Intra-Location Transfer

Overview

An Intra-location transfer occurs when an employee transfers from one position to another at the same business unit:

- Within the same department

- Between departments
Job Aid: Transfer into Same Empl Class
(Intra-Location with no Break in Service -)

This job aid covers the following scenario:

An employee transfers, without a break in service, from one position on campus to another. This includes moving from a position in the same department AND maintaining the same Employee Classification (Academic to Academic or Staff to Staff).

**NOTE:** You cannot use this transaction if the employee is transferring from an Academic position to a Staff position or vice versa.

In this example Tom, an academic employee is transferring from the Physics department to the Chemistry department, effective 10/1/2018. Tom only has one job.

Tom’s 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:

- Vacant Academic/Staff Position
- Position Funded
- Employee’s Employee ID number
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The Process

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

1. Receiving department requests a Position via the Position Control Request transaction as necessary or uses an existing vacant position.
2. Once you have a position/position number, setup accounting and allocation information for the position via Funding Entry transaction.
3. Recruit and select your candidate. An intra-location transfer indicates that a candidate who holds an active job from a different department has been selected. The candidate will vacate their active position and transfer to the new position.
4. The Receiving department initiates the intra-location transfer via the Smart HR Template transaction by selecting the appropriate Intra-Business Unit Transfer template to add the Staff/Academic position: (UC_TRANSFER or UC_TRANSFER_AC).
5. The Sending department is not required to perform any transaction. The Sending department’s position is vacated and the Receiving department’s position is filled.

<table>
<thead>
<tr>
<th>Vacant Position</th>
<th>Funding Entry</th>
<th>Candidate</th>
<th>Transfer Entry Transaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receiving CHEMISTRY</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vacant 40003456</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sending PHYSICS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Filled 40001234</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.

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.

PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions

2) Select the appropriate transfer template:
   UC_TRANSFER,
   UC_TRANSFER_AC

Smart HR Transactions Page

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

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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 will begin 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.

Enter the employee’s Employee ID number.

If the employee has more than one employment record, select the appropriate job the employee is transferring from.

Select Reason Code: For this scenario, you will select Academic Intra-Campus Transfer.

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.

Click Continue to move to the next page.
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Enter Transaction Information Component

The **Enter Transaction Information** component appears. Because this employee is active, the **Personal Data** tab does not appear. Any necessary personal data changes can be updated by the employee on the **Employee Self Service** pages.

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

Job Data Tab

**Things to Remember:**

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

**NOTE:** For academic personnel, the **Employee Classification** field defaults, is view-only and cannot be changed.

For staff, the **Employee Classification** field does not default and must be manually entered.
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Job Data Tab, continued

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:**

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

- **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.

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

- **Comments** field:
  - Anything entered in this field will follow the history of this employee. Enter only information that is appropriate to keep in the employee’s historical records.
NOTE: Do not confuse the transaction Comments box with the separate boxes for Initiator Comments and Approver Comments.

**Job Earnings Dist Tab**

Things to Remember:

- Job earnings distributions can be used to indicate if the compensation should be paid using a different **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.
Save and Submit

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.

Transactions In Progress

<table>
<thead>
<tr>
<th>Select</th>
<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></td>
<td>HIREJPM</td>
<td>09/01/2018</td>
<td>Nathan Smith</td>
<td>NEW</td>
<td>Hire</td>
<td>United States</td>
</tr>
<tr>
<td></td>
<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></td>
<td>JOB</td>
<td>06/01/2018</td>
<td>Daniel Perez</td>
<td>10000776</td>
<td>Terminath</td>
<td>United States</td>
</tr>
<tr>
<td></td>
<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>
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**Employee Job Record**

When your Smart HR Template Transaction has been 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 will have an updated **Job Record**. The vacant position you used, will now be 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 Tom, an academic employee is transferring from the Physics department to an academic position in the Chemistry department, effective 10/1/2018. Tom only has 1 job. The Receiving department initiated the transfer transaction. Tom’s employee record remains at “0” because his employee classification **did not** change.
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Tom’s job record now looks like this:

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<td>0</td>
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<td>40003456</td>
<td>Active</td>
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