Topic Based Zoom:
Transfers – Choosing the Correct Template
8/11/21
Today’s Topics

- Review Key Terms & Concepts
- Choosing the Correct Transaction
- Important Reminders & Resources
- Best Practices and Q&A
<table>
<thead>
<tr>
<th>Intra Location Transfer Process</th>
<th>Inter Location Transfer Process</th>
<th>Reclassifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use the <strong>UC_TRANSFER template</strong>, no termination template, uses existing empl record</td>
<td>Use a <strong>Concurrent Hire template</strong> and a <strong>Voluntary Termination template</strong>, creates a new empl record and terminates previous empl record, no break in service</td>
<td>Use <strong>PayPath</strong>, updates existing empl record</td>
</tr>
<tr>
<td>- Transfer associated with an open recruitment of a staff employee from VCHS/TES</td>
<td>- Transfer between Academic positions</td>
<td>- Staff employee has been reclassified (downward or upward) following departmental/HR review.</td>
</tr>
<tr>
<td>- Staff employee hired via open recruitment into a different staff position within the same department</td>
<td>- Transfer between Staff and Academic positions</td>
<td>- Staff Position classification is changing for a filled Position not via open recruitment (e.g., Limited to Career)</td>
</tr>
<tr>
<td>*VCHS refers to Health Sciences and Medical Center</td>
<td>- Transfer an employee between departments in UC San Diego</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Transfer an employee to another UC location</td>
<td></td>
</tr>
</tbody>
</table>
Choosing The Correct Template

- Review Pages
- How to Process a Transfer – Choosing a Template Matrix
- Action/Reason Codes
WHAT IS VIEWABLE?

- Current employee information for all org relationships at all UC locations
- Job assignment information for all employee records, across all locations
- Current job assignment(s), organizational relationships, HR and payroll status, hire date, expected job end date and termination date if applicable
- Salary information and historical or future-dated employment details are NOT available

WHY GO HERE FIRST?

- To determine if employment status in UCPath is active or inactive
- To ensure that your action will not conflict with the terms and conditions of current employment; resolve any issues or inquiries before moving forward
You can view job assignment information for all employee records across all locations. This page does not display historical or future-dated employment details.

Indicates the Start Date of the assignment.

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

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.

Concurrent Hires transactions must have an effective date while the employee has active employment.
Choosing a Template - Transfers

## HOW TO PROCESS A TRANSFER – CHOOSING A TEMPLATE

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.

<table>
<thead>
<tr>
<th>SCENARIO</th>
<th>SMART HR TEMPLATE and/or UCPath TRANSACTION</th>
<th>ADDITIONAL NOTES AND CONSIDERATIONS</th>
</tr>
</thead>
</table>
| **CAMPUS DEPT → CAMPUS DEPT**  
**CAMPUS DEPT → VCHS* or TES**  
Campus Staff Employee hired via open recruitment into a campus staff position in a different department.  
**OR**  
Campus Staff Employee hired via open recruitment into a VCHS or TES staff position. | **TWO TEMPLATES REQUIRED:**  
1. Concurrent Hire Template  
2. Voluntary Termination Template  
   *This is an Intra-Location Transfer but uses an Action Reason code "Transfer - Intra-Location" rather than a Transfer Template.  
   **RESOURCES:**  
   - How to Initiate a Concurrent Hire  
   - How to Initiate a Voluntary Termination |  
- 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  
*VCHS refers to Health Sciences & Medical Center |
| **VCHS* OR TES → CAMPUS DEPT**  
VCHS or TES Staff Employee hired via open recruitment into a staff position in a campus department. | **ONE TEMPLATE ONLY:**  
1. UC_TRANSFER Template  
   **RESOURCES:**  
   How to Initiate an Intra-Location Transfer |  
- 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  
*VCHS refers to Health Sciences & Medical Center |
## Choosing a Template - Transfers

<table>
<thead>
<tr>
<th>DEPT ➔ SAME DEPT</th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>Staff</strong> Employee hired via open recruitment into a different <strong>staff</strong> position within the same department.</td>
<td><strong>Staff</strong> employee makes a lateral move with the same title and pay rate within the same department.</td>
</tr>
</tbody>
</table>

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<thead>
<tr>
<th>ONE TEMPLATE ONLY:</th>
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<tbody>
<tr>
<td>1. UC_TRANSFER Template</td>
<td>2. UC_TRANSFER Template using the LAT (lateral) Reason Code</td>
</tr>
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<table>
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<td>• This action uses existing active Emp Rec for employee</td>
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<tr>
<th>STAFF ➔ ACADEMIC</th>
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</tr>
</thead>
<tbody>
<tr>
<td>A <strong>staff</strong> employee is transferring to an <strong>academic</strong> position.</td>
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<th>TWO TEMPLATES REQUIRED:</th>
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<tr>
<td>1. Concurrent Hire Template</td>
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</tr>
<tr>
<td>2. Voluntary Termination Template</td>
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| *This is an Intra-Location Transfer but uses an Action Reason code “Transfer - Intra-Location” rather than a Transfer Template. | *This is an Intra-Location Transfer but uses an Action Reason code “Transfer - Intra-Location” rather than a Transfer Template. |

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<th>• Hiring Dept completes Concurrent Hire and Releasing Dept completes Voluntary Termination</th>
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<td>• 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</td>
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Choosing a Template - Transfers

**ANY DEPT ACAD ➔ ANY DEPT ACAD**

*Academic employee hired into a different academic position.*

**NOTE:** For most long-term academic positions, there is no 1:1 replacement of academic positions like there is for staff. For example, a full professor or researcher who resigns is not necessarily replaced in the same department at the same rank and on the same funding. This is why we generally recommend that new positions be created for academics. With ranked titles (e.g. Professor, Researcher, Project Scientist, etc.), especially, it is unlikely that the next person will come in at the same job code, grade, etc., so it is generally safer to just create a new position and set it up correctly for the new hire. It is also important to remember that funding stays with the position and would have to be changed if the new employee is paid from different funds than the previous incumbent.

**POSITION CREATION & TWO TEMPLATES REQUIRED:**
- Position Management Transaction
- Concurrent Hire Template
- Voluntary Termination Template, if applicable

*This is an Intra-Location Transfer but uses an Action Reason code “Transfer - Intra-Location” rather than a Transfer Template.*

**RESOURCES:**
- How to Create a Position
- How to Initiate a Concurrent Hire
- How to Initiate a Voluntary Termination

**UC San Diego**

- Hiring Dept uses Position Management to create a new position
- Hiring Dept completes Concurrent Hire and Releasing Dept completes 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
Choosing a Template - Transfers

| However, for Summer Session instructors or graduate student employees whose job title and funding will likely be the same, you may reuse positions if it is warranted. If the same person will transition in and out of that position (e.g. Lecturer in Summer Session, TA, etc.), then it makes sense to reuse the position (e.g. rehire the person back into that same position). You can also reuse positions for new appointees if the job code, grade, and funding are not changing or you are willing to update all of the required data. |
Choosing a Template - Transfers

<table>
<thead>
<tr>
<th>ANY DEPT ACAD → SAME DEPT &amp; SAME ACAD POSITION &amp; SAME EMPLOYEE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic hired into same academic position in same department; new position not required if the employee was the previous incumbent.</td>
</tr>
<tr>
<td>OR</td>
</tr>
<tr>
<td>GRAD ACAD TITLE* → GRAD ACAD TITLE*</td>
</tr>
<tr>
<td>Graduate Academic Title hired into another Graduate Academic Title position, regardless of departments.</td>
</tr>
<tr>
<td>*Grad Academic Title defined as GSR, Associate-In, TA, Tutor, or Reader</td>
</tr>
</tbody>
</table>

| TWO TEMPLATES REQUIRED if Releasing Dept plans to terminate the current job: |
| 1. Concurrent Hire Template |
| 2. Voluntary Termination Template |

| OR |

| ONE TEMPLATE & A TRANSACTION if current job remaining: |
| 1. Concurrent Hire Template |
| 2. PayPath transaction |

| RESOURCES: |
| How to Initiate a Concurrent Hire |
| How to Initiate a Voluntary Termination |
| How to Manage Appt End Dates |
| How to Initiate a Short Work Break (SWB) |

| Plan to terminate the current job: |
| 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 |

| OR |

| Plan to extend current job or put employee on SWB: |
| Hiring Dept completes Concurrent Hire using one of the non-Transfer Reason Codes |
| Current Dept uses PayPath for extension or SWB |
| Coordination between depts required, especially regarding FTE |
| This action creates a new Empl Rcd for the employee |
## Choosing a Template - Transfers

| ZERO OUT POST DOC PTO | Use Manage Accruals | Best practice is for releasing department to make the adjustments as follows:
|-----------------------|----------------------|---------------------------------------------------------------|
| Zeroing out PTO for postdocs that transfer to a new series or a new appointment (via Termination/Concurrent hire templates--i.e., new empirc) | Manage Accruals is also used for:
- PTO for active postdoc
- Sick leave for active postdoc | 1. If the postdoc is transferring to a new series, the PTO would need to be zeroed out and the sick leave transferred to new appointment/series.
2. If the postdoc is transferring to another postdoc appointment the PTO would need to be zeroed out and the sick leave transferred.

| POST DOC SICK LEAVE BALANCE TRANSFER | Use Accruals & Service Adjustment eForm: The Use Accruals & Service Adjustment eForm utilizes text boxes so please write clear and concise notes. The eForm does not have a category for Postdoc Sick Leave. You will need to select the Other field and write “Postdoc Sick Leave”.

Please see the How to Enter an Accrual Adjustment Job Aid for actions via Manage Accruals | Best practice is for releasing department to make the adjustments as follows:
|-----------------------------|---------------------------------------------------------------|
| Transferring Postdoc Sick leave balance to Regular sick leave upon a transfer to a new series or appointment (via Term/Concurrent hire templates) | Note: UCPath uses the Postdoc Anniversary date to “renew” PTO and Sick time. However, there are instances when the Anniversary date does not align with Date of termination.

Note: UCPath uses the Postdoc Anniversary date to “renew” PTO and Sick time. However, there are instances when the Anniversary date does not align with Date of termination. | 1. If the postdoc is transferring to a new series, the PTO would need to be zeroed out and the sick leave transferred to new appointment/series.
2. If the postdoc is transferring to another postdoc appointment the PTO would need to be zeroed out and the sick leave transferred. |
Choosing a Template - Transfers

| DEPT ➔ ADDITIONAL NEW/SAME DEPT | ONE TEMPLATE REQUIRED:  
1. Concurrent Hire Template | • Hiring Location completes Concurrent Hire  
• Coordination between depts required  
  • Any conflicts existing between FLSA and Pay Frequency must be resolved  
  • Total FTE must be addressed  
• This action creates a new Empl Rcd for the employee  
• Employee needs to understand that correct job must be picked in Ecotime before entering hours worked or leave taken |
|-------------------------------|-------------------------------------------------|-------------------------------------------------|
| Employee is hired for additional position in the same or a different dept and current position will be held concurrently, no termination planned. Note: This is a common scenario for student workers. | RESOURCES:  
How to Initiate a Concurrent Hire |
### Choosing a Template - Transfers

| **DEPT → SAME DEPT** | **NO TEMPLATE REQUIRED instead:** | **HR Transactor completes PayPath transaction on Position Data tab changing the Job Code per reclassification**  
**RESOURCES:**  
[How to Update Position Data for Filled Position](#) | **Effective Date should be date of reclassification per approval documentation** |
<table>
<thead>
<tr>
<th></th>
<th></th>
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<tr>
<td><strong>Staff</strong> employee has been reclassified (downward or upward) following departmental/HR review.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1. PayPath Transaction |  
- **RESOURCES:** |  
- **RESOURCES:** |
| **DEPT → SAME DEPT** | **NO TEMPLATE REQUIRED instead:** | **HR Transactor completes PayPath transaction on Job Data tab changing the Employee Classification**  
**RESOURCES:**  
[How to Update Job Data](#) | **Effective Date should be date of position classification change per approval documentation** |
| **Staff** Position classification is changing for a filled Position not via open recruitment (e.g., Limited to Career). |  
1. PayPath Transaction |  
- **RESOURCES:** |  
- **RESOURCES:** |
| **UCSD → DIFFERENT UC LOCATION**  
**DIFFERENT UC LOCATION → UCSD** | **TWO TEMPLATES REQUIRED:** | **Hiring Location completes Concurrent Hire and other UC Location completes Voluntary Termination**  
**RESOURCES:**  
- **RESOURCES:**  
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- **RESOURCES:** |  
| **The staff or academic employee is transferring from one UC-Location to another.** |  
1. Concurrent Hire template  
2. Voluntary Termination template |  
- **RESOURCES:**  
[How to Initiate an Inter-Location Transfer](#)  
[How to Initiate a Concurrent Hire](#)  
[How to Initiate a Voluntary Termination](#) |  
- **RESOURCES:**  
[Inter-Location Transfer Job Aid](#)  
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 |
How do I know which Action Reason Code to use?

There is no substitute for reviewing the Template Transactions – Action Reason Codes and Descriptions Job Aid on the Help Site for Transactional Users.
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
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
Critical Fields for Approvers to Review

- 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.
For Template Transactions to impact payroll they must have been 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

That means approval processing outside of UCPath must start much earlier than was the case with PPS
How to Plan for Processing Time

When initiating a transaction plan for possible errors and UCPC processing time.

<table>
<thead>
<tr>
<th>MONDAY</th>
<th>TUESDAY</th>
<th>WEDNESDAY</th>
<th>THURSDAY</th>
<th>FRIDAY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>1 Local Approval</td>
<td>2 UCPC Process</td>
<td>3</td>
</tr>
<tr>
<td>6 UCPC Process</td>
<td>7 Re-Submit Template</td>
<td>8</td>
<td>9 UCPC Process</td>
<td>10</td>
</tr>
<tr>
<td>13 UCPC Process</td>
<td>14 Complete AD/Email set up &amp; onboarding</td>
<td>15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>★ Employee First Day</td>
<td></td>
<td>22</td>
<td>23</td>
<td>24</td>
</tr>
</tbody>
</table>

Local Approval: 1
Re-Submit Template: 7
Employee First Day: 20
UCPC Process: 6, 13, 17
Job Aids

How to Process a Transfer – Choosing a Template

How to Initiate an Intra-Location Transfer
UC_TRANSFER Template

How to Initiate an Inter-Location Transfer or Transfer Staff to Academic and Vice Versa
Concurrent Hire Template
Voluntary Termination Template
UPKs

Initiate Intralocation Transfer Template Transaction
UC_Transfer Template

Initiate Interlocation Transfer Template Transaction
Concurrent Hire Template
Voluntary Termination Template
Transfer Coordination Contacts

UCPath Center (UCPC)
Questions regarding new employee or first-time user issues, benefits, net paycheck (after deductions and withholding), overpayments, employment verification, any payroll-related documentation for pay after 6/1/20, transaction support tickets:

- Login to UCPath and click the ‘Ask UCPath’ button or
- Call 855-992-7284 (Monday - Friday: 8 am - 5 pm) to speak to an associate

UC San Diego Support
Questions regarding gross pay, missed pay, local deductions, Labor Ledger, CBR, Direct Retro (Salary Cost Transfers), AVSO, and transaction support:

- Submit a ticket to support.ucsd.edu/path
- For “Missed Pay” submit a ticket with a Missed Pay Description to ensure expedited action is taken

Where should UCPath transactors go for assistance?

- Missing paycheck or concerns regarding benefit eligibility? Contact UCPath Employee Services directly at 855-992-7284 (Monday - Friday: 8 am - 5 pm)
- Looking for news and updates? Make sure you are on our Mailing List
- Have general questions? See the office hours schedule below
- Need step-by-step instructions for a transaction? Find a Local Job Aid or Quick Reference
- Want to see a transaction simulation or additional Job Aids? Access the System-Wide Help Site
- Looking for a Knowledge Article? Browse our KBAs
- Need help starting/completing a specific transaction? Book a 15 min 1:1 “How To” appointment
- Need a Department HR contact? Access our Dept HR Contact List
- Have a time-sensitive, pay-impacting issue? Have a complex transaction scenario? Need assistance with other issues? Submit a ticket to UCPath Support

Local Central Offices
Questions regarding HR policy and eligibility go first to Dept HR Contact and then to the Central Offices:

- Campus HR – Staff: hr@ucsd.edu or call 858.534.2812
- APO - Acad Personnel (excluding postdocs & grad students): academicpersonnel@ucsd.edu
- OPRS – Postdocs: opssa@ucsd.edu
- Grad Division – Grad Student Employees: grademployment@ucsd.edu
- ARC – Health Academic, MD, and Faculty: https://ucsdhealth.service-now.com/arc_request
- HHR – Health Staff: https://uchealth.service-now.com/hrportal or call 619-543-3200
- Career Center – Casual/Restricted Student Workers: studentemployment@ucsd.edu
BEST PRACTICES

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 you’ve created your position before starting your template transaction

- The position that you plan on using must have been created using Position Management

Pay close attention to Effective Dates

- Effective date indicate the first day a status applies (hired, terminated, etc.)
- Inter-Location Transfer Process requires coordination of effective date
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 accepted templates is 1 -4 business days

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
- Dept HR POC list

Review key resources as often as you need to
- Template Transactions – Action Reason Codes and Descriptions Job Aid
- Payroll Processing Calendar
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
Key Takeaways | Transfers – Choosing the Correct Template

- The **UC_TRANSFER template** moves the employee from one position to another within the same Department or from VCHS/TES to a campus Department (uses the existing empl record)

- The **Concurrent Hire and Voluntary Termination templates** moves an employee from one position to another at different UC Location, from one department to another, or between staff and academic positions (creates a new empl record without a break in service)

- The **Concurrent Hire and a Voluntary Termination templates** must have identical effective dates and Action Reason Codes or UCPC will cancel the transactions

- Use **PayPath** to process a reclassification
can the path team develop a decision tree to help determine which template to use? seems like there are so many factors to consider...i.e, within same department, open recruitment, paypath versus smart hr transaction, etc. How to Process a Transfer – Choosing a Template https://ucsdcloud-my.sharepoint.com/:b:/g/personal/ucpathproject_ucsd_edu/ESe8QJ0Fdc1HidrpXRUIbukBZjhX9khivx0uesVavZFBQ?e=aO9nUr Most Transfers will be Concurrent Hire/Voluntary term. Here is a basic decision tree but you should always refer to the Job Aid for important details and considerations:
what will be changing with the UCPath Upgrade that is happening by Dec 2021? **PUM Upgrade information:** [https://ucpath.ucsd.edu/transactors/pum-upgrade.html](https://ucpath.ucsd.edu/transactors/pum-upgrade.html)

HR POC list available on the Transactors Page

For employees that were transferred prior to the change would we be able to gain access to their record to view their employment record info prior to their transfer? **No, that would require row level security provisioning. If you are having this issue please submit a SNOW ticket.**

I think it's important to note that the concurrent hire and voluntary term have two different reason codes depending on the situation.. Intralocation and Interlocation. **Yes, there are different reason codes for Concurrent Hire/Voluntary Termination Templates depending on if it is an employee being transferred to/from another UC Location or if they are being transferred within UC San Diego. There is no substitute for reviewing the Template Transactions – Action Reason Codes and Descriptions Job Aid on the Help Site for Transactional Users.**
I had a SOM transfer and Person Org had designated as campus employee but the HR records were kept at Health HR and they said it was "Health employee" contradicting the Person Org information, but did process as concurrent hire. It was confusing for everyone involved. **Recommendation from Erica Keller: Check VC Areas; HHR = Staff Employees and ARC = Academic Employees**

Does it make a difference which Health (campus or school of med) option it is for when selecting a transfer process? Or if it is a position supported by HHR and a staff position, it's the Intralocation transfer template. **Staff employee with BU SDCMP but supported by HHR (check Work Location - VC Area), UC Transfer template**