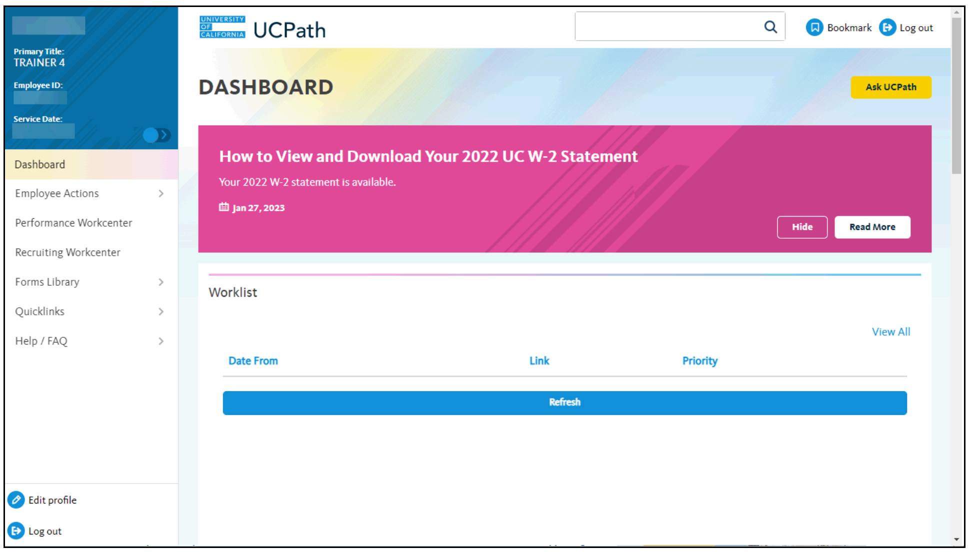
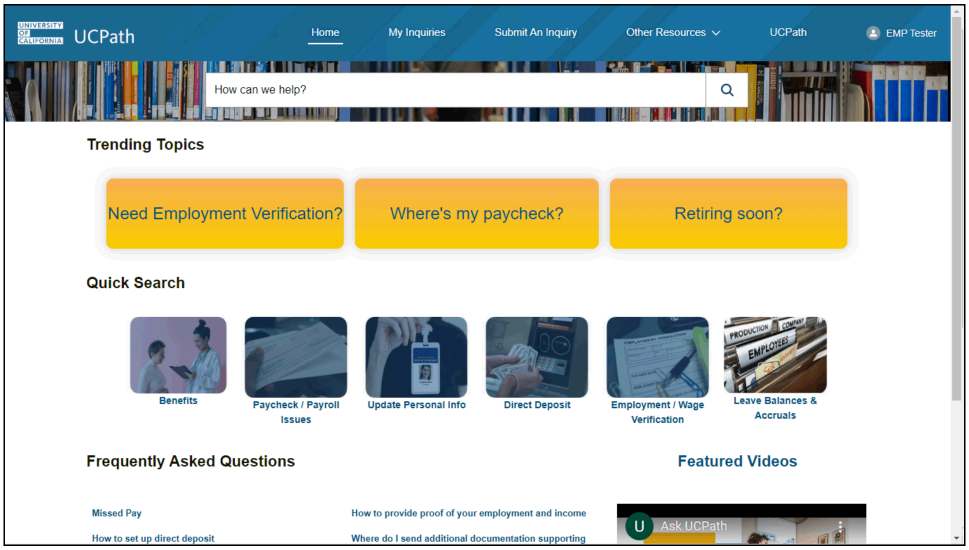
Use this task to navigate through the Ask UCPath site and submit an inquiry to UCPath.

Dashboard Navigation:
Ask UCPath
or
Menu Navigation:
Help / FAQ > **Ask UCPath**

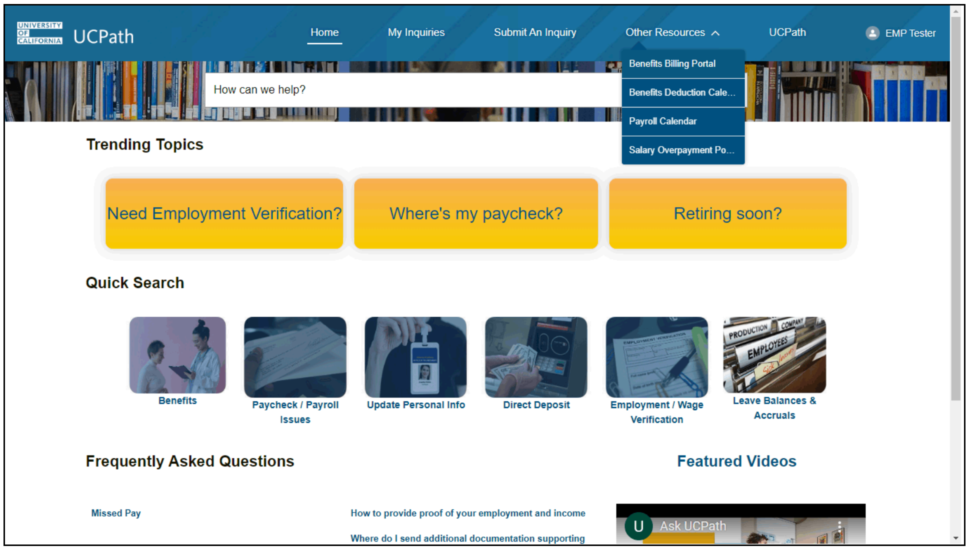
Note: This example uses sample images as seen on a computer. Sample images may appear differently on a tablet or smartphone, but the steps remain the same.



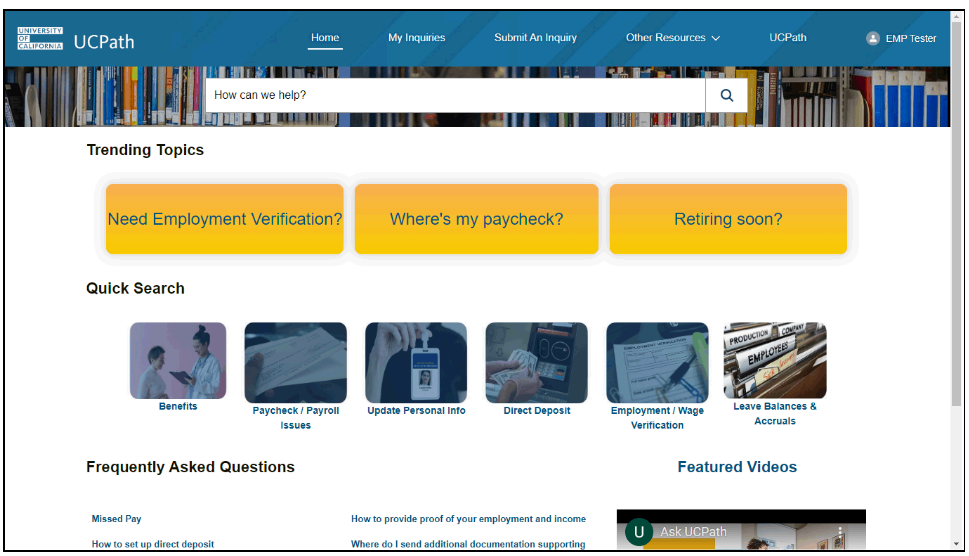
Step	Action
1.	Click the **Ask UCPath** button. 



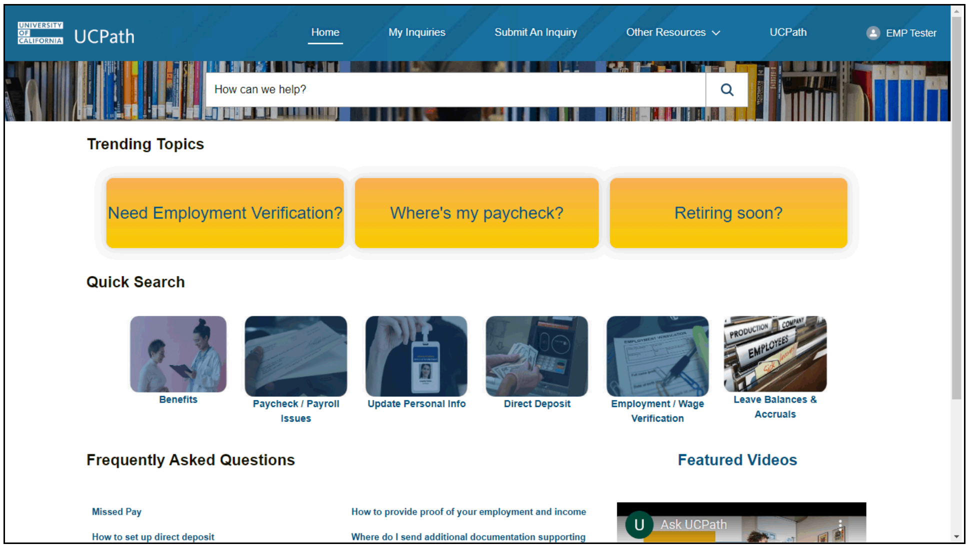
Step	Action
2.	The **Ask UCPath** homepage appears. You can find a variety of resources on this page to help you find answers to your questions without needing to submit an inquiry. Some of the available resources include articles, training resources and other helpful information. Using these resources can save you time and help you find the information you need quickly and easily. Before we review how to submit an inquiry, let's go over all the available resources on Ask UCPath.
3.	**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.
4.	Let's begin with the **Other Resources** section. We will return to the **My Inquiries** and **Submit an Inquiry** sections later in this tutorial. Click the **Other Resources** link. 



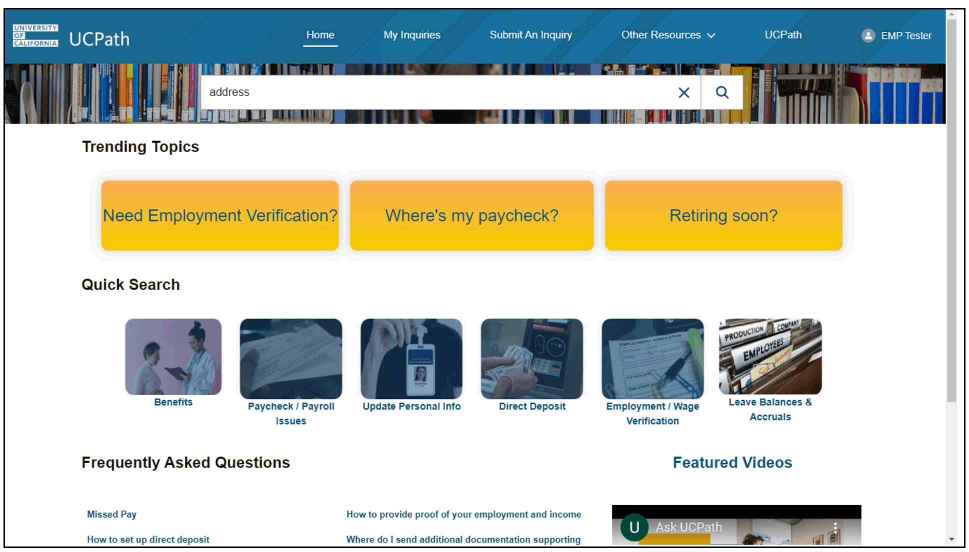
Step	Action
5.	The **Other Resources** provides you with a list of additional sites and resources that are commonly used. **Note:** The list of other resources is subject to change. You may be prompted to log in with your single sign-on credentials when you click on links or access specific resources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

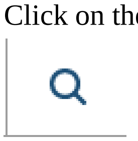


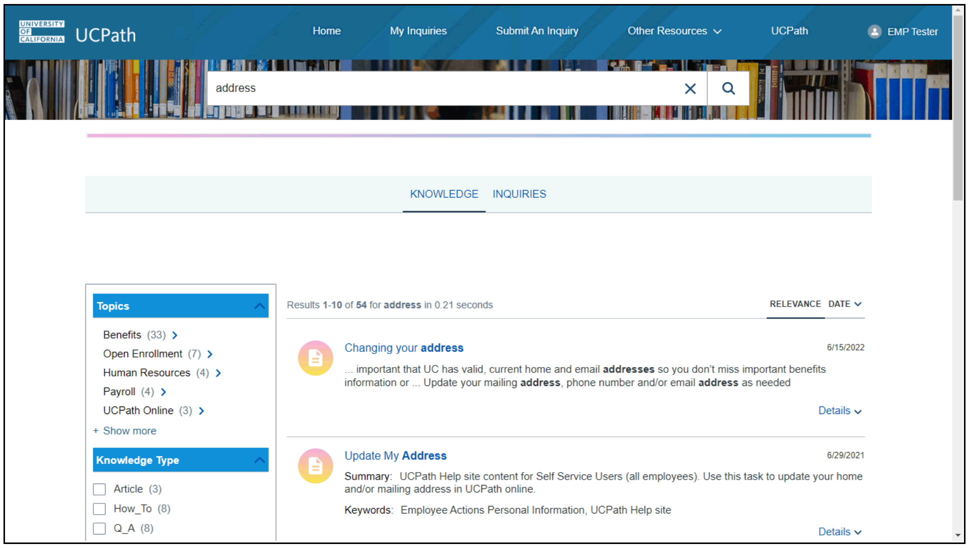
Step	Action
6.	The UCPath link will direct you to your UCPath Dashboard.
7.	Next, is the **How can we help?** search bar. You can search for topics related to UCPath using the search bar.



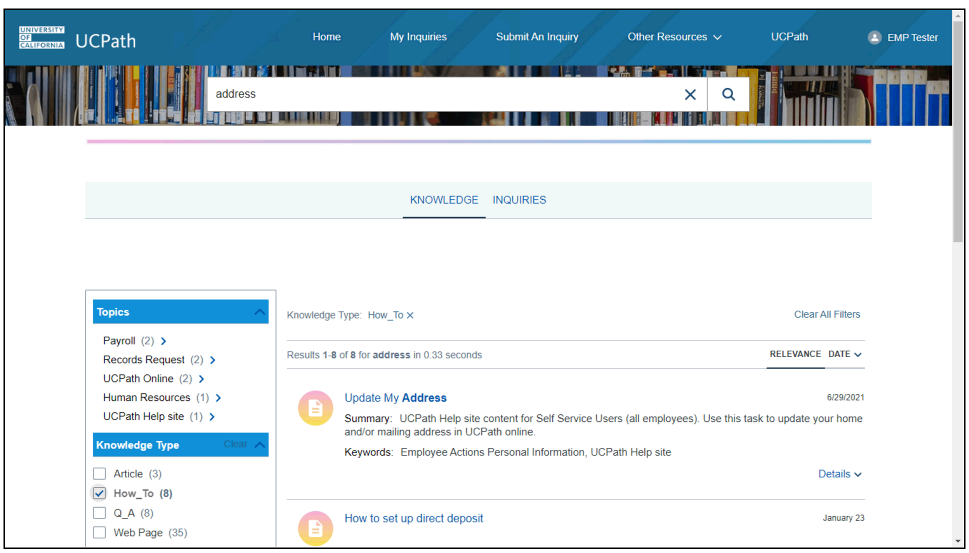
Step	Action
8.	For this example, enter **address** in the search bar.



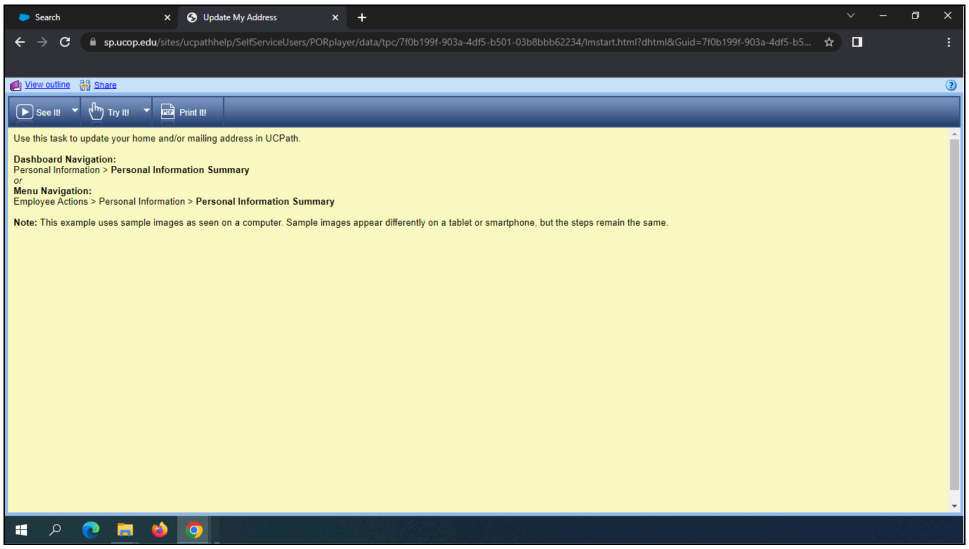
Step	Action
9.	Click on the **Lookup** button. 
10.	The search results will display under the **Knowledge** tab. This will list all of the available resources related to the topic.



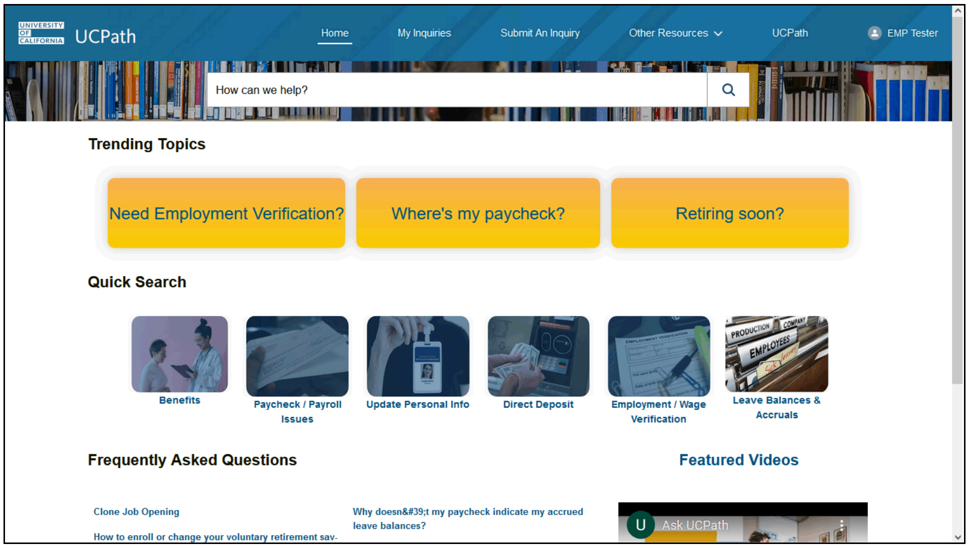
Step	Action
11.	You can use any of the filters to narrow down your search. For this example, use the **How_To** filter. Click the **How_To** option.

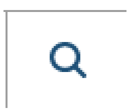


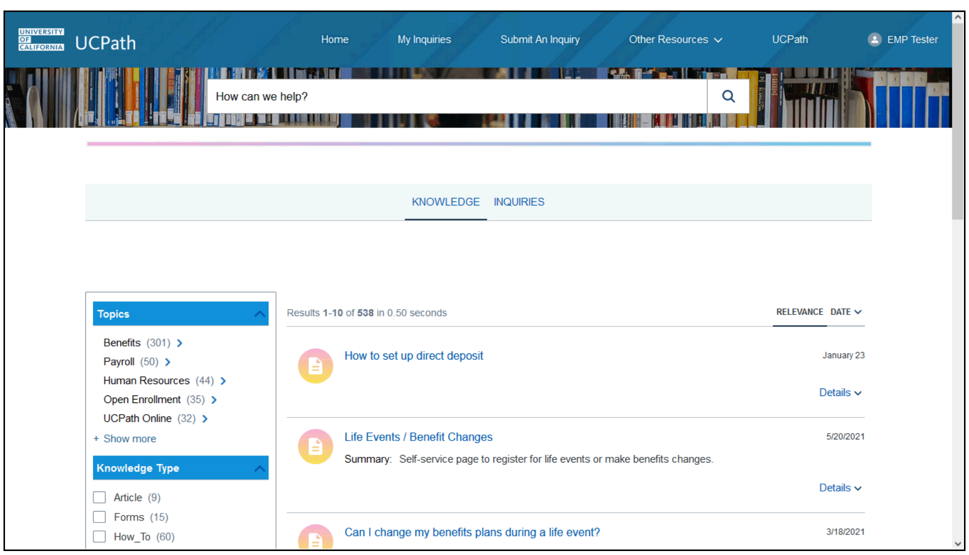
Step	Action
12.	The search results were filtered to list the "how to" resources related to the address topic. For this example, select the **Update My Address** search result. Click the **Update My Address** link. Update My **Address**



Step	Action
13.	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. You will be provided access to a training simulation on how to update your address in UCPath. To return to the Ask UCPath homepage, close the browser tab. Click the **Close** button. 

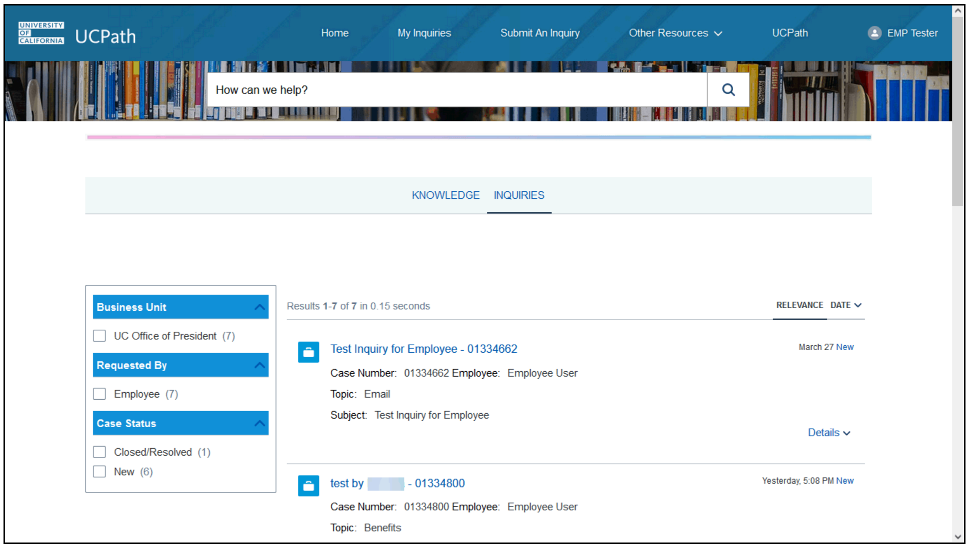


Step	Action
14.	Another option is to run a "global search." Leave the search field blank and click the Lookup button to the right of the **How can we help?** search field. Click on the **Lookup** button. 

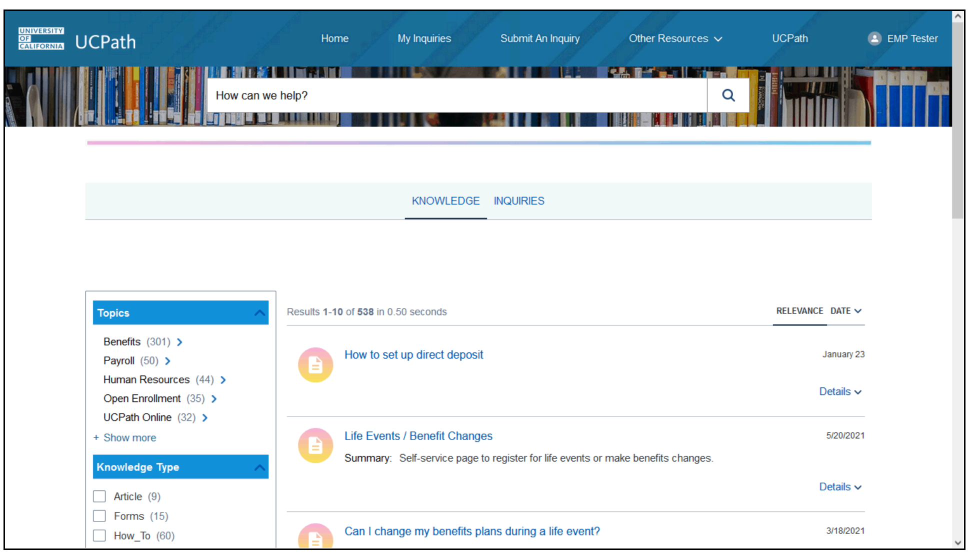


Step	Action
15.	With the "global search" the **Knowledge** tab will provide a list of resources that are trending in the system.

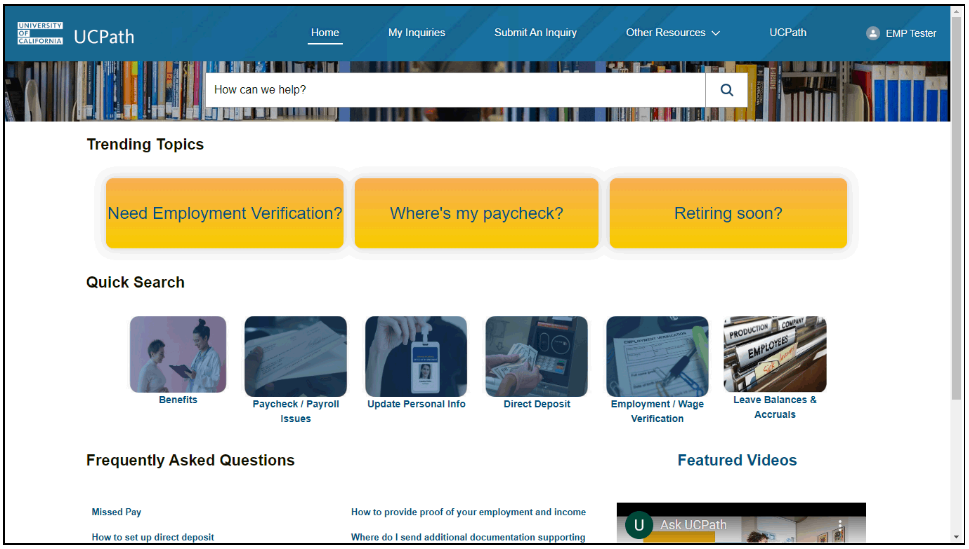
Step	Action
16.	Click on the **Inquiries** link. INQUIRIES



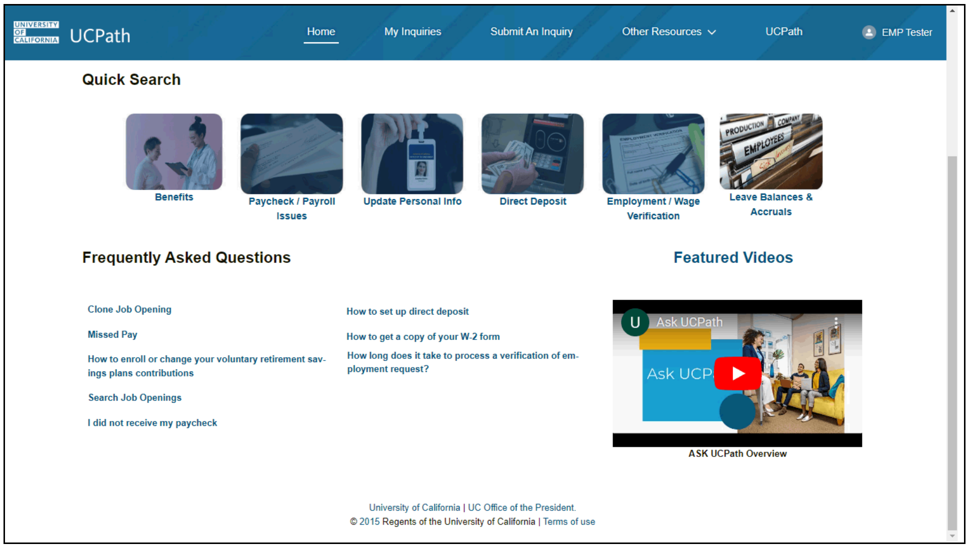
Step	Action
17.	With the "global search" the **Inquiries** tab will list all your open and closed cases.



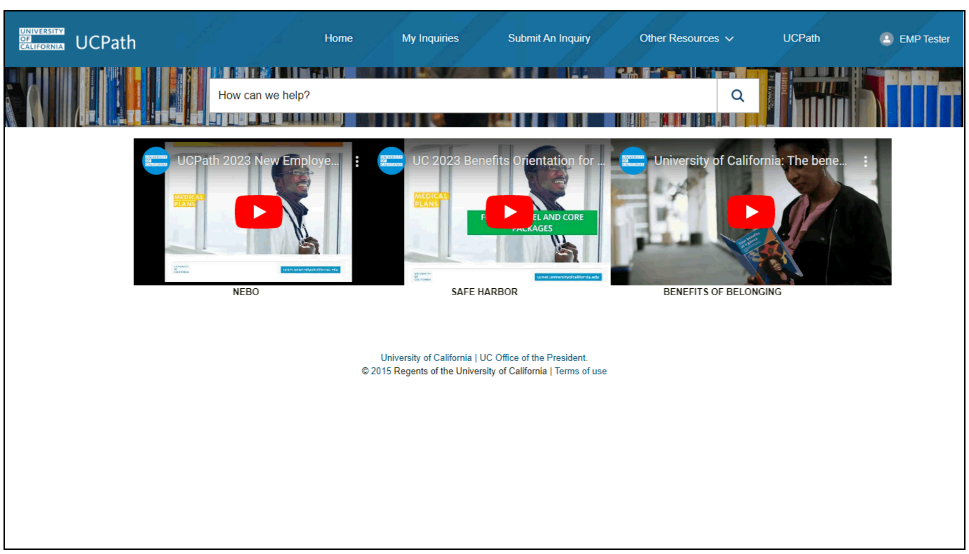
Step	Action
18.	Click on the **Home** link to return to the Ask UCPath homepage. 



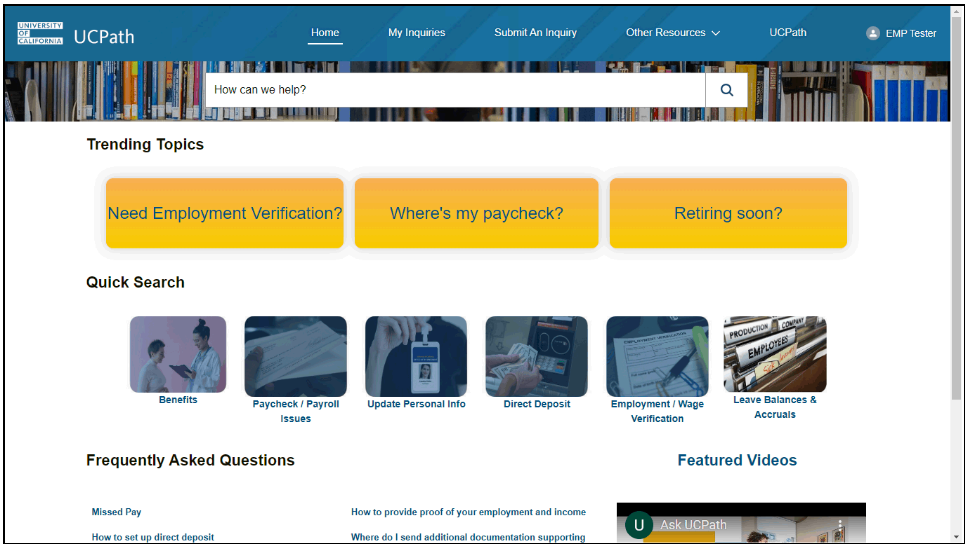
Step	Action
19.	The **Trending Topics** section on the Ask UCPath homepage displays a list of topics that are currently popular or trending among users. By clicking on any of the trending topics, you can access additional information related to that topic. It's worth noting that the trending topics may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



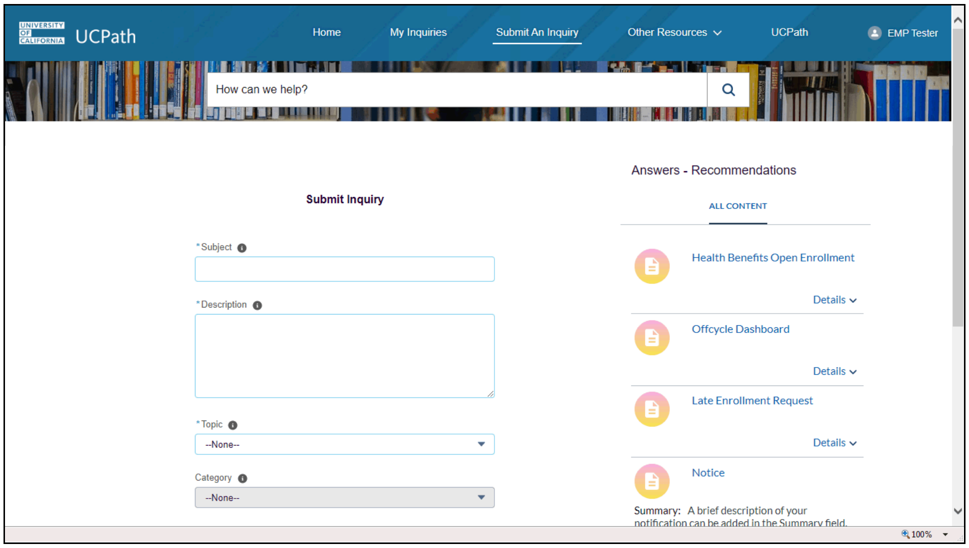
Step	Action
23.	The **Featured Videos** section will showcase a video or you can click on the Featured Videos link to access additional videos. Click on the **Featured Videos** link. Featured Videos

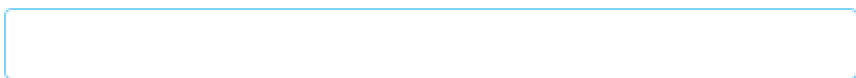


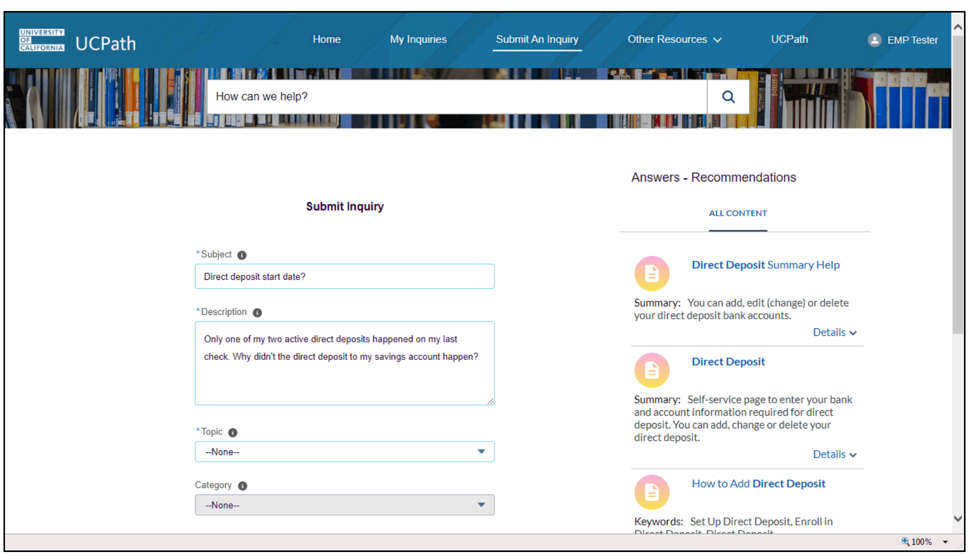
Step	Action
24.	For this example, these are the videos that are currently available. The videos will change based on availability. Click on the **Home** link to return to the Ask UCPath homepage. 

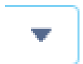


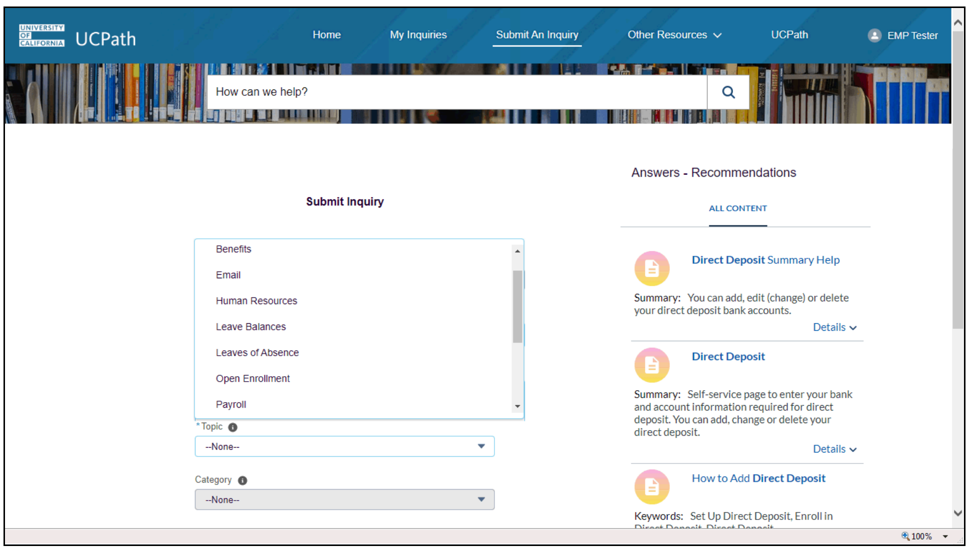
Step	Action
25.	Now let's return to the top toolbar and review the **Submit An Inquiry** section. **Note:** Be sure to check the status of your inquiry **prior** to submitting another inquiry. You can add a comment to your open case if you would like to request a status update. Additionally, utilizing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



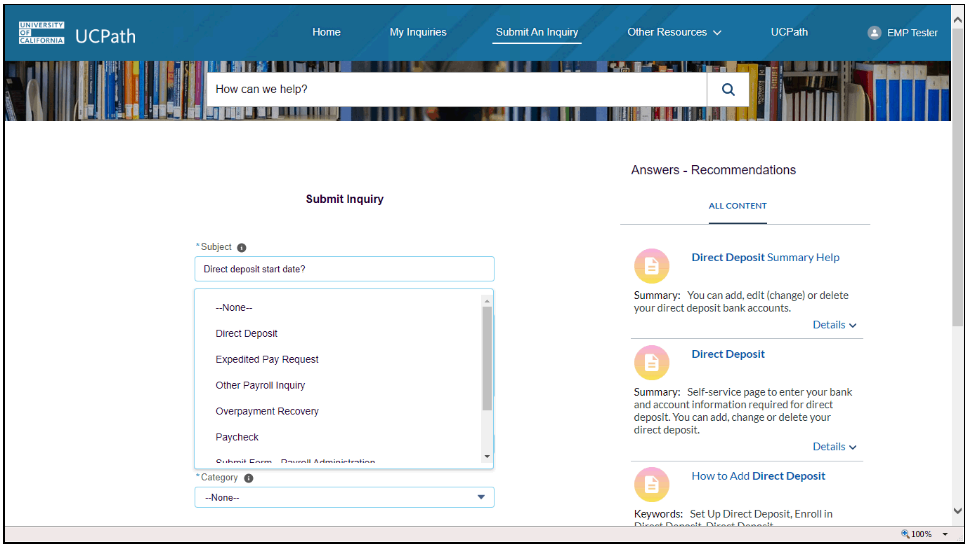
Step	Action
26.	Click in the **Subject** field. 
27.	Enter the desired information into the **Subject** field. For this example, enter **Direct deposit start date?**
28.	Click in the **Description** field.
29.	Enter the desired information into the **Description** field. For this example, enter **Only one of my two...**



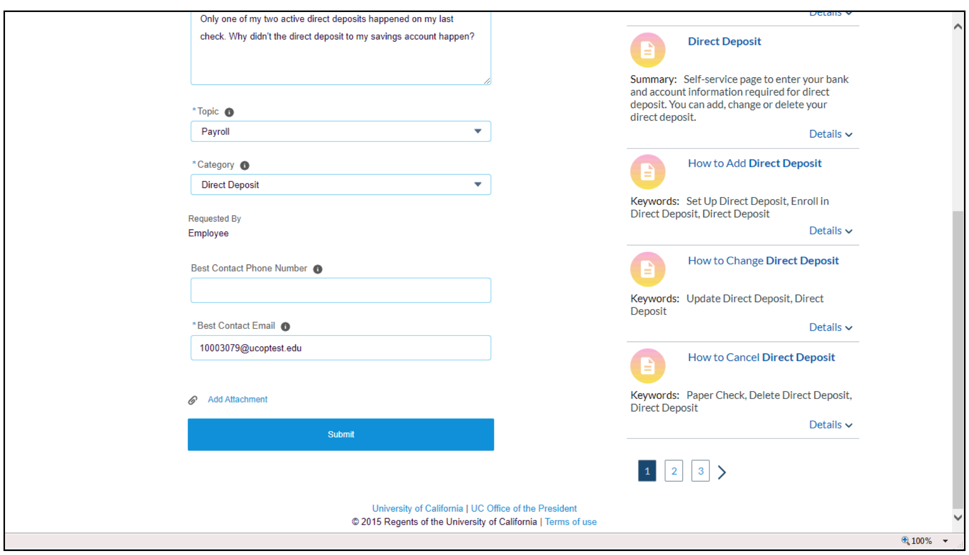
Step	Action
30.	This is the full **Description** for this case example.
31.	As you type into the **Subject** and **Description** fields, the **Answers - Recommendations** section will update to become increasingly relevant to your field entries. We recommend you refer to this list of resources before you submit your inquiry, as they may help answer your question.
32.	For your question about direct deposit, select **Payroll** for the **Topic**. Click the button to the right of the **Topic** field. 



Step	Action
33.	Choose the topic area associated with your inquiry. For this example, click the **Payroll** list item. Payroll
34.	Click the button to the right of the **Category** field. 

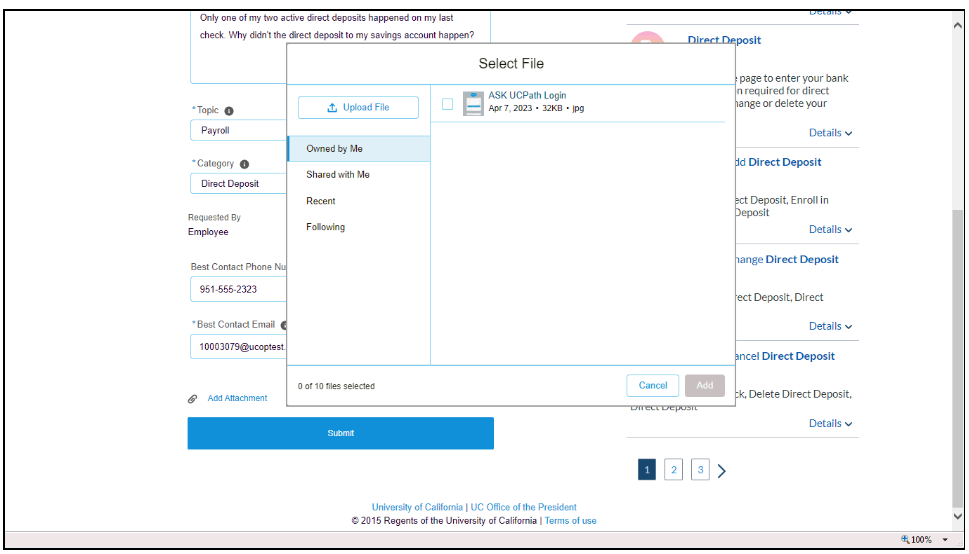


Step	Action
35.	A list of categories associated with the selected topic appears. Choose the category associated with your inquiry. For this example, click the **Direct Deposit** list item. Direct Deposit
36.	Click the scroll bar.

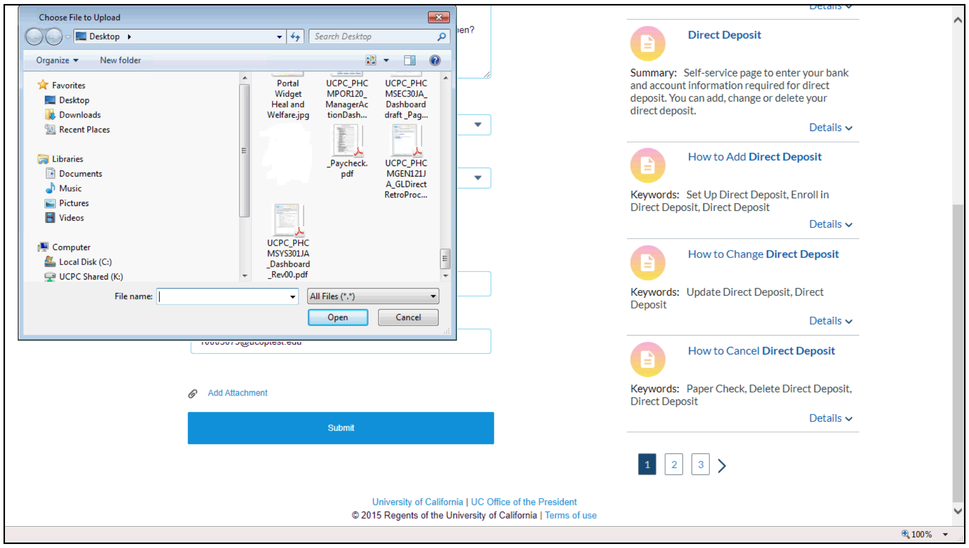


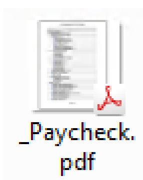
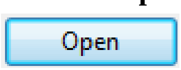
Step	Action
37.	Notice that the **Requested By** field defaults to **Employee**. This indicates you are submitting an inquiry on your own behalf.

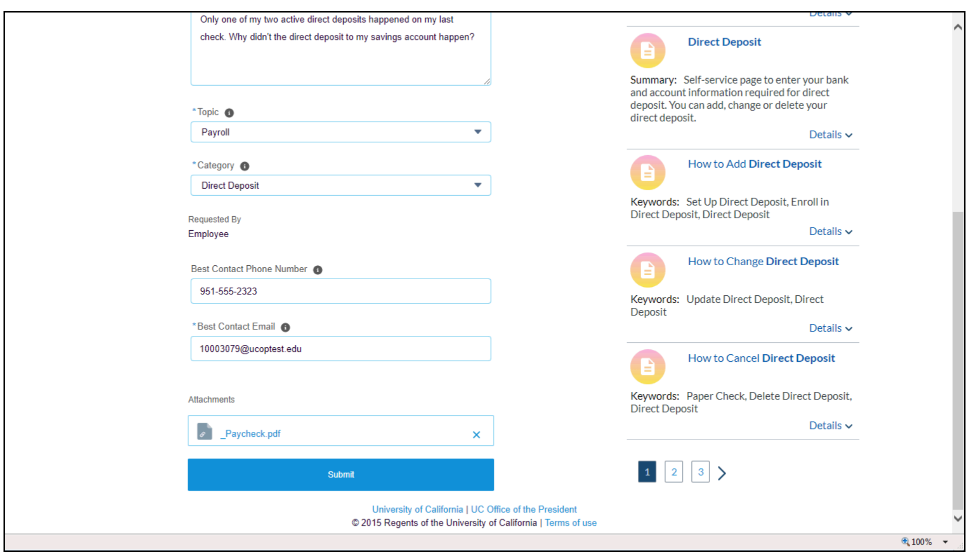
Step	Action
38.	Click in the **Best Contact Phone Number** field.
39.	Enter the desired information into the **Best Contact Phone Number** field. For this example, enter **951-555-2323**
40.	This email address automatically defaults from your UCPath record. You can override it by clicking in the **Best Contact Email** field and entering a new email address. **Note:** Changing your email address here will not change your default email address in the system. In this example, the default email is the best contact email.
41.	You can attach files by using the **Add Attachment** link. You can also include additional attachments after you submit your inquiry. Accepted file formats include MS Office suite, PDF, JPG, TIFF, PNG, or WAV.
42.	Click the **Add Attachment** link. Add Attachment



Step	Action
43.	Click the **Upload File** button. Upload File

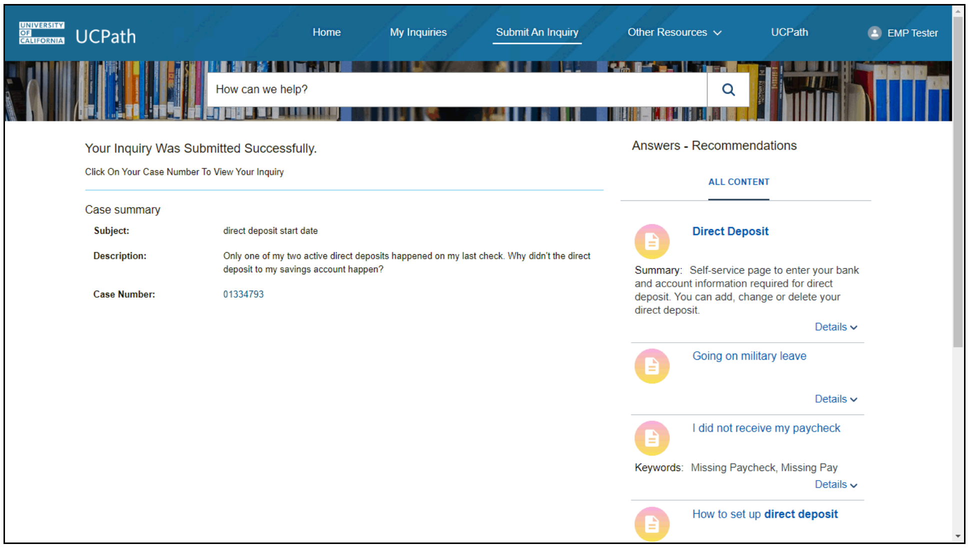


Step	Action
44.	For this example, click the **_Paycheck.pdf** list item. 
45.	Click the **Open** button. 

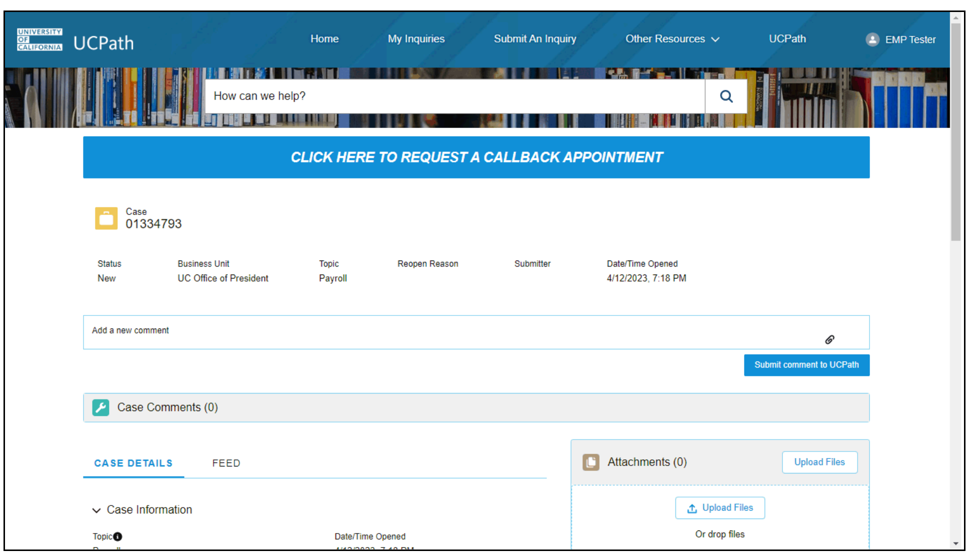


Step	Action
46.	The file name is displayed in the **Attachments** box.

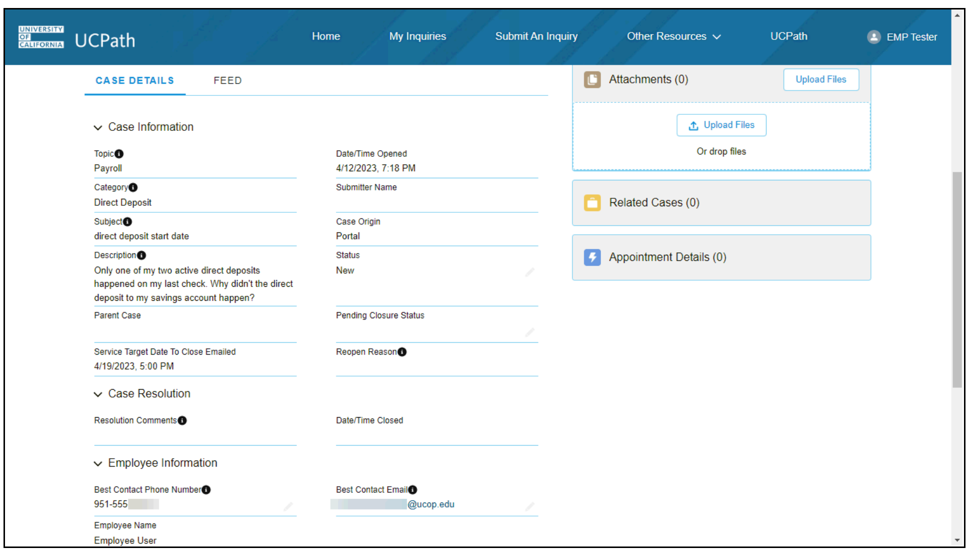
Step	Action
47.	Click the **Submit** button. Submit



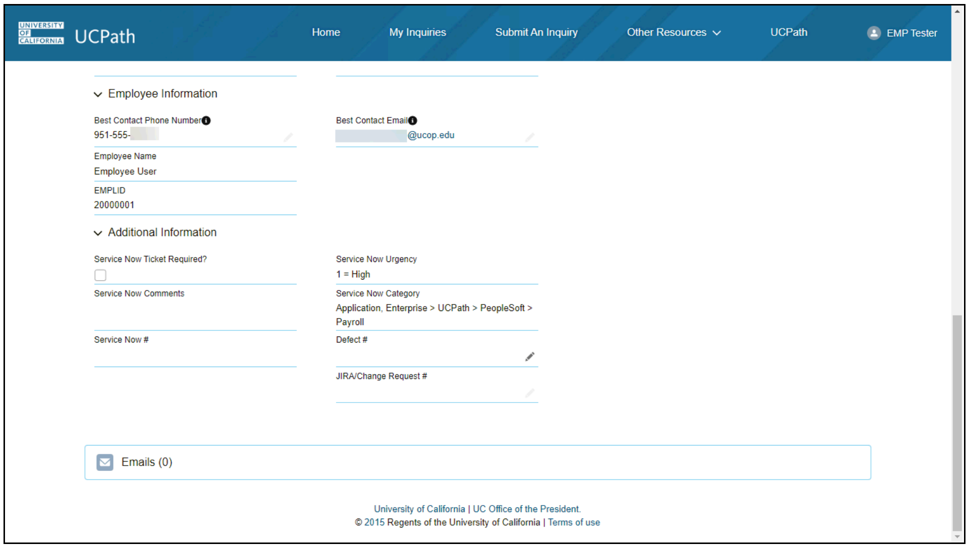
Step	Action
48.	Your inquiry was submitted successfully and was assigned a case number. Click on the **Case Number** to view your inquiry. 01334793



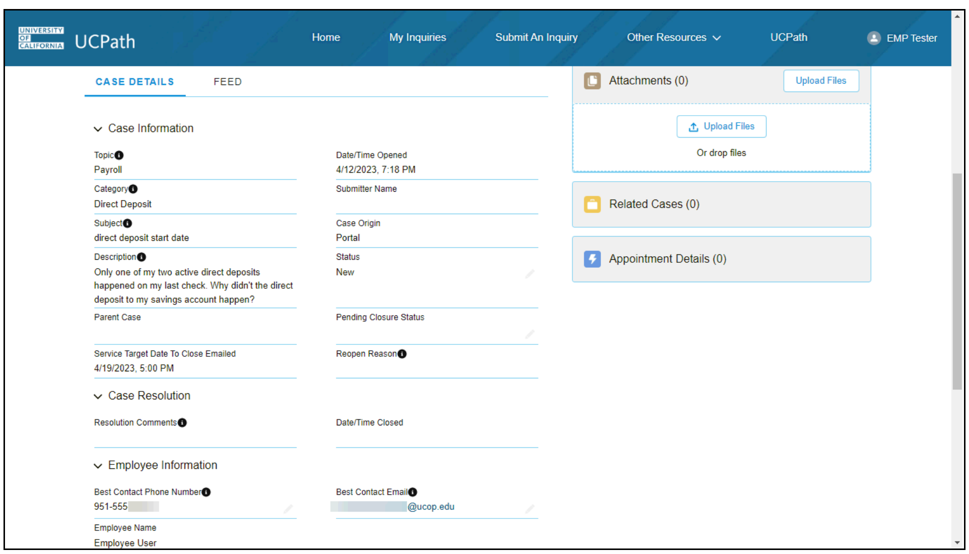
Step	Action
49.	Let's review the **Case Details** section of your submitted inquiry. This is the case number assigned to your inquiry. *We will return to the Callback Appointment button later in this tutorial.*
50.	You can add comments to your inquiry using the **Add a new comment** field. You also have the option to attach documents. You would click on the **Submit comment to UCPath** button once you are done entering your comments.
51.	Comments added to the case will display in the **Case Comments** section. Because this is a new inquiry, no comments appear.
52.	Existing attachments can be reviewed and new attachments can be uploaded in the **Attachments** section.
53.	Click the scroll bar.



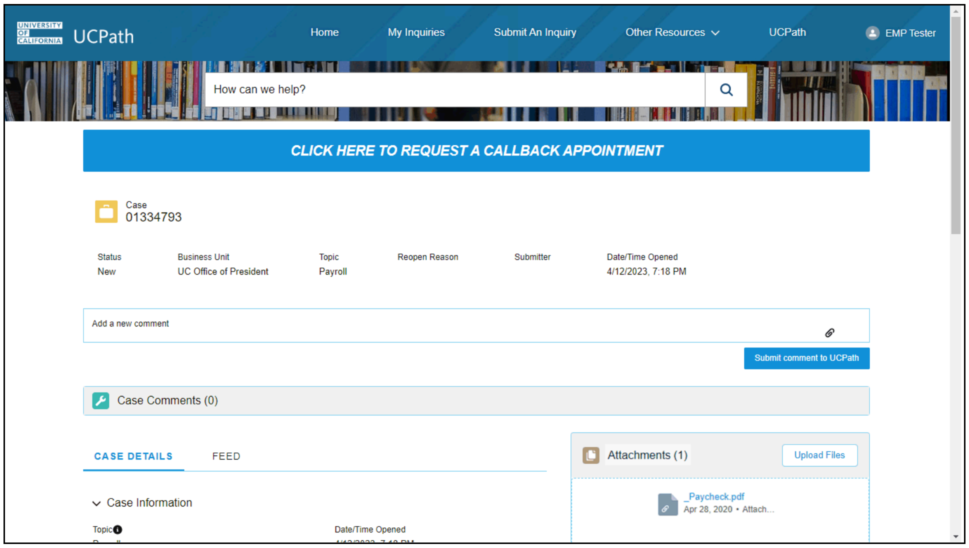
Step	Action
54.	Related inquiries can be reviewed in the **Related Cases** section. No related cases exist for this new inquiry.
55.	Click the scroll bar.



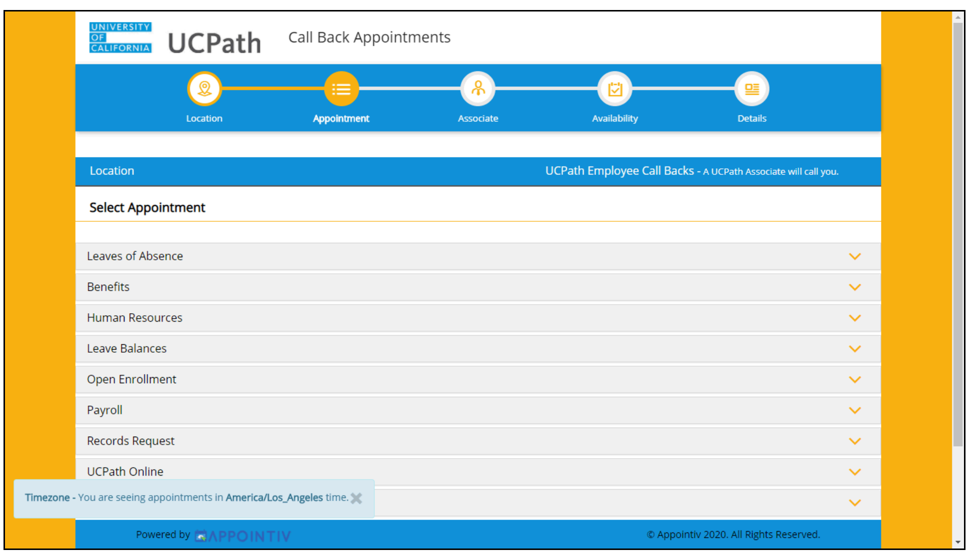
Step	Action
56.	Email messages associated with the case can be reviewed in the **Emails** section. Because this is a new inquiry, no emails are displayed.
57.	Click the scroll bar.



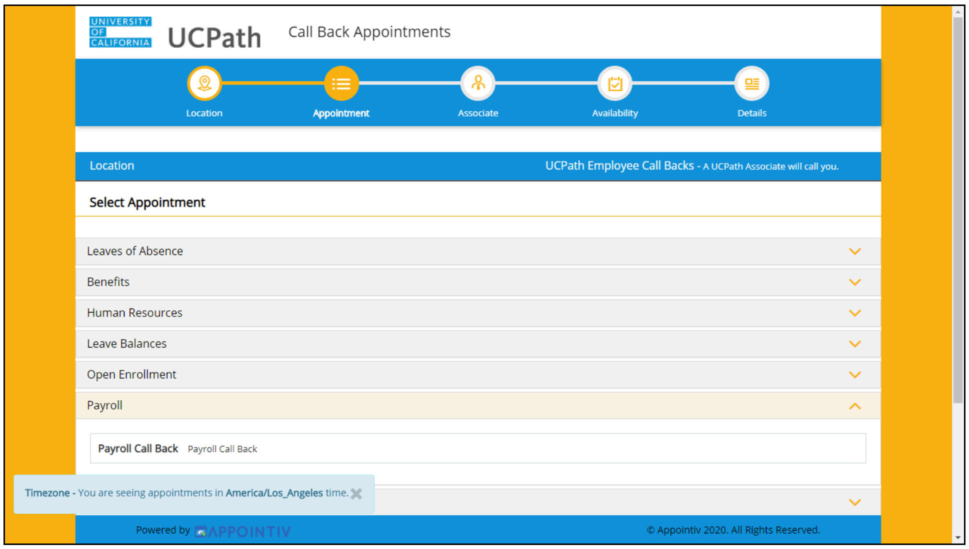
Step	Action
58.	The **Service Target Date To Close Emailed** field lists the expected resolution date. An email is also sent to notify you of the service target date. Cases may be resolved before this date.
59.	The **Status** of a case updates throughout the life of the case. This helps to provide an indication of what is happening with the case. For example, this new inquiry displays the status **New**.
60.	Click the scroll bar.



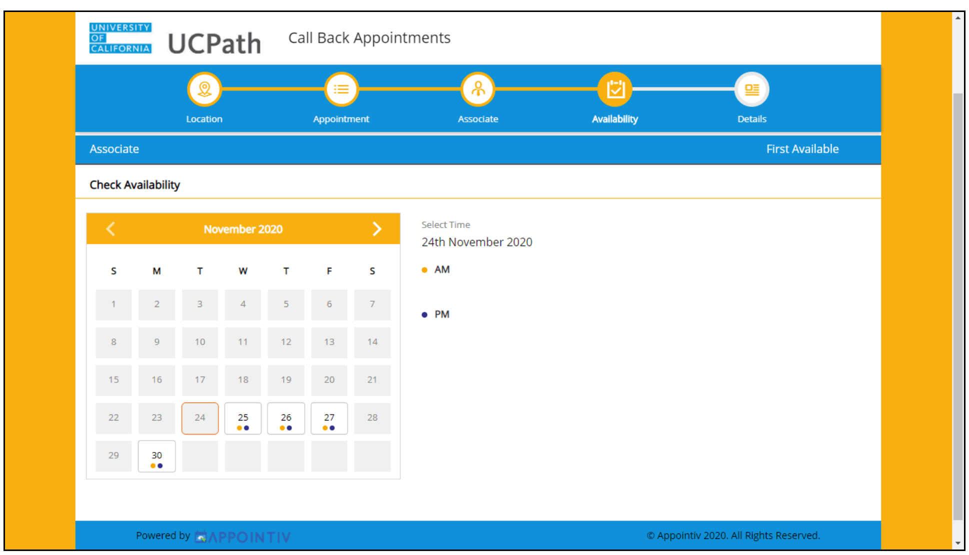
Step	Action
61.	After submitting an inquiry, you can request an appointment to speak with a UCPath Associate. You will need this case number and your employee ID when making the appointment. The **Call Back Appointments** page opens in a new tab so that you can easily refer back to this page if needed. Click the **CLICK HERE TO REQUEST A CALLBACK APPOINTMENT** button.

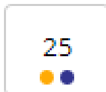


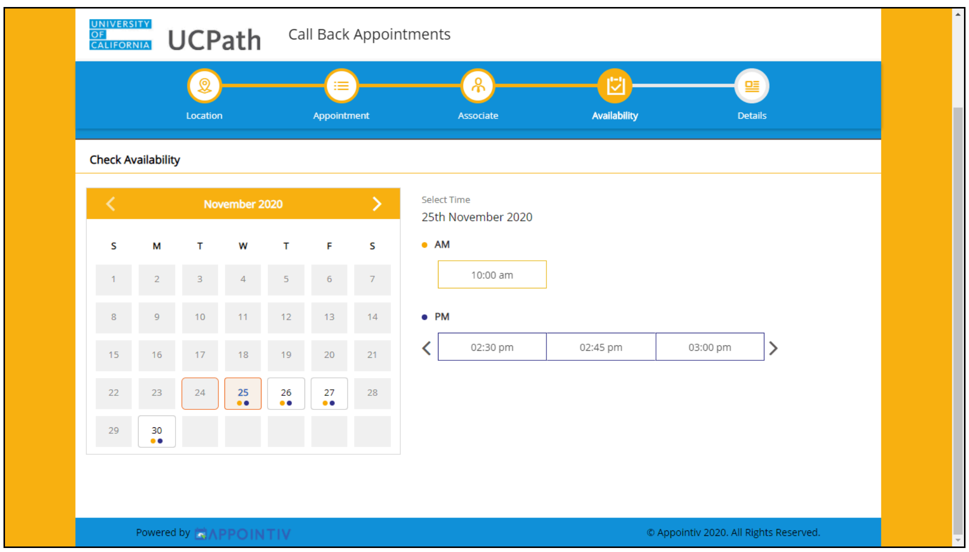
Step	Action
62.	Choose the topic that best fits the nature of your inquiry. Click the button to the right of the **Payroll** topic. 

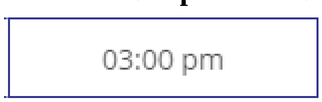


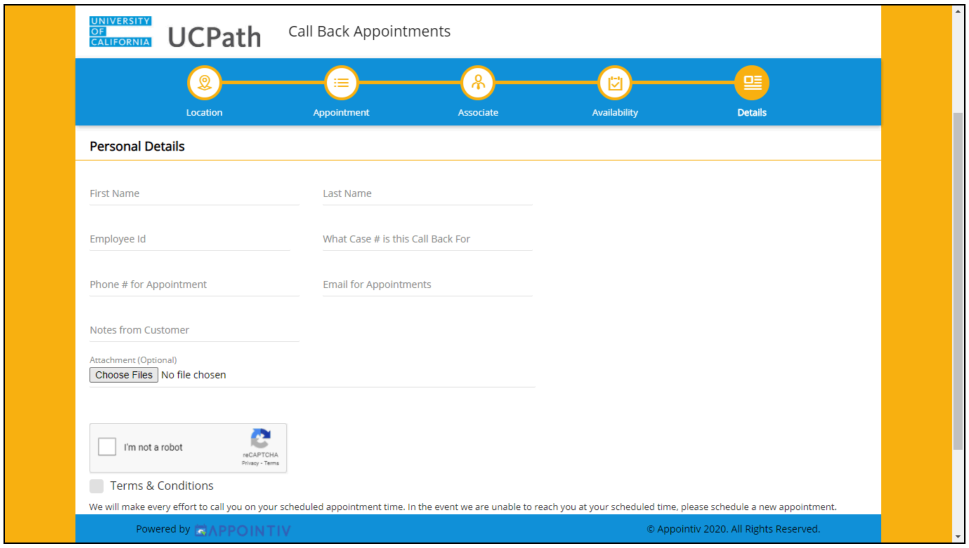
Step	Action
63.	Select **Payroll Call Back**.



Step	Action
64.	All appointments are scheduled for the next day or later. Look for the gold and blue dots, designating appointment availability for each date. Click the **Date** button. 
65.	Scroll to find available appointment start times. Appointments are for one hour. Click the **Right Arrow** button. 

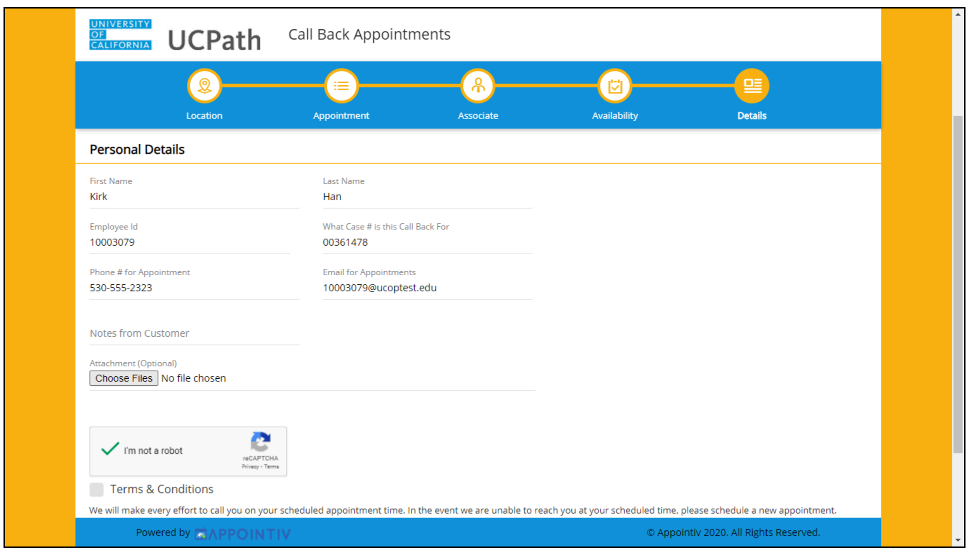


Step	Action
66.	Click the **3:00 pm** button. 

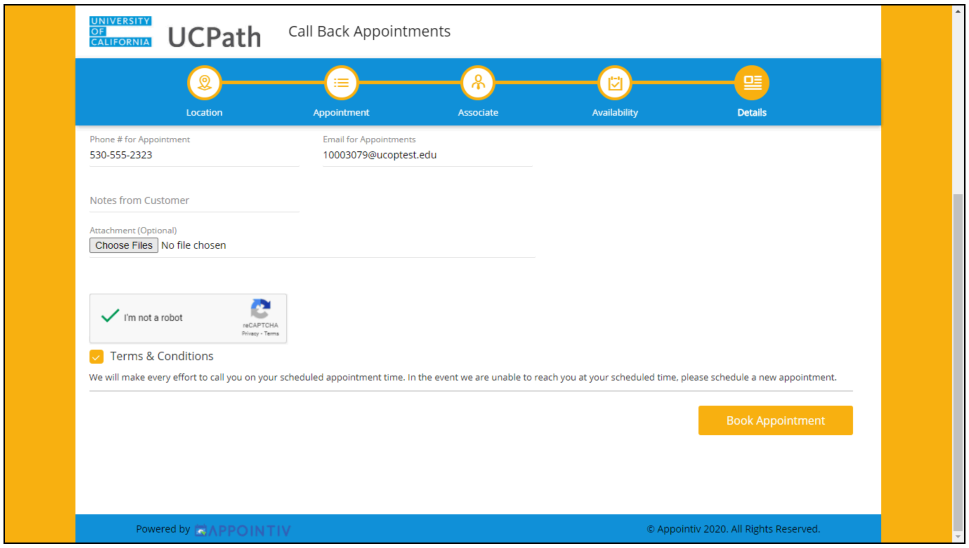


Step	Action
67.	Enter your call back information on the **Personal Details** page. **Note:** You can access the previous tab to find your **Employee ID** and **Case Number** on the **Case Details** page in UCPath.
68.	Click in the **First Name** field. First Name
69.	Enter the desired information into the field. For this example, enter **Kirk**.
70.	Click in the **Last Name** field. Last Name
71.	Enter the desired information into the field. For this example, enter **Han**.
72.	Click in the **Employee Id** field. Employee Id
73.	Enter the desired information into the field. For this example, enter **10003079**.
74.	Click in the **What Case # is this Call Back For** field. What Case # is this Call Back For
75.	Enter the full case number, including the preceding zeroes. Enter only one case number in this field. For this example, enter **00361478**.
76.	Click in the **Phone # for Appointment** field. Phone # for Appointment

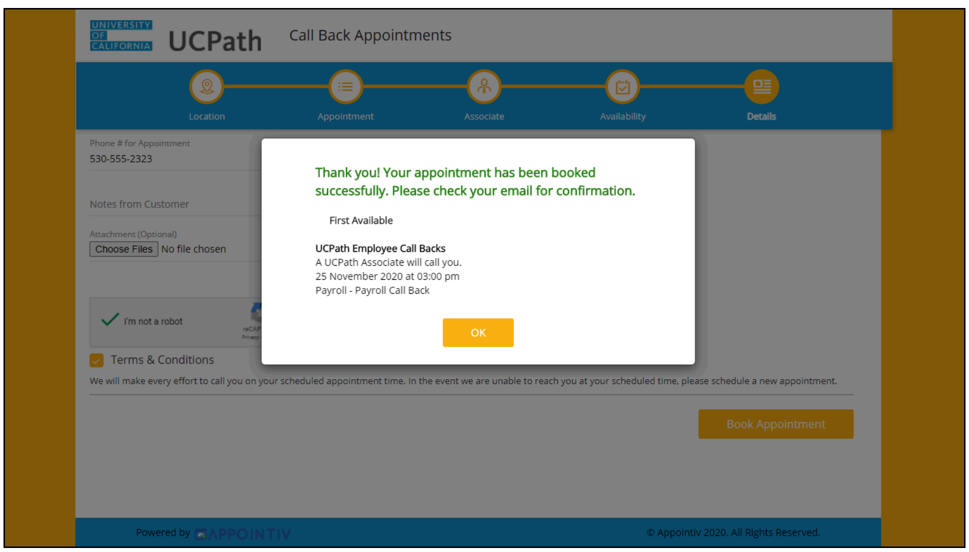
Step	Action
77.	Enter the desired information into the field. For this example, enter **530-555-2323**.
78.	The appointment confirmation will be sent to the email entered here. Click in the **Email for Appointments** field. Email for Appointments
79.	Enter the desired information into the field. For this example, enter **10003079@ucoptest.edu**.
80.	(optional) Enter additional notes or add attachments as needed.
81.	Click the **I'm not a robot** option.



Step	Action
82.	Click the scroll bar.
83.	Read the notes below and check the **Terms & Conditions** check box.

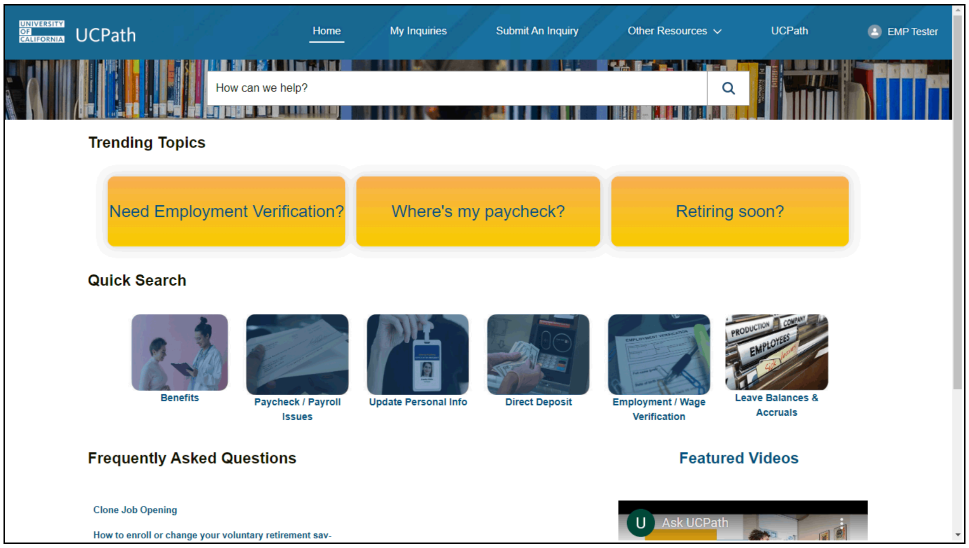


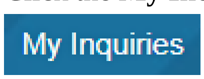
Step	Action
84.	Click the **Book Appointment** button. 

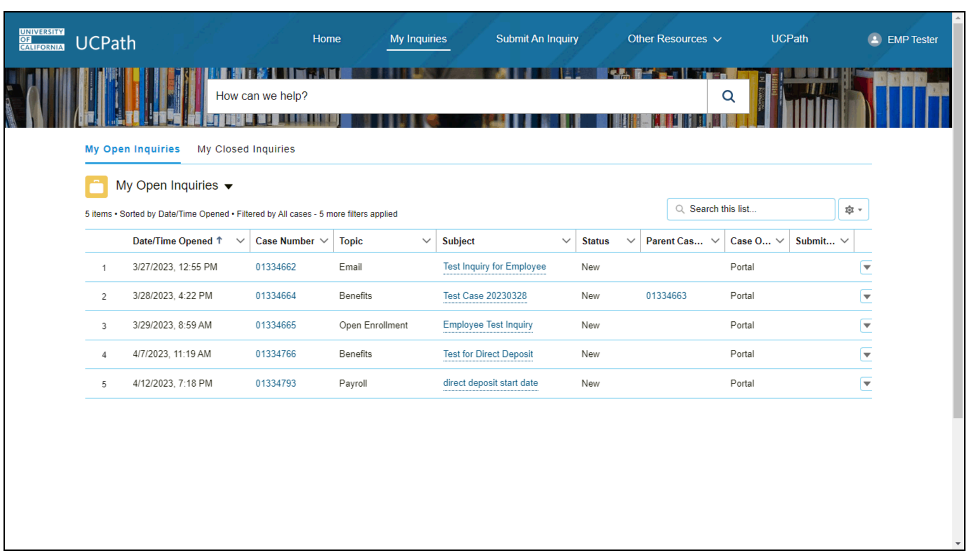


Step	Action
85.	A confirmation message appears. **First Available** indicates the first available UCPath Associate for your selected date and time. Please check your email for the appointment confirmation with an attached calendar invite. The email also provides links to cancel or reschedule if needed.

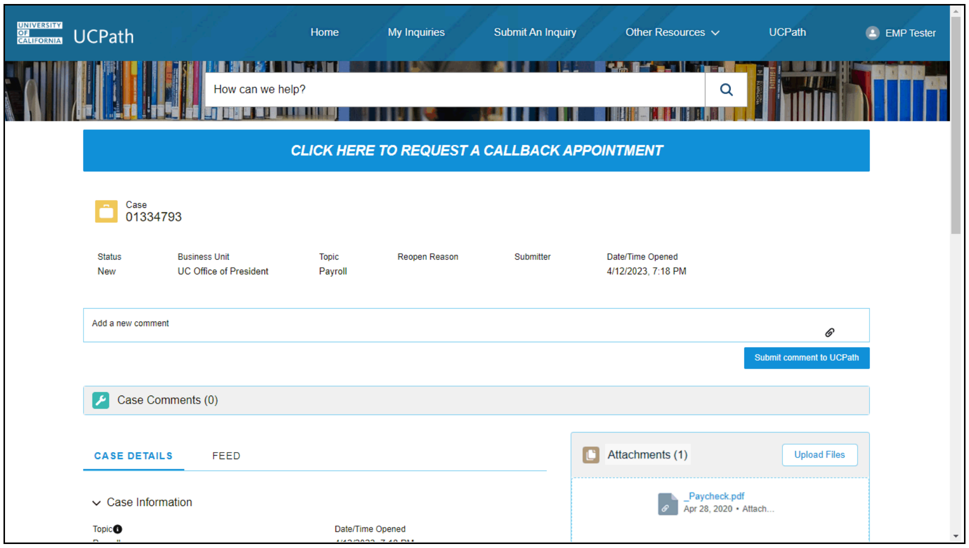
Step	Action
86.	Click the **OK** button. 



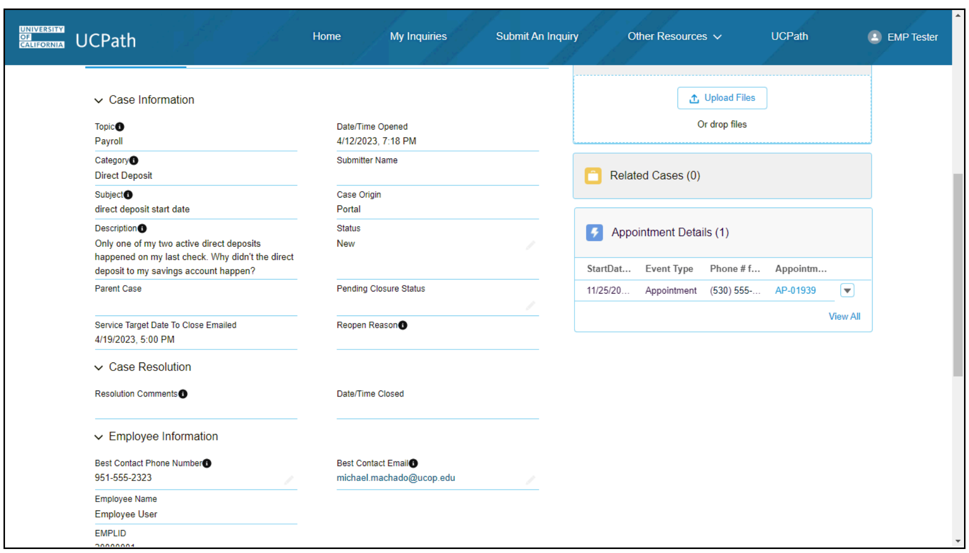
Step	Action
87.	The requested appointment will appear in the **Case Details** page. Click the **My Inquiries** link. 



Step	Action
88.	Click the **Case Number 01334793** link to view the **Case Details**. 01334793

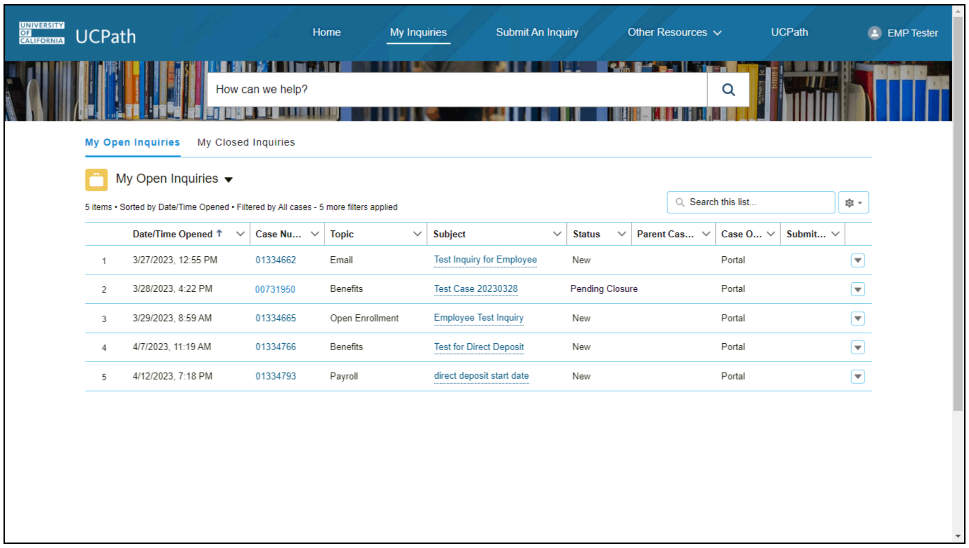


Step	Action
89.	Click the scroll bar.



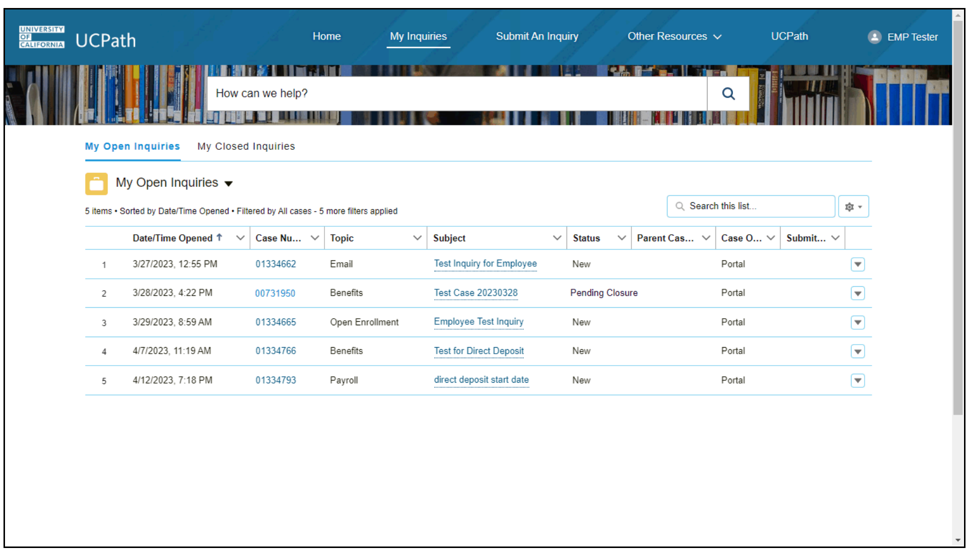
Step	Action
90.	Call back appointments can be reviewed in the **Appointment Details** section.

Step	Action
91.	Click the **My Inquiries** link to view another inquiry. My Inquiries

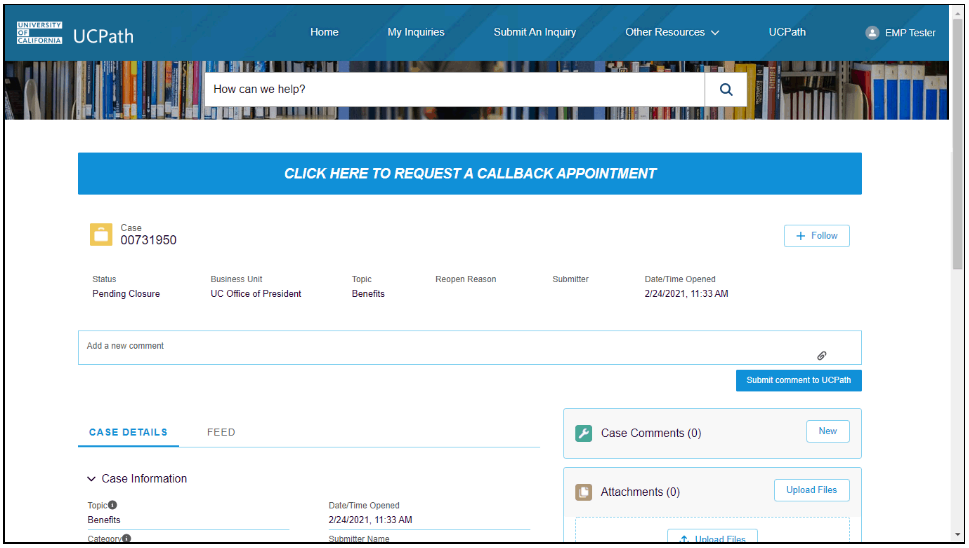


Step	Action
92.	When a case is resolved and the assisting agent is in direct contact with you, they will request your permission to close the case at that time. When not in direct contact and the case is resolved, the **Status** is changed to **Pending Closure** for five days before the case is closed. You will receive an email notification of this status change that includes the case resolution comments. Once the case is closed, you will have an additional five days to reopen the case if needed. Instructions for reopening a case will be emailed when the case is closed.

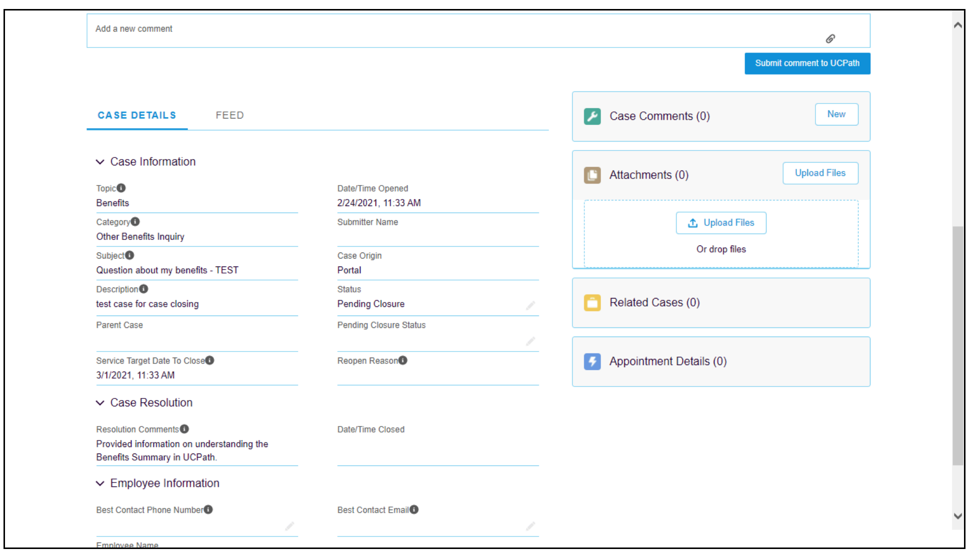
Step	Action
93.	Listed below are exceptions to the **Pending Closure** status process. These types of inquiries will be closed directly: • Accrual transactions processed off-cycle • Cases requiring actions outside of production (e.g., change requests, ITSS) • Completed transactions • Duplicate cases • Denied transactions • Information/Confirmation received • Inquiry withdrawn • Invalid case • Processed transactions (e.g., enrollment forms, payroll) • Resolved cases (duplicate cases) • Spam/Incomplete cases • Vendor quality cases submitted via email • Vendor/Lender verification of employment



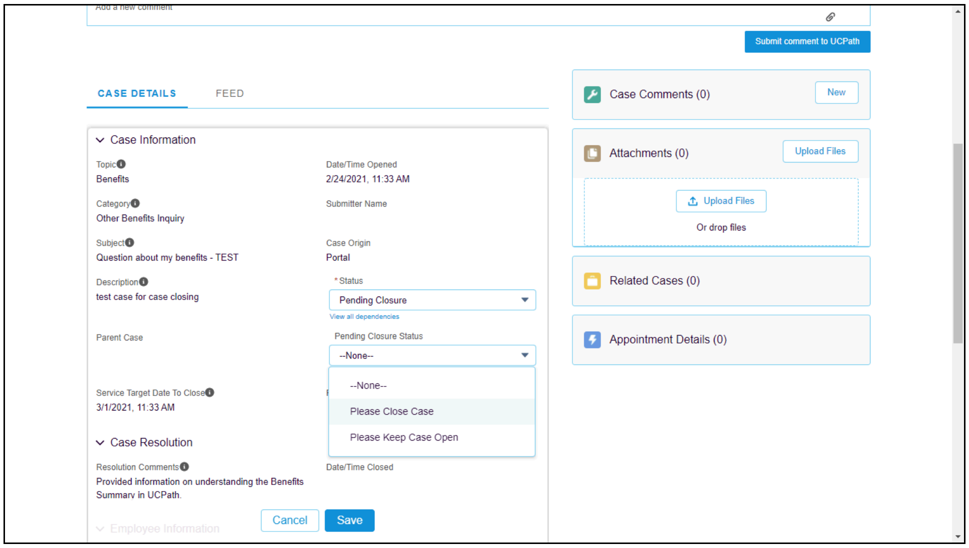
Step	Action
94.	Click the **Case Number 00731950** link to view the **Case Details**. 00731950



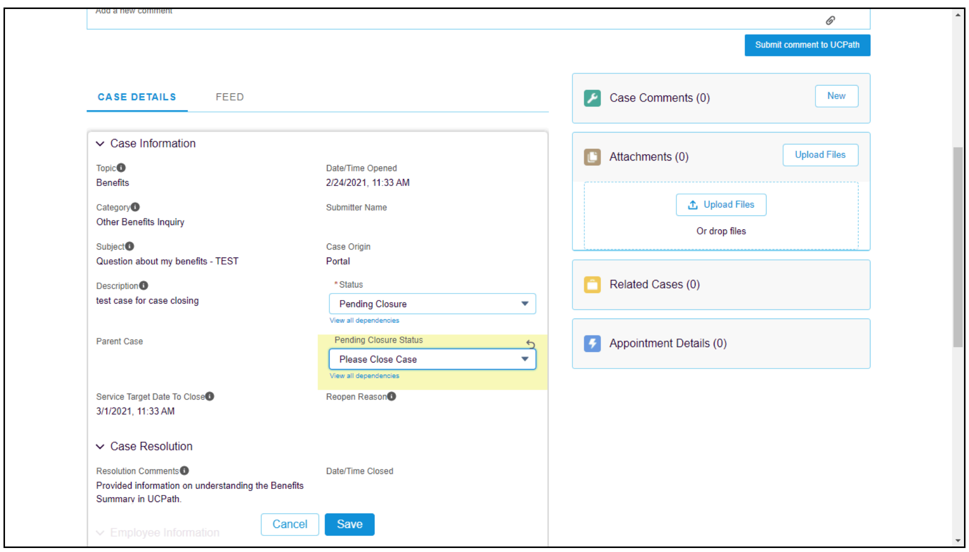
Step	Action
95.	Click the scroll bar.



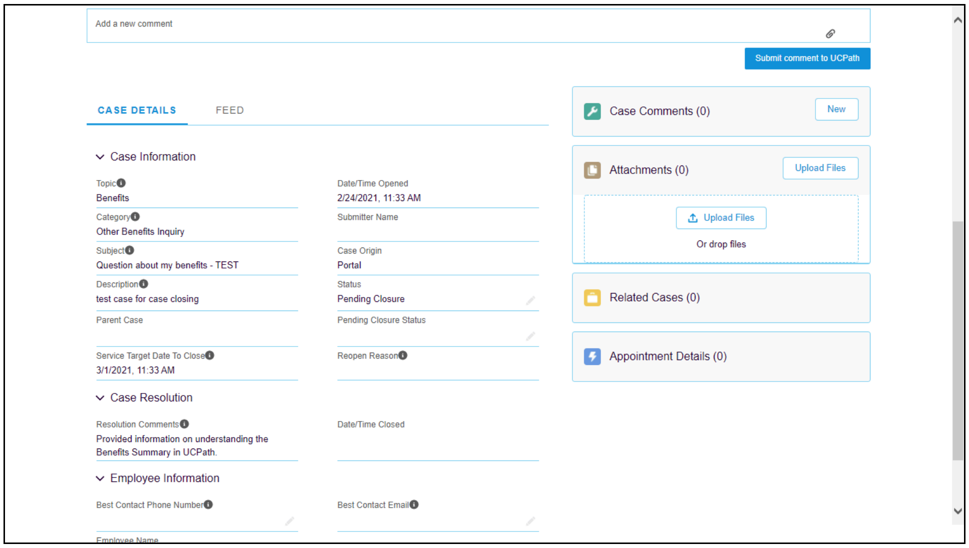
Step	Action
96.	There are two options available under **Pending Closure Status**. You can request to close the case. Or you can add a comment and request to keep the case open. The following steps demonstrate both options.
97.	Click the **Pending Closure Status Edit** button.
98.	Click the button to the right of the **Pending Closure Status** field. 



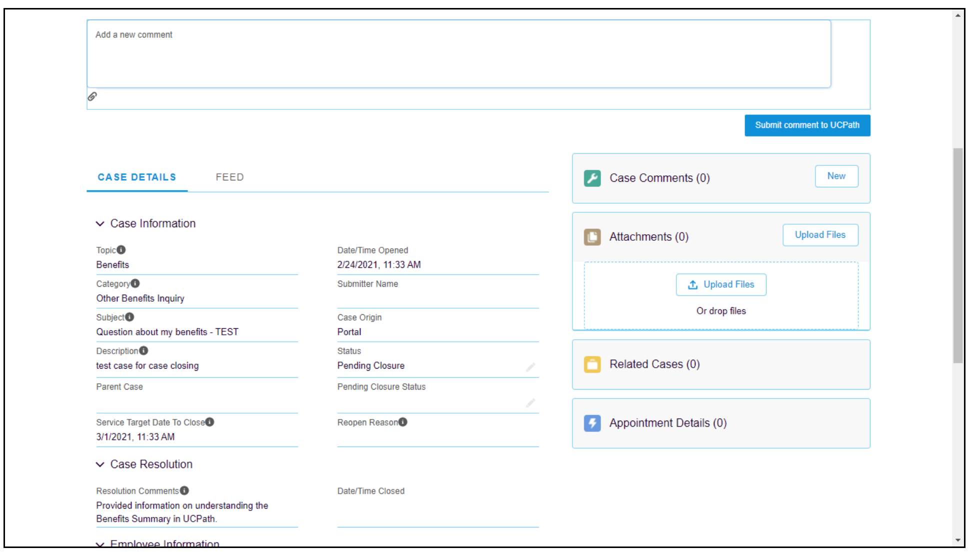
Step	Action
99.	To close the case, click the **Please Close Case** list item. 



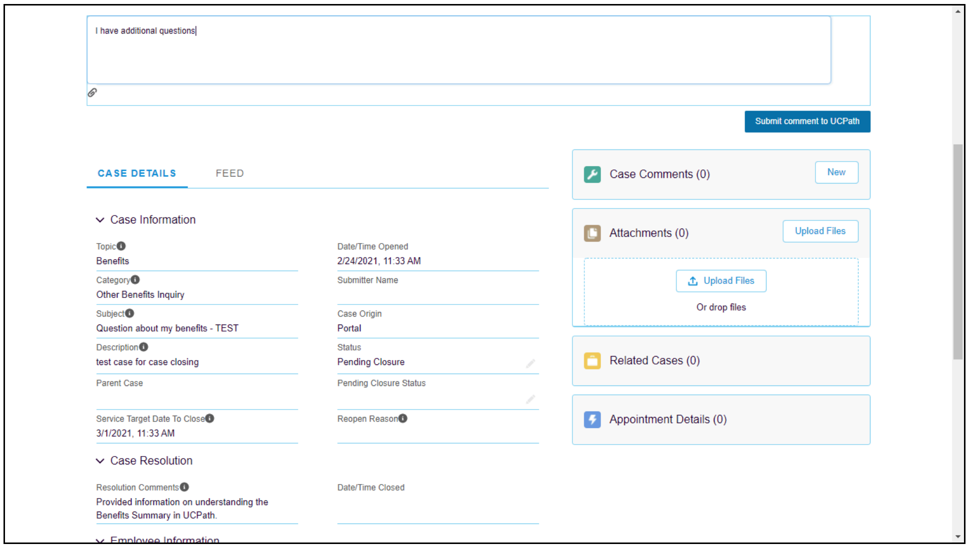
Step	Action
100.	Click the **Save** button to complete the transaction. 



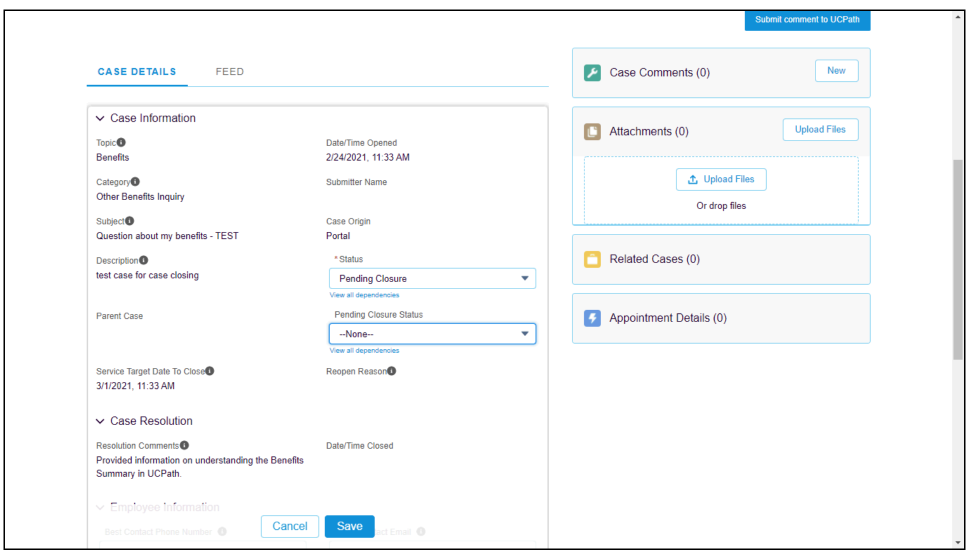
Step	Action
101.	The page is now reset to demonstrate the **Please Keep Case Open** option.
102.	First, add a comment with details on additional needs for this case. Click in the **Add a new comment** field.



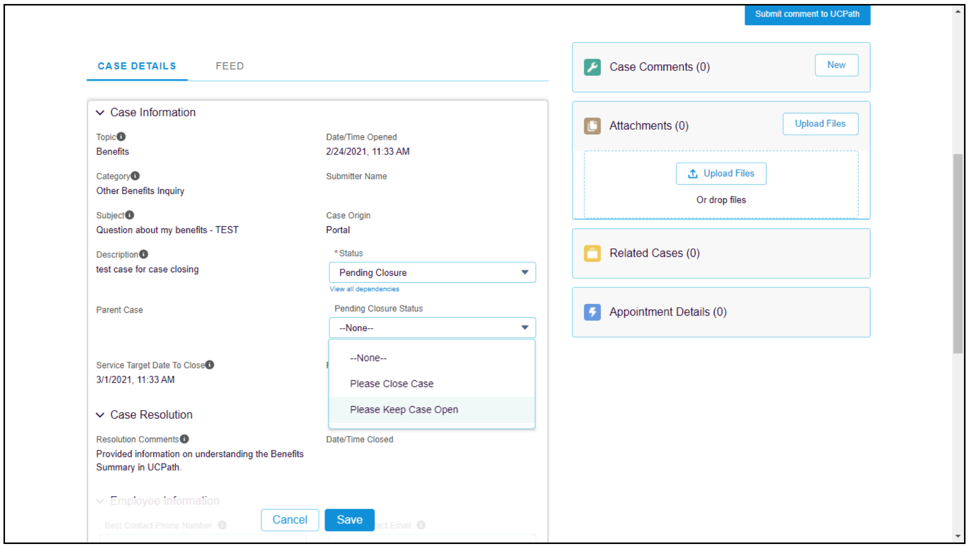
Step	Action
103.	Enter the desired information into the field. For this example, enter **I have additional questions**.



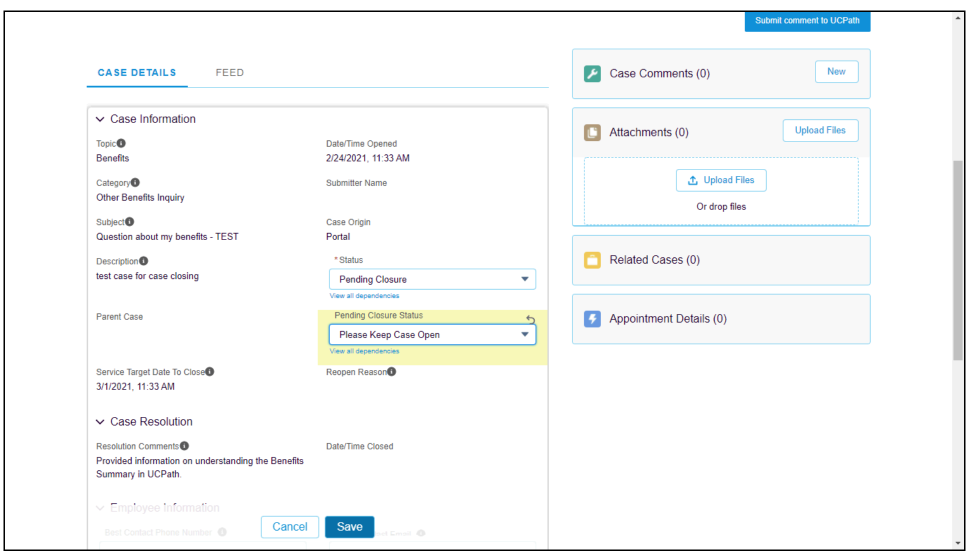
Step	Action
104.	Click the **Submit comment to UCPath** button. 
105.	The recently added comment will appear under the **Case Comments**.
106.	Click the **Edit Pending Closure Status** button.



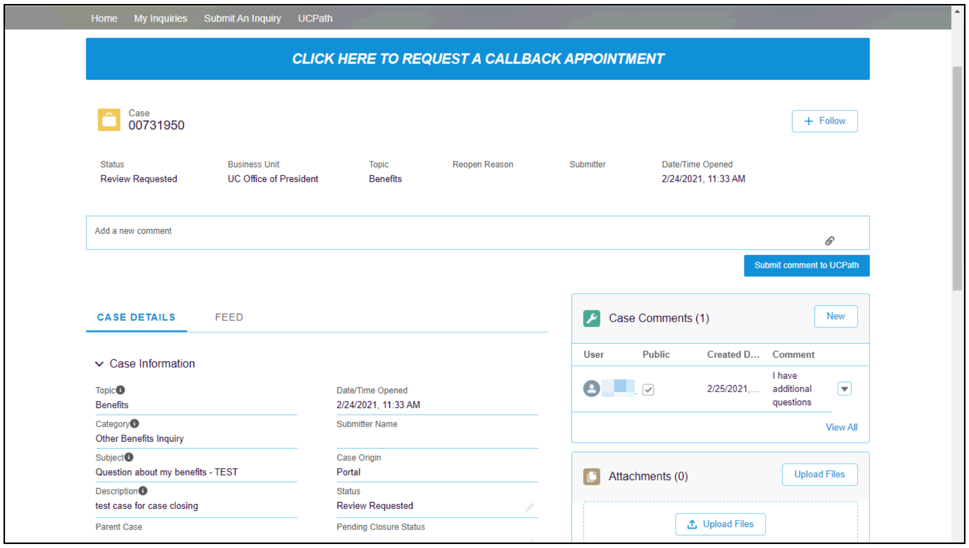
Step	Action
107.	Click the button to the right of the **Pending Closure Status** field. 



Step	Action
108.	Click the **Please Keep Case Open** list item. Please Keep Case Open



Step	Action
109.	Click the **Save** button. 



Step	Action
110.	The **Status** is updated to **Review Requested** and UCPath is notified of the status change.
111.	You have submitted an inquiry to UCPath. **End of Procedure.**