Topic-Based Zoom
Intra-Location Transfer Transactions
Today’s Topics

- Concepts
- Choosing the Correct Transaction
- Notes for Initiators & Approvers
- Best Practices, Review and Q&A
Concepts

- Auto-Termination Implications
- Funding Impacts
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 Implications

- MCOP worksheet only available on Hire Date and after (calendar date)

- UC_Transfer can disable Direct Retros to previous dept
  - Global access user in Central Offices can perform on behalf

- New funding needed to ensure the pay doesn’t go to the dept default

- Direct Retro disabled to previous dept with EmplRecord changing Dept
Choosing The Correct Transaction

- Review Pages
- Intra-Location Transfers
- Action/Reason Codes
- Reclassifications
WHAT IS VIEWABLE?

- Job assignment information for all employee records, across all locations
- Current job assignment(s), organizational relationships, HR and payroll status, hire date, and “termination date” if applicable
- Current employee information for all org relationships at all UC locations
- 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
Person Org Summary Page | Always Check Here First

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

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

ORG Instance is synonymous with Employee Record.

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.

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.
The Workforce Job Summary page shows all job data updates for a particular employee record.

REMEMBER: Many Job Data fields are cascaded directly from Position Data. You’ll see Position Data on Job Data pages.
This page can be used to review Position and Job Data for Concurrent Hire processing. FLSA Status, Job End Date, Hire Date, and Pay Frequency are all important data elements of the current appointment(s) to consider.
Performing Transactions

- Intra-Location Transfers
- Action Reason Codes
- Reclassifications & PayPath
Key Intra-Location Transfer Scenarios

**STAFF**

- Use the **UC_Transfer template** for a staff transfer associated with an open recruitment within the same Dept
- Use the **UC_Transfer template** for a staff transfer associated with an open recruitment from VCHS or TES
- Use **PayPath** to process a reclassification
- Use a **Concurrent Hire and a Termination** for an employee moving from one department (non-VCHS/TES department) to another department

**ACADEMIC**

- **NEVER** use the **UC_Transfer** template for academic transfers
- Use a **Concurrent Hire and a Termination** for an academic employee transfer
- Use a **Concurrent Hire and a Termination or SWB** for graduate students that move between jobs (E.g., GSR and TA)
Choosing Your Templates – New Transfer Job Aid!

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 | TWO TEMPLATES REQUIRED: 1. Concurrent Hire Template 2. Voluntary Termination Template | • Hiring Dept completes Concurrent Hire and Releasing Dept completes the Voluntary Termination  
• Both templates use same Effective Date & Action Reason code “Intra-Location Transfer”  
• 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 Emp Rcd for the employee |
| CAMPUS DEPT → VCHS or TES | *This is an Intra-Location Transfer, but uses an Action Reason code “Intra-Location Transfer” rather than a Transfer Template. | Resources: How to Initiate a Concurrent Hire How to Initiate a Voluntary Termination |
| 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. | | |
| VCHS OR TES → CAMPUS DEPT | ONE TEMPLATE ONLY: 1. UC_TRANSFER Template | • 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 or TES Staff Employee hired via open recruitment into a staff position in a campus department. | Resources: How to Initiate an Intra-Location Transfer | |
| DEPT → SAME DEPT | ONE TEMPLATE ONLY: 1. UC_TRANSFER Template | • Dept completes UC_Transfer template  
• No termination template needed  
• This action uses existing active Emp Rec for employee |
| Staff Employee hired via open recruitment into a different staff position within the same department. | Resources: How to Initiate an Intra-Location Transfer | |
The Expected Job End Date and Union Code 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 isn’t wrongly terminated.
- The existing Job End Date and Union Code 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.
- Union Code will need to be updated via PayPath after the transfer is complete, if applicable.
### SMART HR TEMPLATE | WHEN TO USE

<table>
<thead>
<tr>
<th><strong>SMART HR TEMPLATE</strong></th>
<th><strong>WHEN TO USE</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>UC_CONC_HIRE</td>
<td>Transfer an employee between staff and academic positions at UCSD Location without a break in service</td>
</tr>
<tr>
<td>UC_CONC_HIRE_AC</td>
<td>Transfer an employee between one department (non-TES or VCHS) to another department at UCSD Location without a break in service</td>
</tr>
<tr>
<td>UC_VOL_TERM</td>
<td>Transfer from one UC-Location to another UC-Location</td>
</tr>
<tr>
<td><strong>This approach creates a new employee record</strong></td>
<td>Transfers involving an academic employee</td>
</tr>
</tbody>
</table>

**Note:** This is a process that requires two templates: Concurrent Hire and Termination

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**Note:** The Effective Date and Action Reason code for both the Concurrent Hire and Voluntary Termination templates must be identical for UCPC processing, along with timely processing by UC San Diego Initiators/Approvers. If not, UCPC will cancel the transactions. This two template process is used at UC San Diego to retain historical data access to the separating department.
Enter the details for the **Concurrent Hire** on the template tabs.

- Existing **Personal Data** is populated
- **Personal Data** changes should be submitted using the Personal Data Change template or through Self Service
- Enter applicable **Comments**
- After completing all the tabs, click **Save and Submit** on the **Earn Dist** page to route for approval
EARNINGS DIST TAB
Only required for employees with MCOP or when changing Earn Code (e.g., Summer Salary)

JOB DATA TAB
Requires entry of most fields, follow UPK or UC San Diego Job Aid. If FTE = 0 and/or you are not entering compensation because the employee will receive flat dollar/Additional pay, add that to your Comments
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.
Initiate Concurrent Hire Template Transaction

1. Open the UCPath Help site.
2. Staff: Search the Initiate Concurrent Hire Template Transaction (Staff) topic.
Concurrent Hire template creates a new EmplRecord, UC_Transfer template reuses existing EmplRecord

To use the Concurrent Hire template the employee must **already have an active employee record** in UCPath at time of hire

To avoid UCPC cancellation, timely processing of both the Voluntary Termination and Concurrent Hire templates must be done

Identical Effective Dates and Action Reason Codes must be used to prevent UCPC cancellation

UCPC will not process **either** Smart HR Template Transaction unless both are submitted correctly
To reclassify an employee (upward or downward), a combination of changes across Position Data, Job Data, and Additional Pay may be required.

- Both **Position Data and Job Data** changes can be entered in single transaction, but must have the same Effective Date.

- **Additional Pay** can be entered after the Hire Date becomes the calendar date.

- When you initiate a Position Data change, a new row is automatically entered on the Job Data tab; **Position Data cascades** onto Job Data and **Job Data fields** (e.g., step, etc.) become editable.

- New PayPath transactions cannot be entered until the pending transaction has been approved.
The UCPath **Short Work Break (SWB)** process is used to stop pay for an employee for a temporary period of time and moves them to a ‘work break’ status.

- **SWB** is NOT a leave, but is treated similarly by UCPC.
- **SWB** process applies to both staff and academic employees, process a Benefits Election form as applicable.
- Academic GSR/TA appointments should utilize the SWB functionality to prevent EmplRecords from being transferred/terminated erroneously.
View Transaction Status

- How do I review my transactions in progress?
- How do I clone a transaction?
- Future Dated Rows
- Forms
- Payroll Processing Calendar
Template Transactions | Three Ways to View Current Status

**Smart HR Transactions Page**
- View list of templates **you have submitted** that are in progress
- Click name link to open and review your transaction, including local AWE status

**SS Smart HR Transactions Page**
- View status and comments for template transactions in **local approval workflow**
- Search and view any template submitted within your **Business Unit**

**Transaction Status Page**
- View status of templates locally approved or denied; see status of templates being processed by UCPC
- Search and view any template transactions submitted by any department(s) for which you have row-level security

- **Requested**
  Transaction completed local AWE and is waiting for UCPC to process.

- **Completed**
  Transaction was processed by UCPC and saved into UCPath.

- **Hired/Added**
  Hire or rehire transaction was processed by UCPC and saved into UCPath.

- **Cancel**
  Transaction was canceled by UCPC.

- **Denied**
  Transaction was denied during local AWE by a Location Approver.
Use this page to review or delete Template Transactions you have initiated.
To view the Template Transaction details, click the Name link.

This is the same page Template Approvers use to Approve or Deny a Template Transaction. Displays templates in local approval within your BU.

The status appears at the top of the page and also at the bottom of the page.

Displays the Approver.
You will likely reference the Transaction Status page more than the previous two pages.

**Transaction Status**

The following transactions are pending, canceled or have been processed by Human Resources.

- **HR Review Status**: Selected/All
- **Transaction Type**: Selected/All
- **Transaction Status**: Selected/All
- **Start Date From**: 09/15/2018
- **End Date To**: 10/05/2018

**Search by:**
- Transaction Status or Type, and/or Date Range, Empl ID, and Name.

**Transaction Status** can be:
- Requested
- Completed
- Hired/Added
- Denied
- Cancel

**Caution:** This button deletes the selected transaction(s) from the system, removing it from UCPC’s processing list.

**View locally Approved/Denied templates within your ROW level access. Status at UCPC shown here.**
Clone a template when you need to correct a transaction that has been canceled or denied:

- UCPC may **cancel** a Template Transaction and will provide a comment explaining why and what needs to be corrected (View the comments on the **Transaction Status Page**)
- A Campus Approver may **deny** a Template Transaction and will provide comments about what needs to be corrected (View the comments on the **SS Smart HR Transaction Page**)

NOTE: The Template Initiator is notified by email of a canceled or denied transaction.
1. Open the UCPath Help site.


4. Search the Clone a Canceled Template Transaction topic.
Key Takeaways | View Transaction Status

- Local approvers **deny** template transactions; UCPC **cancels** template transactions
- Use the **Smart HR Transactions page** to review or **delete** template transactions you have initiated that are in progress
- Use the **SS Smart HR Transactions page** to review **local AWE status and approver comments** for template transactions in your Business Unit
- Use the **Transaction Status page** to (1) view the **status** of transactions that have already been approved/denied locally and (2) **clone** transactions that have been denied or canceled
SCENARIO: An employee is recruited via open recruitment into a new position. HR Initiator Todd processed a Permanent Increase in Time a few months ago for the anticipated increase in FTE Effective 12/1. The employee is hired by Tanya’s department and she performs the UC_Transfer template transaction to move the employee Eff. 11/1/2020.

Following the Transfer, Tanya notices that rows exist subsequent to the transfer date, that she did not enter; Tanya knows UCPC should delete actions from the previous record and submits a Job Data Update form to UCPC to delete the future dated row. If she hadn’t caught this, the position would revert back to the previous department’s appointment Position and Job Data.

<table>
<thead>
<tr>
<th>Calendar Date Entered in UCPath</th>
<th>Eff Date</th>
<th>Action</th>
<th>Action Reason</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/15/2020</td>
<td>6/1/2019</td>
<td>Created</td>
<td>position</td>
<td></td>
</tr>
<tr>
<td>5/1/2020</td>
<td>6/1/2020</td>
<td>Hire</td>
<td>No Prior UC Affiliation (Job Data)</td>
<td></td>
</tr>
<tr>
<td>6/2/2020</td>
<td>12/1/2020</td>
<td>POS</td>
<td>PIT</td>
<td>Permanent Increase in Time (Changed: FTE)</td>
</tr>
</tbody>
</table>
SECTION 1
- Indicate row in Job Data which requires an update
- Types of updates: Adding a New Row, Updating Existing Row, Removing an Existing Row, Correcting Effective Dates, Correcting Action/Reason Codes

SECTION 2
- Enter applicable fields with requested corrections

SECTION 3
- Enter applicable fields with requested corrections
- Enter **Initiator Comments** to communicate pertinent information to help UCPC process the request
- Ensure approvals are included on the request
Transactor | How to Submit a Case to UCPC

- Select “For an Employee” when submitting a case to UCPC about a transaction or about another employee.
- Select “For Me” when submitting a case to UCPC about your own personal data or your own pay.

*Note: If the transfer is from a Comp Time accruing position to a non-accruing position, payout of Comp Time should be done in EcoTime by unit payout means.

Both links go to the same case management system, if your ROW level access does not include your own dept you will not be able to submit cases for yourself.
Payroll Processing Calendar

For Template Transactions to impact payroll they must 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.

That means approval processing outside of UCPath must start much earlier.
Wrap Up

- Notes for Initiators & Approvers
- Best Practices
- Notes
Other 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**

- 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 and processing, 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 8/1 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. UCPath 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
BEST PRACTICES

Review Person Org Summary before initiating a template transaction
- Ensure you have a complete understanding of the employee’s active and inactive Positions
- Identify departments for transaction collaboration

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 dates indicate the first day a status applies (hired, terminated, etc.)
- Inter-Location Transfer Process requires coordination of effective date
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

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
- Utilize the HR POC matrix for coordination

Review key resources as often as you need to

- Template Transactions – Action Reason Codes and Descriptions Job Aid
- Payroll Processing Calendar
Key Takeaways | Transfers

- An **UC_Transfer template** moves the employee from one position to another **within the same Department** or **from VCHS or TES** to a campus Department, utilizing the existing EmplRecord.

- The **Concurrent Hire and Voluntary Termination templates** moves an employee from one position to another at **different Locations, from one department to another**, or **between staff and academic positions**.

- Concurrent Hire template creates a **new EmplRecord** for the employee.

- The **Concurrent Hire** and a **Voluntary Termination templates** must have identical effective dates and Action Reason Codes.
Does the intra location transfer apply when a limited employee is being hired via open recruit in a career position in the same dept? **Yes, use a UC_Transfer template for an open recruitment of a staff position within the same dept.**

With regards to reclassifications, how would I correct an effective date? **Position Update Form and Job Data Update Form.**

A couple of months ago a GSR in our Dept became a Postdoc. I coordinated academic concurrent hire and termination processes with another transactor in my department. He handled the GSR termination part of the process. The GSR had 2 jobs in codes 3287 and 3266. The other transactor processed the termination template on one of those GSR jobs and checked the End Job Automatically checkbox to let the other job auto-terminate. Was it fine to let that one GSR job auto-terminate? If not, what negative impact might it have had, how/where would I look to see if any such negative impact actually happened, and how would we correct it? **Appears the job didn’t break service and wasn’t use as a transfer. No issues that I can tell.**

For Academic appts - can you confirm that we would never use a transfer template? We often have postdocs that move to the project series, in the same department/lab - and they go through an open recruitment. So the transfer template seems to fit - but the project series is academic - so do we have to use the concurrent hire AC and Vol term? **Correct, we will not use a UC_Transfer for academic transfers.**

The first bullet references transferring employees with systems access - what systems are we referring to? **Folks who are HR/Funding Initiators/Approvers in the UCPath system.**
Are there exceptions to when a transfer template is not used for a Health Sciences staff position to a Campus Staff position? **No exceptions at this time**

Can we rehire/reinstate an employee who is currently active, but has a termination date before the start date of the second appointment? We have an employee whose stdt apt will end on 1/31, but the staff apt can't start until 2/4 for visa reasons. Can we process the second apt now, or do we have to wait until after the termination date? **Rehire templates require inactive HR Status, so the employee must be terminated before the Rehire can be processed or the Position Number will prompt an error.**

Re-using position numbers for academic positions, does this apply to Academic Employee Student employment titles? **Academics, including students, should not reuse position number**
  - Summer salary positions okay to reuse position number – Tyler to confirm with Kelly M and bring to Tuesday Office Hours

I often process Postdoc to Project Scientist transfers within the same department who become newly eligible for UC benefits. I've noticed a trend that some within this population cannot enroll in benefits once their new effective date becomes active. Could this be due to the type of transfer template used to complete the transfer? Example: UC_Transfer_AC was used instead of the Concurrent Hire Template with reason code: Intra Location Transfer. **Definitely could be why**