Inter-Location Transfer

Overview

- An Interlocation transfer occurs when an employee transfers from one location to another without a break in service:

  4 Types of transactions:
  - New Hire
  - Rehire
  - Concurrent Hire
  - Voluntary Termination

UCPath → UCPath Transfers

- If there is no Break in Service, a Concurrent Hire is initiated by the new location. Reference UCSB UCPath Concurrent Hire Job Aid
  - The new UCPath location must include a comment indicating concurrent hire is due to location transfer from the old location.
- Voluntary Termination is initiated by the old location.
  - The old UCPath location must include a comment indicating termination is due to location transfer and the new location.
- WFA Production Team at UCPath Center confirms and validates both templates
  - UCPath Center processes the concurrent hire prior to the termination to ensure there is no break in service
  - If no break in service, the effective dates of both templates must be the same and a comment must be included in both templates.
- If there is no Break in Service, a Rehire is initiated by the location
Overview, Continued

- **PPS → UCPath Transfers**
  - Full Hire template is initiated. Reference UCSC UCPath Hires Job Aid.
  - Use the appropriate **Reason Code** related to the new position transferring into
    - Transfer-Inter BU, Promotion
    - Transfer-Inter BU, Demotion
    - Transfer-Inter BU, Lateral
    - Transfer-Inter BU, Undefined
  - PPS location is responsible for providing the employee’s benefit and payroll information by submitting a UFIN301 form.
    - The new location must include a comment on the hire template informing UCPC of the transfer.

- **UCPath → PPS Transfers**
  - Termination template is initiated by the UCPath location: Reference UCSC UCPath Terminations Job Aid.
  - Reason Code:
    - Transfer from UCPath PS
  - UCPath Center WFA Production team is responsible for initiating the UFIN301 form
  - UCPath location must include comment indicating termination is due to location transfer and which location they are transferring to
  - PPS Location will perform transfer/hire, per the location business process.
This job aid will cover the following scenario:

Adding a new job to an employee who already has a job at another location; an employee who currently works at one UC Campus is transferring to another UC Campus.

In this example Chris already works at UCLA in Physics. Chris transfers to UCSB’s Chemistry department. The new department uses the Concurrent Hire template because Chris is transferring from a UCPath location (UCLA) to another UCPath location (UCSB).

Chris’ current Job Record looks like this:

<table>
<thead>
<tr>
<th>EFFDT</th>
<th>EMPL RCD</th>
<th>DEPT</th>
<th>POSITION NBR</th>
<th>HR STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/1/2018</td>
<td>0</td>
<td>PHYS</td>
<td>40001234</td>
<td>Active</td>
</tr>
</tbody>
</table>

**Before You Begin**

Things you need:

- Verify Chris' employment by reviewing the Person Org Summary page.
- Vacant Academic/Staff Position
- Position Funded
- Employee’s Employee ID number
The Process

Once approval for a Job/Position is granted, you can begin the UCPath process to hire an employee into the new position.

1. New department requests a Position via the Position Control Request transaction as necessary or uses an existing vacant position.
2. Once the position is created, setup accounting and allocation information for the position via Funding Entry transaction.
3. Recruit and select your candidate. An inter-location transfer indicates that a candidate who holds an active job from a different campus has been selected. The candidate will vacate their active position and transfer to the new position.
4. The New department initiates the inter-location transfer via the Smart HR Template transaction by selecting the appropriate Inter-Business Unit Transfer template to add the Staff/Academic position: (UC_CONC_HIRE, UC_CONC_HIRE_AC, UC_FULL_HIRE, UC_FULL_HIRE_AC, UC_REHIRE, UC_REHIRE_AC).
5. The Old department initiates a Voluntary Termination via the Smart HR Template transaction by selecting the UC_VOL_TERM template.
6. The UCPath Center is responsible for tracking and processing the transactions as appropriate.

Things to Remember:

- UC_CONC_HIRE_AC is used for AC to AC interlocation transfers.
- UC_FULL_HIRE_AC used for Staff to AC interlocation transfers.
Job Aid: Transfer - Inter-Location

Smart HR Template Transaction

Navigate to the Smart HR Transactions page from your homepage in UCPath Online.

1) Click on the Select Template look up icon to view all the Smart HR Templates.

2) Select the appropriate hire template:
   - UC_CONC_HIRE,
   - UC_CONC_HIRE_AC,
   - UC_FULL_HIRE,
   - UC_FULL_HIRE_AC,
   - UC_REHIRE,
   - UC_REHIRE_AC

Reminder: Prior to beginning Smart HR Hire Transactions, perform an employee search to confirm employee’s previous job history:

Use the Person Organizational Summary and Job Data pages.

Smart HR Transactions Page

All HR Hiring transactions begin at the Smart HR Transactions page. Here you select the appropriate staff or academic template.

PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions
Enter the transfer effective date in the **Effective Date** field:

**NOTE:** The effective date you use is not necessarily Today’s date. This is the transfer date or the date the employee first performs work, earning hours for pay and benefits.

After selecting the appropriate template and entering the **Effective Date**, click the **Create Transaction** button to continue.
Enter Transaction Details Page

The **Enter Transaction Details** page appears. Required fields are identified with an *Asterisk*. Continue entering the transfer data in each required field.

**NOTE**: Navigate to the UCPath Help site and refer to the Template Transactions - Action Reason Codes and Descriptions Job Aid for more information about Reason Codes.

This **Message** will appear after you click the **Continue** button. It confirms that the employee number you entered exists in the System, and the employee name associated with it.

Click **OK** to move to the next page.
Enter Transaction Information Component

The Enter Transaction Information component appears. Because this employee has a current employee record, the Personal Data tab defaults with their information. You cannot edit or update greyed out fields. Any necessary personal data changes can be updated by the employee on the Employee Self Service pages.

Remember: You must navigate through all four tabs before the Save and Submit button is enabled.

Job Data Tab

![](image-url)
Things to Remember:

- **Comments** field:
  - Anything entered in this field follows the history of this employee. Enter only information appropriate to keep in the employee’s historical records.
  - You must include a comment indicating concurrent hire is due to location transfer and which location the employee is coming from.

**NOTE**: Do not confuse the transaction Comments box with the separate boxes for Initiator Comments and Approver Comments.
Things to Remember:

- Several fields default after the **Position Number** is entered. The fields are highlighted in **grey** and cannot be edited.

**NOTE:** For staff, the **Employee Classification** field does not default and must be manually entered. For academic personnel, the **Employee Classification** field defaults, is view-only and cannot be changed.
Things to Remember:

- **The Job Code** determines the following data fields:
  - Salary Admin Plan
  - Salary Grade
  (Note: Some Job Codes do not have an established Salary Plan)

- **Academic Duration of Appt**: Some academic jobs require this field to be populated. Select the appropriate option from the dropdown list.

- **Expected Job End Date**: Most Academic appointments must have an end date. If you want the job to terminate automatically on the expected end date, select the **End Job Automatically** checkbox.

For many Job Codes, a **Step** must be entered to populate compensation fields. If a **Step** is not applicable, you must manually enter the compensation data.

The **Compensation Frequency** field in this section defines how the quoted compensation amount is presented:
- **A** = Annual amount
- **H** = Hourly amount

The **Compensation Frequency** field in this section defines how the total compensation is actually paid out to the employee per paycheck.
Things to Remember:

- Job earnings distributions indicate if the compensation should be an **Earn Code** other than REG pay. For example, **ERIT** (Employee Reduction In Time).

- The majority of your transactions will not require this tab to be completed.
Things to Remember:

- There are some cases where an employee's base salary is paid through **Additional Pay** using a flat dollar amount (i.e., BYA).

- **Additional Pay** is also used for recurring payments.
  
  - Recurring payments are paid over multiple, consecutive pay periods in the same amount.
  
  - Recurring additional pay can be submitted on the hire templates (Full Hire, Rehire, and Concurrent Hire).

- **Initiator Comments** field: Enter any comments necessary for your department approver to consider when reviewing this transaction for approval..
When complete, click the **Save and Submit** button on the last tab to submit the transaction for review and approval.

You can also click the **Save for Later** button to save this transaction when it is not ready to be submitted.
### Transactions In Progress Section

You can access **Saved for Later** transactions at a later time in the **Smart HR Transactions** page **Transactions in Progress** section.

#### Smart HR Transactions

Select a template and press Create Transaction.

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Effective Date</th>
<th>Name</th>
<th>Person ID</th>
<th>Action</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>09/01/2018</td>
<td>Nathan Smith</td>
<td>NEW</td>
<td>Hire</td>
<td>United States</td>
</tr>
<tr>
<td>JOB</td>
<td>09/03/2018</td>
<td>Karla Beltran</td>
<td>10000283</td>
<td>Retirement</td>
<td>United States</td>
</tr>
<tr>
<td>JOB</td>
<td>09/01/2018</td>
<td>Daniel Perez</td>
<td>10000776</td>
<td>Terminati</td>
<td>United States</td>
</tr>
<tr>
<td>JOB</td>
<td>09/01/2018</td>
<td>Halle Smith</td>
<td>10022526</td>
<td>Transfer</td>
<td>United States</td>
</tr>
</tbody>
</table>

*Delete Selected Transactions*
Employee Job Record

When your Smart HR Template Transaction is approved on campus, the transaction moves to the UC Path Center for processing. If there are no errors the transaction is processed and your transferred employee has an updated Job Record. The vacant position you used, is now filled, any additional updates on the employee records can be initiated by the new department. You should review the job record and ensure all the data is correct.

In this scenario Chris, a UCLA employee is transferring from the Physics department to a position in UCSB’s Chemistry department 10/1/2018. Chris only has one job. The New department initiated the transfer transaction. Chris’ employee record adds a new record, “1” to reflect the job located at the new campus.
When the old location completes the voluntary termination transaction, Chris’ scenario will look like this:

Chris’ job record now looks like this:

<table>
<thead>
<tr>
<th>EFFDT</th>
<th>EMPL RCD</th>
<th>DEPT</th>
<th>POSITION NBR</th>
<th>HR STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/1/2018</td>
<td>0</td>
<td>PHYS</td>
<td>40001234</td>
<td>Terminated</td>
</tr>
<tr>
<td>10/1/2018</td>
<td>1</td>
<td>CHEM</td>
<td>40003456</td>
<td>Active</td>
</tr>
</tbody>
</table>