

Use this task to navigate through the Ask UCPath site and submit an inquiry to UCPath.

Dashboard Navigation:

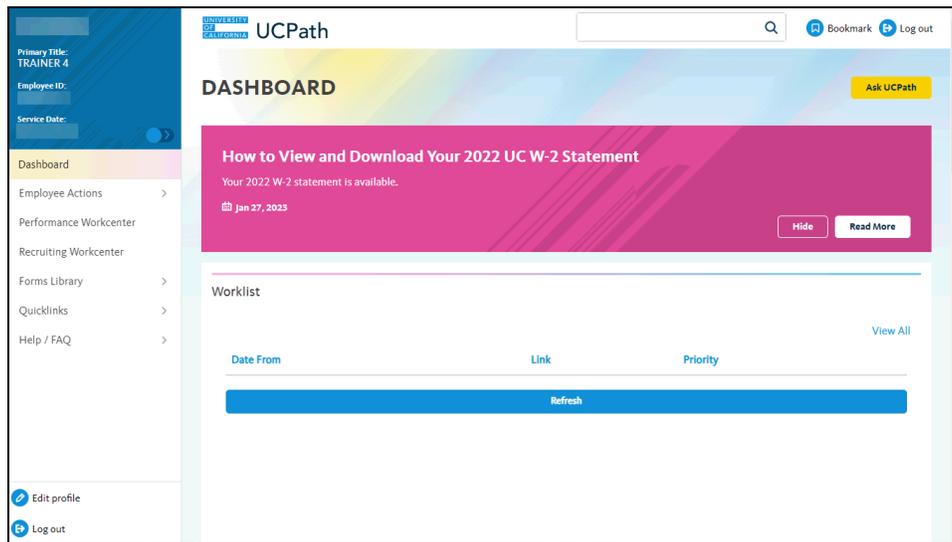
Ask UCPath

or

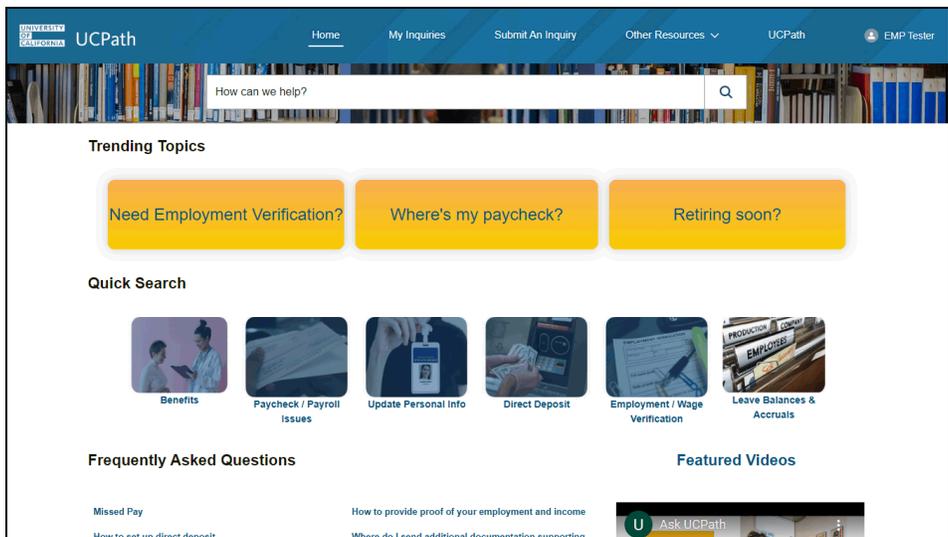
Menu Navigation:

Help / FAQ > **Ask UCPath**

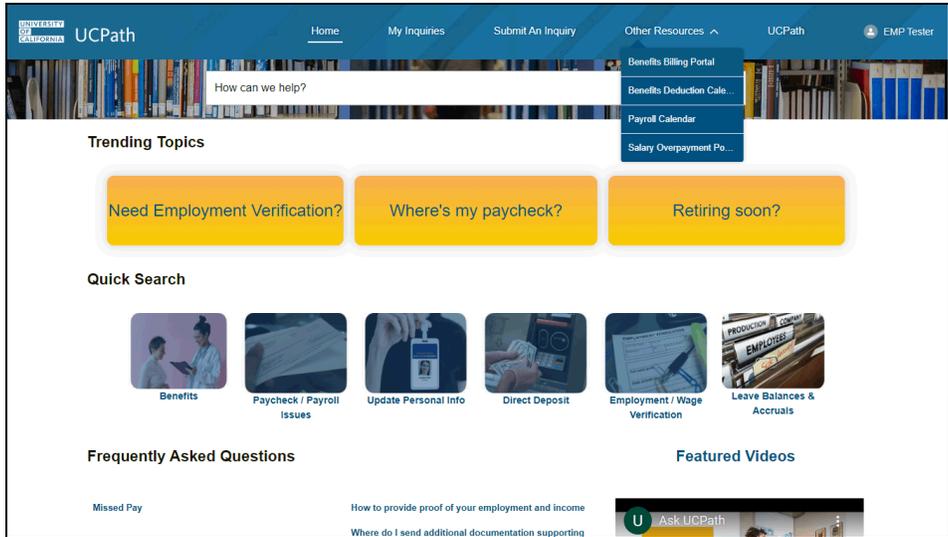
Note: This example uses sample images as seen on a computer. Sample images may appear differently on a tablet or smartphone, but the steps remain the same.



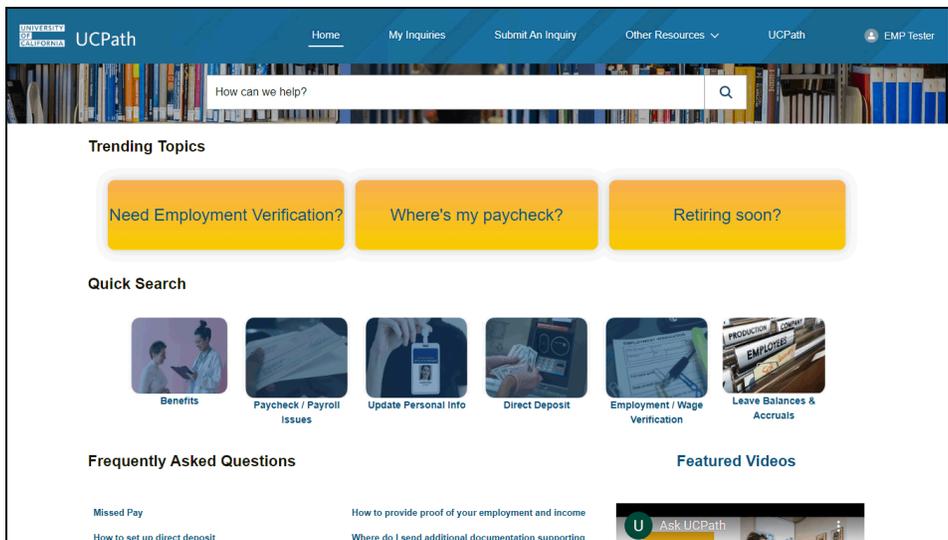
Step	Action
1.	<p>Click the Ask UCPath button.</p> 



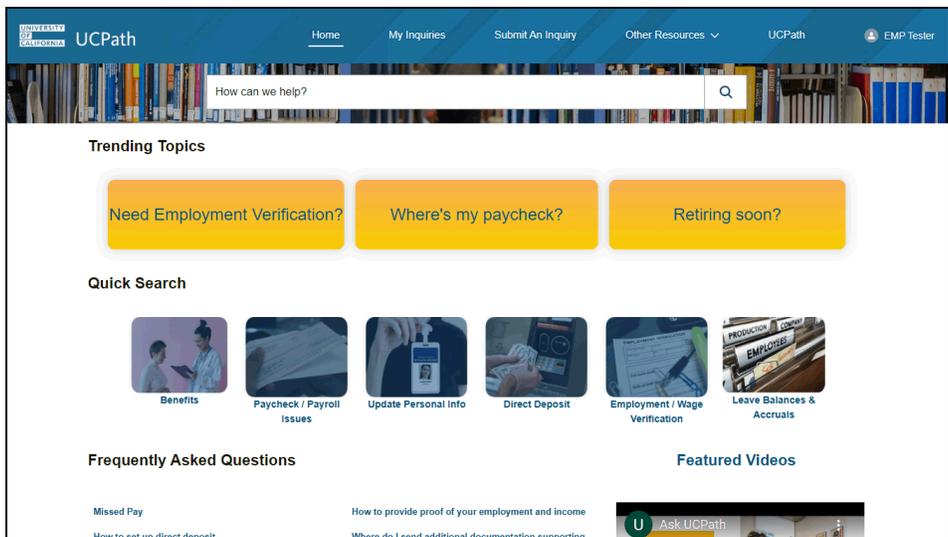
Step	Action
2.	<p>The Ask UCPath homepage appears. You can find a variety of resources on this page to help you find answers to your questions without needing to submit an inquiry.</p> <p>Some of the available resources include articles, training resources and other helpful information. Using these resources 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 Ask UCPath.</p>
3.	<p>Note: As you click on links or access certain resources on Ask UCPath, you may be redirected outside of the 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 Other Resources section.</p> <p>We will return to the My Inquiries and Submit an Inquiry sections later in this tutorial.</p> <p>Click the Other Resources link.</p> 



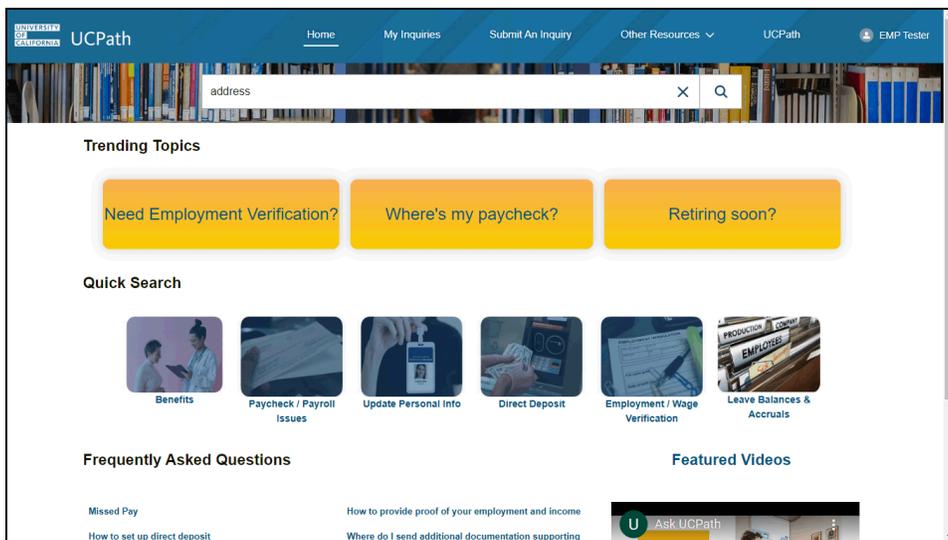
Step	Action
5.	<p>The Other Resources provides you with a list of additional sites and resources that are commonly used.</p> <p>Note: The list of other resources is subject to change. You may be prompted to log in with your single sign-on credentials when you click on links or access specific resources on Ask UCPath.</p>



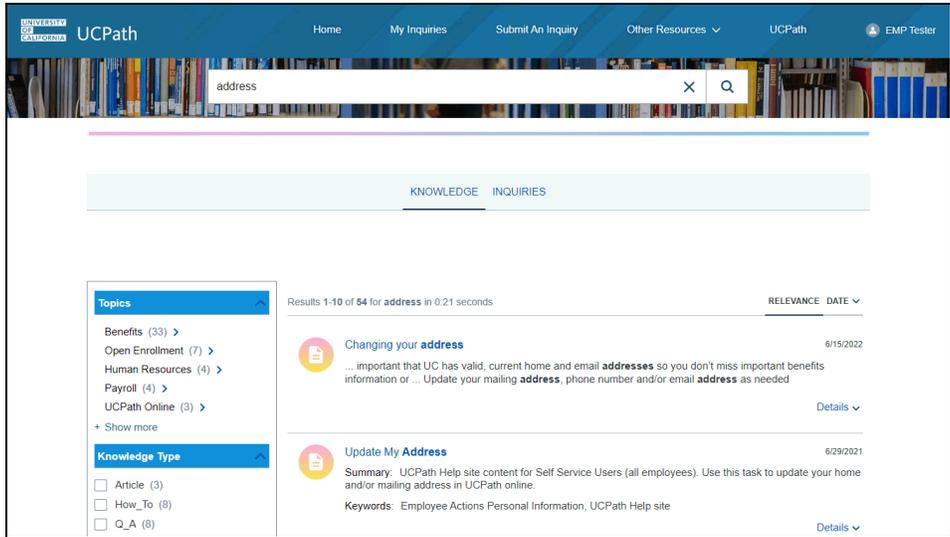
Step	Action
6.	The UCPath link will direct you to your UCPath Dashboard.
7.	Next, is the How can we help? search bar. You can search for topics related to UCPath using the search bar.



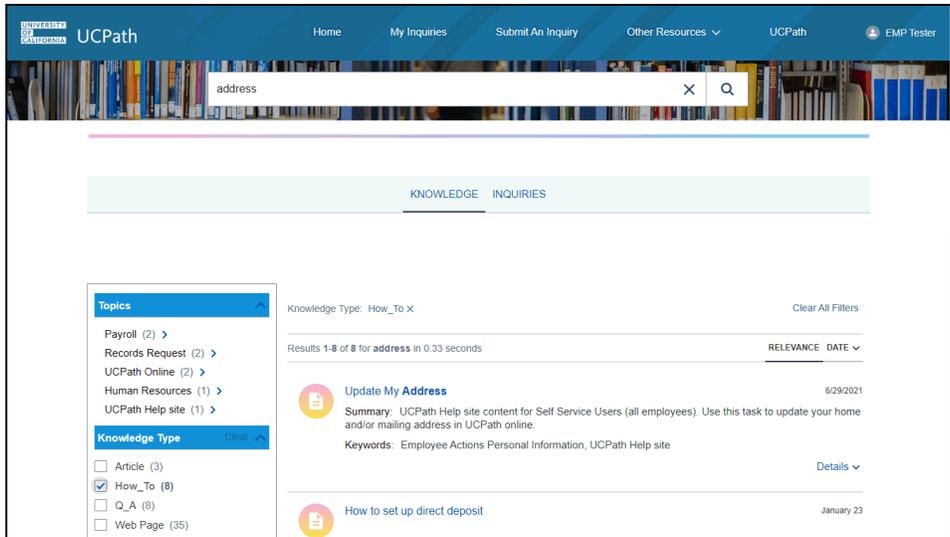
Step	Action
8.	For this example, enter address in the search bar.



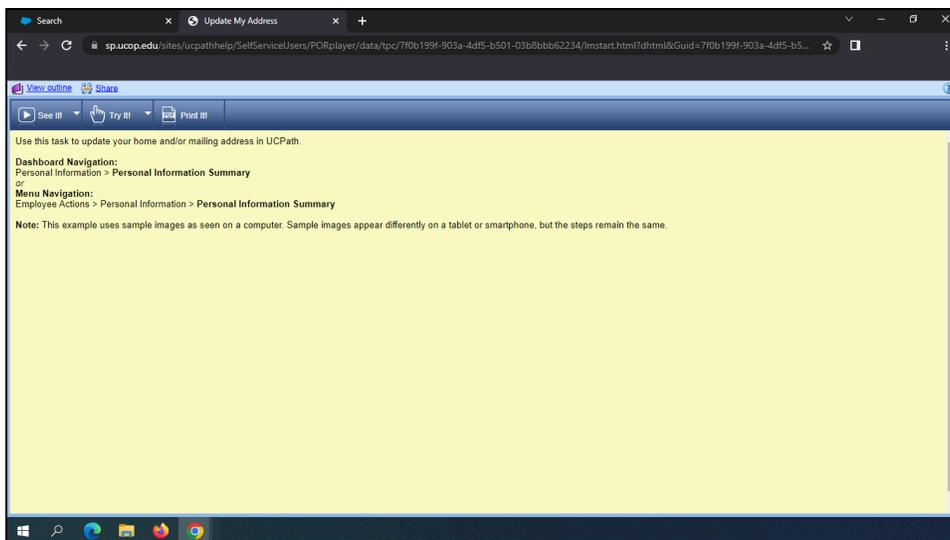
Step	Action
9.	Click on the Lookup button. 
10.	The search results will display under the Knowledge tab. This will list all of the available resources related to the topic.



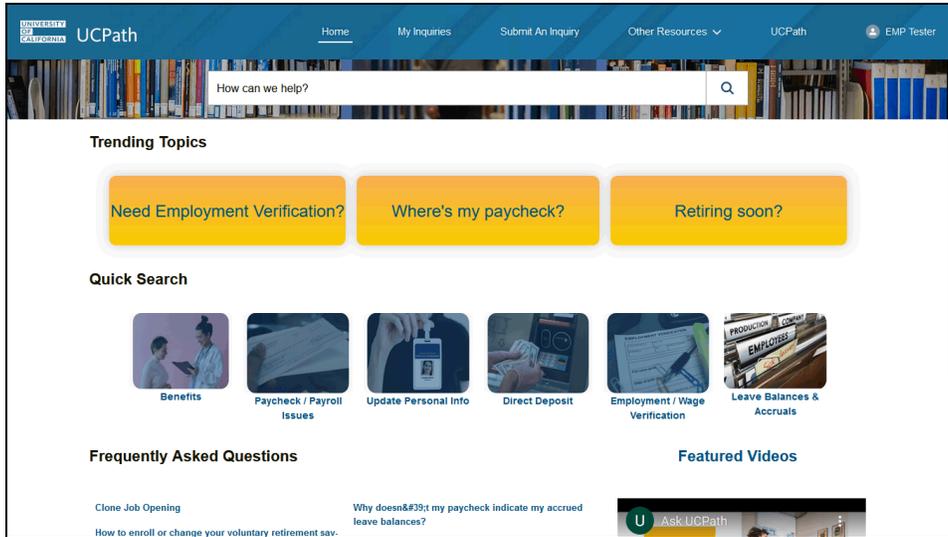
Step	Action
11.	<p>You can use any of the filters to narrow down your search. For this example, use the How_To filter.</p> <p>Click the How_To option.</p> <input data-bbox="397 987 435 1024" type="checkbox"/>



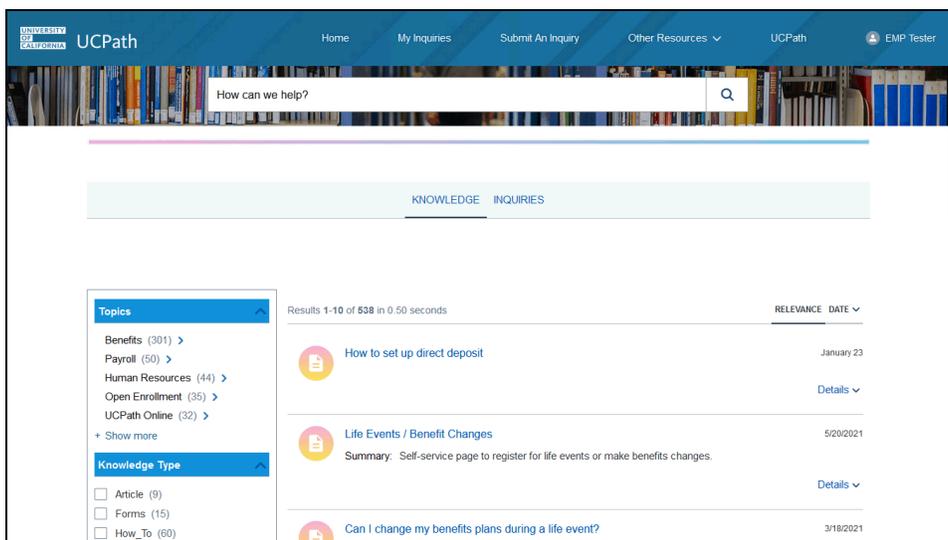
Step	Action
12.	<p>The search results were filtered to list the "how to" resources related to the address topic. For this example, select the Update My Address search result.</p> <p>Click the Update My Address link.</p> <p>Update My Address</p>



Step	Action
13.	<p>For this example, the UCPath Help 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 update your address in UCPath.</p> <p>To return to the Ask UCPath homepage, close the browser tab.</p> <p>Click the Close button.</p> 

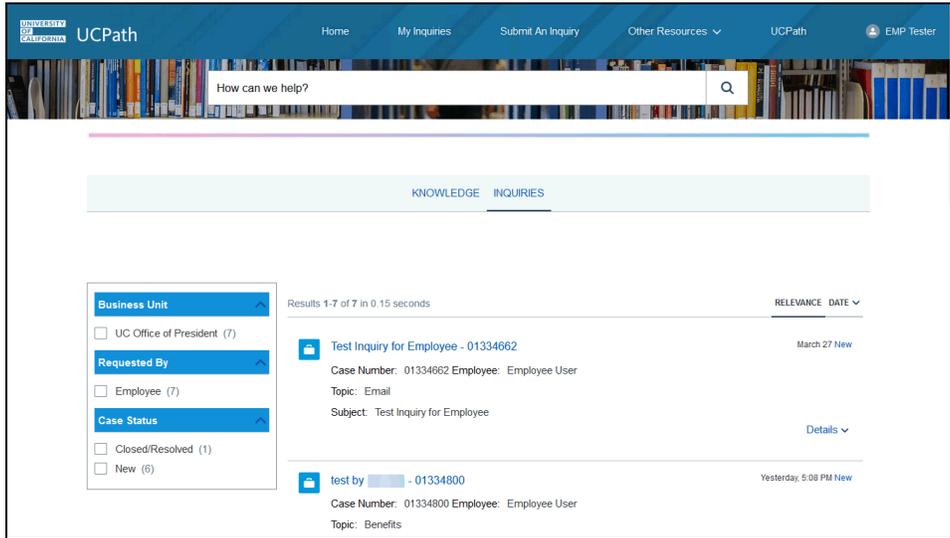


Step	Action
14.	<p>Another option is to run a "global search."</p> <p>Leave the search field blank and click the Lookup button to the right of the How can we help? search field.</p> <p>Click on the Lookup button.</p> 

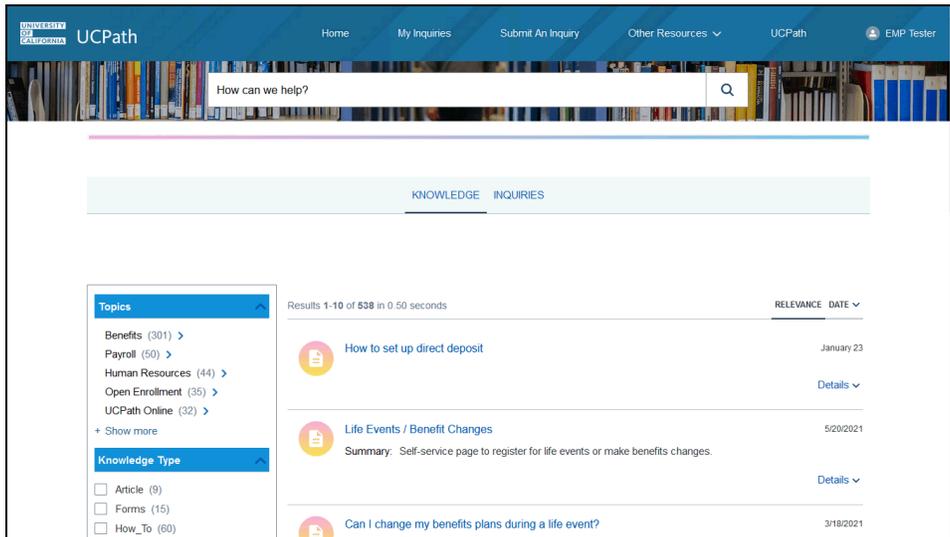


Step	Action
15.	<p>With the "global search" the Knowledge tab will provide a list of resources that are trending in the system.</p>

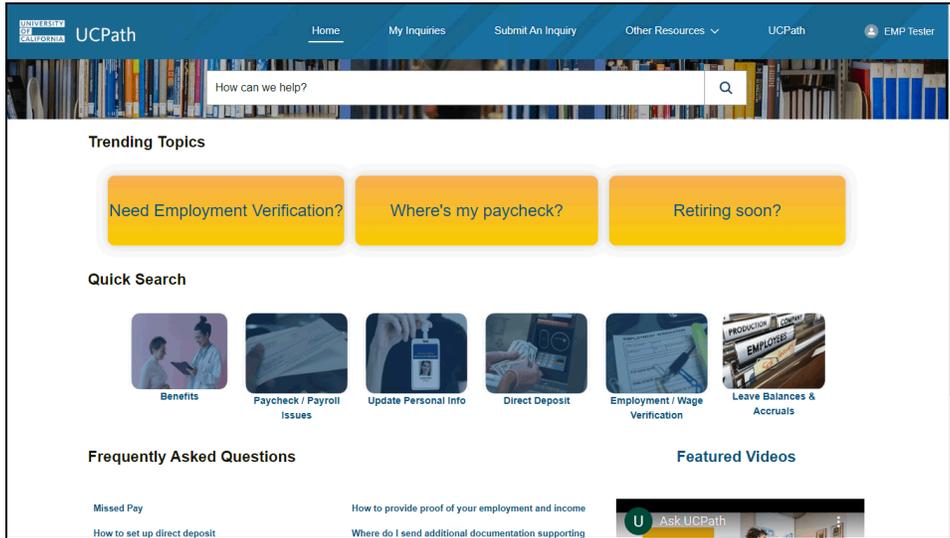
Step	Action
16.	Click on the Inquiries link. 



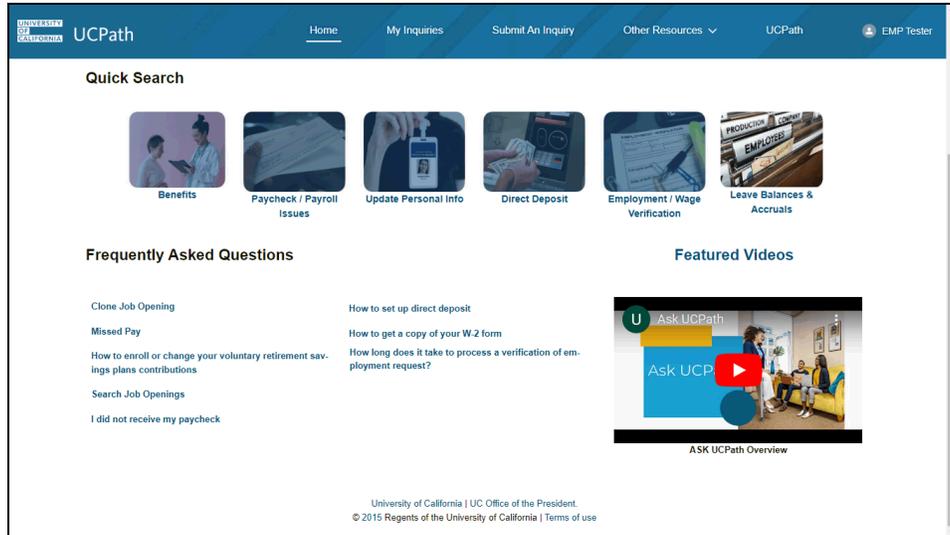
Step	Action
17.	With the "global search" the Inquiries tab will list all your open and closed cases.



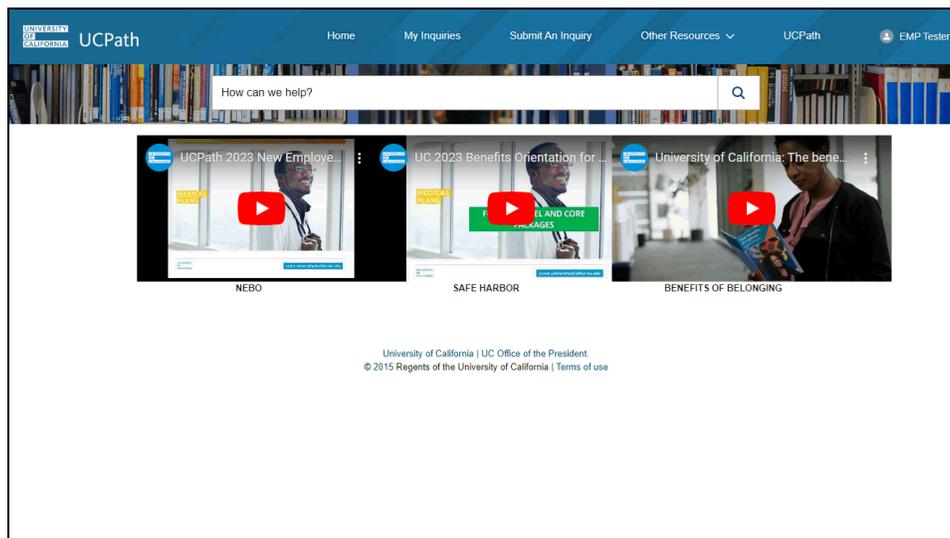
Step	Action
18.	<p>Click on the Home link to return to the Ask UCPath homepage.</p> 



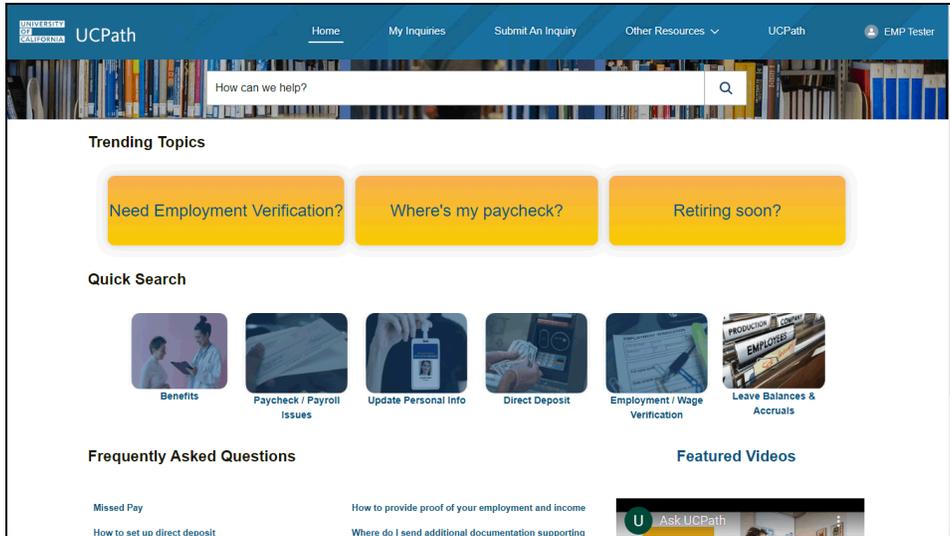
Step	Action
19.	<p>The Trending Topics section on the Ask UCPath homepage displays a list of topics that are currently popular or trending among users.</p> <p>By clicking on any of the trending topics, you can access additional information related to that topic.</p> <p>It's worth noting that the trending topics may change frequently, so it's a good idea to check back regularly to see if there are any new or updated resources available.</p>
20.	<p>The Quick Search section is designed to help users find information on the most commonly searched topics.</p> <p>By clicking on any of the quick search topics, you can access additional information related to that topic.</p>
21.	<p>Click the scroll bar.</p>
22.	<p>The Frequently Asked Questions 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 Frequently Asked Questions section, you can access additional information related to that topic.</p>



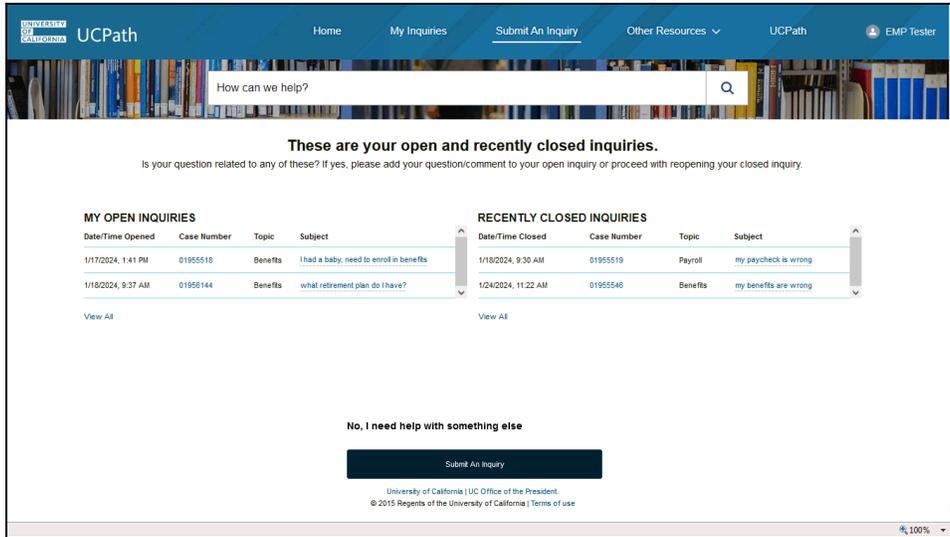
Step	Action
23.	<p>The Featured Videos section will showcase a video or you can click on the Featured Videos link to access additional videos.</p> <p>Click on the Featured Videos link.</p> <p>Featured Videos</p>



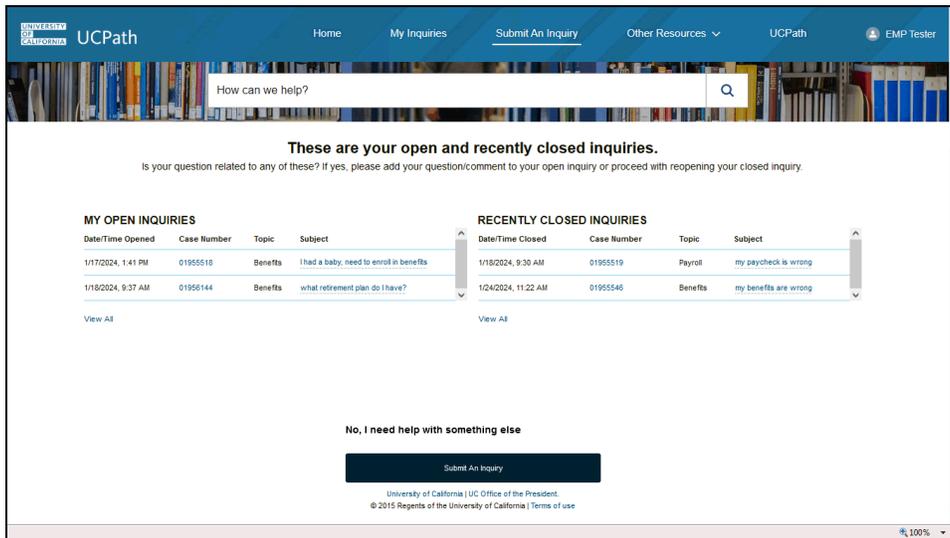
Step	Action
24.	<p>For this example, these are the videos that are currently available. The videos will change based on availability.</p> <p>Click on the Home link to return to the Ask UCPath homepage.</p> 



Step	Action
25.	<p>Now let's return to the top toolbar and review the Submit An Inquiry section.</p> <p>Note: Be sure to check the status of your inquiry prior to submitting another inquiry. You can add a comment to your open case if you would like to request a status update. Additionally, utilizing the resources available on the Ask UCPath site before submitting an inquiry can help you find the answer to your question more quickly.</p> <p>Click on the Submit An Inquiry link to submit your question to UCPath.</p> 



Step	Action
26.	This page will display your open and closed inquiries. It is important to check your open and closed inquiries to determine if your question is related to any of them. If it is, you can add your question or comment to your open or reopen your recently closed inquiry.



Step	Action
27.	If you still need help with something else, you can proceed with submitting your question. Click on Submit An Inquiry .



Step	Action
28.	You will be directed to the inquiry form.

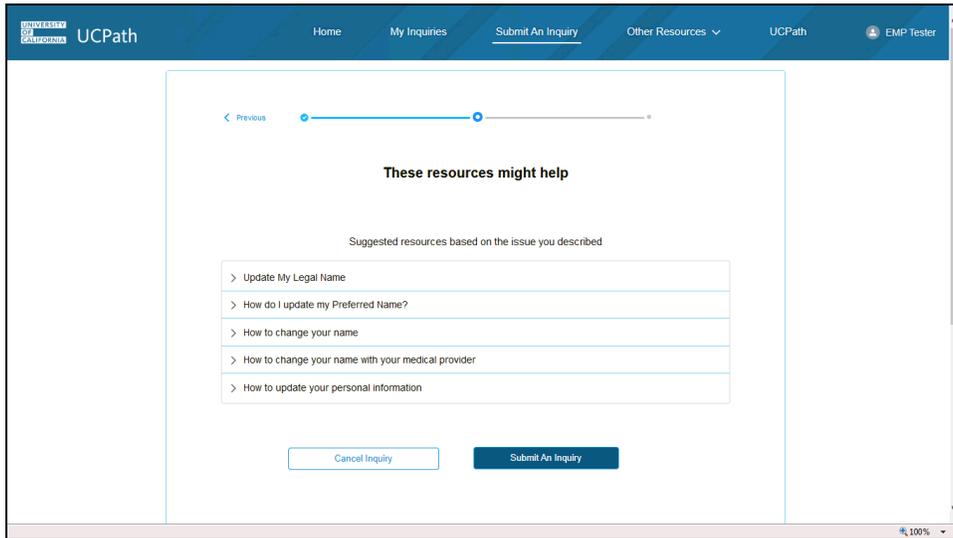
Step	Action
29.	Begin with entering what UCPath can help you with. For this example, type How do I change my name and benefits?

Step	Action
30.	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.

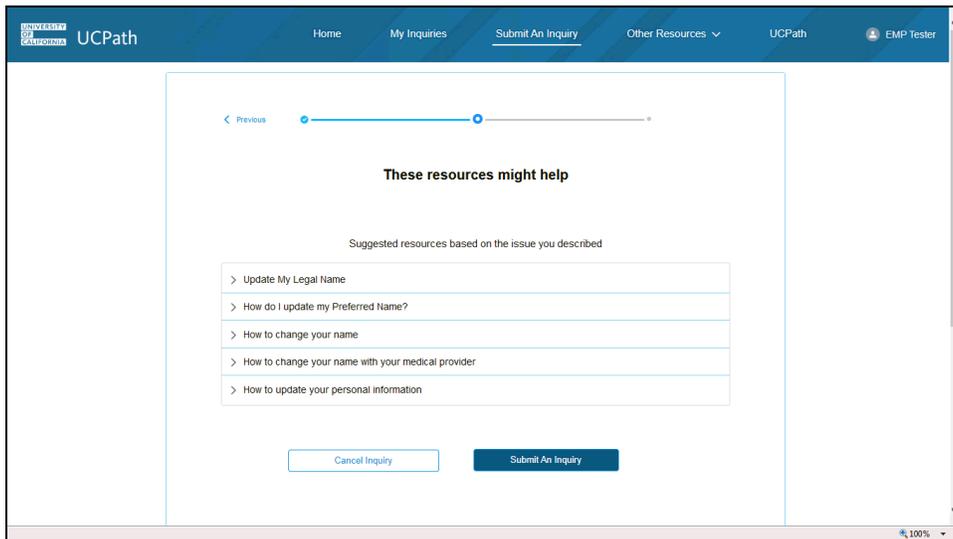
Step	Action
31.	Type, I got married on 1/30/24.

Step	Action
32.	<p>For this example, the description has been completed for you.</p> <p>Once you have provided a detailed description, the process indicator will change to green, accompanied by a check mark.</p> <p>Although you can still submit your inquiry if the progress indicator does not turn green, we encourage you to provide as much information as possible to ensure proper handling of your inquiry.</p>

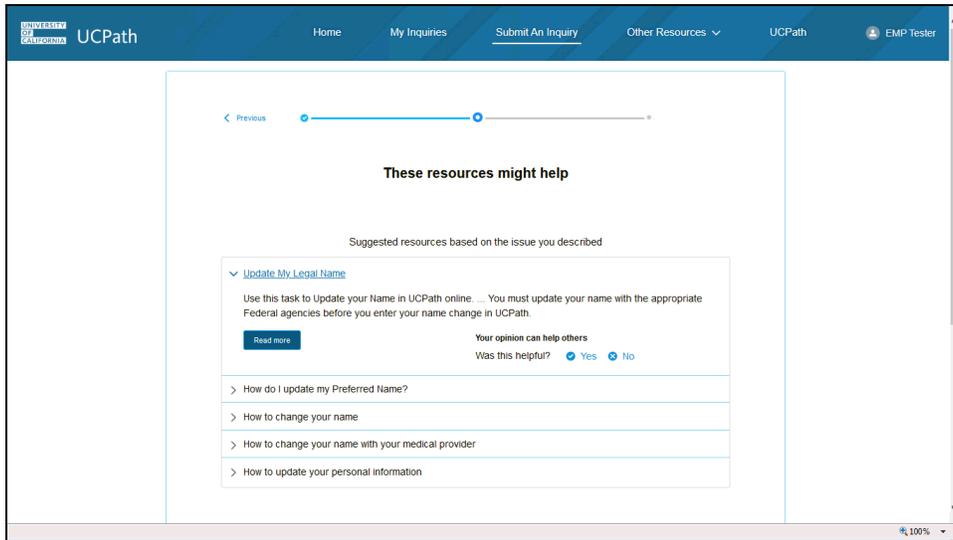
Step	Action
33.	Once you have entered all the details, click on Next to continue. 



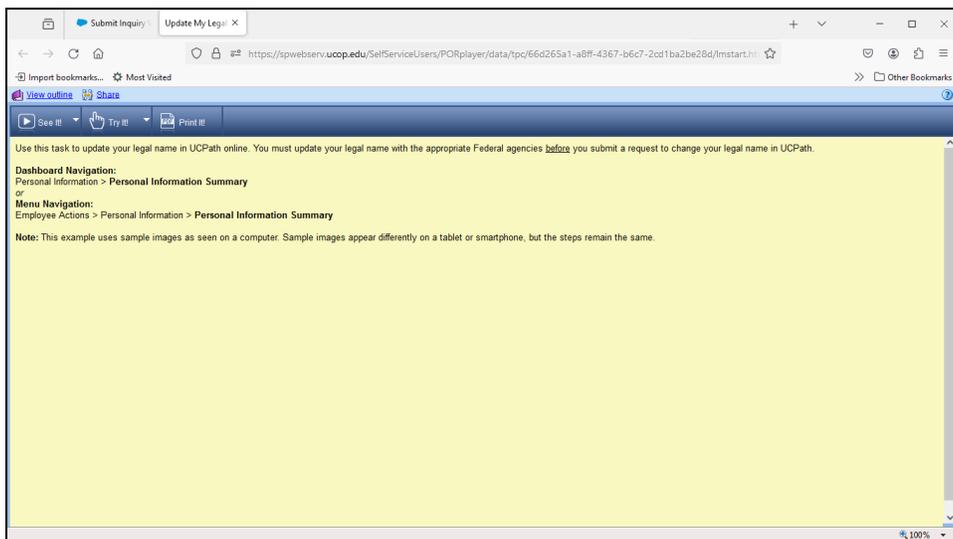
Step	Action
34.	You will then be redirected to the resources page.



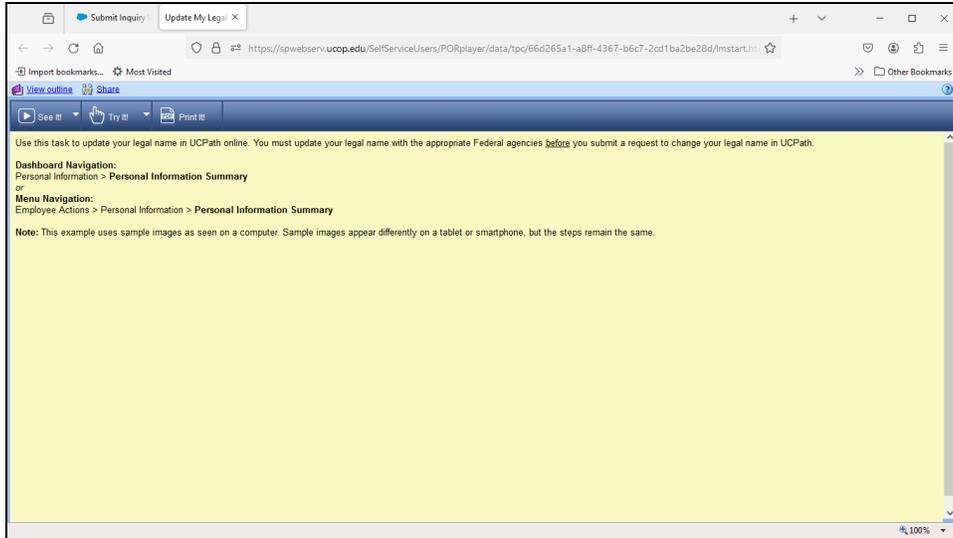
Step	Action
35.	<p>Based on the information you provided, suggested resources will populate to assist you in resolving your question. Select the name of the resource you would like to view. For this example, select Update My Legal Name.</p> <p>> Update My Legal Name</p>



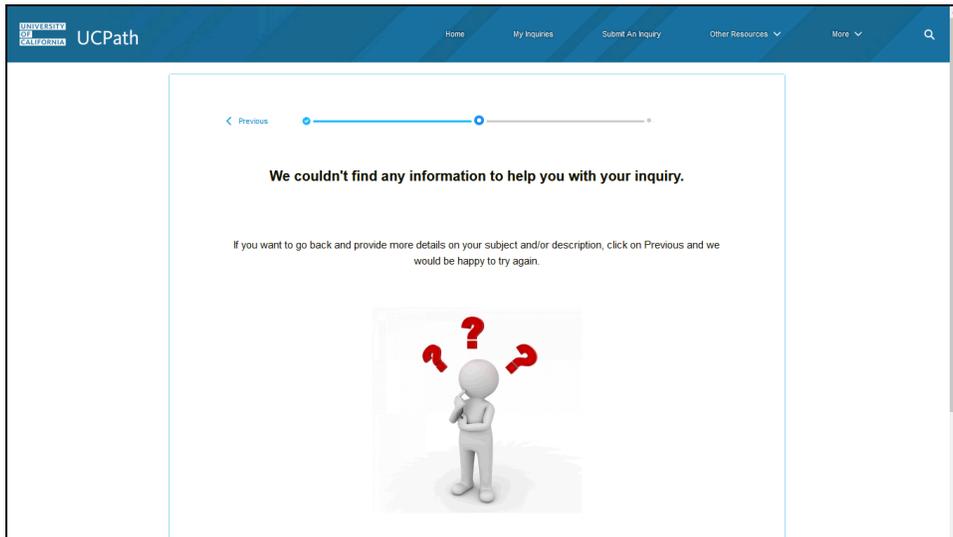
Step	Action
36.	<p>Click Read more.</p> <p>Read more</p>



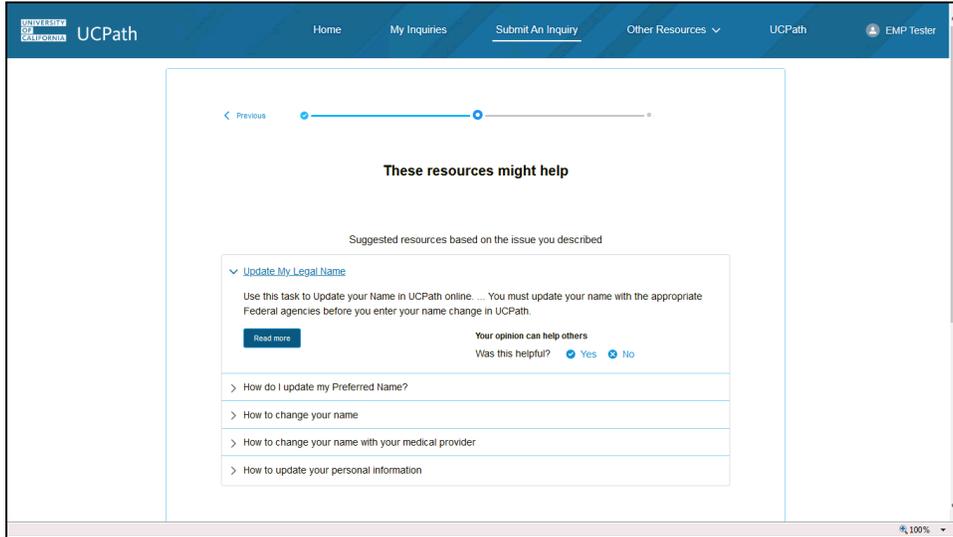
Step	Action
37.	The selected resource will open in a new browser tab.



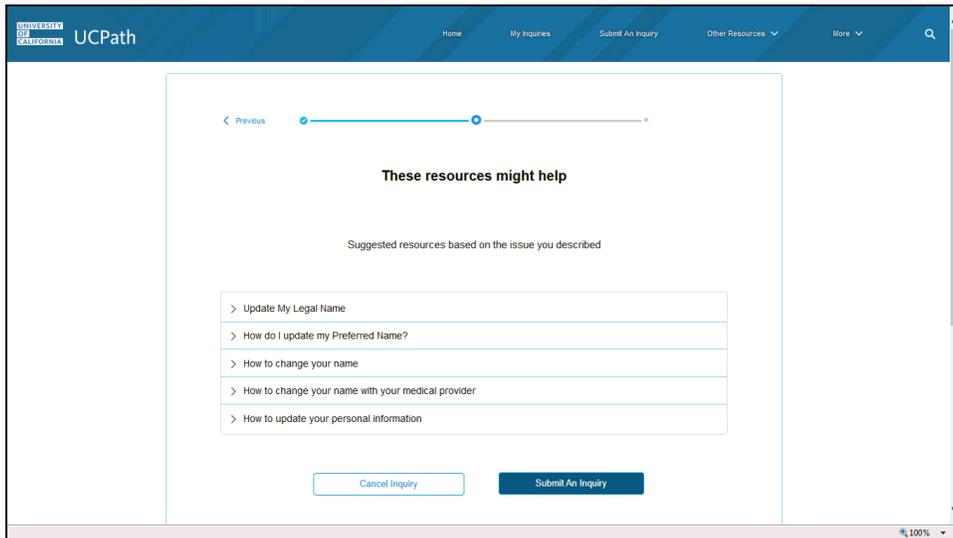
Step	Action
38.	When you are finished you can go back to the Submit An Inquiry tab. Click on the X to close out your current tab.



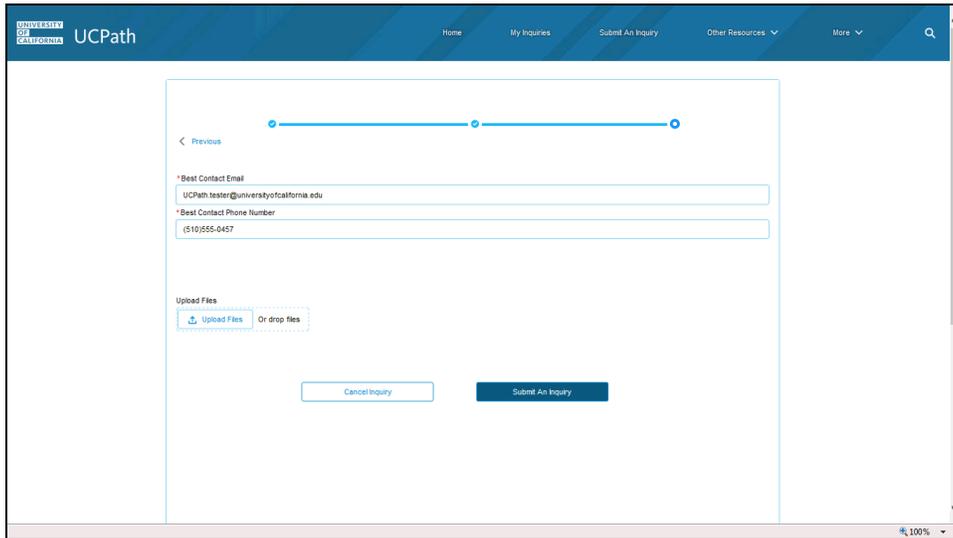
Step	Action
39.	Please note, if there are no resources related to your question, you will see this page. You may choose to go back and provide additional details in your description. In this example, we will proceed with submitting an inquiry.



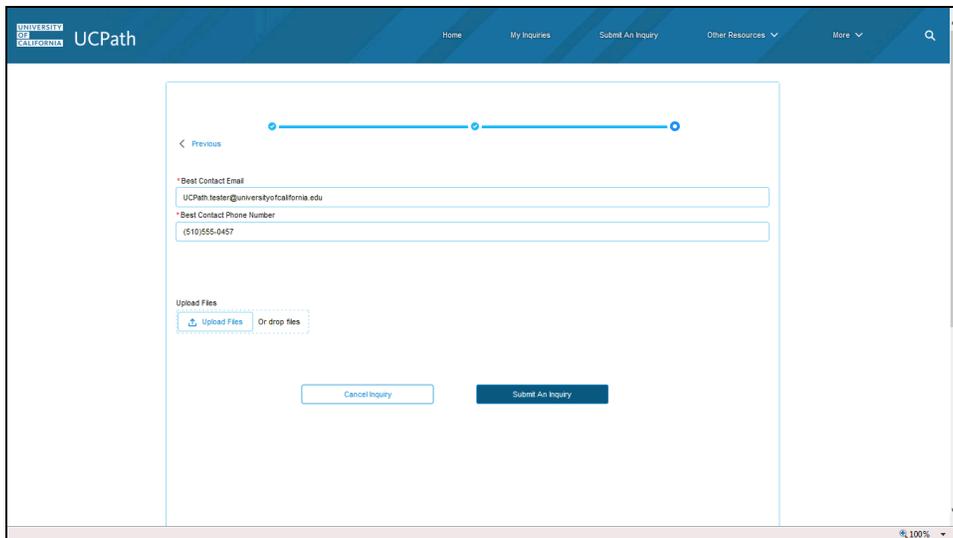
Step	Action
40.	Click the scroll bar.



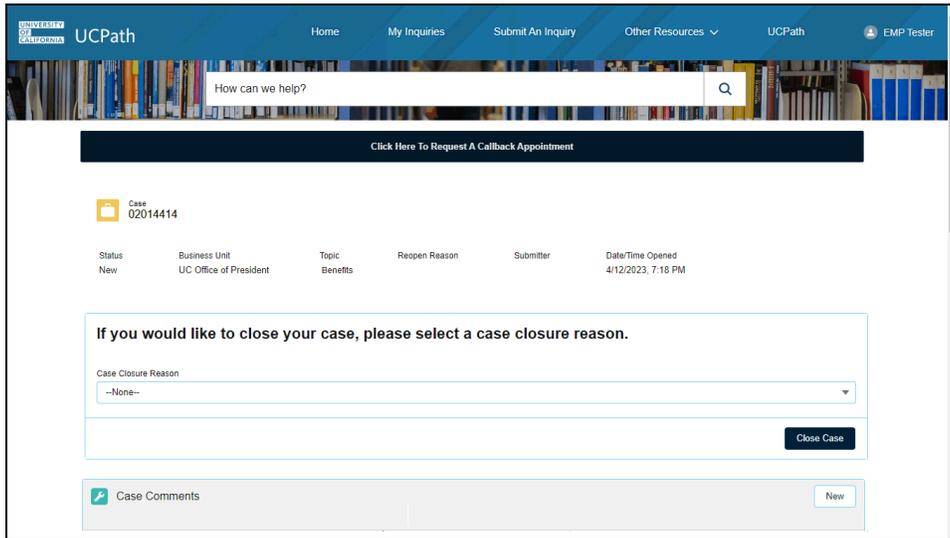
Step	Action
41.	Click Submit An Inquiry . 



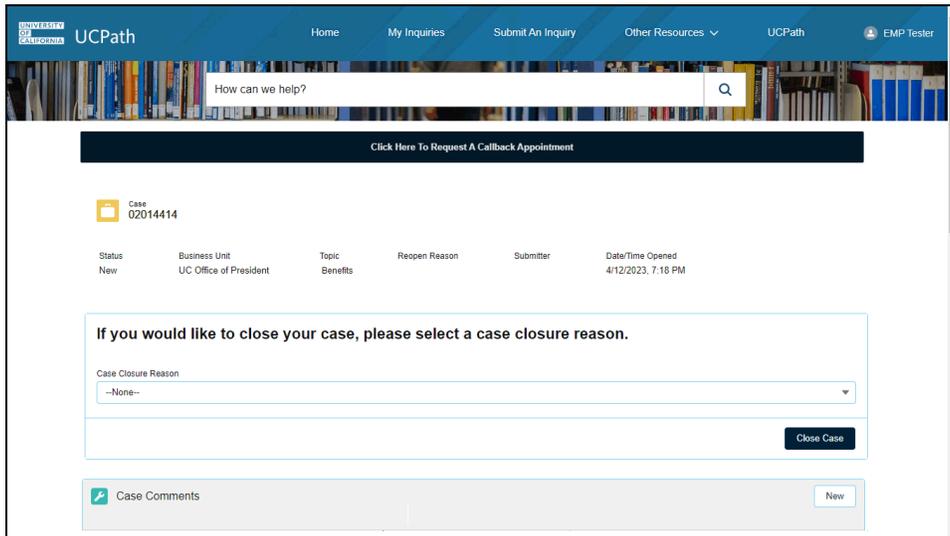
Step	Action
42.	Your email and phone number will automatically populate. You can update it as needed. You also have the option to upload files.



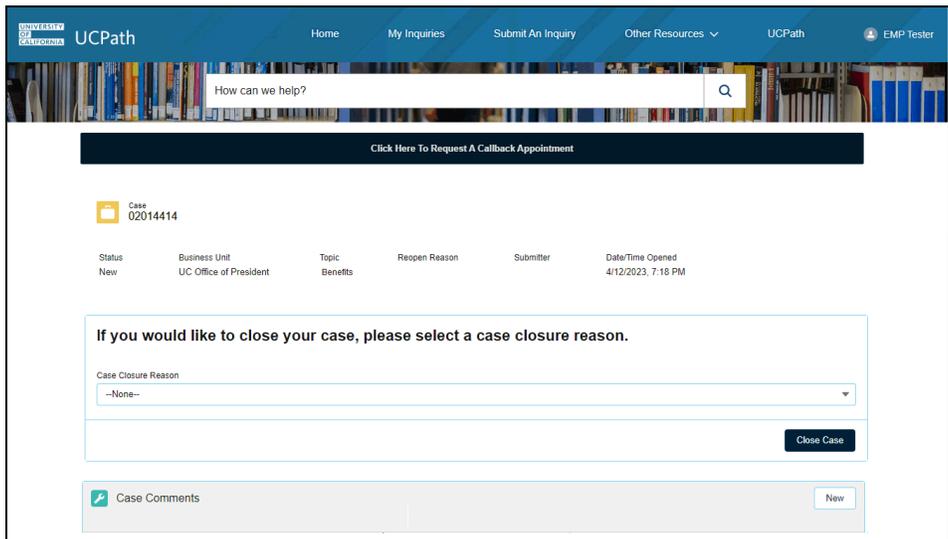
Step	Action
43.	<p>Click Submit An Inquiry.</p> 



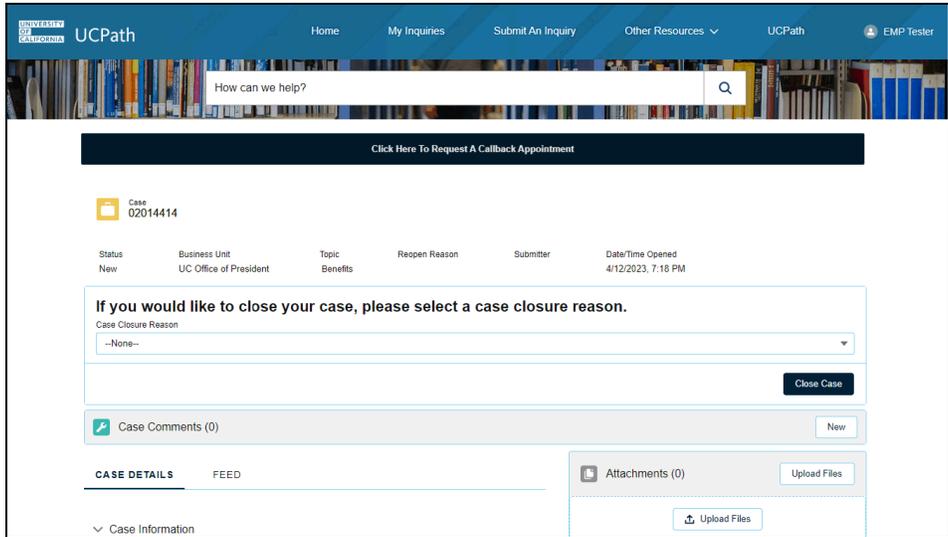
Step	Action
44.	<p>After submitting your inquiry, you will see the case details page confirming your submission.</p>



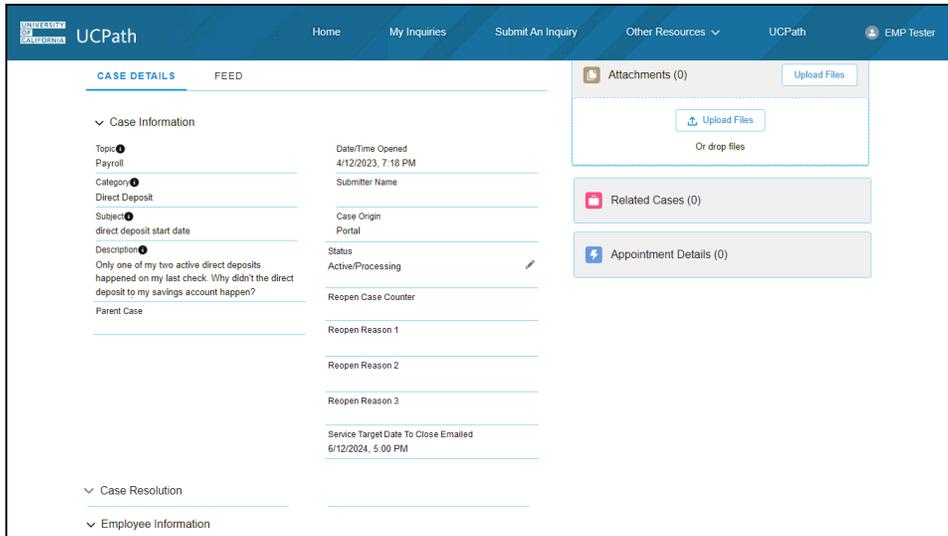
Step	Action
45.	<p>Let's review the Case Details section of your submitted inquiry. This is the case number assigned to your inquiry.</p> <p><i>We will return to the Callback Appointment button later in this tutorial.</i></p>



Step	Action
46.	<p>You can add comments to your inquiry using the Case Comments field. You also have the option to attach documents.</p> <p>Click on the New button to add a case comment.</p>
47.	<p>Comments added to the case will display in the Case Comments section. For this example, no comments appear.</p>
48.	<p>Existing attachments, if any, can be reviewed and new ones can be uploaded in the Attachments section.</p>



Step	Action
49.	Click the scroll bar.



Step	Action
50.	Related inquiries can be reviewed in the Related Cases section. For this example, there are no related cases.

The screenshot shows the UCPath Case Details page. The 'CASE DETAILS' tab is active. The 'Case Information' section includes fields for Topic (Payroll), Category (Direct Deposit), Subject (direct deposit start date), and Description (Only one of my two active direct deposits happened on my last check. Why didn't the direct deposit to my savings account happen?). Other fields include Date/Time Opened (4/12/2023, 7:18 PM), Submitter Name, Case Origin (Portal), Status (Active/Processing), Reopen Case Counter, Reopen Reason 1, 2, and 3, and Service Target Date To Close Emailed (6/12/2024, 5:00 PM). The right sidebar shows 'Attachments (0)', 'Related Cases (0)', and 'Appointment Details (0)'. A vertical scroll bar is visible on the right side of the page.

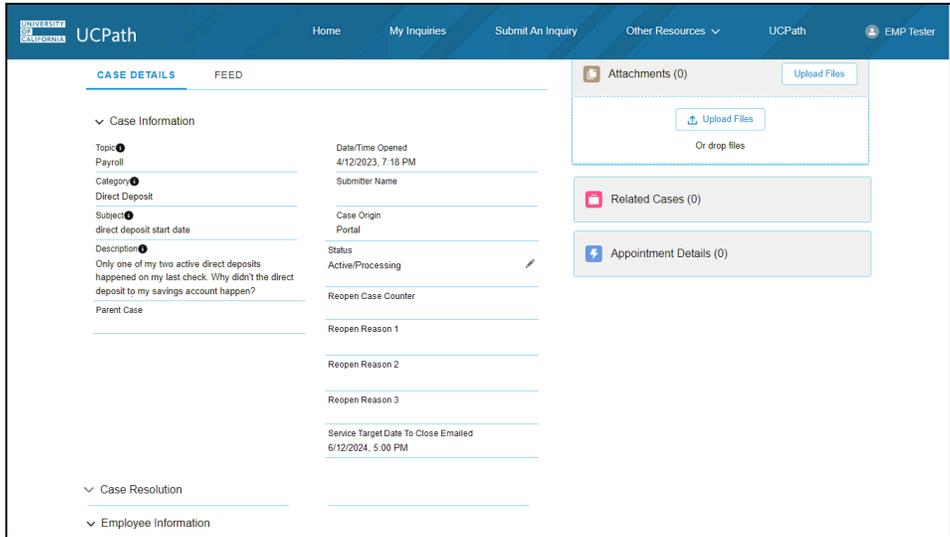
Step	Action
51.	Click the scroll bar.

The screenshot shows the UCPath Case Details page with the 'Employee Information' section expanded. Fields include Best Contact Phone Number (510/987-0457), Best Contact Email, Employee Name, and EMPLID. The 'Additional Information' section includes Service Now Ticket Required? (checkbox), Service Now Comments, Service Now #, Service Now Urgency (1 = High), Service Now Category (Application, Enterprise > UCPath > PeopleSoft > Benefits), Defect #, and JIRA/Change Request #. At the bottom, the 'Emails (0)' section is visible with a table header: SUBJECT, FROM ADDRESS, TO ADDRESS, MESSAGE DATE, and a 'View All' link. A vertical scroll bar is visible on the right side of the page.

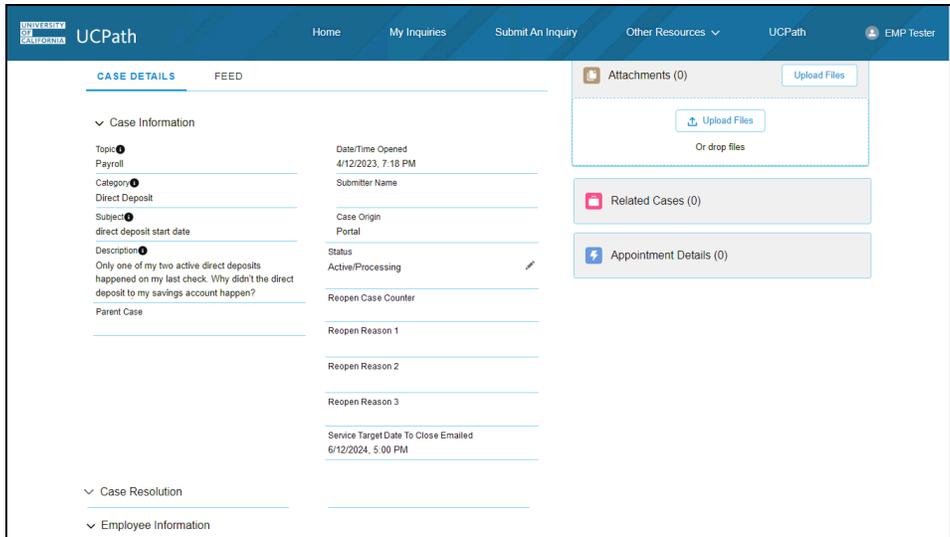
Step	Action
52.	Emails associated with the case can be reviewed in the Emails section. For this example, no emails are displayed.

Step	Action
53.	Click the scroll bar.

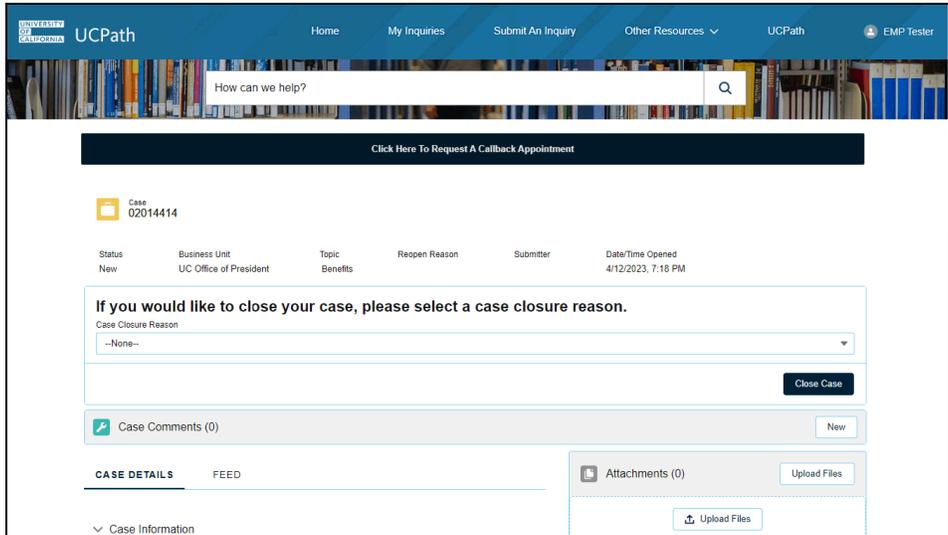
Step	Action
54.	The Status updates throughout the life of the case. This helps provide an indication of what is happening with the case. For example, this new inquiry displays the status as Active/Processing .



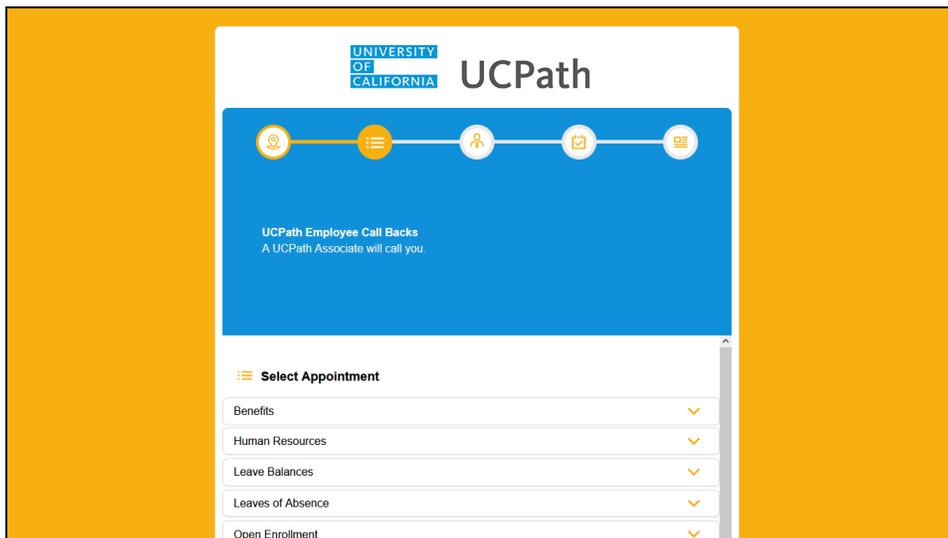
Step	Action
55.	<p>The Service Target Date To Close Emailed field lists the expected resolution date.</p> <p>An email is also sent to notify you of the service target date. Cases may be resolved before this date.</p>



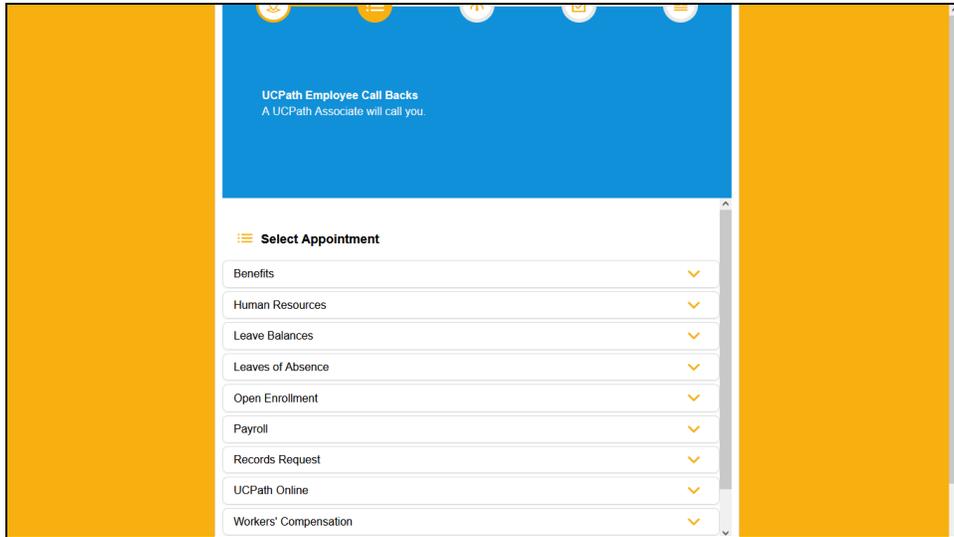
Step	Action
56.	Click the scroll bar.



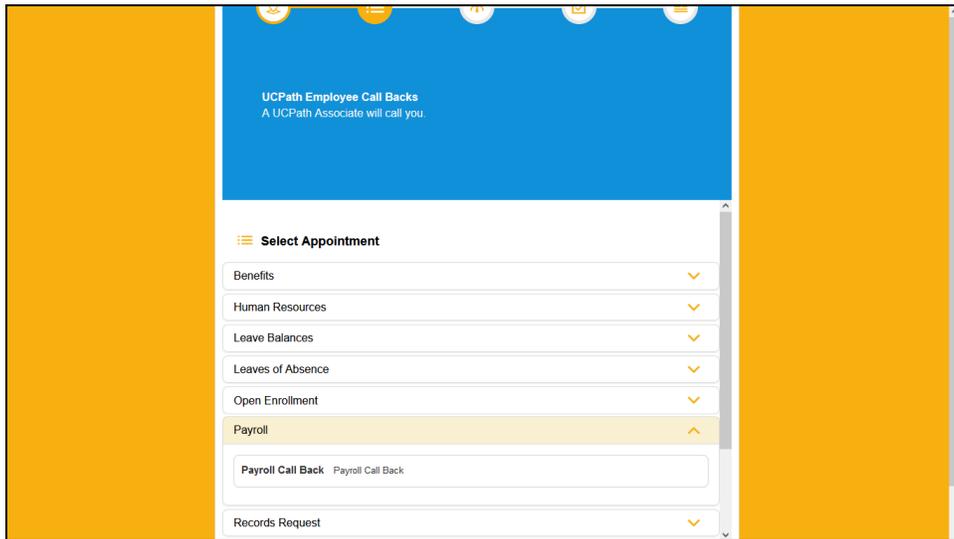
Step	Action
57.	<p>After submitting an inquiry, you can request an appointment to speak with a UCPath Associate.</p> <p>You will need this case number and your employee ID when making the appointment. The Call Back Appointments page opens in a new tab so that you can easily refer back to this page if needed.</p> <p>Click the Click Here To Request A Callback Appointment button.</p>



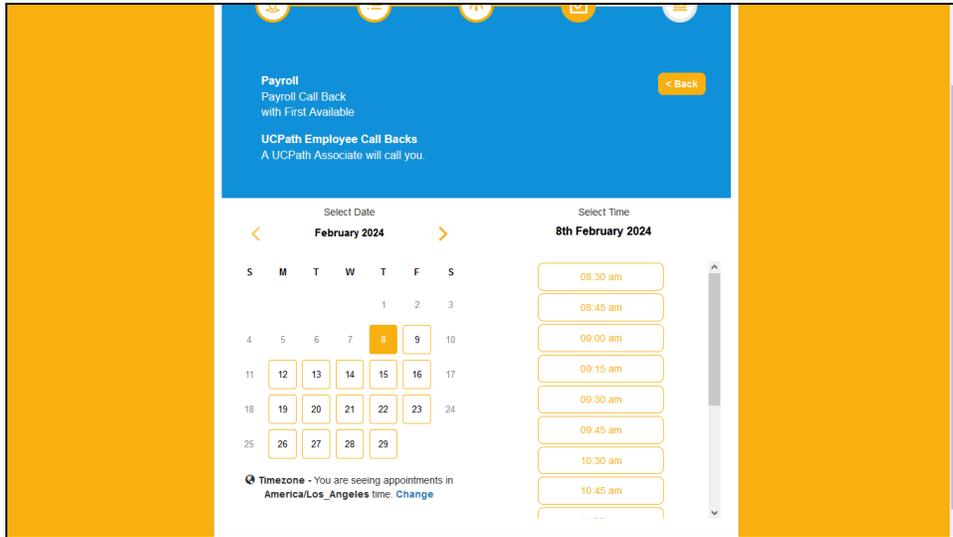
Step	Action
58.	<p>Choose the topic that best fits the nature of your inquiry.</p> <p>Click the scroll bar.</p>



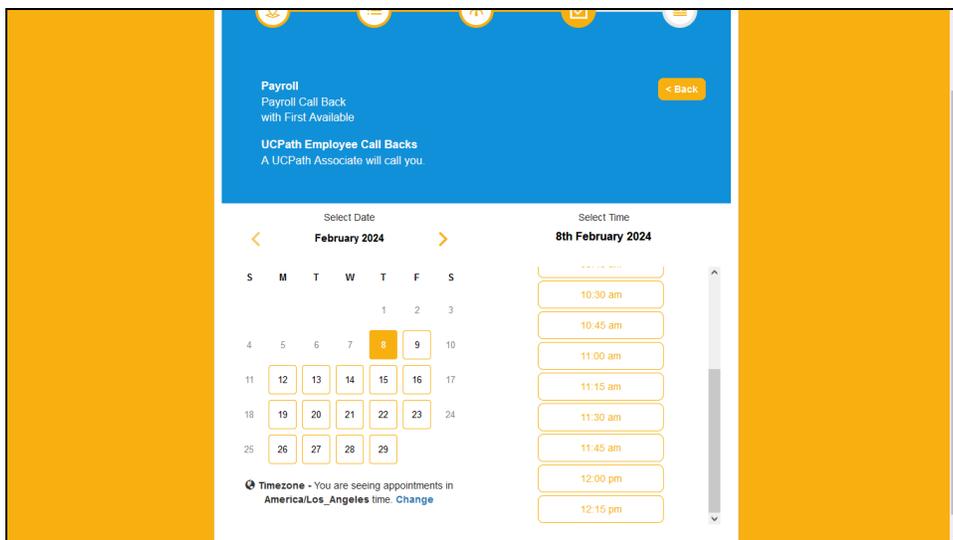
Step	Action
59.	Click the button to the right of the Payroll topic. 



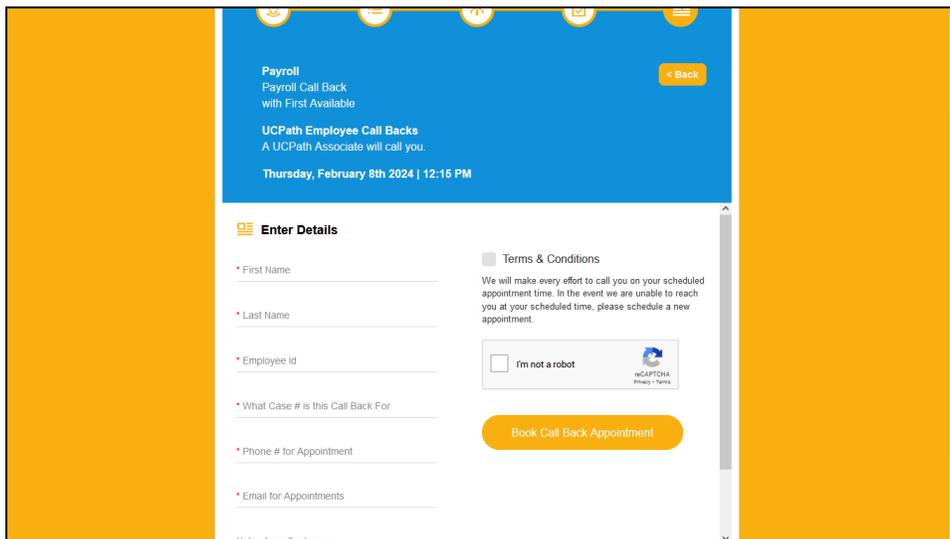
Step	Action
60.	Select Payroll Call Back .



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



Step	Action
63.	Click the 12:15 pm button.



Step	Action
64.	Enter your call back information on the Personal Details page. Note: You can access the previous tab to find your Employee ID and Case Number on the Case Details page in UCPath.
65.	Click in the First Name field. * First Name
66.	Enter the desired information into the field. For this example, enter Kirk .
67.	Click in the Last Name field. * Last Name
68.	Enter the desired information into the field. For this example, enter Han .
69.	Click in the Employee Id field. * Employee Id
70.	Enter the desired information into the field. For this example, enter 10003079 .
71.	Click in the What Case # is this Call Back For field. * What Case # is this Call Back For

Step	Action
72.	Enter the full case number, including the preceding zeroes. Enter only one case number in this field. For this example, enter 02014414 .
73.	Click in the Phone # for Appointment field. * Phone # for Appointment
74.	Enter the desired information into the field. For this example, enter 530-555-2323 .
75.	The appointment confirmation will be sent to the email entered here. Click in the Email for Appointments field. * Email for Appointments
76.	Enter the desired information into the field. For this example, enter 10003079@ucoptest.edu .
77.	(optional) Enter additional notes or add attachments as needed.
78.	Click the I'm not a robot option. <input type="checkbox"/>
79.	Read the notes below and check the Terms & Conditions check box. <input type="checkbox"/>

Payroll
Payroll Call Back
with First Available

UCPath Employee Call Backs
A UCPath Associate will call you.

Thursday, February 8th 2024 | 12:16 PM

Enter Details

* First Name
Kirk

* Last Name
Han

* Employee Id
10003079

* What Case # is this Call Back For
02014414

* Phone # for Appointment
530-555-2323

* Email for Appointments
10003079@ucoptest.edu

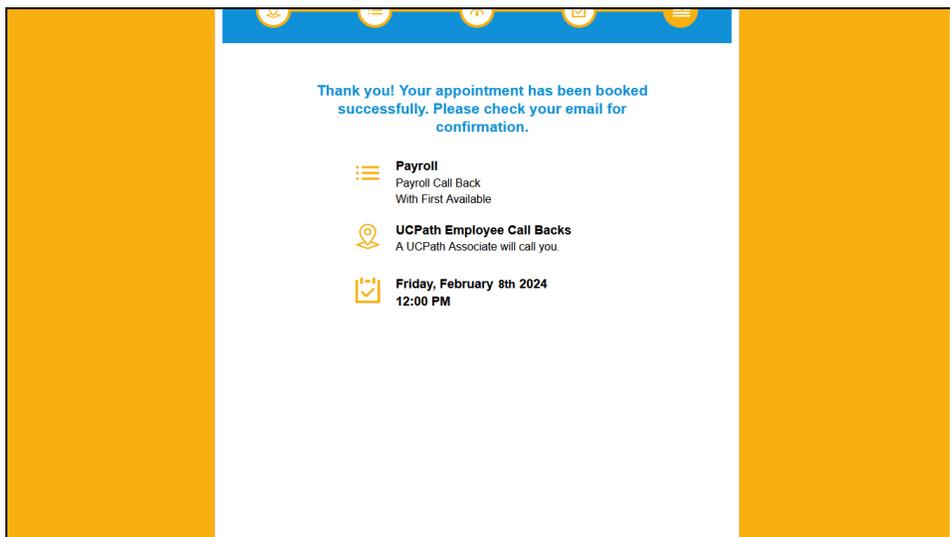
Terms & Conditions
We will make every effort to call you on your scheduled appointment time. In the event we are unable to reach you at your scheduled time, please schedule a new appointment.

I'm not a robot

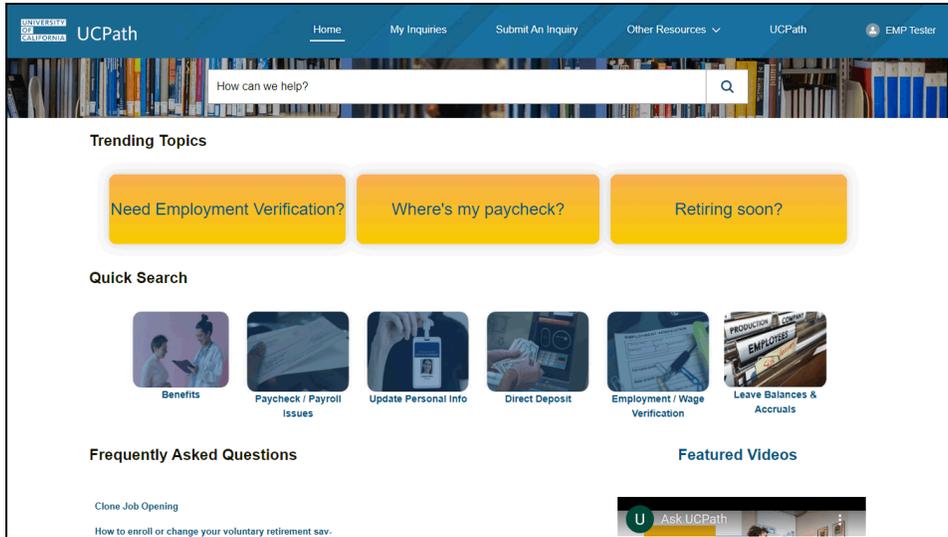
Book Call Back Appointment

Unless from Customer

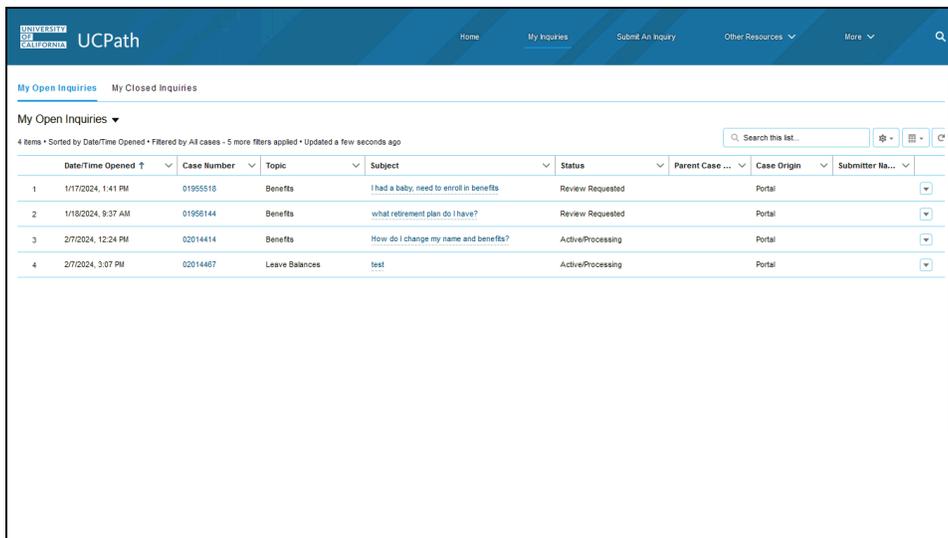
Step	Action
80.	Click the Book Call Back Appointment button. 



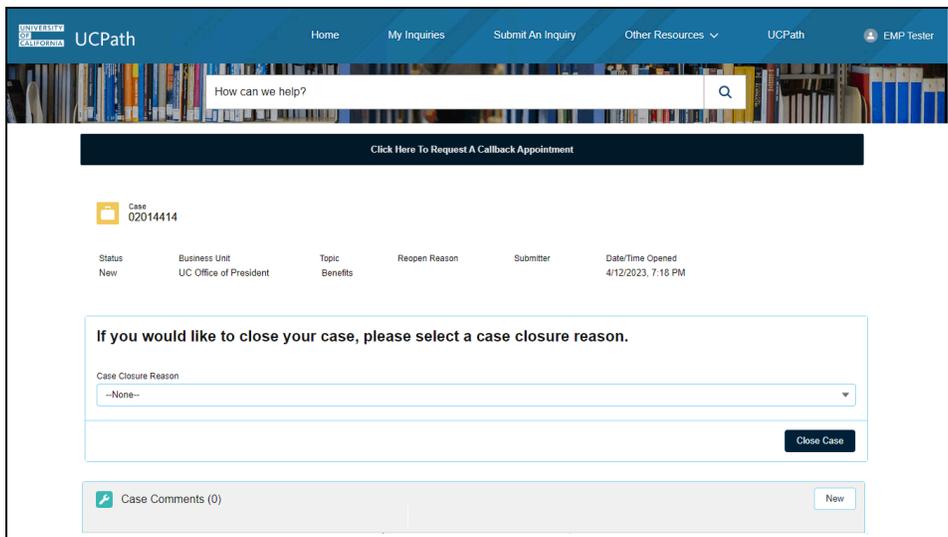
Step	Action
81.	A confirmation message appears. You will receive a call back with the First Available UCPath Associate at your selected date and time. Please check your email for the appointment confirmation with an attached calendar invite. The email also provides links to cancel or reschedule if needed.



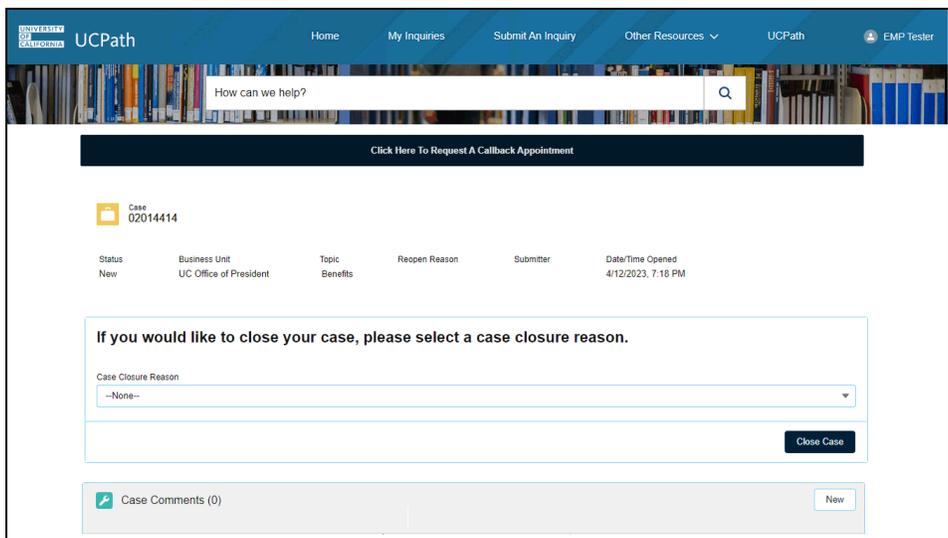
Step	Action
82.	<p>You will be redirected to the Ask UCPath homepage. The requested call back appointment will appear in the Case Details page.</p> <p>Click the My Inquiries link.</p> <p>My Inquiries</p>



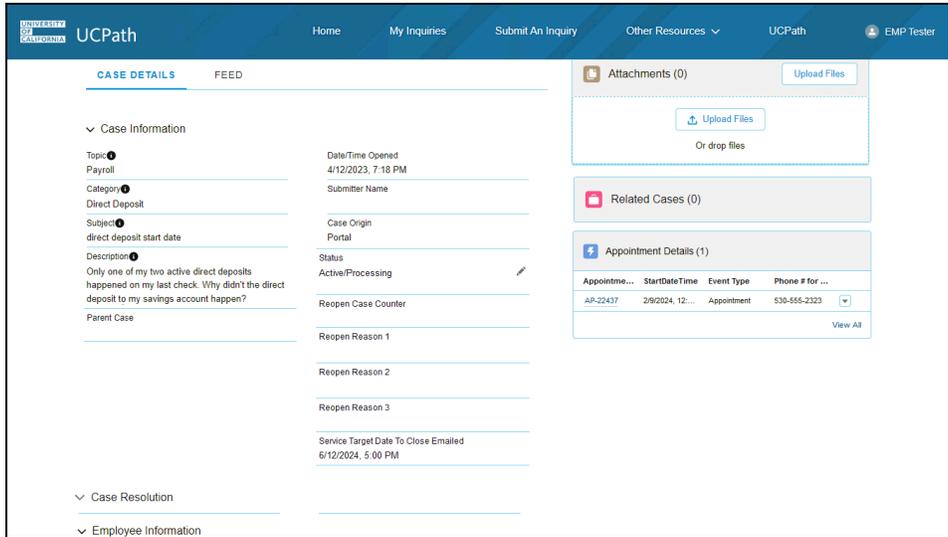
Step	Action
83.	<p>Click the Case Number 02014414 link to view the Case Details.</p> <p>02014414</p>



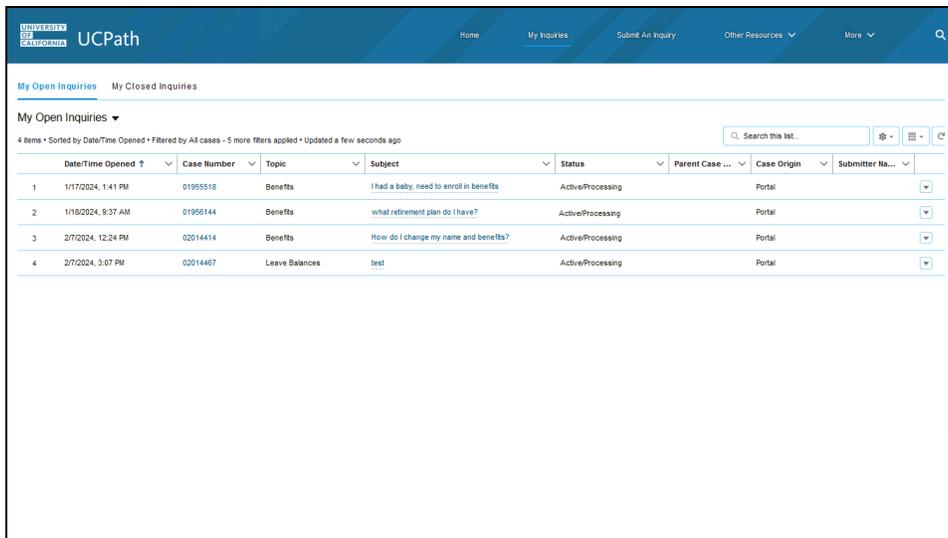
Step	Action
84.	You will be redirected to the case details page.



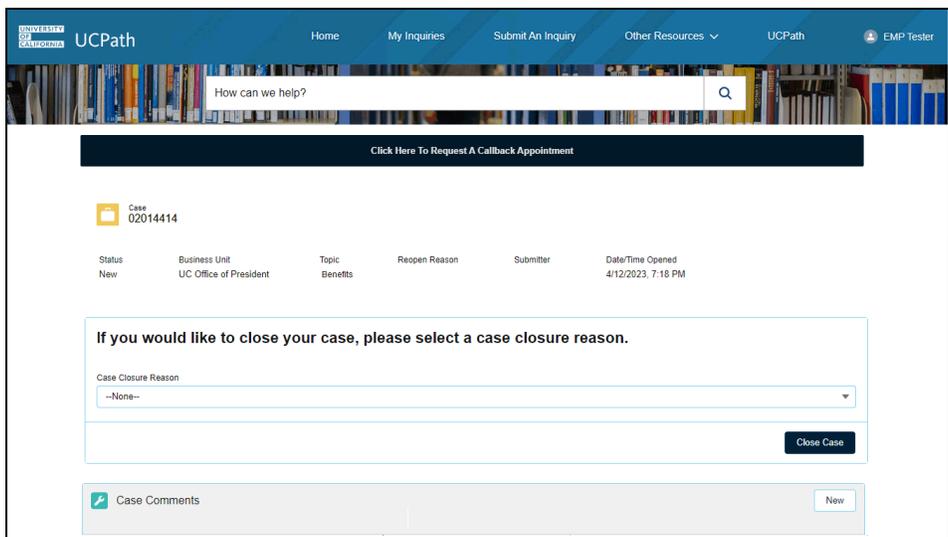
Step	Action
85.	Click the scroll bar.



Step	Action
86.	Call back appointments can be reviewed in the Appointment Details section.
87.	Click the My Inquiries link to view another inquiry.



Step	Action
88.	<p>Once your inquiry is resolved, if a UCPath Associate is in direct contact with you they will request your permission to close the case at that time.</p> <p>If a UCPath Associate is not in direct contact with you but has resolved your inquiry, you will receive an email notification of this status change that includes the case resolution comments.</p> <p>An open inquiry can be closed if UCPath assistance is no longer required or to close a duplicate case.</p> <p>Once the case is closed, it can be reopened up to three times within a period of 12 months (365 days) from the original closure date. Instructions for reopening a case will be emailed when the case is closed.</p>



Step	Action
89.	<p>You have submitted an inquiry to UCPath. End of Procedure.</p>