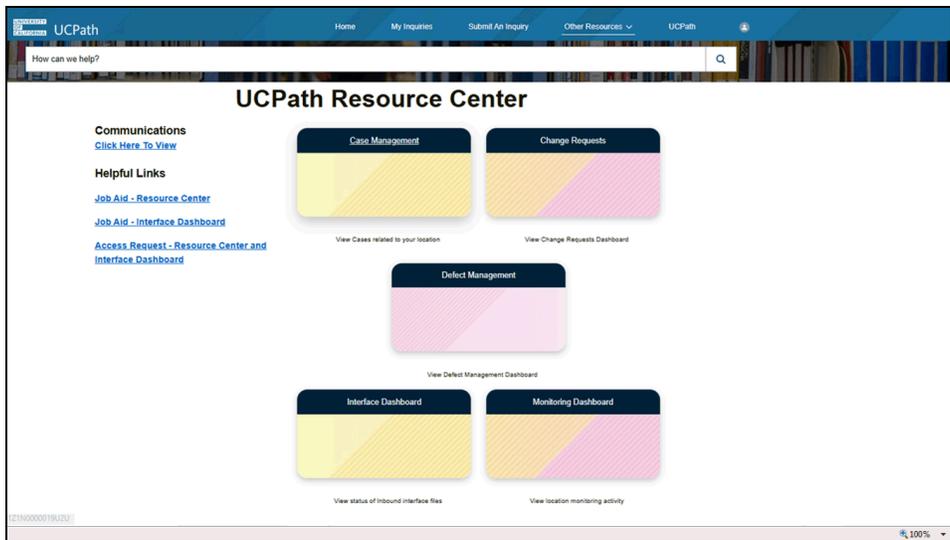
| Step | Action  |
|------|---|
| 72.  | <p>Let's review additional tools available for location submitters.</p> <p>Click on the <b>Other Resources</b> link.</p> <p><a href="#">Other Resources</a> ▾</p> |



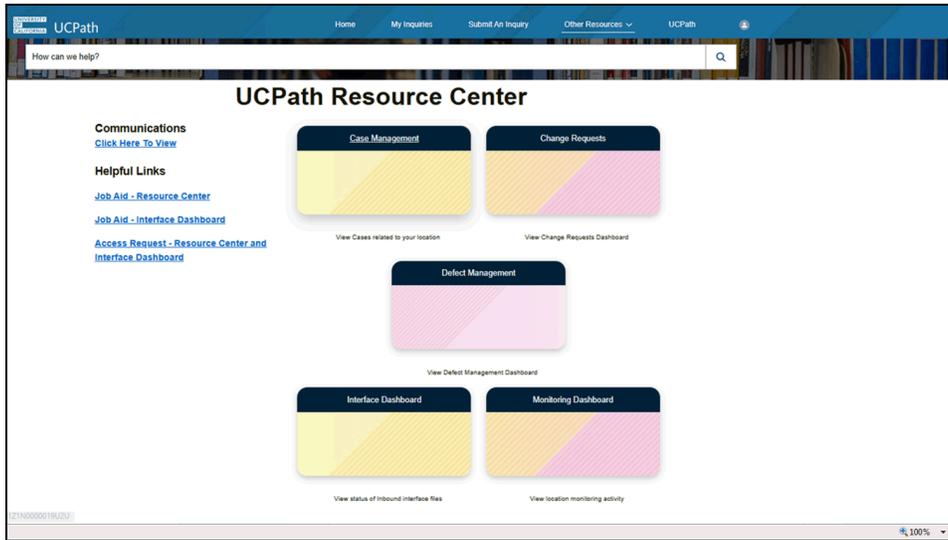
| Step | Action  |
|------|---|
| 73.  | <p>Click on the <b>Resource Center</b> link.</p> <p><a href="#">Resource Center</a></p> |



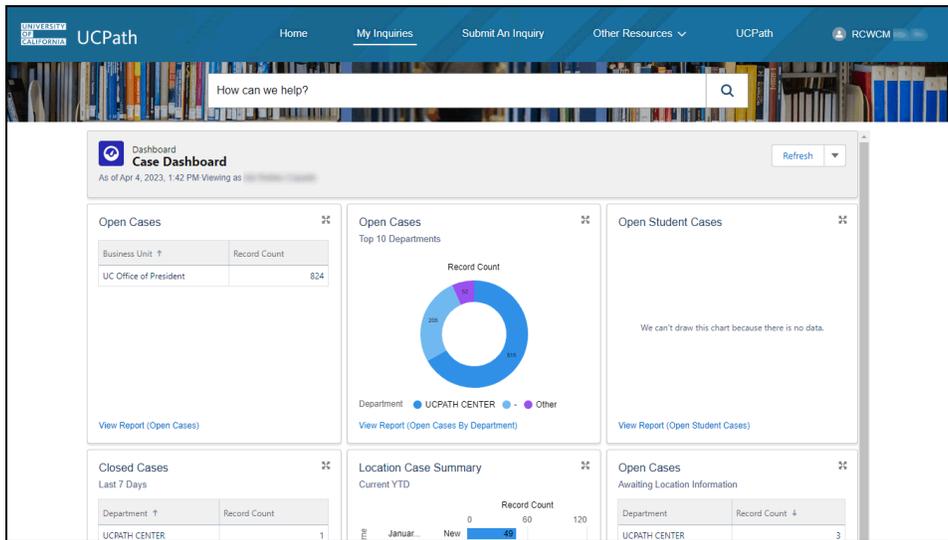
| Step | Action   |
|------|--|
| 74.  | <p>You are directed to the <b>UCPath Resource Center</b>.</p> <p>The <b>UCPath Resource Center</b> is a central hub for tools and documentation related to UCPath. It is designed for location central teams and transactors to access essential UCPath information.</p> |

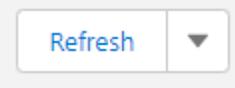


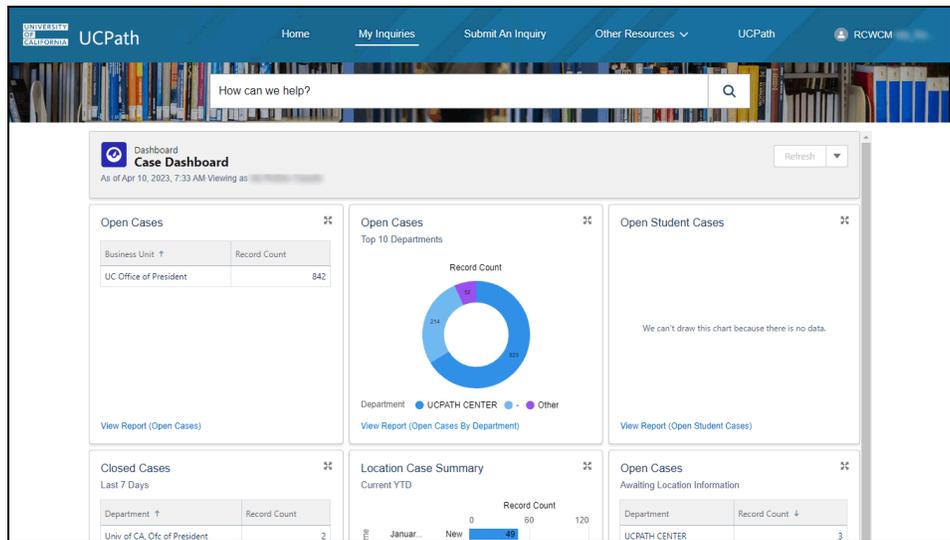
| Step | Action   |
|------|--|
| 75.  | <p>Use the links on the left to access Location-impacting UCPath communications as well as job aids for navigating the <b>Resource Center</b>.</p> |



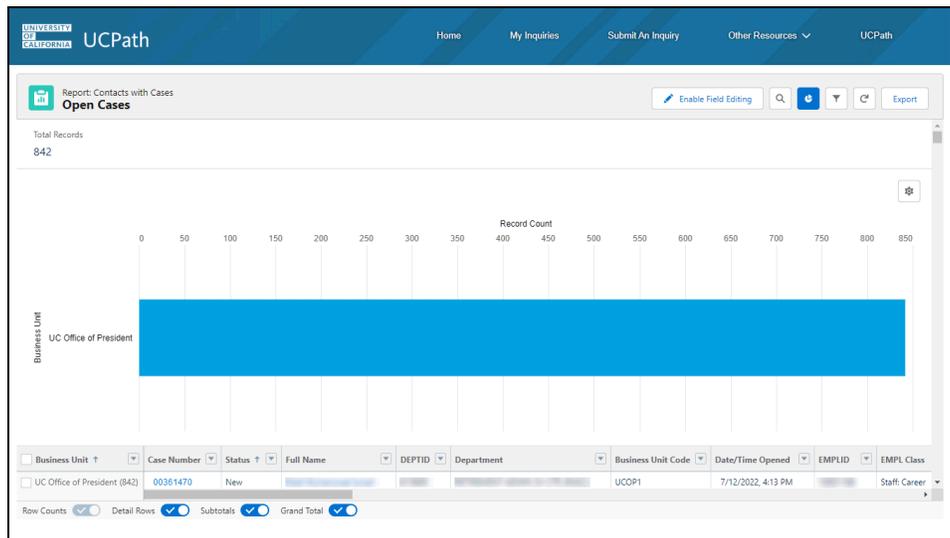
| Step | Action  |
|------|---|
| 76.  | Click the <b>Case Management</b> link.<br> |



| Step | Action   |
|------|--|
| 77.  | You are directed to the <b>Case Dashboard</b> . The <b>Case Dashboard</b> will provide you with access to view all the cases you are associated with.<br><br>Click on the <b>Refresh</b> button to get the most current data.<br> |



| Step | Action  |
|------|---|
| 78.  | Click the <b>View Report (Open Cases)</b> link.<br><br><a href="#">View Report (Open Cases)</a> |



| Step | Action  |
|------|---|
| 79.  | The <b>Open Cases</b> report will display a list of all the cases you are associated with.<br><br>For this example, we will remove the graph. Click on the <b>Toggle Chart</b> button.<br><br> |

Report: Contacts with Cases  
Open Cases

| Business Unit | Case Number | Status                  | Full Name | DEPTID | Department              | Business Unit Code | Date/Time Opened    | EMPLID | EMPL Class   | Union             |
|---------------|-------------|-------------------------|-----------|--------|-------------------------|--------------------|---------------------|--------|--------------|-------------------|
|               | 01325283    | Awaiting Third Party In |           | 816200 | LOCAL HR SRVCS          | UCOP1              | 7/21/2022, 7:27 AM  |        | Staff Career | Non-Re            |
|               | 00361470    | New                     |           | 830300 | UCPATH CENTER           | UCOP1              | 7/21/2022, 8:20 AM  |        | Staff Career | Clerical Services |
|               | 00731950    | Pending Closure         |           | 814100 | TECHNOLOGY DELIVERY SVS | UCOP1              | 7/21/2022, 8:28 AM  |        | Staff Career | Non-Re            |
|               | 01323375    | Active/Processing       |           | -      | -                       | -                  | 7/21/2022, 8:39 AM  |        | -            | -                 |
|               | 01325492    | Active/Processing       |           | -      | -                       | -                  | 7/21/2022, 9:24 AM  |        | -            | -                 |
|               | 01325541    | Active/Processing       |           | -      | -                       | -                  | 7/21/2022, 9:40 AM  |        | -            | -                 |
|               | 01325549    | Active/Processing       |           | -      | -                       | -                  | 7/21/2022, 9:45 AM  |        | -            | -                 |
|               | 01325663    | New                     |           | 814100 | TECHNOLOGY DELIVERY SVS | UCOP1              | 7/21/2022, 10:41 AM |        | Staff Career | Non-Re            |
|               | 01325725    | Active/Processing       |           | -      | -                       | -                  | 7/21/2022, 11:12 AM |        | -            | -                 |
|               | 01325751    | Active/Processing       |           | -      | -                       | -                  | 7/21/2022, 11:23 AM |        | -            | -                 |

Row Counts  Detail Rows  Subtotals  Grand Total

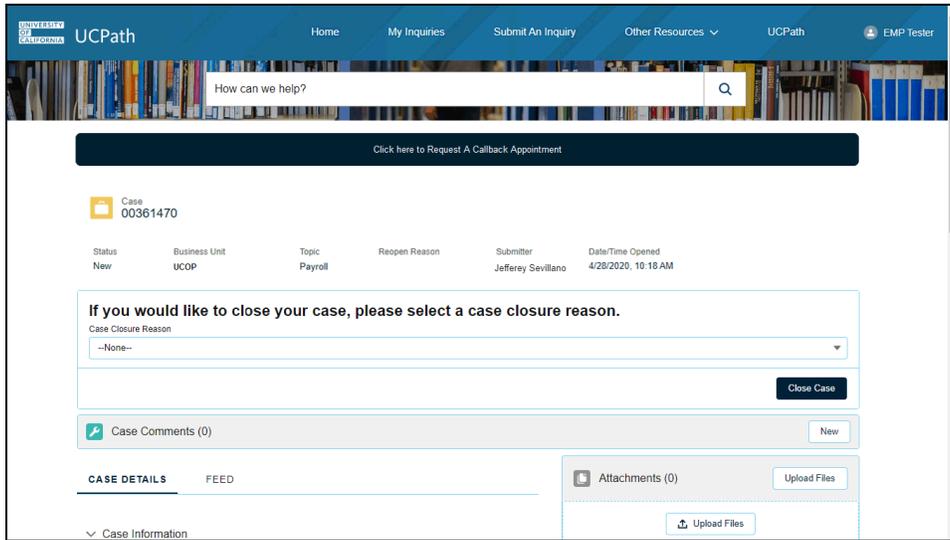
| Step | Action   |
|------|--|
| 80.  | You can also use the <b>Search</b> button to narrow your search by entering any data from the report columns, such as a <b>Case Number</b> , <b>Full Name</b> or <b>EMPLID</b> . |

Report: Contacts with Cases  
Open Cases

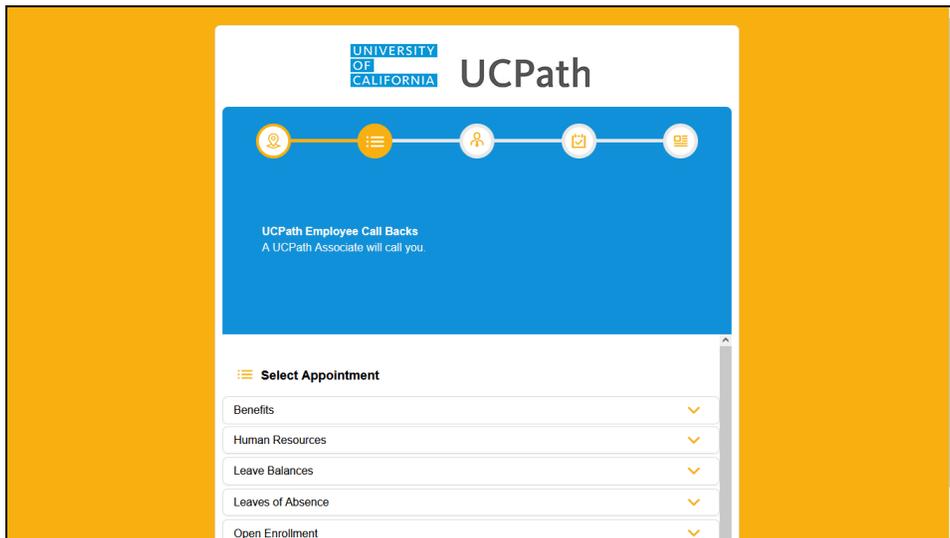
| Business Unit | Case Number | Status                  | Full Name | DEPTID | Department              | Business Unit Code | Date/Time Opened    | EMPLID | EMPL Class   | Union             |
|---------------|-------------|-------------------------|-----------|--------|-------------------------|--------------------|---------------------|--------|--------------|-------------------|
|               | 01325283    | Awaiting Third Party In |           | 816200 | LOCAL HR SRVCS          | UCOP1              | 7/21/2022, 7:27 AM  |        | Staff Career | Non-Re            |
|               | 00361470    | New                     |           | 830300 | UCPATH CENTER           | UCOP1              | 7/21/2022, 8:20 AM  |        | Staff Career | Clerical Services |
|               | 00731950    | Pending Closure         |           | 814100 | TECHNOLOGY DELIVERY SVS | UCOP1              | 7/21/2022, 8:28 AM  |        | Staff Career | Non-Re            |
|               | 01323375    | Active/Processing       |           | -      | -                       | -                  | 7/21/2022, 8:39 AM  |        | -            | -                 |
|               | 01325492    | Active/Processing       |           | -      | -                       | -                  | 7/21/2022, 9:24 AM  |        | -            | -                 |
|               | 01325541    | Active/Processing       |           | -      | -                       | -                  | 7/21/2022, 9:40 AM  |        | -            | -                 |
|               | 01325549    | Active/Processing       |           | -      | -                       | -                  | 7/21/2022, 9:45 AM  |        | -            | -                 |
|               | 01325663    | New                     |           | 814100 | TECHNOLOGY DELIVERY SVS | UCOP1              | 7/21/2022, 10:41 AM |        | Staff Career | Non-Re            |
|               | 01325725    | Active/Processing       |           | -      | -                       | -                  | 7/21/2022, 11:12 AM |        | -            | -                 |
|               | 01325751    | Active/Processing       |           | -      | -                       | -                  | 7/21/2022, 11:23 AM |        | -            | -                 |

Row Counts  Detail Rows  Subtotals  Grand Total

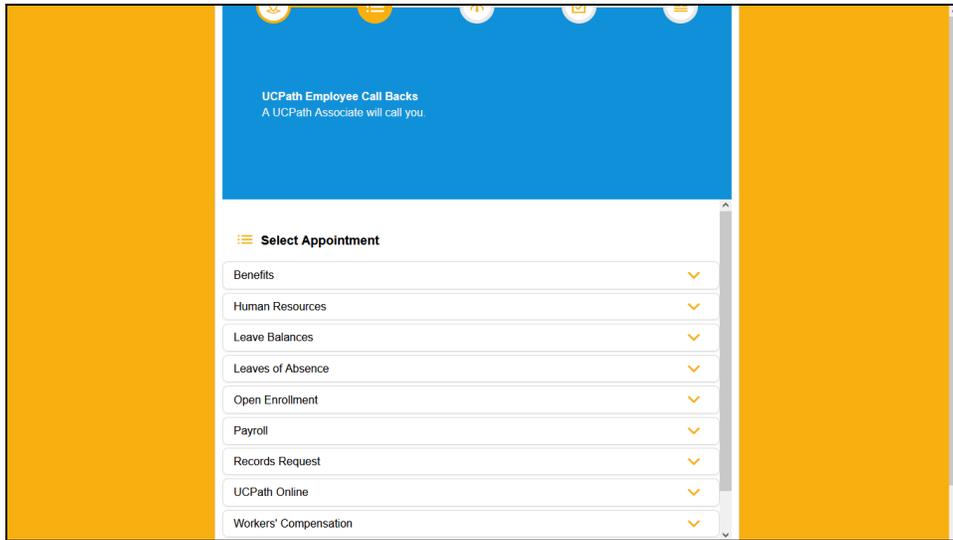
| Step | Action   |
|------|--|
| 81.  | <p>After submitting an inquiry, you have the option to request an appointment to speak with a UCPath Associate.</p> <p>Click the <b>Case Number 00361470</b> link to request a callback appointment.</p> <p><a href="#">00361470</a></p> |



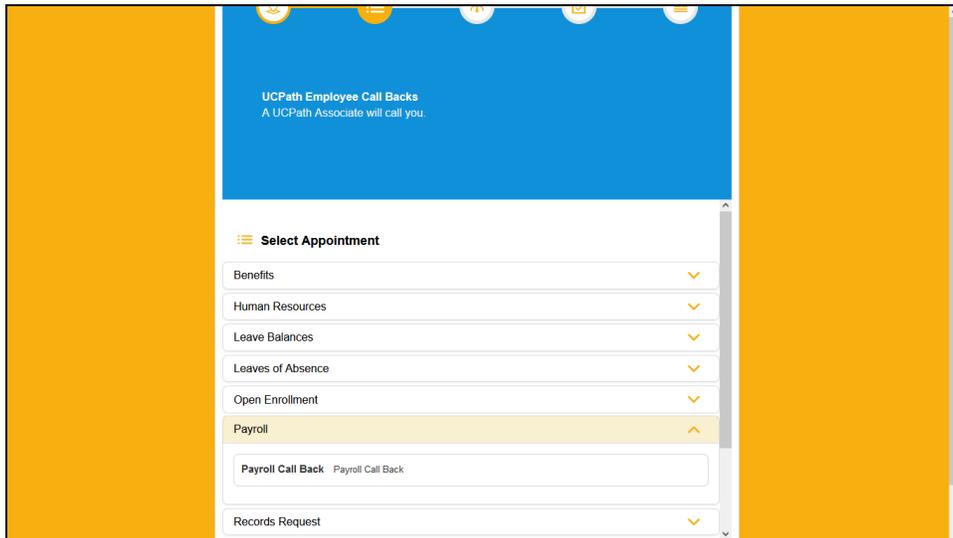
| Step | Action   |
|------|--|
| 82.  | <p>You can make an appointment for yourself or for the person you have submitted the case on behalf of.</p> <p>When you click this button, a new tab opens with the callback appointment request page. The current tab remains open to easily access the case number and the employee's ID for the appointment request.</p> <p>Click the <b>Click here to Request A Callback Appointment</b> button.</p> |



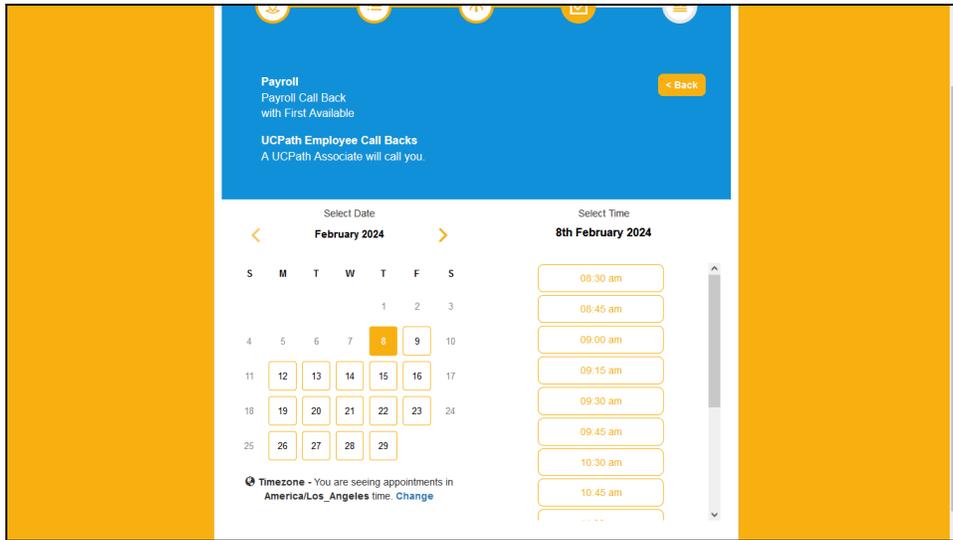
| Step | Action  |
|------|---|
| 83.  | <p>Choose the topic that best fits the nature of your inquiry.</p> <p>Click the scroll bar.</p> |



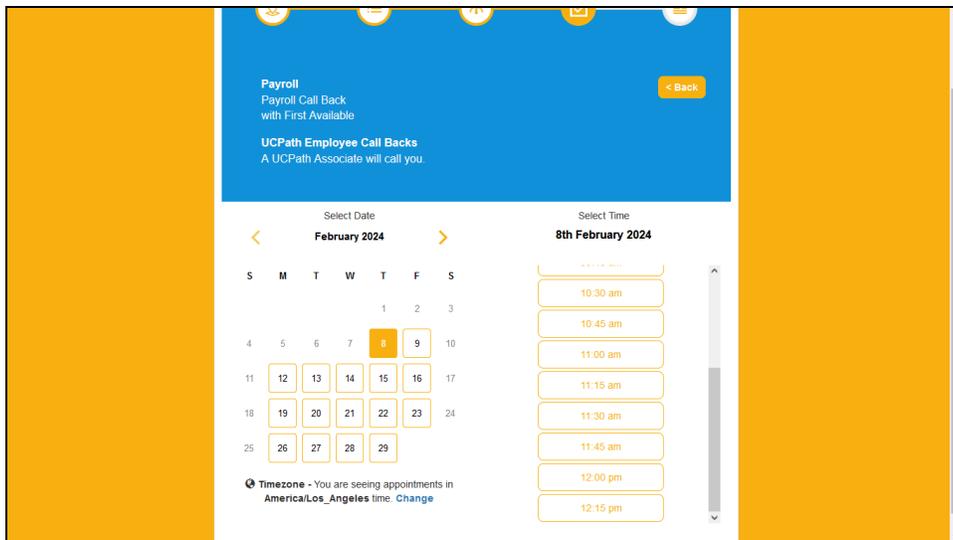
| Step | Action  |
|------|---|
| 84.  | Click the button to the right of the <b>Payroll</b> topic.<br><br>▼ |



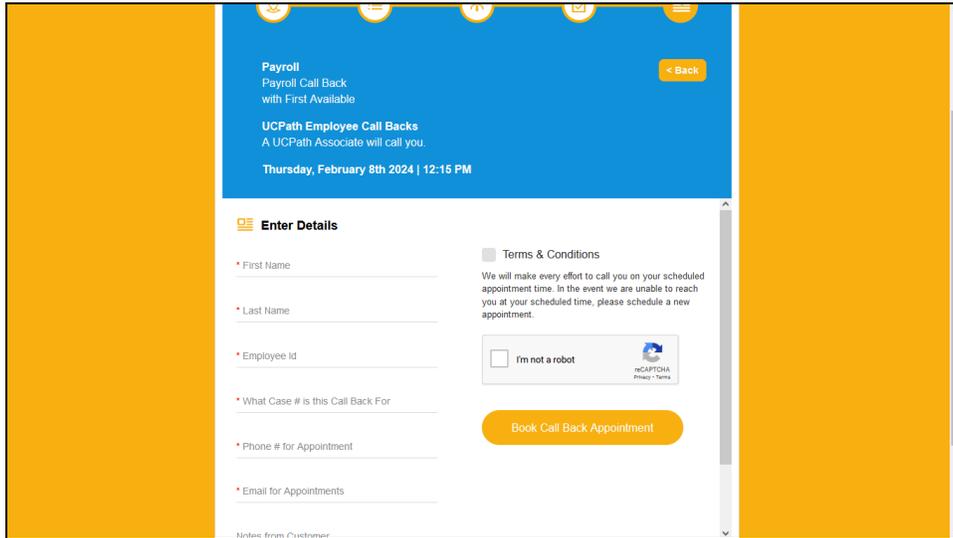
| Step | Action                            |
|------|-----------------------------------|
| 85.  | Select <b>Payroll Call Back</b> . |



| Step | Action   |
|------|--|
| 86.  | <p>All appointments are scheduled for the next day or later.</p> <p>Click the <b>Date</b> button.</p>  |
| 87.  | <p>Scroll to find available appointment start times. Appointments are for one hour.</p> <p>Click the scroll bar.</p>   |



| Step | Action   |
|------|--|
| 88.  | Click the <b>12:15 pm</b> button.<br> |



| Step | Action  |
|------|---|
| 89.  | <p>The <b>Personal Details</b> page appears.</p> <p><b>Note:</b> The information entered on this page must be for whomever the call is for and match either you or the employee from the case.</p> <p>For example, if you are requesting a callback appointment for another employee, enter their Name, Employee ID, Case # and the employee's best Phone # and Email for the appointment callback. You will not receive the confirmation email.</p> <p>If you are requesting the appointment for yourself, whether the case is for your own issue or a case you submitted on behalf of an employee, enter your Name, Employee ID, Case # and your best Phone # and Email for the appointment callback.</p> |
| 90.  | Click in the <b>First Name</b> field.<br>  |
| 91.  | Enter the desired information into the field. For this example, enter <b>Kirk</b> .   |
| 92.  | Click in the <b>Last Name</b> field.<br>   |
| 93.  | Enter the desired information into the field. For this example, enter <b>Han</b> .  |

| Step | Action  |
|------|---|
| 94.  | Click in the <b>Employee Id</b> field.<br><br>* Employee Id   |
| 95.  | Enter the desired information into the field. For this example, enter <b>10003079</b> .   |
| 96.  | Click in the <b>What Case # is this Call Back For</b> field.<br><br>* What Case # is this Call Back For   |
| 97.  | Enter the full case number, including the preceding zeroes. Enter only one case number in this field.<br><br>For this example, enter <b>00361470</b>          |
| 98.  | Click in the <b>Phone # for Appointment</b> field.<br><br>* Phone # for Appointment   |
| 99.  | Enter the desired information into the field. For this example, enter <b>530-555-2323</b>   |
| 100. | The appointment confirmation will be sent to the email entered here.<br><br>Click in the <b>Email for Appointments</b> field.<br><br>* Email for Appointments |
| 101. | Enter the desired information into the field. For this example, enter <b>10003079@ucoptest.edu</b>  |
| 102. | (optional) Enter additional notes or add attachments as needed.   |
| 103. | Click the <b>I'm not a robot</b> option.<br><br><input type="checkbox"/>  |
| 104. | Read the notes below and check the <b>Terms &amp; Conditions</b> check box.<br><br><input type="checkbox"/>   |

The screenshot shows a web form titled "Payroll Call Back with First Available" and "UCPath Employee Call Backs". The form includes the following fields and elements:

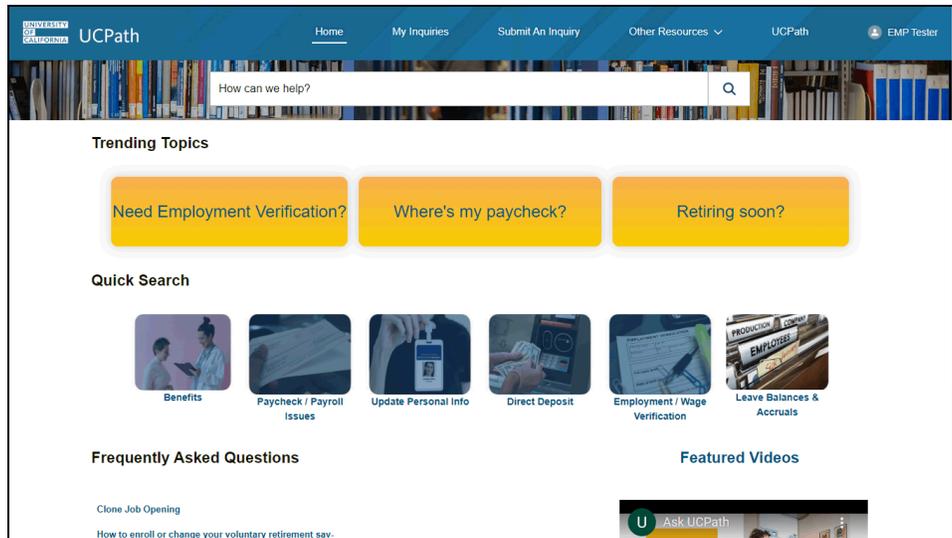
- Header:** "Payroll Call Back with First Available" and "UCPath Employee Call Backs. A UCPath Associate will call you." with a "< Back" button.
- Date/Time:** "Thursday, February 8th 2024 | 12:16 PM"
- Enter Details Section:**
  - First Name:** Kirk
  - Last Name:** Han
  - Employee id:** 10003079
  - What Case # is this Call Back For:** 00361470
  - Phone # for Appointment:** 530-555-2323
  - Email for Appointments:** 10003079@ucopfest.edu
- Terms & Conditions:** A checked checkbox and a text block stating: "We will make every effort to call you on your scheduled appointment time. In the event we are unable to reach you at your scheduled time, please schedule a new appointment."
- Verification:** A CAPTCHA box with "I'm not a robot" and a "reCAPTCHA" logo.
- Action:** A prominent orange button labeled "Book Call Back Appointment".
- Footer:** "Unless from Customer"

| Step | Action  |
|------|---|
| 105. | <p>Click the <b>Book Call Back Appointment</b> button.</p>  |

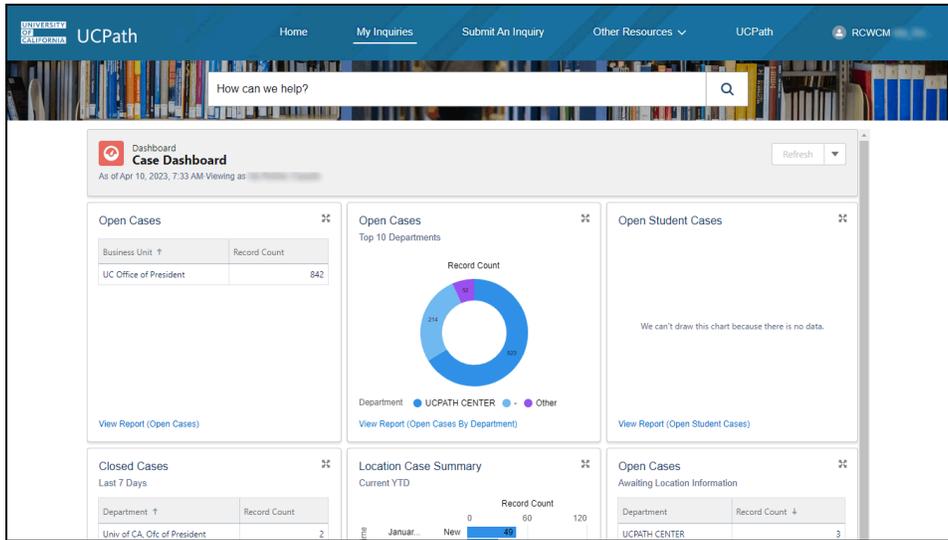
The screenshot shows a confirmation message on a white background with orange accents:

- Message:** "Thank you! Your appointment has been booked successfully. Please check your email for confirmation."
- Summary:**
  - Payroll:** Payroll Call Back With First Available
  - UCPath Employee Call Backs:** A UCPath Associate will call you.
  - Appointment:** Friday, February 9th 2024 12:00 PM

| Step | Action   |
|------|--|
| 106. | <p>A confirmation message appears.</p> <p>You will receive a call back with the <b>First Available</b> UCPath Associate at your selected date and time.</p> <p>Please check your email for the appointment confirmation with an attached calendar invite. The email also provides links to cancel or reschedule if needed.</p> |



| Step | Action  |
|------|---|
| 107. | <p>You will be redirected to the Ask UCPath homepage. The requested call back appointment will appear on the <b>Case Details</b> page.</p> <p>Click the <b>My Inquiries</b> link.</p> <p><a href="#">My Inquiries</a></p> |

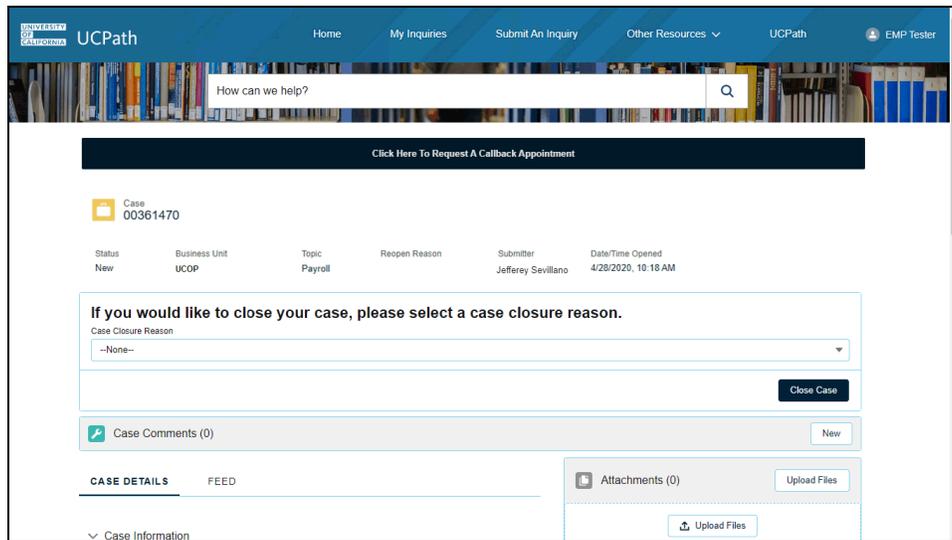


| Step | Action  |
|------|---|
| 108. | Click the <b>View Report (Open Cases)</b> link.<br><a href="#">View Report (Open Cases)</a> |

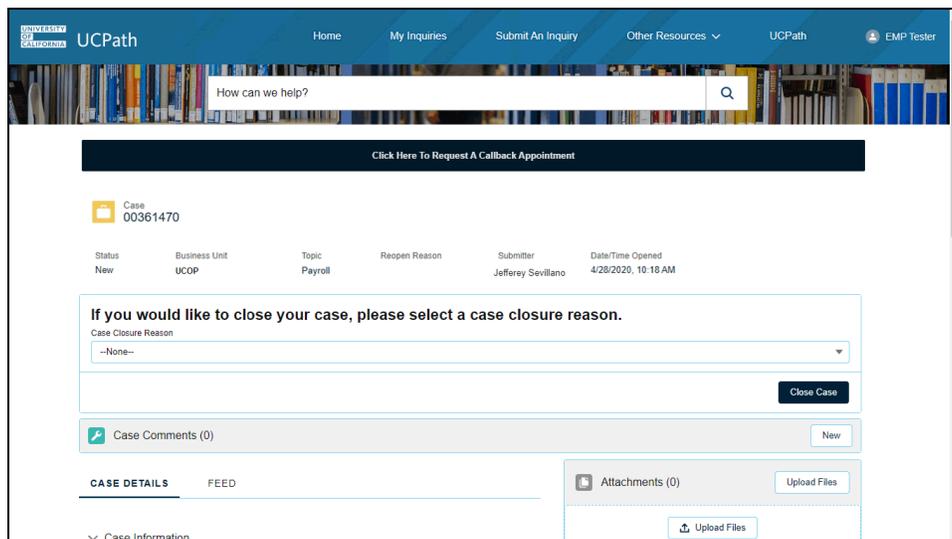
The screenshot shows the UCPath Open Cases report. The report is titled "Report: Contacts with Cases" and "Open Cases". It includes a table with the following columns: Business Unit, Case Number, Status, Full Name, DEPTID, Department, Business Unit Code, Date/Time Opened, EMPLID, EMPL Class, and Union. The table contains 10 rows of data, with the first row having Case Number 00361470.

| Business Unit | Case Number | Status                  | Full Name | DEPTID | Department              | Business Unit Code | Date/Time Opened    | EMPLID | EMPL Class    | Union             |
|---------------|-------------|-------------------------|-----------|--------|-------------------------|--------------------|---------------------|--------|---------------|-------------------|
|               | 00361470    | Awaiting Third Party In |           | 816200 | LOCAL HR SRVCS          | UCOP1              | 7/21/2022, 7:27 AM  |        | Staff: Career | Non-Re            |
|               | 01325335    | New                     |           | 830300 | UCRATH CENTER           | UCOP1              | 7/21/2022, 8:20 AM  |        | Staff: Career | Clerical Services |
|               | 00731950    | Active/Processing       |           | 814100 | TECHNOLOGY DELIVERY SVS | UCOP1              | 7/21/2022, 8:28 AM  |        | Staff: Career | Non-Re            |
|               | 01325375    | Active/Processing       |           | -      | -                       | -                  | 7/21/2022, 8:39 AM  |        | -             | -                 |
|               | 01325492    | Active/Processing       |           | -      | -                       | -                  | 7/21/2022, 9:24 AM  |        | -             | -                 |
|               | 01325541    | Active/Processing       |           | -      | -                       | -                  | 7/21/2022, 9:40 AM  |        | -             | -                 |
|               | 01325549    | Active/Processing       |           | -      | -                       | -                  | 7/21/2022, 9:45 AM  |        | -             | -                 |
|               | 01325663    | New                     |           | 814100 | TECHNOLOGY DELIVERY SVS | UCOP1              | 7/21/2022, 10:41 AM |        | Staff: Career | Non-Re            |
|               | 01325725    | Active/Processing       |           | -      | -                       | -                  | 7/21/2022, 11:12 AM |        | -             | -                 |
|               | 01325751    | Active/Processing       |           | -      | -                       | -                  | 7/21/2022, 11:23 AM |        | -             | -                 |

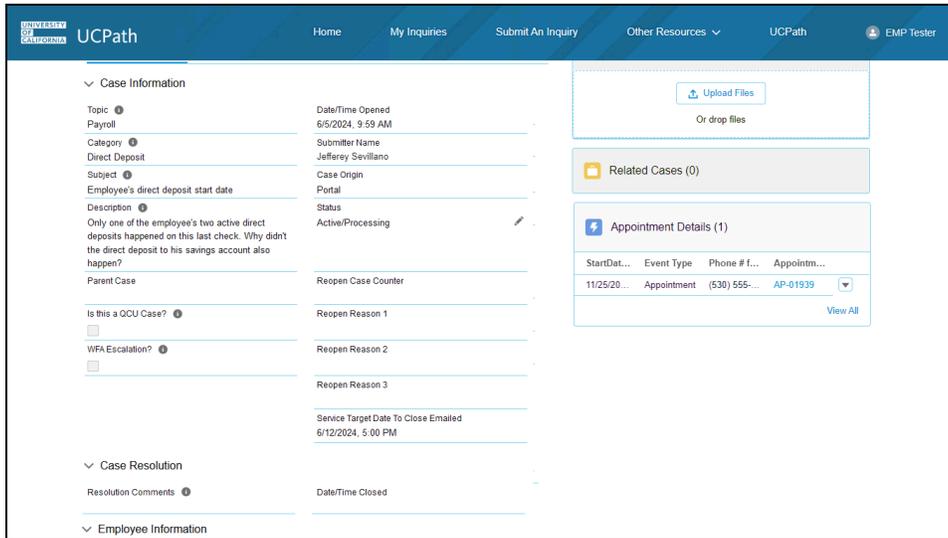
| Step | Action   |
|------|--|
| 109. | Click the <b>Case Number 00361470</b> link to view the <b>Case Details</b> .<br><a href="#">00361470</a> |



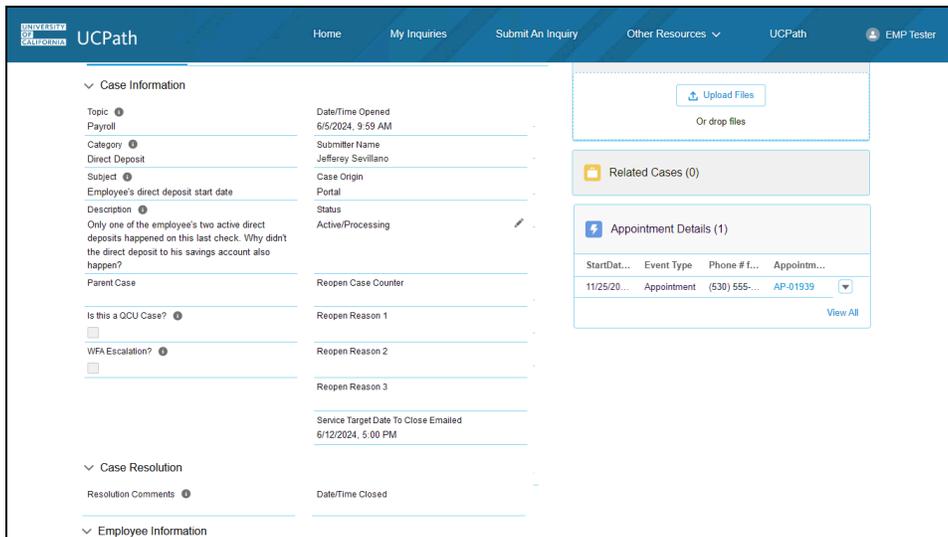
| Step | Action  |
|------|---|
| 110. | You will be redirected to the <b>Case Details</b> page. |



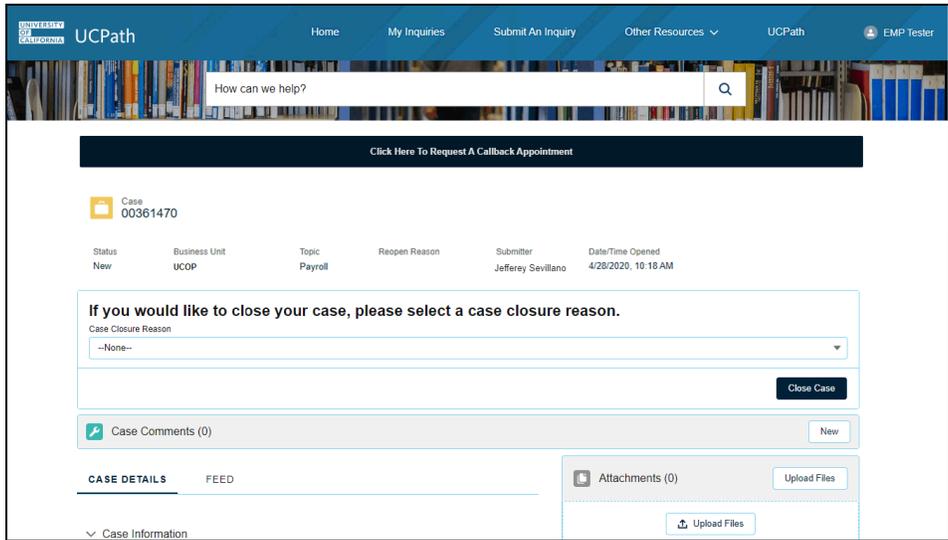
| Step | Action                |
|------|-----------------------|
| 111. | Click the scroll bar. |



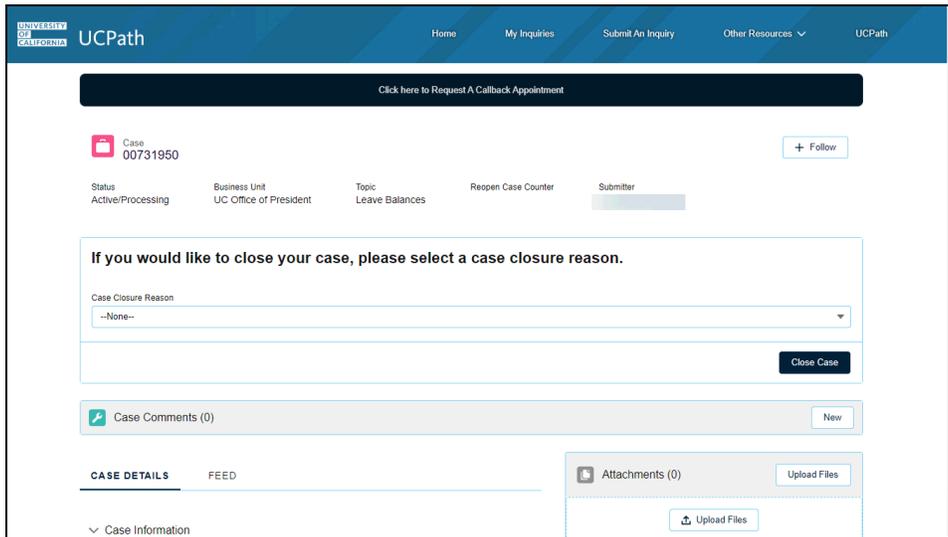
| Step | Action  |
|------|---|
| 112. | Call back appointments can be reviewed in the <b>Appointment Details</b> section. |



| Step | Action                |
|------|-----------------------|
| 113. | Click the scroll bar. |

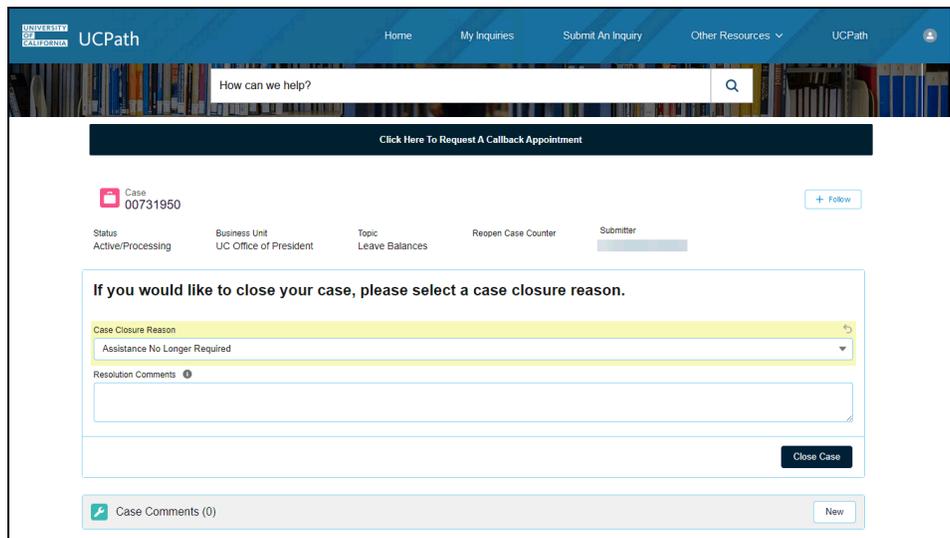


| Step | Action   |
|------|--|
| 114. | Click the <b>My Inquiries</b> link to view another inquiry and review the case closure process.<br> |
| 115. | Click the <b>Case Number 00731950</b> link to view the <b>Case Details</b> page.<br>              |

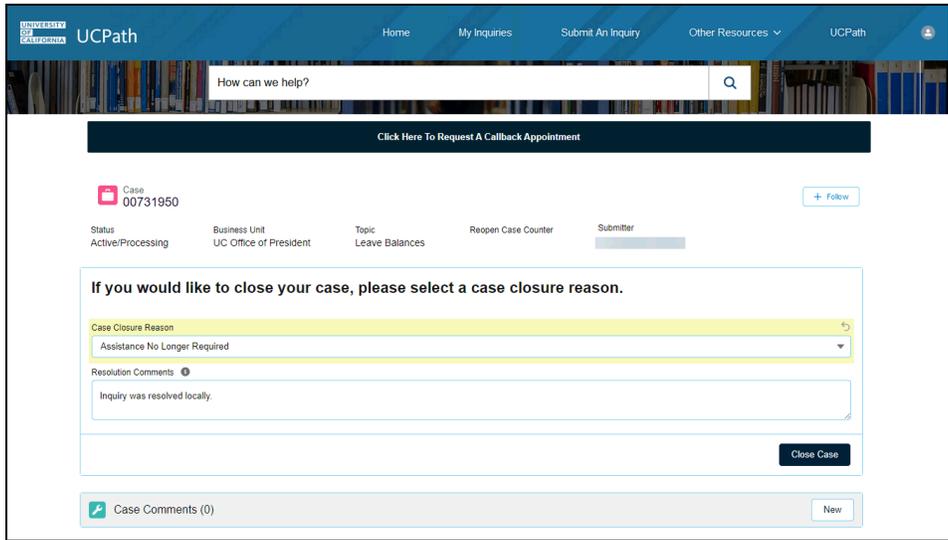


| Step | Action   |
|------|--|
| 116. | You will be redirected to the case details page. |

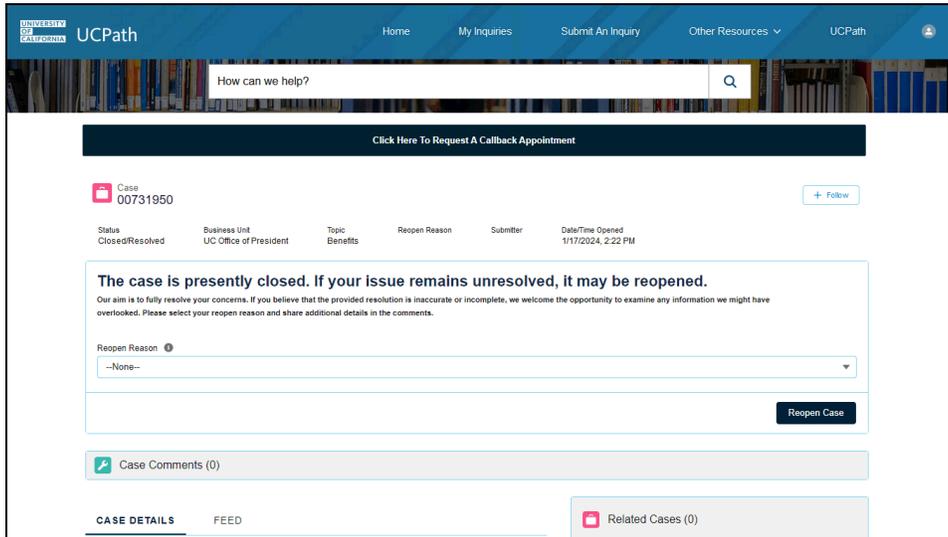
| Step | Action  |
|------|---|
| 117. | <p>To close an open inquiry that you have submitted, select a reason in the <b>Case Closure Reason</b> section.</p> <p>Click on the <b>Case Closure Reason</b> drop-down.</p>  |
| 118. | <p>Select a reason from the drop-down menu.</p> <p>For this example, select <b>Assistance No Longer Required</b>.</p>    |



| Step | Action  |
|------|---|
| 119. | <p>Enter <b>Resolution Comments</b> detailing why you are closing the case.</p> <p>For this example, enter <b>Inquiry was resolved locally</b>.</p> |



| Step | Action  |
|------|---|
| 120. | <p>Click <b>Close Case</b>.</p>  |



| Step | Action  |
|------|---|
| 121. | <p>The <b>Reopen Reason</b> section appears. You have now closed the inquiry.</p> <p><b>Note:</b> Inquiries can be reopened up to three times within a period of 12 months (365 days) from the original closure date.</p> |
| 122. | <p>You have submitted an inquiry on behalf of an employee.</p> <p><b>End of Procedure.</b></p>  |

