

Micro Learning: Transfers-Choosing the Correct Template

6/21/22



1

Create or identify existing vacant **Position** you will be transferring the employee into

2

Check **Person Org Summary** to see existing Empl Records:

- Active Status
- Expected Job End Date
- FLSA/pay frequency
- Dept Contact

3

Coordinate with the **Releasing Department** as needed

4

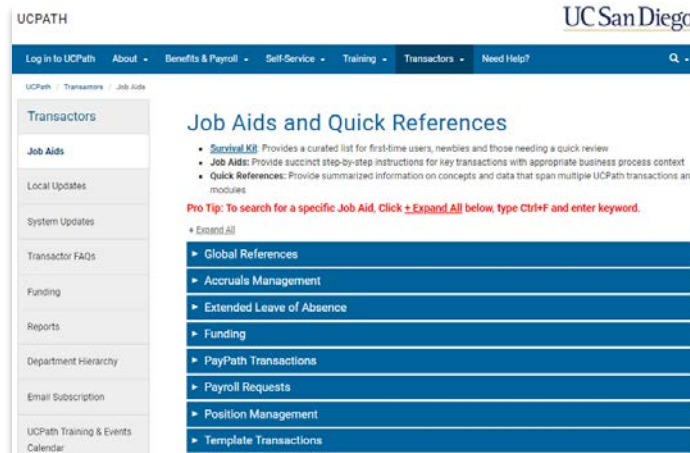
Refer to **Transfer Matrix** and **Template Action Reason Code** job aids to determine which template and action reason code to use

5

Review the **Payroll Processing Calendar** to ensure you submit your transaction(s) in time for approval

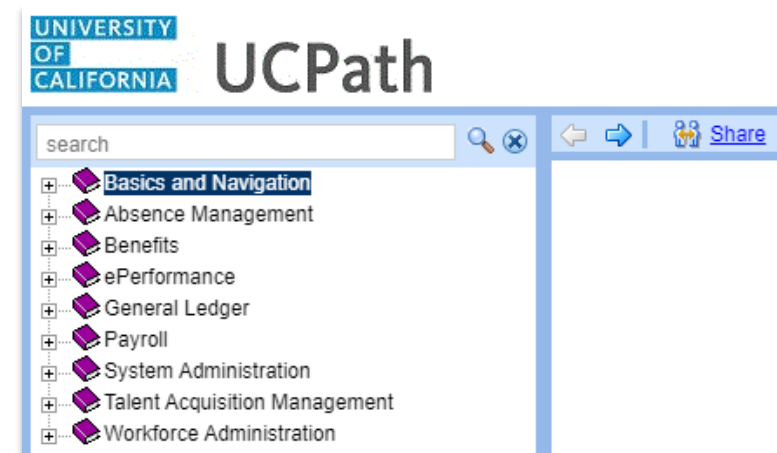
UC_Transfer Template	Concurrent Hire Template & Voluntary Termination Template	PayPath
<p>uses existing empl record; do not submit termination template</p>	<p>creates a new empl record and terminates previous empl record; no break in service</p>	<p>updates existing empl record; <u>do not</u> use for open recruitment</p>
<ul style="list-style-type: none"> ▪ Transfer associated with an open recruitment of a staff employee from VCHS ▪ Staff employee hired via open recruitment into a different staff position within the same department <p>*VCHS refers to Health Sciences and Medical Center</p>	<ul style="list-style-type: none"> ▪ Transfer between Academic positions ▪ Transfer between Staff and Academic positions ▪ Transfer an employee between departments in UC San Diego ▪ Transfer an employee to another UC location 	<ul style="list-style-type: none"> ▪ Staff employee has been reclassified (downward or upward) following departmental/HR review. ▪ Staff Position classification is changing for a filled Position not via open recruitment (e.g., Limited to Career) ▪ Reorganization/Restructuring

[UC San Diego Job Aids and Quick References](#)



- [Transfer Matrix](#)
- [How to Initiate an Intra-Location Transfer](#)
- [How to Initiate An Inter-Location Transfer or Intra-Location Transfer Creating a Different EMPL Record](#)

[UCPath Help Site for Transactional Users](#)



- [Template Transactions - Action Reason Codes and Descriptions](#)
- [Template Transactions - Status Pages](#)
- [PayPath Transactions - Action Codes, Reason Codes and Descriptions \(Academic\)](#)
- [PayPath Transactions - Action Codes, Reason Codes and Descriptions \(Staff\)](#)

The logo features the letters 'UC' in white on a gold square background. To the right, the word 'Path' is written in a blue, italicized sans-serif font. The 'Path' text is enclosed in a blue rectangular frame with a white border. A blue trident symbol is positioned at the top right corner of the frame.

UC *Path*

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