Lived Name Implementation

UCPath changes in support of the Gender Recognition and Lived Name Policy



Table of Contents

- Changes to the Name Fields
- Page Labels for Lived Name including Lived and Legal Names
- Quick Reference Pages Displaying Legal Name



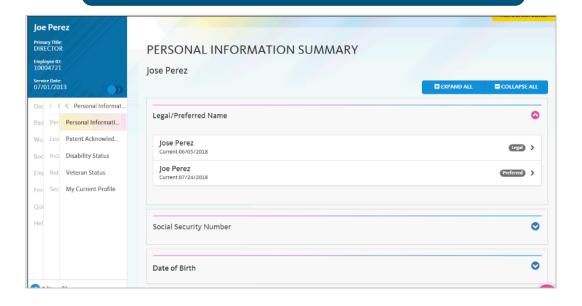
Changes to the Name Fields

The new "Name" Field

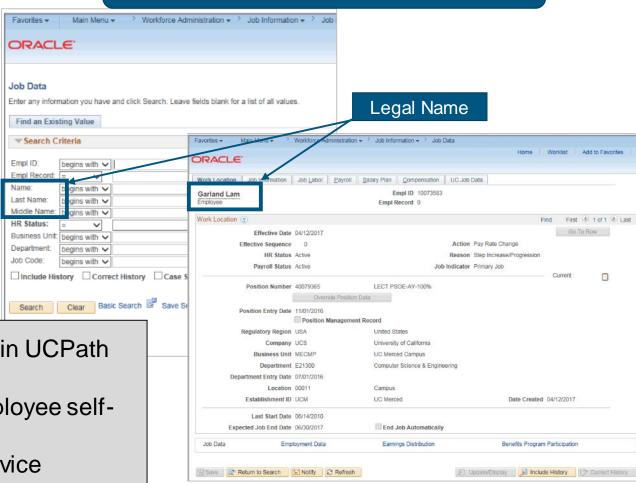


Name: Current State

Employee



Transactor

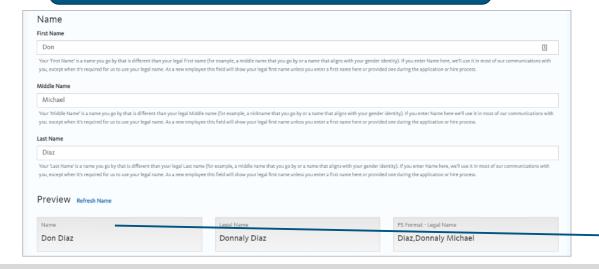


- Employees add and maintain their preferred name in UCPath online
- Preferred name is visible in UCPath Online for employee selfservice only
- Managers see only legal name in manager self-service
- Transactors see only legal name on all pages in UCPath

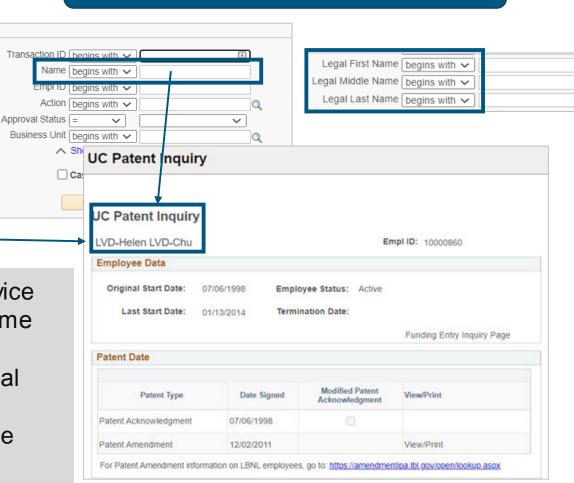


Lived Name: Future State - June 2023

Employee



Transactor



- New "Name" field will be available in employee self-service
- Existing "Preferred Name" will populate into the new Name field
- Employees without a "Preferred Name" will populate legal name
- UCPath has configured search pages to match the name displayed on the page
- Legal name is visible only where required (e.g., paycheck)



Pages that Display Lived and Legal Name

Pages, roles, search field, page label for lived and legal name



Absence Management

Page	Page Navigation	Role	Search Field	Page Display
Career & Benefits Elig Hrs INQ	Global Payroll & Absence Mgmt > Payee Data > Career & Benefits Elig Hrs INQ	ULAWE_AM_EXTABS_INIT ULSHR_AM_AM_INQUIRY	Employee ID / Name	Name
Absence Event	Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Absence Event	ULSHR_AM_AM_INQUIRY	Employee ID / Name	Name
Administer Extended Absence	Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > UC Customizations > Administer Extended Absence	Extended Absences Approver	Not applicable	Name
Extended Absence Trans History	Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > UC Customizations > Extended Absence Trans History	Extended Absences Approver ULAWE_AM_EXTABS_INIT ULSHR_AM_AM_INQUIRY	Employee ID / Name	Name
Request Extended Absence	Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > UC Customizations > Request Extended Absence	Extended Absences Approver ULAWE_AM_EXTABS_INIT	Employee ID / Name	Name
Admin - Review Absence Balance	UC Customizations > UC Extensions > Admin - Review Absence Balance	Extended Absences Approver Manage Accruals Approver ULSHR_LOCATION_SUPPORT ULSHR_PY_PY_INQUIRY ULAWE_AM_EXTABS_INIT ULAWE_AM_MNGACCRUAL_INIT ULSHR_AM_MNGACCRUAL_PYADMIN ULSHR_AM_AM_INQUIRY	Employee ID / Name	Name



Absence Management

Page	Page Navigation	Role	Search Field	Page Display
Manage Accrual Trans History	UC Customizations > UC Extensions > Manage Accrual Transactions	Manage Accruals Approver ULAWE_AM_MNGACCRUAL_INIT ULSHR_AM_MNGACCRUAL_PYADMIN	Employee ID	Name
Manage Accruals	UC Customizations > UC Extensions > Manage Accruals	ULAWE_AM_MNGACCRUAL_INIT ULSHR_AM_MNGACCRUAL_PYADMIN ULSHR_AM_AM_INQUIRY Manage Accruals Approver	Transaction ID / Department	Name



Benefits

Page	Page Navigation	Role	Search Field	Page Display
Update Dependent/Beneficiary	Benefits > Employee/Dependent Information > Update Dependent/Beneficiary	ULSHR_BN_RASC ULSHR BN HCF	Name	Name
Arrears/Frequency Ovrd	Benefits > Enroll In Benefits > Arrears/Frequency Ovrd	ULSHR_BN_BN_SUPPORT	Name	Name
Assign to Benefit Program	Benefits > Enroll In Benefits > Assign to Benefit Program	ULSHR_BN_BN_SUPPORT	Name	Name
Disability Benefits	Benefits > Enroll In Benefits > Disability Benefits	ULSHR_BN_BN_SUPPORT ULSHR_BN_RASC ULSHR_LOCATION_SUPPORT	Name	Name
Health Benefits	Benefits > Enroll In Benefits > Health Benefits	ULSHR_BN_BN_SUPPORT ULSHR BN RASC	Name	Name
Life and AD/D Benefits	Benefits > Enroll In Benefits > Life and AD/D Benefits	ULSHR_BN_BN_SUPPORT ULSHR BN RASC	Name	Name
Retirement Plans	Benefits > Enroll In Benefits > Retirement Plans	ULSHR_BN_BN_SUPPORT ULSHR BN RASC	Name	Name
Savings Management	Benefits > Enroll In Benefits > Savings Management	ULSHR_BN_BN_SUPPORT ULSHR_BN_RASC	Name	Name
Savings Plans	Benefits > Enroll In Benefits > Savings Plans	ULSHR_BN_BN_SUPPORT ULSHR_BN_RASC	Name	Name
Simple Benefits	Benefits > Enroll In Benefits > Simple Benefits		Name	Name
Spending Accounts	Benefits > Enroll In Benefits > Spending Accounts	ULSHR_BN_BN_SUPPORT ULSHR_BN_RASC	Name	Name



Benefits

Page	Page Navigation	Role	Search Field	Page Display
On-Demand Event Maintenance	Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance	ULSHR_BN_HCF	Emplid	Name
Employee Event Detail	Benefits > Manage Automated Enrollment > Review Processing Results > Employee Event Detail	-	Name	Name
Benefits Summary	Benefits > Review Employee Benefits > Benefits Summary	ULSHR_BN_HCF ULSHR_BN_RASC ULSHR_LOCATION_SUPPORT	Name	Name



Payroll

Page	Page Navigation	Role	Search Field	Page Display
Contract Payment Details	Payroll for North America > Employee Pay Data USA > Contract Payment Details	ULSHR_HR_CONTRACT_PAY_INQ	Employee ID / Name	Name
Create Additional Pay	Payroll for North America > Employee Pay Data USA > Create Additional Pay	ULSHR_BN_RASC ULSHR_HR_WFA_INQUIRY ULSHR_HR_WFA_INQUIRY_NO_PII	Employee ID / Name	Name
Create General Deductions	Payroll for North America > Employee Pay Data USA > Deductions > Create General Deductions	ULSHR_PY_MOP_LOAN_COORD	Employee ID / Name	Name
View Union Deductions	Payroll for North America > Employee Pay Data USA > Deductions > View Union Deductions	ULSHR_PY_PY_SUPPORT	Employee ID / Name	Name
Request Direct Deposit	Payroll for North America > Employee Pay Data USA > Request Direct Deposit	ULSHR_PY_PY_SUPPORT	Employee ID / Name	Name
Employee Tax Data USA	Payroll for North America > Employee Pay Data USA > Tax Information > Update Employee Tax Data	ULSHR_PY_TAX_SUPPORT ULSHR_LOCATION_SUPPORT ULSHR_LOCATION_TAX_DATA	Employee ID / Name	Name
Paycheck Modeler	Payroll for North America > Payroll Processing USA > Paycheck Modeling > Paycheck Modeler	ULSHR PY Paycheck Modeler	Employee ID / Name	Name
Review Paycheck	Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck	ULSHR_BN_RASC ULSHR_LOCATION_SUPPORT ULSHR_PY_PY_SUPPORT	Employee ID / Legal Name	Legal Name
Review Paycheck Summary	Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck Summary	ULSHR_PY_REVIEW_PAYCHECK	Employee ID / Legal Name	Legal Name



Payroll

Page	Page Navigation	Role	Search Field	Page Display
Review Self Service Paycheck [Admin]	Payroll for North America > Payroll Processing USA > Produce Payroll > Review Self Service Paycheck	ULSHR_LOCATION_SUPPORT	Employee ID / Legal Name	Legal Name
Limits/Offset Amounts	Payroll for North America > Periodic Payroll Events USA > Balance Reviews > Limits/Offset Amounts	ULSHR_BN_RASC ULSHR_PY_PY_SUPPORT	Employee ID / Name	Name
Special Accumulators	Payroll for North America > Periodic Payroll Events USA > Balance Reviews > Special Accumulators	ULSHR_PY_PY_SUPPORT	Employee ID / Name	Name
View W-2/W-2c Forms	Payroll for North America > U.S. Annual Processing > Create W-2 Data > View W-2/W- 2c Forms	ULSHR_PY_TAX_SUPPORT	Employee ID / Legal Name	Legal Name
General Deduction Entry Update	UC Customizations > UC Extensions > General Deduction Entry Update	ULSHR_PY_GEN_DEDUCTION_SUB ULSHR_PY_PY_INQUIRY	Employee ID / Legal Name	Legal Name
Loan Repayment Information	UC Customizations > UC Extensions > Loan Repayment Information	ULSHR_PY_PY_SUPPORT	Emplid	Name
One-Time Payments	UC Customizations > UC Extensions	ULSHR_PY_PY_INQUIRY	Emplid	Name
Payroll Requests	UC Customizations > UC Extensions	ULSHR_PY_PY_INQUIRY ULAWE PY PAYREQUEST INIT	Emplid	Name
Additional Pay	UC Customizations > UC Extensions	ULSHR_PY_PY_INQUIRY ULAWEPL_PY_ADDLPAY_APPROVER ULAWE_PY_ADDLPAY_INIT	Emplid	Name



Page	Page Navigation	Role	Search Field	Page Display
Search/Match	Workforce Administration > Personal Information > Search Person	Template Approver ULAWE_HR_TEMPLATES_ALL_INIT ULSHR_TM_PREPARE_HIRE ULSHR_BN_RASC ULAWE_HR_POI_ALL_INIT ULSHR_HR_WFA_INQUIRY	SSN/Legal Name	Legal Name
PayPath Actions	Main Menu>UC Customizations>UC Extensions>PayPath Actions	ULAWE_HR_PAYPATH_CEN_INIT ULAWE_HR_PAYPATH_DEPT_INIT Paypath Academic PL PayPath Staff PL	Emplid/Name	Name
Maintain POI Types	Main Menu>Workforce Administration>Personal Information>Organizational Relationships>Maintain POI Relationship	ULAWE_HR_POI_ALL_INIT	Emplid/Name	Name
Person of Interest -Add	Main Menu>UC Customizations>UC Extensions>Person of Interest -Add	ULAWE_HR_POI_ALL_INIT POI Approver	Emplid/Name	Name
Gender Identity	Main Menu>Workforce Administration>Personal Information>Gender Identity	ULAWE_HR_TEMPLATES_ALL_INIT	Emplid/Name	Name
Smart HR Transactions	Workforce Administration > Smart HR Template > Smart HR Transactions	ULAWE_HR_TEMPLATES_ALL_INIT Template Approver	Not Applicable	Name/Legal Name
Personal Information	Main Menu>Workforce Administration>Personal Information>Modify a Person	ULAWE_HR_TEMPLATES_ALL_INIT ULSHR_BN_RASC ULSHR_LOCATION_SUPPORT ULSHR_HR_WFA_INQUIRY ULSHR_HR_WFA_INQUIRY_NO_PII	Emplid/Legal Name/Name	Name/Legal Name



Page	Page Navigation	Role	Search Field	Page Display
UC External Systems IDs	Main Menu>UC Customizations>UC Extensions>UC External System IDs	ULAWE_HR_TEMPLATES_ALL_INIT ULSHR_HR_UC_EXT_SYS_ID Template Approver	Emplid/Name	Name
Person Profiles	Main Menu>Workforce Development>Profile Management>Profiles>Person Profiles	ULAWE_HR_TEMPLATES_ALL_INIT ULSHR_HR_WFA_INQUIRY ULSHR_HR_PERSONPROFILE_ADMIN ULSHR_HR_WFA_INQUIRY-NoPII ULSHR_PY_PY_INQUIRY	Emplid/Name	Name
Transaction Status	Main Menu > Administer Workforce > Smart HR Templates > Transaction Status	ULAWE_HR_TEMPLATES_ALL_INIT ULSHR_HR_WFA_INQUIRY ULSHR_HR_WFA_INQUIRY-NoPII ULSHR_RT_PAYPATH_TXN_STATUS	Emplid/Name	Name
Workforce Job Summary	Main Menu>Workforce Administration>Job Information>Review Job Information>Workforce Job Summary	ULSHR_BN_RASC ULAWE_HR_PAYPATH_CEN_INIT ULAWE_HR_PAYPATH_DEPT_INIT ULSHR_HR_WFA_INQUIRY ULSHR_HR_WFA_INQUIRY-NoPII ULSHR_PY_PY_INQUIRY ULSHR_CA_BUDGET_ENTRY ULSHR_CA_BUDGET_SNAPSHOT Paypath Academic PL PayPath Staff PL ULAWE HR TEMPLATES ALL INIT	Emplid/Legal Name/Name	Name/Legal Name
Update Contract Pay NA	Main Menu>Workforce Administration>Job Information>Contract Administration>Update Contract Pay NA	ULSHR_BN_RASC ULSHR_HR_CONTRACT_PAY_INQ	Emplid/Name	Name



Page	Page Navigation	Role	Search Field	Page Display
UC Employee Experience Admin	Workforce Administration > Job Information > Experience Based Pay > UC Employee Experience Admin	ULSHR_HR_EXP_BASED_PAY_INIT ULSHR_HR_EXP_BASED_PAY_ADMIN	Not Applicable	Name
UC Employee Experience Page	Main Menu>Workforce Administration>Job Information>Experience Based Pay>UC Employee Experience Page	ULSHR_HR_EXP_BASED_PAY_INIT ULSHR_HR_EXP_BASED_PAY_ADMIN	Emplid/Name	Name
Security Clearance	Main Menu>Workforce Administration>Personal Information>Security Clearance	ULSHR_HR_I9_REVIEWER ULSHR_HR_WFA_INQUIRY ULSHR_HR_WFA_INQUIRY-NoPII ULAWE_HR_TEMPLATES_ALL_INIT	Emplid/Name	Name
UC ULSHR_HR_PATENT_INQUIRY	Main Menu>UC Customizations>UC Extensions>UC ULSHR_HR_PATENT_INQUIRY	ULSHR_HR_PATENT_INQUIRY	Emplid	Name
Maintain Teleworkers	Main Menu>Workforce Administration>Job Information>Maintain Teleworkers	ULSHR_HR_TELEWORK_INIT ULSHR HR TELEWORK INQ	Emplid/Name	Name
Admin-Verification of Employment	Main Menu>UC Customizations>UC Extensions>Admn- Verification of Employmnt	ULSHR_HR_VERIFY_EMPLMNT	Emplid/Legal Name	Legal Name
UC Employee Review	Main Menu>Compensation>Base Compensation>Group Increases>UC Employee Review	ULSHR_HR_WFA_INQUIRY ULSHR HR WFA INQUIRY-NoPII	Emplid/Name	Name
Person Organizational Summary	Main Menu>Workforce Administration>Personal Information>Person Organizational Summary	ULSHR_HR_WFA_INQUIRY ULSHR_HR_WFA_INQUIRY-NoPII	Emplid/Name	Name
ULSHR_HR_PERSON_CHECKLIST	Main Menu>Workforce Administration>Personal Information>Organizational Relationships>ULSHR_HR_PERSON_CHECKLIST	ULSHR_HR_WFA_INQUIRY ULSHR_HR_WFA_INQUIRY-NoPII ULAWE_HR_TEMPLATES_ALL_INIT	Emplid/Name	Name
Emergency Contact	Main Menu>Workforce Administration>Personal Information>Personal Relationships>Emergency Contact	ULSHR_HR_WFA_INQUIRY ULSHR_HR_WFA_INQUIRY-NoPII ULAWE_HR_TEMPLATES_ALL_INIT	Emplid/Name	Name



Page	Page Navigation	Role	Search Field	Page Display
Identification Data	Main Menu>Workforce Administration>Personal Information>Citizenship>Identification Data	ULSHR_LOCATION_SUPPORT ULSHR_HR_WFA_INQUIRY ULSHR_HR_I9_REVIEWER ULAWE HR TEMPLATES ALL INIT	Emplid/Name	Name
SS Smart HR Transactions	Main Menu>UC Customizations>UC Extensions>SS Smart HR Transactions	ULSHR_PY_PY_INQUIRY Template Approver ULAWE_HR_TEMPLATES_ALL_INIT ULSHR LOCATION SUPPORT	Emplid/Name	Name
Job Data	Main Menu>Workforce Administration>Job Information>Job Data	ULSHR_PY_PY_INQUIRY ULSHR_BN_RASC ULSHR_LOCATION_SUPPORT ULSHR_HR_WFA_INQUIRY ULSHR_HR_WFA_INQUIRY-NoPII ULSHR_HR_JOBDATA_NO_COMP	Emplid/Legal Name/Name	Name/Legal Name



General Ledger

Page	Page Navigation	Role	Search Field	Page Display
Process Benefits Cost Transfer	Payroll for North America > Payroll Distribution > UC Customizations > Process Benefit Cost Transfer	ULAWE_CA_BCT_INIT	Emplid/Name	Name
Process Direct Retro	Payroll for North America > Payroll Distribution > UC Customizations > Process Direct Retro	ULAWE_CA_DRCTRETRO_INIT	Emplid/Name	Name
Review Benefits Cost Transfer	Payroll for North America > Payroll Distribution > UC Customizations > Review Benefit Cost Transfer	ULAWE_CA_BCT_INIT ULSHR_CA_BCT_INQUIRY ULAWE_CA_BCT_%	Emplid/Name	Name
Review Retro Distribution	Payroll for North America > Payroll Distribution > UC Customizations > Review Retro Distribution	ULSHR_CA_DRCTRETRO_INQ ULAWE_CA_DRCTRETRO_INIT ULAWE_CA_DRCTRETRO_%	Emplid/Name	Name
Budget Distribution	Set Up HCM > Product Related > Commitment Accounting > Budget Information > UC Customizations > Budget Distribution	ULSHR_CA_BUDGET_SNAPSHOT	Emplid/Name	Name
Funding Entry	Set Up HCM > Product Related > Commitment Accounting > UC Customizations > Funding Entry	ULAWE_CA_FUNDENTRY_INIT Funding Entry Approver	Emplid/Name	Name
Funding Entry Inquiry	Set Up HCM > Product Related > Commitment Accounting > UC Customizations > Funding Entry Inquiry	ULAWE_CA_FUNDENTRY_INIT Funding Entry Approver	Emplid/Name	Name
Work Study Award Table	Set Up HCM > Product Related > Commitment Accounting > UC Customizations > Work Study Award Table	ULSHR_CA_WORKSTUDY_INQ	Emplid/Name	Name



Employee Self Service

Page	Page Navigation	Page Display
Review Absence Balances - ESS	UC Customizations > UC Extensions > SS - Review Absence Balance	Name
1095-C Consent	Self Service > Benefits > 1095-C Consent	Name
ESS: Benefits Summary	Self Service > Benefits > Benefits Summary	Name
ESS: Dependent Coverage	Self Service > Benefits > Dependents > Dependent Coverage	Name
ESS: Enroll in Benefits	Self Service > Benefits > Enroll in Benefits	Name
ESS: Life Events/Benefits Changes	Self Service > Benefits > Life Events/Benefits Changes	Name
Military Status/Veteran Status	Main Menu > UC Customizations > UC Extensions > Military Status/Veteran Status	Name
Patent Acknowledgement	Main Menu > UC Customizations > UC Extensions > Patent Acknowledgement	Name
Direct Deposit	Self Service > Payroll and Compensation > Direct Deposit	Name
CA State W-4 Tax Info	Self Service > Payroll and Compensation > CA State W-4 Tax Info	Legal Name
View Paycheck [ESS]	Self Service > Payroll and Compensation > View Paycheck	Legal Name
View W-2/W-2c Forms	Self Service > Payroll and Compensation > View W-2/W-2c Forms	Legal Name
W-2/W-2c Consent	Self Service > Payroll and Compensation > W-2/W-2c Consent	Name
W-4 Tax Information	Self Service > Payroll and Compensation > W-4 Tax Information (Federal)	Legal Name



Employee Self Service

Page	Page Navigation	Page Display
My Current Profile	Main Menu>Self Service>Learning and Development>My Current Profile	Name
My Historical Profile	Main Menu>Self Service>Learning and Development>My Historical Profile	Name
Compensation History	Main Menu>Self Service>Payroll and Compensation>Compensation History	Name
Disability	Main Menu>Self Service>Personal Information>Disability	Name
Email Addresses	Main Menu>Self Service>Personal Information>Email Addresses	Name
Emergency Contact	Main Menu>Self Service>Personal Information>Emergency Contacts	Name
Employee Disclosures	Main Menu>Self Service>Personal Information>Employee Disclosures	Name
Ethnic Groups	Main Menu>Self Service>Personal Information>Ethnic Groups	Name
Gender Identity and Sexual Orientation	Main Menu>Self Service>Personal Information>Gender Identity	Name
Home and Mailing Address	Main Menu>Self Service>Personal Information>Home and Mailing Address	Name
My Patent Amendment	Main Menu>Self Service>Personal Information>My Patent Amendment	Name
Name Change	Main Menu>Self Service>Personal Information>Name Change	Name
Personal Information Summary	Main Menu>Self Service>Personal Information>Personal Information Summary	Name
Phone Numbers	Main Menu>Self Service>Personal Information>Phone Numbers	Name



Manager Self-Service

Page	Page Navigation	Page Display
View Compensation History	Main Menu>Manager Self Service>Compensation and Stock>View Compensation History	Name
View Employee Personal Info	Main Menu>Manager Self Service>Job and Personal Information>View Employee Personal Info	Name
Current Team Profiles	Main Menu>Manager Self Service>Learning and Development>Current Team Profiles	Name



Quick Reference – Pages Displaying Legal Name

Pages that display legal name



Lived Name: Legal Name

Page	Page Navigation	Search Field	Label
Review Paycheck	Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck	Employee ID / Legal Name	Legal Name
Review Paycheck Summary	Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck Summary	Employee ID / Legal Name	Legal Name
Review Self Service Paycheck [Admin]	Payroll for North America > Payroll Processing USA > Produce Payroll > Review Self Service Paycheck	Employee ID / Legal Name	Legal Name
View W-2/W-2c Forms	Payroll for North America > U.S. Annual Processing > Create W-2 Data > View W-2/W-2c Forms	Employee ID / Legal Name	Legal Name
General Deduction Entry Update	UC Customizations > UC Extensions > General Deduction Entry Update	Employee ID / Legal Name	Legal Name
Admin-Verification of Employment	Main Menu>UC Customizations>UC Extensions>Admn-Verification of Employmnt	Employee ID / Legal Name	Legal Name
Search/Match	Workforce Administration > Personal Information > Search Person	SSN/Legal Name	Legal Name



Lived Name: Legal Name and Name

Page	Page Navigation	Search Field	Label
Job Data	Main Menu>Workforce Administration>Job Information>Job Data	Employee ID / Legal Name	Name and Legal Name
Workforce Job Summary	Main Menu>Workforce Administration>Job Information>Review Job Information>Workforce Job Summary	Employee ID / Legal Name	Name and Legal Name
Personal Information	Main Menu>Workforce Administration>Personal Information>Modify a Person	Employee ID / Legal Name	Name and Legal Name

