

Topic Based Zoom:
Transfers - Choosing the Correct
Template

6/22/22



Today's Topics



Review Key Terms & Critical Concepts



Transfer Matrix



Reminders & Resources



Best Practices and Q&A



Transfer	A transfer occurs when an employee is moving to another department and/or position
Inter Location Transfer Process	Uses a Concurrent Hire template and a Voluntary Termination template, creates a new empl record and terminates previous empl record, no break in service
Intra Location Transfer Process	Uses the UC_TRANSFER template, no termination template, uses existing empl record
Promotion	Occurs where there is an assignment of an employee from one position to another position into a class having a higher salary range maximum, by way of an open recruitment ; action would be used in conjunction with recruitment activities; DO NOT use PayPath
Reclassification	Occurs when there is a change in title (job code) of an employee's current position to a title (job code) in the same classification but having a different salary range maximum; can be upward, downward, or lateral; must be reviewed and approved by compensation; Use a Position Data update in PayPath with a Job Reclassification reason code

Transfers: Template vs PayPath

Employee is moving to a new department and/or position:

Template

- Open Recruitment

PayPath

- Reclassification (upward, downward, or lateral)
- Department only change due to reorganization/restructuring

NOTE: Do not use PayPath for promotions when it is associated with recruitment. Although an upward reclass could be considered a promotion, for reporting purposes need to differentiate between a recruitment/promotion (Template) and an upward reclassification (PayPath).

UC_Transfer Template

The **UC_Transfer Template** moves an employee to a new department and/or position using the existing Empl Record

Note: A termination template should not be submitted.

- 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

*VCHS refers to Health Sciences and Medical Center

Concurrent Hire Template & Voluntary Termination Template

The **Concurrent Hire Template** creates a new Empl Record and the **Voluntary Termination Template** terminates the previous Empl Record, transferring the employee without a break in service

- 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

PayPath

PayPath updates the Position/Job data on the existing Empl Record

Note: Should not be use for transfers associated with open recruitment

- 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)
- Department only change due to reorganization/restructuring

Person Org Summary Page | Always Check Here First



NAVIGATION

- PeopleSoft Menu
- Workforce Administration
- Personal Information
- **Person Organizational Summary**

ORG Instance is synonymous with Employee Record.

Indicates the Start Date of the assignment.

You can view job assignment information for all employee records across all locations. This page does not display historical or future-dated employment details.

Person Organizational Summary

Alex Rand Person ID 10002000

Find **View 1** First 1-2 of 2 Last

ORG Instance 0 HR Status Active Last Hire 01/01/2016
 Primary Job: Payroll Status Active Termination Date

Assignments Personalize | Find | First 1 of 1 Last

Empl Record	Business Unit	Position Number	Dept ID	Department Description	Job Code	Description	Expected Job End Date	FTE	Employee Class	Union Code	FLSA Status	Pay Group	Employee Type	Probation Code	Probation End Date
0	UCOP1	40001351	814000	IMM OFC INFO TECH SRVCS	004920	STDT 3	09/01/2016	0.250000	Student: Casual/Restricted	99	N	MB7	H	None	

ORG Instance 1 HR Status Active Last Hire 01/21/2015
 Primary Job: Payroll Status Active Termination Date

Assignments Personalize | Find | First 1 of 1 Last

Empl Record	Business Unit	Position Number	Dept ID	Department Description	Job Code	Description	Expected Job End Date	FTE	Employee Class	Union Code	FLSA Status	Pay Group	Employee Type	Probation Code	Probation End Date
1	UCOP1	40001456	814200	TECHNOLOGY SUPPORT SVS	004920	STDT 3	07/22/2016	0.240000	Student: Casual/Restricted	99	N	MB7	H	None	

Indicates the Termination Date of the assignment, if applicable. This is **Last Day Worked** not the Effective Date of the Termination.

Concurrent Hires transactions must have an effective date while the employee has active employment.

FLSA Statuses and Pay Frequencies must match for Concurrent Hires to be processed by UCPC. A Pay Group change may be needed (with form potentially). PayGroup will be set to DEF until the nightly process runs after UCPC processing

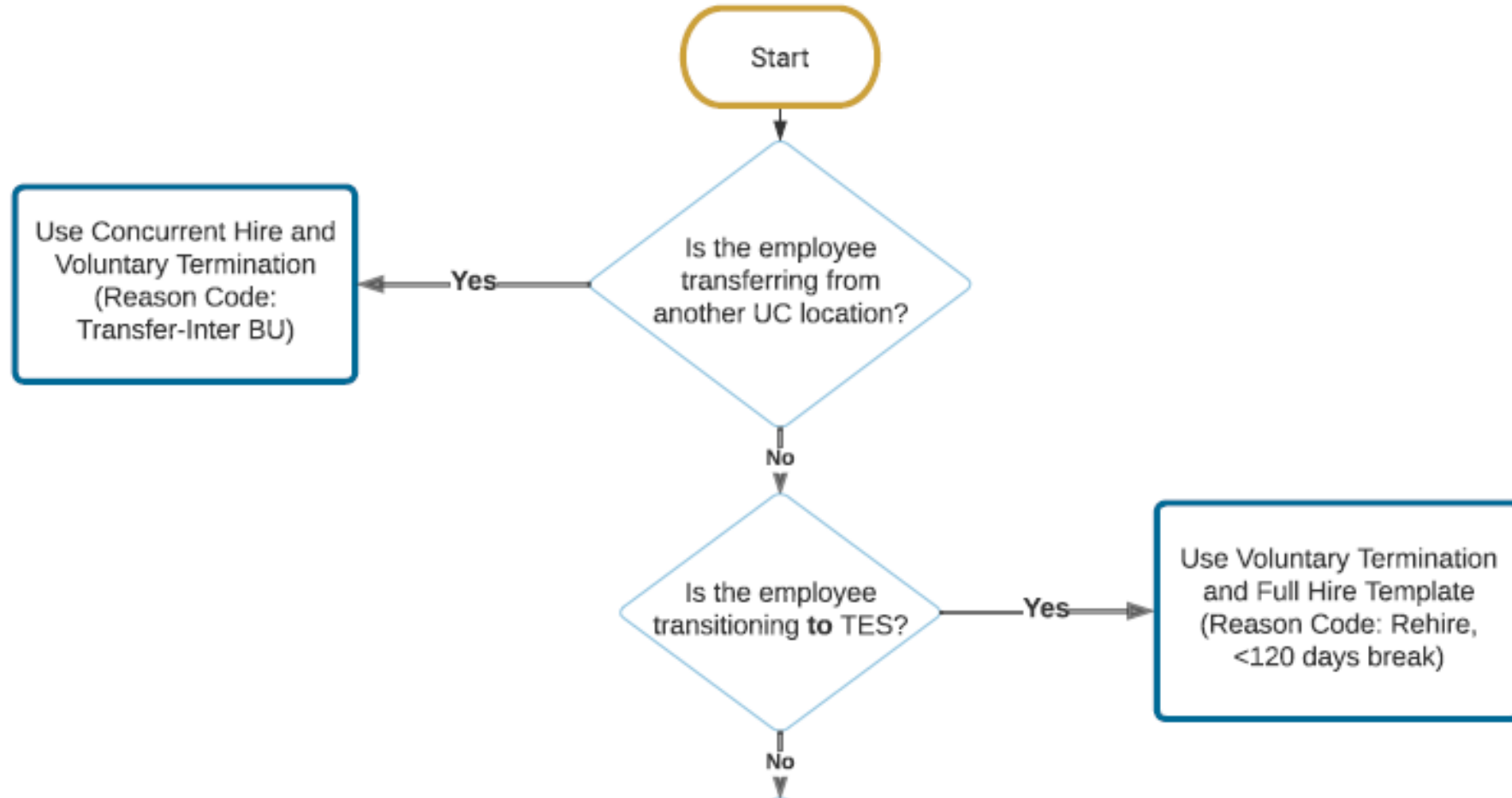
Click the **View All** link to view all current information.

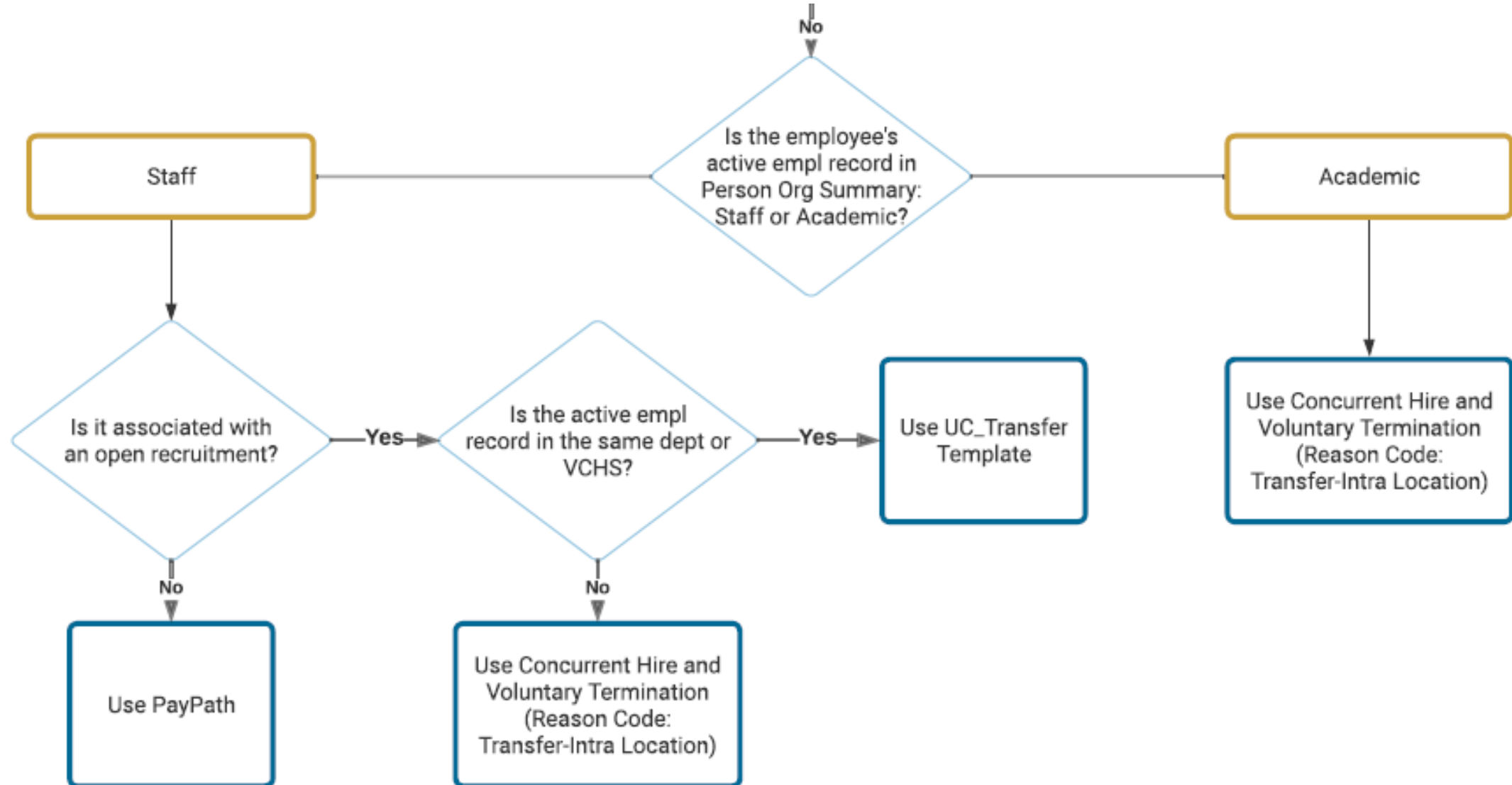
Transfer Matrix

- Reading the Decision Tree
- New TES transfer processes

Basic Decision Tree

This decision-tree provides a general overview, but the [Transfer Matrix](#) provides important details and considerations for each scenario and should *always* be referenced.





This matrix helps you choose the correct template when a hire includes a transfer scenario. Find your situation & complete the indicated transaction(s). Job Aids are available with step-by-step instructions. To coordinate with another department, [find the Dept HR POC here](#).

SCENARIO	SMART HR TEMPLATE and/or UCPATH TRANSACTION	ADDITIONAL NOTES AND CONSIDERATIONS
<p>CAMPUS DEPT OR TES → CAMPUS DEPT OR VCHS*</p> <p>Campus Staff or TES Staff Employee hired via open recruitment into a campus staff position in a different department.</p> <p>OR</p> <p>Campus Staff or TES Staff Employee hired via open recruitment into a VCHS staff position.</p>	<p>TWO TEMPLATES REQUIRED:</p> <ol style="list-style-type: none"> 1. Concurrent Hire Template 2. Voluntary Termination Template <p>*This is an Intra-Location Transfer but uses an Action Reason code "Transfer - Intra-Location" rather than a Transfer Template.</p> <p>RESOURCES:</p> <ul style="list-style-type: none"> • How to Initiate a Concurrent Hire • How to Initiate a Voluntary Termination 	<ul style="list-style-type: none"> • Hiring Dept completes Concurrent Hire and Releasing Dept completes the Voluntary Termination • Both templates use same Effective Date & Action Reason code "Transfer - Intra-Location" • To avoid a break in service, Concurrent Hire Template should be submitted before Voluntary Termination Template, but w/o lag in time or UCPC will cancel hire - coordination between depts required • This action creates a new Empl Rcd for the employee <p>*VCHS refers to Health Sciences & Medical Center</p>
<p>VCHS* → CAMPUS DEPT</p> <p>VCHS Staff Employee hired via open recruitment into a staff position in a campus department.</p>	<p>ONE TEMPLATE ONLY:</p> <ol style="list-style-type: none"> 1. UC_TRANSFER Template <p>RESOURCES:</p> <p>How to Initiate an Intra-Location Transfer</p>	<ul style="list-style-type: none"> • Hiring Dept completes UC_Transfer template • No action should be performed by the releasing department; no termination template needed • This action uses existing active Emp Rec for employee <p>*VCHS refers to Health Sciences & Medical Center</p>

<p>CAMPUS DEPT → TES</p> <p>Campus Staff Employee hired via open recruitment into a TES staff position.</p> <p>NOTE: A break in service is required for Campus to TES transitions in order to ensure benefits and accruals are reset. Benefits eligibility criteria for TES are not the same as for campus. In addition, there are restrictions in service hours for some titles.</p>	<p>TWO TEMPLATES REQUIRED:</p> <ol style="list-style-type: none"> Voluntary Termination Template Full Hire Template with Action Reason code Rehire, <120 days break <p>RESOURCES:</p> <ul style="list-style-type: none"> How to Initiate a Voluntary Termination How to Initiate a Full Hire Template Transaction Transaction Transaction 	<ul style="list-style-type: none"> Releasing Dept completes the Voluntary Termination Template and Final Pay Transaction to pay out any accruals TES completes the Full Hire Template with Rehire Action Reason code This action creates a new Empl Rcd for the employee
<p>DEPT → SAME DEPT</p> <p>Staff Employee hired via open recruitment into a different staff position within the same department.</p>	<p>ONE TEMPLATE ONLY:</p> <ol style="list-style-type: none"> UC_TRANSFER Template <p>RESOURCES:</p> <p>How to Initiate an Intra-Location Transfer</p>	<ul style="list-style-type: none"> Dept completes UC_Transfer template No termination template needed This action uses existing active Emp Rec for employee
<p>DEPT → SAME DEPT</p> <p>Staff employee makes a lateral move with the same title and pay rate within the same department.</p>	<p>ONE TEMPLATE ONLY:</p> <ol style="list-style-type: none"> UC_TRANSFER Template using the LAT (lateral) Reason Code <p>RESOURCES:</p> <p>How to Initiate an Intra-Location Transfer</p>	<ul style="list-style-type: none"> Dept completes UC_Transfer template No termination template needed This action uses existing active Emp Rec for employee

Reminders & Resources

- Auto Term Implications
- Funding Considerations
- Expected Job End Date – Known Issue
- Reminders for Initiators & Approvers
- Timing Considerations
- Resources

Auto-Termination Implications

If an employee is auto-terminated by accident before a transfer, the separating department will need to process a Rehire Reinstatement before performing the needed actions to complete the transfer.

Funding Considerations

- MCOP worksheet only available after the employee has been hired into the position
- New funding needed to ensure the pay doesn't go to the Dept default
- **UC_TRANSFER** template can disable Direct Retros to previous dept

Expected Job End Date Known Issue | UC_TRANSFER Template

The Expected Job End Date listed on the employee's current job will pull across to their new appointment when processing a **UC_TRANSFER** template transaction

- Expected Job End Date needs to be actively managed in PayPath to ensure the employee is not wrongly terminated before the transfer occurs
- The existing Job End Date on the employee's current appointment will populate within their newly processed hire Job Data
- An extension to the Job End Date should be done before or immediately following the transfer within PayPath

Important Things for Initiators to Remember

- If the transferring employee has system access, ensure you've submitted the appropriate **SNOW ticket to remove system access**
- The address you enter is where a paper paycheck will be mailed (and benefits correspondence, and ALL other correspondence)
- If you realize you've made a mistake after you have submitted your template:
 - Delete the template from your **Smart HR Templates** page (no clone option)
 - Ask your approver to deny (you can clone from **Transaction Status** page)
 - If they have already approved, submit a Case to UCPC and ask them to cancel the transaction (you can clone from **Transaction Status** page)
 - If you don't want to risk UCPC missing your Case, Delete the template from the **Transaction Status** page (no clone option)
- Future dated hires don't have full access until the Start Date: For example, if an employee starts 9/1 but is fully in the system now, they will not have access to complete some of the onboarding items such as Direct deposit, tax forms, etc. They need to wait until their actual hire date. Peoplesoft is effective date driven.
- Future dated hire records also cannot be updated until the Start Date: For example, if you had not entered the Oath, you cannot add it on Person Profile until their start date

- Always check the **Effective Date**
- Hire transactions require the following but can be submitted without; be sure these are in the transaction or the Comments explain why they aren't otherwise UCPC will cancel the transaction:
 - **Person email (both fields)**
 - **SSN**
 - **Zero Compensation**
- Closely review all compensation-related fields: **FTE, Salary Admin Plan, Grade, Step, Pay Components**, etc.
- **FTE** should not be zero unless the employee will only receive pay via Additional Pay

Remember: Denied Template Transactions can be cloned; the initiator does not need to start from scratch.

Payroll Processing Calendar



For Template Transactions to impact payroll they must have be approved by the **Employee Data Change*** deadline. UCPC will then review, and, if accepted, process the transaction in time for the payroll run.

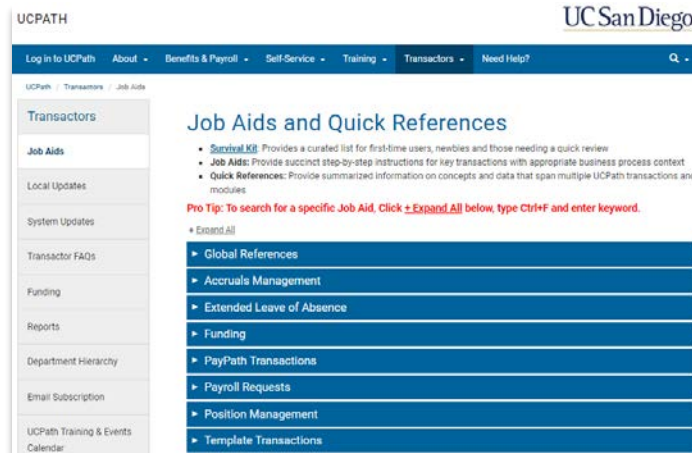
- UCPC processing time is 1-4 business days but can be delayed during high transaction volume periods (Current UCPC processing time for templates available on the [UCPath Metrics Dashboard](#))
- Additional Pay cannot be entered on a Template Transaction and must be entered and approved by the **Employee Data Change Deadline**
- Position funding should be added no later than the day before Pay Confirm of the first pay period in which the employee will receive pay

Pay Cycle	Check Date	Pay Period Dates		Run ID Schedule	Location							UCPath Center						
		Begin	End		* Employee Data Change *** (3:00 PM) After 3:00 PM changes will not be processed for current pay cycle	Campus		Med Center Only			Pay Confirm	DDODS Burst (4:30 AM)	Accrual Post Confirm	GL Post Confirm (Complete Summary Level Data)	GL Post Confirm (Complete Detail Labor Ledger Data)	Pay Statements on UCPath (8:00 AM)	Leave Accrual Available on UCPath (After 5:00 PM)	
						Stop Processing PayPath & Position Mngt (5:00 PM)	Resume Processing (6:00 AM)	* Inbound Files Due **** (2:30 PM) * Msg Error Log Distribution (11:00 PM)	* Location Corrections To Msg Error Log (2:00 PM) * E-703 Funding Upload	* Inbound Files Due **** (5:00 PM) * Msg Error Log Distribution (11:00 PM)								* Location Corrections To Msg Error Log (2:00 PM)
MO	Thu 07-01-21	06-01-21	06-30-21	210630M0X	Fri 06-18-21	Wed 06-23-21	Sat 06-26-21	Tue 06-22-21	Wed 06-23-21	Tue 06-22-21	Wed 06-23-21	Fri 06-25-21	Mon 06-28-21	Thu 07-01-21	Tue 06-29-21	Tue 06-29-21	Tue 06-29-21	Thu 07-01-21
B1	Wed 07-07-21	06-13-21	06-26-21	210626B1X	Thu 06-24-21	Tue 06-29-21	Fri 07-02-21	Tue 06-29-21	Wed 06-30-21	Tue 06-29-21	Wed 06-30-21	Thu 07-01-21	Fri 07-02-21	Tue 07-06-21	Tue 07-06-21	Tue 07-06-21	Fri 07-02-21	Tue 07-06-21 *
B2	Wed 07-21-21	06-27-21	07-10-21	210710B2X	Thu 07-08-21	Tue 07-13-21	Fri 07-16-21	Tue 07-13-21	Wed 07-14-21	Tue 07-13-21	Wed 07-14-21	Thu 07-15-21	Fri 07-16-21	Mon 07-19-21	Mon 07-19-21	Mon 07-19-21	Mon 07-19-21	

Transfer Coordination Contacts

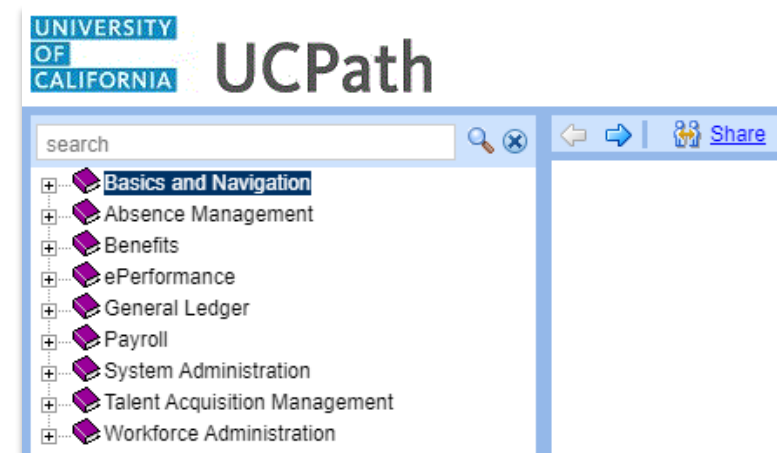
- Within UC San Diego: [Department HR Contact List](#)
- Other UC Locations: Inter-campusTransfer@ucsd.edu

[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 \(Staff\)](#)



Review Person Org Summary before initiating a template transaction

- Ensure employee has an active position and the expected job end date is not before the transfer effective date
- Identify departments for transaction coordination



Verify the position has been created in UCPATH before starting your template transaction

- Create or identify existing vacant position you will be using
- Write down the position number



Pay close attention to Effective Dates

- Effective date indicate the first day a status applies (hired, terminated, etc.)
- Concurrent Hire/Voluntary Termination Templates must have matching effective date and action reason code



Coordinate with other departments as needed

- Your row-level security will limit access to the employee Positions you can transact on, you may need to coordinate with other departments
- [Department HR Contact List](#)



Plan for Approval and Processing Times

- The payroll calendar deadline for template transactions is the Employee Data Change date at 3:00 pm
- UCPC processing time for templates available on the [UCPath Metrics Dashboard](#)



Review key resources as often as you need to

- Template Transactions – Action Reason Codes and Descriptions Job Aid
- Payroll Processing Calendar
- Transfer Matrix



Do not let employees auto-terminate in error

- Monitor the **Expected Job End Date Report**
- To extend an appointment, the update must be approved one day before Appointment End Date or termination will occur

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*

UC San Diego

UC San Diego
Health Sciences



- Regarding known issue with end dates following the employee with a UC_Transfer template, UCPATH is supposed to remove it when processing but some may slip through the cracks. So always go check and remove if you see it followed over.
- Local Job Aids Page: <https://ucpath.ucsd.edu/transactors/job-aids.html>
- [Understanding Contingent Workers](#)
This Quick Reference document summarizes the process for managing Contingent Workers at UC San Diego.
- Contingent Workers are not employees and so they have separate templates to update their contingent worker record in UCPATH. Refer to Template action reason codes for descriptions.