UCPath Inquiry Only Matrix

This matrix outlines questions that can be answered by inquiry-based security access. These pages are intended for business use only. Each question is followed by the name of the page which has that information, a description of what can be found in this area, breadcrumbs on how to navigate through UCPath to the page, and finally the name of the security role that would need to be requested in SARA to have access to the page. No training is required for inquiry-only access. If a simulation is available from the UCPath Center on the topic, a hyperlink is available to the simulation in the help column.

Absence Management:

Question	Name	Description	Navigation	SARA Role
Where can I see a leave of absence request for an employee?	Extended Absence Trans History	Use this task to view extended absence requests for a specific employee within your business unit. This data will include the UCPath User ID for the initiator and a date and time stamp so you can identify who made the change and when.	Main Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > UC Customizations > Extended Absence Trans History	Absence Management Inquiry
Where can I see an accrual adjustments submitted for an employee? Where can I review Catastrophic Leave transactions? Where can I see sabbatical adjustments for an employee?	Review Manage Accrual Transactions	Use this task to view requests entered as a Manage Accrual transaction for a specific employee within your business unit. This data will include the UCPath User ID for the initiator and a date and time stamp so you can identify who made the change and when. Examples of manage accrual transactions include: sabbatical adjustments, FMLA, CFRA, PDLL balance adjustments, Vacation Take, and Catastrophic Leave transactions.	PeopleSoft Menu > UC Customizations > UC Extensions > Manage Accrual Transactions	Absence Management Inquiry

Commitment Accounting:

Question	Name	Description	Navigation	SARA Role
Where can I see any transactions to change the funding for an employee's benefit costs?	Review Benefit Cost Transfer	Use the Review Benefit Cost Transfer page to access a transaction that has been entered and saved, but not submitted. You can also use this page to access transactions that have been submitted and are awaiting approval or have already been approved.	PeopleSoft Menu > Payroll for North America > Payroll Distribution > Review Benefit Cost Transfer	Benefits Cost Transfer Inquiry
Where can I find the funding information for an employee's salary?	Funding Entry Inquiry Page	Use this page to view funding already committed to the database. That is, verify new funding was approved or look up current funding.	PeopleSoft Menu > Set up HCM > Product Related > Commitment Accounting > UC Customizations > Funding Entry Inquiry	Funding Entry Inquiry

Where can I see any transactions to change the funding for an employee's salary after the employee was paid?	[Review Retro Distribution]	The Review Retro Distribution component provides an audit trail of changes made on a particular direct retro transaction. It provides key information, such as process status, approval status, pay period, old and new data, initiator comments and approval details. The bottom of the page displays the Initiator Comment field, the transaction Reason Code, Questionnaire answers, if applicable, and access to justification documents and additional information on the approval.	PeopleSoft Menu > Payroll for North America > Payroll Distribution > UC Customization > Review Retro Distribution	Direct Retro Inquiry

Payroll:

Question	Name	Description	Navigation	SARA Role
Where can I find information on pay request for overpayment, off-cycle pay or for an employee's final pay?	[View Payroll Request]	Use this task to view an employee's payroll request, including Final Pay and Off-Cycle Check requests.	PeopleSoft Menu > UC Customizations > UC Extensions > Self Service Transaction Links	Payroll Inquiry
What payroll information was submitted to UCPath outside of a payroll request?	[Review PREPSHUP Tables]	Use this section to enter search criteria to search for payroll data, such as time, attendance, earnings, deductions and so on what have been loaded as paysheet data into payroll from sources outside of the application. At a minimum, the Process Name or Empl ID is required.	PeopleSoft Menu > Payroll for North America > Payroll Processing USA > UC PREPSHUP Process > Update PREPSHUP Staging Trans	PREPSHUP Tables Inquiry
Where can I search for and view an employee's paycheck data?	[Review Paycheck Summary]	Use the Review Paycheck Summary page to view paycheck information on earnings, deductions, and taxes.	PeopleSoft Menu > Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck Summary	Review Paycheck Inquiry

Security:

Question	Name	Description	Navigation	SARA Role
Where can I find what security clearance an employee has or if they've been eVerified?	[View Security Clearance]	Use this task to view an employee's security clearance information, including I-9 information.	PeopleSoft Menu > Workforce Administration > Personal Information > Security Clearance	Workforce Administration Inquiry

Workforce Administration:

Question	Name	Description	Navigation	SARA Role
Where can I find out if an employee is PPSM or represented?	View Job Data	The union code is displayed on the Job Labor tab of the Job Data page. The description attached to the code will outline the union (if any) that the employee is covered under.	PeopleSoft Menu > Workforce Administration > Job Information > Job Data (Job Labor tab)	Workforce Administration Inquiry
What does a position's HR Worksite ID indicate about e-Verification or I-9 requirement?	View Position Information	Use this to find information on a position's HR Worksite ID which drives the majority of UCPath and Tracker integration functionality. This field determines: • If the Worksite is configured to send automatic emails or not. • If the Worksite has e-Verify turned on or not. • If the Worksite requires a new I-9 for all rehires. View details of position setup data and if an incumbent is assigned to the position. This component is view-only for most WFA users.	PeopleSoft Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info	Workforce Administration Inquiry
Where can I find information on an employee's job?	View Job Data	View employee information within your department related to the employee's job. Data that is available by tab: Work Location tab: View employee’s position number, department, and/or location. Job Information tab: View employee’s job code, FT/PT, standard hours and FTE. View expected job end date and expected return from leave date. Job Labor tab: View labor information for represented employees. Payroll tab: View payroll information such as Pay Group data. Salary Plan tab: View employee’s salary plan information. Compensation tab: View employee’s compensation. UC Job Data tab: View employee’s custom UC information such as the probation end date.	PeopleSoft Menu > Workforce Administration > Job Information > Job Data (Work Location tab)	Workforce Administration Inquiry

Where can I find information on an employee's original start date?	Job Data – Employment Data	View employee's original start date. Unless adjusted, this will show the first date of employment for an employee at UCB while the UCPath system has been in place.	PeopleSoft Menu > Workforce Administration > Job Information > Job Data (Employment Data link)	Workforce Administration Inquiry
Where can I find information on an employee's ERIT? Where can I find information on an employee's other earnings distribution types if applicable?	Job Data – Earnings Distribution	View employee's earnings distribution types if applicable.	PeopleSoft Menu > Workforce Administration > Job Information > Job Data (Earnings Distribution link)	Workforce Administration Inquiry
Where can I find out if a person has active or inactive positions in the UC system?	View Person Organizational Summary	Use this task to view all current organizational relationships for a person: Employee, Contingent Worker (CWR) and/or Person of Interest (POI). This page does not display historical or future-dated employment details. For example, you can view a summary of an employee's curren job assignments and associated details.	PeopleSoft Menu > Workforce Administration > Personal Information > Person Organizational Summary	Person Organizational Summary Inquiry
How else can I search for a person to see if they have ever held a position or employment connection in the UC system?	Search for People Using Search/Match	Use one of the following three search methods to see if the person already exists in UCPath. 1. Enter the person's full Social Security number, if you have it. 2. Enter the person's first name and the date of birth. 3. Enter the person's first and last name.	PeopleSoft Menu > Workforce Administration > Personal Information > Search for People	Workforce Administration Inquiry
Where can I find an employee's complete job history at UC Berkeley?	Workforce Job Summary	View a summary of an employee's complete job history. Include the following tabs: General, Job Information, Work Location, Salary Plan, Compensation and UC Job.	PeopleSoft Menu > Workforce Administration > Job Information > Review Job Information > Workforce Job Summary	Workforce Administration Inquiry
Where can I view a summary of current, future, and historical jobs held by an employee with multiple employment records?	Multiple Job Summary	View a summary (current, future and history) of jobs and job statuses for those employees with multiple employment records Includes the following tabs: Employee, Position Data, Job Information.	PeopleSoft Menu > Workforce Administration > Job Information Review > Job Information > Multiple Jobs Summary	Workforce Administration Inquiry

Where can I find an employee's qualifications? Where can I find information about a multi-location appointment held by an employee? What is an employee's student status? Where could I find an employee's I9 Tracker information?	[Person Profile]()	View employee’s qualifications, education, oath and patent date multi-location appointment, UC Student Status and I9 Tracker information.	PeopleSoft Menu > Workforce Development > Profile Management > Profiles > Person Profiles	Workforce Administration Inquiry
Where could I find information on an employee's personal data such a current address, email address, citizenship or visa status?	Modify a Person	View employee’s personal data, including date of birth, gender, and education, current address, phone information, and email addresses. View ethnic group, proof of citizenship, and veteran status, UC Office of the President Disclosure options and citizenship or visa status.	PeopleSoft Menu > Workforce Administration > Personal Information > Biographical > Modify a Person	Workforce Administration Inquiry

Benefits:

Question	Name	Description	Navigation	SARA Role
Where can I find information on an employee's benefits status and benefits administration eligibility?	Job Data – Benefits Program Participation	View employee’s benefits administration eligibility.	PeopleSoft Menu > Workforce Administration > Job Information > Job Data (Benefits Program Participation link)	Workforce Administration Inquiry
When can I find information on what benefits elections an employee has selected?	Benefits Summary – Benefits Enrollment Summary	View employee’s benefits selections, deductions, and the coverage dates.	PeopleSoft Menu > Workforce Administration > Job Information > Job Data (Benefits Program Participation link)	BN - Health Care Facilitator Workforce Administration Inquiry