

April 2021 Research Administration Forum Q&A

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UCPath Central Resource Unit

Q1: When will CRU have phone hours again?

A1: In determining our new normal, we are looking into addressing phone access. Please send inquiries via Salesforce case.

Q2: How do you submit a case to CRU instead of UCPath? UCPath has been completely unresponsive to my case.

A2: You can [open a case with CRU](#), which will lead to one of our forms. In the SF form, choose the correct "Topic" and "Category". This will ensure the inquiry will be routed to the correct queue.

The escalation path for your UCPath case is to contact a UCPath Employee Services Supervisor if the SLA was not met. Their phone number is (855) 982-7284.

Q3: Is it possible for CRU to create a database in order for a department to keep track of cases submitted? It will be really useful for departments to be able to know the current status of the cases submitted.

A3: We are currently reviewing our CRU instance of Salesforce to see what enhancements we can implement immediately. Database buildout looks to be a long-term enhancement that we will discuss with our IT team.

Q4: Is there a way for CRU to create a worklist of outstanding cases that were submitted within each user's account in UCPath? It's been very difficult tracking open cases through our own emails. We have had instances where we had to create new case numbers referencing old cases.

A4: CRU does not have access to the UCPath instance of Salesforce. We can bring up the suggestion to UCPath.

Q5: Will there be transparency for cases submitted to CRU to see where it is at? At the moment, we don't have a way to check what is going on with the case submitted.

A5: We are currently reviewing our CRU instance of Salesforce to see what enhancements we can implement immediately. Case transparency and tracking looks to be a long-term enhancement that we will discuss with our IT team. In the meantime, we are working on providing submitters with case number, case subject and case details in our response.

Q6: On the receipt email that was provided to the person submitting the case, can we have a copy of what was submitted, to at least give us a reference point? At the moment, all we have is the case number.

A6: We are currently reviewing our CRU instance of Salesforce to see what enhancements we can implement immediately. We are working to provide submitters with case number, case subject and case details in our response.

Q7: Why is it that once a case has been identified as defect-related, it is classified as "non-workable"? Is the hope that there will be a mass correction for all GL errors once the defect is fixed?

A7: The "Defect" classification is used when there is a technical defect with UCPATH that is preventing resolution. It is currently viewed as "non-workable" as there is no way to resolve it by our GL team. Once UCPATH is able to correct a defect and provide a workable solution, we then go back to review and resolve individual cases.

Q8: The DR processing schedule that's currently posted on your site only goes through those locally approved on 3/18/21, so I don't know when a DR I submit today will be approved. Can this schedule be updated?

A8: The DR processing schedule will be updated once we receive clarification on dates from UCPATH. Keep an eye out for notification in our newsletter and check the [CRU UCPATH GL](#) page for updates.

Q9: When you open a CRU case, can the email confirmation that your case has been received include the information you have provided regarding your case?

A9: We are currently reviewing our CRU instance of Salesforce to see what enhancements we can implement immediately. We are working to provide submitters with case number, case subject and case details in our response.

Q10: When will UCPATH have benefit by earn dates? UCSF already has this updated on their payroll reports.

A10: This data should be available on the Relating Labor Ledger to GL - Fringe report in CDW as of May 2020. It is listed in the Fringe UC Earn End Date column. UCPATH was not able to add end dates to transactions prior to May 2020.

Q11: Is there a flow-chart showing who or what team is in charge of what (e.g. Benefit Cost Transfer, Defect or Payroll Correction)?

A11: CRU's main areas of responsibility are:

1. Payroll Support for general ledger and gross pay
2. Employment eligibility verification and NRA processes
3. Reporting and analytics
4. Partnership with UCPATH and UCLA stateholders
5. Case management
6. Campus training and communications for UCPATH & CRU

For a detailed list of topics that CRU is responsible for and UCPATH, visit the [CRU website](#).

Q12: I recently received an email that CRU wanted more information regarding a ticket I put in, but there was no information on what I put in so I could intelligently answer the request. I had no idea which ticket it was for. Can case details be included in your email responses?

A12: We are currently reviewing our CRU instance of Salesforce to see what enhancements we can implement immediately. We are working to provide submitters with case number, case subject and case details in our response.

Q13: When CRU replies, can they attach the original information as to what was submitted?

A13: We are currently reviewing our CRU instance of Salesforce to see what enhancements we can implement immediately. We are working to provide submitters with case number, case subject and case details in our response.

Q14: If I remember correctly, in PPS days, when Upay was done, the GL would reflect it 'retroactively'. Now it seems it's not the case with UCPATH anymore. Is that correct?

A14: In PPS, the GL did not post retroactively; Expense transfers hit in the month that the transaction posted (e.g. a January expense transferred in April would have hit in April). UCPATH follows the same logic, though there are more processing dates. Direct Retro will hit the GL in the month it is processed.

Campus Purchasing and Payables

Q1: Thanks Marcia for addressing the question you posed to OT Wells about sole source. We want to hear more on that in the future.

A1: We can request a follow up presentation on how that works.

Q2: When will Vendor PaymentWorks go live or is it already in use?

A2: PaymentWorks is live