Please Note: This memo will also be shared via the Payroll listserv. We ask that you forward as appropriate to others in your organization or department who may need this information.

Submit Inquires to CRU Using the Improved CRU Service Request Form for HR/Admin

Consider submitting your inquiries to CRU using the improved CRU Service Request Form – HR/Admin. You can find the link to this form on the Contact page of CRU’s website. This form has been designed for HR, Payroll and other transactors to submit a question or request on behalf of an employee or to request guidance on submitting a UCPATH transaction. This service request form now:

- Uses UCLA Single Sign-On to pre-populate your name and contact information
- Auto-assigns cases to CRU staff based on the topic you select
- Prompts you to enter critical information about the employee record or transaction you have an inquiry about

These improvements should improve turnaround time and ensure CRU has the information needed to provide a detailed answer to your inquiry. You may continue to email contactcru@ucla.edu or call CRU at (310) 825-1089 and select Option 5, Monday – Friday, 8:00 a.m. to 4:00 p.m., as well.

New & Updated Job Aids Now Available

We have updated the Training Resources & Help page of the training website with the following supplemental training materials (which are also attached to this email):
• **Job Aid – Using the Transaction Status Page at UCLA:** This job aid explains how to view the status of Smart HR Template transactions that have completed the approval workflow (AWE) and are either awaiting to be processed or have already been processed by UCPath Center WFA Production. This document is available as a supplemental material to the *Template Transactions* training course.

• **Job Aid – Preventing Position Data Change Errors in PayPath at UCLA:** This job aid presents some important considerations when effective dating positions and processing Position Data changes in PayPath. This document is available as a supplemental material to the *PayPath Transactions* training course.

• **Job Aid – Setting Up Dual Appointments at UCLA:** Dual Appointment set up will be required for employees with two jobs that exceeds 1.0 FTE. This job aid reviews the process for initially setting up Dual Appointment during the hire process and correcting Dual Appointment after the employee has been hired.

We have also updated the following document:

• **Job Aid – Concurrent Hire FLSA Status at UCLA:** Use this Job Aid to determine how to align FLSA status and pay frequency between an employee’s existing job and their additional concurrent job. This document is available as a supplemental material to the *Template Transactions* training course.

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**New Year UCPath Updates & Reminders**

We would like to take a moment to share information regarding important deadlines that may affect you and the actions required.

<table>
<thead>
<tr>
<th>Information About Your Taxes</th>
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<tr>
<td>It’s Tax Season!</td>
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<tr>
<td>Sign-up to Receive Your UCPath W-2 Online</td>
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<tr>
<td>DEADLINE:</td>
</tr>
<tr>
<td>January 18, 2019</td>
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</table>

If you currently receive your W-2 in the mail, consider receiving it electronically. The deadline for requesting an electronic W-2 for your 2018 tax information is **January 18, 2019**. It’s fast, secure and environmentally friendly.

To sign-up, visit [UCPath](#) online and click on Employee Actions > Income and Taxes> Enroll to Receive Online W-2. If your current status says **CONSENT RECEIVED**, then you do not have to do anything – you’re already signed up for the electronic statement. Once you’ve signed up, all notifications pertaining to your W-2/W-2c will be sent to your preferred email address on file in the UCPath system.
Important Note: All UCLA employees will receive two (2) W-2s for 2018

- W-2 statement from AYSO will cover your January – September, 2018 paychecks. You will need to log into AYSO to obtain your W-2 if you have previously signed-up for an electronic W-2 in AYSO.
- W-2 statement from UCPath will cover your October - December, 2018 paychecks.

W-2 Statements and Important Security Reminders

- **UC does not send actual W-2 statements to employees by email or text.** You must log in to [UCPath](https://ucpath.identitynow.com) online to view your electronic W-2 (if you enrolled to receive one electronically). If you receive an email or text that has an attachment for viewing your W-2, it is a phishing scam designed to gain your private information.
- Scammers may also send emails with fraudulent links. Do not open any attachments or click on any email links.
- To access your electronic W-2 statement, always go directly to the [UCPath](https://ucpath.identitynow.com) online site using a safe/known link and log in.

Federal and State Earned Income Tax Credit (EITC)

- In accordance with the Earned Income Tax Credit Information Act, the university includes a notice with all Form W-2 statements notifying employees that they may be eligible for the federal Earned Income Tax Credit (EITC). The Earned Income Tax Credit, EITC or EIC, is a benefit for working people with low to moderate income. To qualify, you must meet certain requirements and file a tax return, even if you do not owe any tax or are not required to file. EITC reduces the amount of tax you owe and may give you a refund. To see if you qualify use the EITC Assistant, found [here](https://www.irs.gov/). Additional information regarding the federal Earned Income Tax Credit (EITC), can be obtained by referencing [IRS Notice 797](https://www.irs.gov/), or by contacting the Internal Revenue Service by calling 1-800-829-3676 or through its website at [www.irs.gov](http://www.irs.gov).
- You also may be eligible to receive the California Earned Income Tax Credit (California EITC) starting with the calendar year 2015 tax year. The California EITC is a refundable state income tax credit for low-income working individuals and families. The California EITC is treated in the same manner as the federal EITC and generally will not be used to determine eligibility for welfare benefits under California law. To
| **1042-S Tax Forms** | International persons receiving wages from the University of California may receive either a W-2 or 1042-S (Foreign Person's U.S. Source Income Subject to Withholding).

If this applies to you, please take a moment verify your email and home mailing addresses matches in both UCPath online and in the GLACIER tax database, to ensure that your 1042-S notification and/or form is sent to the correct email and home address. Additionally, you may elect to have an electronic 1042-S sent to you via your GLACIER account. **The deadline for requesting is January 18, 2019**

To learn more about Form 1042-S, click [here](https://www.irs.gov/forms-pubs/about-form-1042-s). |
| **Claiming Exemption from Withholding** | The IRS requires you to complete a new W-4 form each year if you are claiming exemption from tax withholding. If you wish to claim exemption from withholding in 2019, **you must make this choice on UCPath online before February 13, 2019.** |

| **Information about Reviewing and Updating Your Personal Information** |
| **Add/Update Your Personal Email Address and Home Address on UCPath** | It’s the new year and there’s no better time than to review and update your personal information. Take a moment and log in to UCPath online and select Employee Actions > Personal Information > Personal Information Summary to review and/or update your emails and address. By doing this, you’re helping to ensure the timely delivery of important information. |
| **Review/Update Dependent information** | The Affordable Care Act (ACA) requires employers to make reasonable efforts to obtain Social Security numbers for its employees and their spouses/domestic partners and dependents. |
**DEADLINE:**
January 18, 2019

Take a moment to log in to UCPath online to review and/or update your dependent information by selecting Employee Actions > Health and Welfare > Dependent Coverage in the Employee Actions menu. The deadline for updating your dependent information is **January 18, 2019**.

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**Information on Managing Your Vacation Accruals**

**Reduce Over Maximum Vacation Accruals**

As a result of the UCPath implementation, all employee vacation hours accrued, including hours over the policy maximum, were transitioned over to UCPath at the time of go-live.

**DEADLINE:**
January 31, 2019

For those employees with hours exceeding the policy maximum, a grace period of four (4) months was allowed for employees to reduce their over maximum balances. The deadline for reducing the over maximum balances and bringing vacation accruals below the policy maximum is **January 31, 2019**.

For impacted employees, failure to reduce vacation hours and bring them under the policy maximum by January 31, 2019, will result in the employee no longer accruing vacation hours until the vacation accruals are brought below the policy maximum.

**Important to Note:**

- The policy regarding vacation accrual maximum did not change as a result of UCPath as the UCPath system is designed to support the current UC system policy.
- An exception to exceed policy maximum accruals continue to require prior approval. You should contact your department HR representative for details.
- Represented employees should refer to their union contracts for vacation accrual provisions applicable to them.

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**Information on How You Can Learn More about UCPath**
Weekly UCPath Online Demonstrations

The UCPath Center will host live demonstrations of UCPath online. These one hour sessions are scheduled from 1:00 p.m. to 2:00 p.m. (PDT) every Friday. During these sessions you can expect to learn more about...

- What has transitioned to UCPath and what remains on AYSO
- How to access UCPath (system requires single sign on and MFA authentication)
- How to navigate UCPath online
- Employee Self Service functionality

If you would like to join the webinar, see the Zoom information below:

- **Step 1:** Join Zoom Meeting: Click on [https://ucop.zoom.us/j/578608466](https://ucop.zoom.us/j/578608466)
- **Step 2:** Dial by your location: +1 (669) 900 6833 (US Toll) or +1 (646) 876 9923 (US Toll)
- **Step 3:** Enter Meeting ID: 578 608 466

(Demonstrations are limited to the first 500 participants.)

2019 Payroll Calendar

Find the current [UCPath Payroll Calendars](https://ucpathcenter.ucop.edu/2019-payroll-calendar) under the Quick Links section on the front home page of UCPath. You can select Payroll Calendars & Schedule to view both biweekly and monthly calendars.

Have Questions or Need Help?

For General Questions: Please visit UCPath and click on “Ask UCPath Center” to submit an inquiry. You may also call the UCPath Center at 855-982-7284 from 8 a.m. to 5 p.m. (PDT) Monday – Friday and speak with an associate.

For Payroll Questions: Please contact the UCLA Central Resource Unit (CRU) by sending an email to contactcru@ucla.edu to generate a case that will be assigned to a CRU team member who will follow-up with you to resolve your issue. You may also phone the CRU at (310) 825-1089 and select Option 5, Monday – Friday, 8:00 a.m. to 4:00 p.m.

Thank you for your ongoing support of UCPath at UCLA.

Sincerely,

UCLA UCPath Project Team