

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**

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

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

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	

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.

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.

- NAVIGATION**
- Main Menu
 - Workforce Administration
 - Job Information
 - Review Job Information
 - **Workforce Job Summary**

Workforce Job Summary

Ramiro Ramos EMP Empl ID 10022789

Empl Status Active Hire Date 09/17/2018

[Go To Job Data](#)

Job Information Personalize | Find | First 1-6 of 6 Last

General Job Information Work Location Salary Plan Compensation UC Job

Organizational Relationship	Empl Record	Effective Date	Seq	Action	Action Reason	Description	Job Indicator
EMP	1	03/01/2019	2	Data Chg	BNE	Benefits: Update Eligibility	Primary
EMP	1	03/01/2019	1	Data Chg	FIC	Change in FICA Status	Primary
EMP	1	03/01/2019	0	Data Chg	CNV	CONV: Conversion row	Primary
EMP	1	10/01/2018	0	Data Chg	DIS	CONV: Distribution Begin Date	Primary
EMP	1	09/17/2018	1	Transfer	CNV	Used for Conversion	Primary
EMP	1	09/17/2018	0	Hire	CNV	Conversion Use Only	Primary

Return to Search Previous in List Next in List Notify

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.

Review Examples | Intra-Location Transfer in Workforce Job Summary & Person Org Summary

Person Org Summary:

Employment Instances Find | View All First 1 of 1 Last

ORG Instance 0 HR Status Active Last Hire [Redacted]
 Primary Job: Payroll Status Active Termination Date [Redacted]

Assignments Personalize | Find | [Icons] 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	SDCMP	[Redacted]			007583	BUS SYS ANL 2		1.000000	Staff: Career	9					

Workforce Job Summary:

Go To Job Data

Job Information

Organizational Relationship	Empl Record	Effective Date	Seq	Action	Action Reason	Description	Job Indicator	Job Code	Description
EMP	0	06/22/2020	2	Data Chg	BNE	Benefits: Update Eligibility	Primary	007583	BUS SYS ANL 2
EMP	0	06/22/2020	1	Data Chg	PAY	Pay Group Change	Primary	007583	BUS SYS ANL 2
EMP	0	06/22/2020	0	Transfer	PRO	Promotion	Primary	007583	BUS SYS ANL 2
EMP	0	05/17/2020	1	Posn Chg	RTC	Reports To Change	Primary	004722	BLANK AST 3
EMP	0	05/17/2020	0	Data Chg	CNV	CONV: Conversion row	Primary	004722	BLANK AST 3
EMP	0	03/22/2020	0	Data Chg	DIS	CONV: Distribution Begin Date	Primary	004722	BLANK AST 3
EMP	0	07/03/2018	1	Transfer	CNV	Used for Conversion	Primary	CONV	CONVERSION JOB CODE
EMP	0	07/03/2018	0	Hire	CNV	Conversion Use Only	Primary	CONV	CONVERSION JOB CODE

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

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!

HOW TO PROCESS A TRANSFER – CHOOSING YOUR TEMPLATES



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 → CAMPUS DEPT CAMPUS DEPT → VCHS or TES</p> <p>Campus Staff Employee hired via open recruitment into a campus staff position in a different department.</p> <p>or</p> <p>Campus Staff Employee hired via open recruitment into a VCHS or TES staff position.</p>	<p>TWO TEMPLATES REQUIRED:</p> <ol style="list-style-type: none"> Concurrent Hire Template Voluntary Termination Template <p>*This is an Intra-Location Transfer, but uses an Action Reason code "Intra-Location Transfer" rather than a Transfer Template.</p> <p>RESOURCES: How to Initiate a Concurrent Hire How to Initiate a Voluntary Termination</p>	<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 "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 <u>Empl Rcd</u> for the employee
<p>VCHS OR TES → CAMPUS DEPT</p> <p>VCHS or TES 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"> UC_TRANSFER Template <p>RESOURCES: 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>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: 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

Known Issues | UC_Transfer Template

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

Reminder | Most Transfers Require Two Templates



SMART HR TEMPLATE	WHEN TO USE
<p>UC_CONC_HIRE UC_CONC_HIRE_AC</p> <p>UC_VOL_TERM</p> <p>This approach creates a new employee record</p>	<ul style="list-style-type: none"> ▪ Transfer an employee between staff and academic positions at UCSD Location without a break in service ▪ Transfer an employee between one department (non-TES or VCHS) to another department at UCSD Location without a break in service ▪ Transfer from one UC-Location to another UC-Location ▪ Transfers involving an academic employee <p>Note: This is a process that requires two templates: Concurrent Hire and Termination</p>

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 **Earn Dist** page to route for approval

Smart HR Transactions

Enter Transaction Information

[Click here to view Header Details](#)

Personal Data | Job Data | Earns Dist | Addl Pay

Employee Information

Primary Name - English

*First Name Jennifer Middle Name
*Last Name Salazar Name Suffix

Birthday Information

Date of Birth 01/01/1970

Diversity - United States

Personalize | Find | View All | First 1 of 1 Last

Ethnic Group

1

Person Education Level

Highest Education Level I

Person Gender

Gender Female

Person National ID United States

National ID Type PR National ID 552145994

Person Address 01 - United States

*Address Type Home Address Line 1 300 Lakeside Dr
Address Line 2 Dummy 100 City Oakland
State CA Postal Code 94612

Person Phone Number

Personalize | Find | View All | First 1 of 1 Last

Phone Type Telephone Preferred

1

Person Email Address

Personalize | Find | View All | First 1 of 1 Last

Email Type Email Address

1

Comments

Comments

Return to Enter Transaction Details Page

Save and Submit Save for Later Cancel Supporting documents

Transaction ID: NEW
Initiator Comments:



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

		
Job Aid: Template Transactions – Action Reason Codes and Descriptions		
Template / Description / Action	Action Reason	Description
Template: UC_FULL_HIRE_AC Description: Full Hire – Academic Use Only Action: HIR - Hire	ACP - Academic Hire w/ Contract Pay	Use to hire an academic year employee with Contract Pay. This also can be used for a concurrent hire.
	HIR - Hire - No Prior UC Affiliation	Use to hire a new employee. Employee has never been on pay status with UC.
	AIL - Academic Inter BU Transfer	Use for an inter-business unit transfer of an academic employee. This is a transfer from a non-UCPath location to a UCPath location.
	CN1 - Academic Concurrent Hire	Use to add a concurrent job (either Dual or Non-Dual employment).
	RE2 - Rehire, < 120 days break	Use for rehires from a different business unit. Use for a regular rehire to return to pay status following less than 120 days of break in service.
	RE3 - Rehire, >= 120 days break	Use for rehires from a different business unit. Use to hire a prior UC employee with a break in service. The employee does not already have a PeopleSoft record. The receiving campus must treat this as a rehire.
	RL2 - Rehire, fr Layoff-No Pref <120	Use for rehires from a different business unit. Use to rehire following a layoff and not secured through the preferential rehire process within 120 days of separation.
	RLO - Rehire, fr Layoff-No Pref >=120	Use for rehires from a different business unit. Use to rehire following a layoff and not secured through the preferential rehire process where there is greater than or equal to 120 days of separation.
	PR2 - Rehire, from Layoff-Pref <120	Use for rehires from a different business unit. Use to rehire following a layoff and secured through the preferential rehire process within 120 days of separation.
	PRF - Rehire, from Layoff-Pref >=120	Use for rehires from a different business unit. Use to rehire following a layoff and secured through the preferential rehire process where there is greater than or equal to 120 days of separation.
	ACA - Rehire: Academic Recall	Use for rehires from a different business unit. Use for recall of retired academic. For Job Codes that are without salary (WOS), be sure to also enter the Comp Rate as UCWOS.

Transaction Simulation



Initiate Concurrent Hire Template Transaction

1. Open the [UCPath Help site](#).
2. **Staff:** Search the **Initiate Concurrent Hire Template Transaction (Staff)** topic.
3. **Academic:** Search the **Initiate Concurrent Hire Template Transaction (Acad)** topic.

Pertinent Information | Concurrent Hire

- 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

PayPath | Reclassification - Combination Changes

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**

PayPath Job Data | Short Work Break

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.

Short
Work
Break

- **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.

Smart HR Transactions Page | View Your Transactions



Use this page to review or delete Template Transactions you have initiated.

NAVIGATION

- PeopleSoft Menu
- Workforce Administration
- Smart HR Template
- **Smart HR Transactions**

Smart HR Transactions

Select a template and press Create Transaction.

Transaction Template ?

Transaction Type: All

Select Template:

Transaction Type: All

Refresh

Create Transaction

Transactions in Progress

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	JOB	07/16/2017	Jerry Chin	10000004	Terminatn	United States
<input type="checkbox"/>	PERSON	08/07/2017	Nubia Gonzales	10026789		United States

Delete Selected Transactions

Go To Transaction Status

Your transactions in progress will display here. When approved, transactions disappear from list.

SS Smart HR Transactions Page | View Your Transactions



NAVIGATION

- PeopleSoft Menu
- UC Customizations
- UC Extensions
- **SS Smart HR Transactions**

In Find Existing Value page (not shown), Search by:

- Empl ID
- Last Name
- Transactions ID

SS Smart HR Transactions

Transaction Details

Transaction ID T000000003 Transaction Status Pending

Hire Details Personalize | Find | View All | [Print] | [Grid] First 1 of 1 Last

Name	Type of Hire	Start Date	Action	Country
1 Kyle Gonzalez	Employee	08/07/2017	HIR	USA

Initiator Comment

Requester ID 10002561 Nicson Pilson

Requested 08/09/17 9:16:13.000000PM

Approver Comment

Academic Hire

Transaction: T000000003, ID: 10060892, Effdt: 2017-08-07, Unit: LACMP:Pending

Academic Hire

Approved

✓ Roy Aero - UCLA
Approver 1 - Acad Hire
08/10/17 - 2:31 PM

Pending

🕒 Multiple Approvers
Approver 2 - Acad Hire

Return to Search Notify

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.

Transaction Status Page | View Your Transactions



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

NAVIGATION

- PeopleSoft Menu
- Workforce Administration
- Smart HR Template
- **Transaction Status**

Transaction Status

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

HR Review Status
 Transaction Type
 Transaction Status
 Start Date From To
 Business Unit
 Empl ID
 First Name
 Last Name

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

Select	Template	Effective Date	Transaction Status	Person ID	Empl Record	Action		Business Unit	First Name	Last Name	Reason for Cancellation	View Email text
<input type="checkbox"/>	UC_REHIRE	09/16/2018	Hired/Added	10025725	0	Rehire		RVCMP	Chris	Desarzant		
<input type="checkbox"/>	UC_CONC_HIRE_AC	09/16/2018	Hired/Added	10024915	1	Hire		RVCMP	Jasmine	Perez Cristobal		
<input type="checkbox"/>	UC_CONC_HIRE_AC	09/16/2018	Cancel				<input type="button" value="Clone"/>	RVCMP	Jing	Nyitray	View Comments	
<input type="checkbox"/>	UC_CONC_HIRE_AC	09/16/2018	Hired/Added					RVCMP	Amanda	Chao		
<input type="checkbox"/>	UC_CONC_HIRE_AC	09/16/2018	Hired/Added				<input type="button" value="Clone"/>	RVCMP	Amanda	Markovitz		
<input type="checkbox"/>	UC_CONC_HIRE_AC	09/16/2018	Cancel				<input type="button" value="Clone"/>	RVCMP	Jenny	Diaz Calderon	View Comments	
<input type="checkbox"/>	UC_CONC_HIRE_AC	09/16/2018	Hired/Added					RVCMP	Lori	Burton		
<input type="checkbox"/>	UC_CONC_HIRE_AC	09/16/2018	Hired/Added					RVCMP	Andrea	Rose		
<input type="checkbox"/>	UC_CONC_HIRE_AC	09/16/2018	Cancel	10029577	2	Hire	<input type="button" value="Clone"/>	RVCMP	Scheryl	Chavez Guitron	View Comments	
<input type="checkbox"/>	UC_CONC_HIRE_AC	09/16/2018	Hired/Added	10026441	1	Hire		RVCMP	Karina	Wilson		

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.

Transaction Simulation



1. Open the [UCPath Help site](#).
2. Search the **View Transaction Status – Transaction Status Page** topic.
3. Search the **View Template Transaction Status – SS Smart HR Transactions Page** topic.
4. Search the **Clone a Canceled Template Transaction** topic.

Key Takeaways | View Transaction Status

- Local approvers **deny** template transactions; UCPC **cancel**s 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 employees 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.

TODD’s Transaction before Transfer

Calendar Date Entered in UCPath	Eff Date	Action	Action Reason	Description
4/15/2020	6/1/2019	Created position		
5/1/2020	6/1/2020	Hire – No Prior UC Affiliation (Job Data)		
6/2/2020	12/1/2020	POS	PIT	Permanent Increase in Time (Changed: FTE)

TANYA’s Case After Transfer, needs UCPC processing

Calendar Date Entered in UCPath	Eff Date	Action	Action Reason	Description
4/15/2020	6/1/2019	Created position		
5/1/2020	6/1/2020	Hire – No Prior UC Affiliation (Job Data)		
10/25/2020	11/1/2020	XFR	PRO	Transfer due to Promotion
11/2/2020	12/1/2020	UCPC Corrects History		Deletes Row

Job Data Update Form | Sections



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

The screenshot shows the UCPath user interface for Tyler Redden. A dialog box titled "Ask UCPath" is overlaid on the screen, asking "How can we help you today?". The dialog box contains four options, each with an icon and a label:

- Submit an Inquiry for myself
- Submit an Inquiry for an employee
- View Inquiries
- Search Solution

The background interface shows a sidebar with navigation options like Dashboard, PeopleSoft Menu, Worklist, and Forms Library. The main content area displays a Worklist table with columns for Date From and Priority, and a Forms Library section at the bottom with buttons for Open Enrollment, Accruals Management, Employee Benefits, General Ledger / Reporting & Analytics, Human Resources, and Payroll.

***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. [UC San Diego](#)

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

Pay Cycle	Check Date	Pay Period Dates		Run ID Schedule	Location						UCPath Center							
					Campus			Med Center Only			Pay Confirm	DDODS Bust (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)	
		* Employee Data Change *** (3:00 PM) After 3:00 PM changes will not be processed for current pay cycle	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)	Begin								End
MO	Mon 01-04-21	12-01-20	12-31-20	201231M0X	Mon 12-21-20 *	Tue 12-22-20	Wed 12-30-20	Tue 12-22-20 *	Wed 12-23-20 *	Tue 12-22-20 *	Wed 12-23-20 *	Tue 12-29-20	Wed 12-30-20	Mon 01-04-21	Mon 01-04-21	Tue 01-05-21	Sat 01-02-21	Mon 01-04-21
B1	Wed 01-06-21	12-13-20	12-26-20	201226B1X	Tue 12-22-20 *	Fri 12-25-20	Fri 12-31-21	Mon 12-28-20 *	Tue 12-29-20 *	Mon 12-28-20 ▲▲	Tue 12-29-20 *	Wed 12-30-20	Fri 12-31-21	Wed 01-06-21	Tue 01-05-21	Wed 01-06-21	Mon 01-04-21	
B2	Wed 01-20-21	12-27-20	01-09-21	210109B2X	Thu 01-07-21	Tue 01-12-21	Fri 01-15-21	Tue 01-12-21	Wed 01-13-21	Tue 01-12-21	Wed 01-13-21	Thu 01-14-21	Fri 01-15-21	Tue 01-19-21	Tue 01-19-21	Wed 01-20-21	Fri 01-15-21	Tue 01-19-21

That means approval processing outside of UCPath must start much earlier

Wrap Up

- Notes for Initiators & Approvers
- Best Practices
- Notes

- 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



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

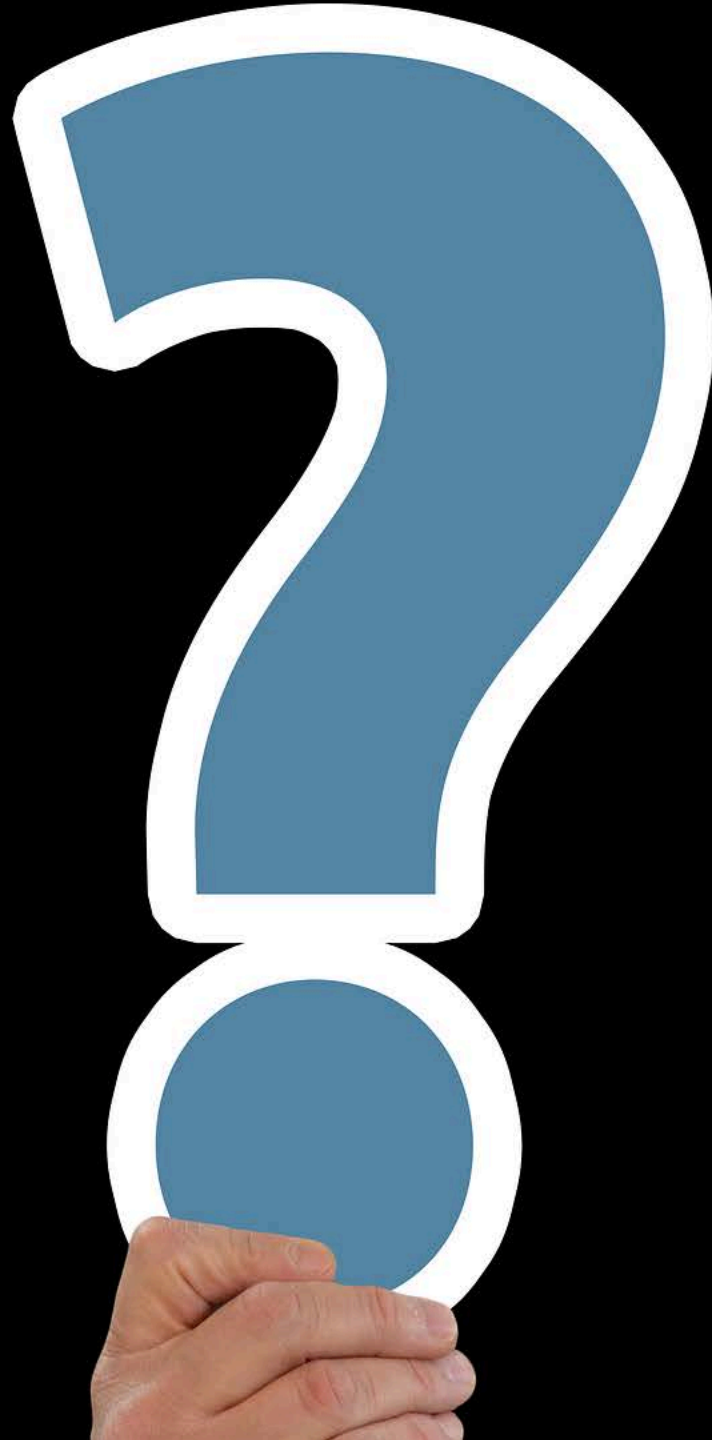


Review key resources as often as you need to

- 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**

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. This text is enclosed in a blue rectangular frame that has a slight 3D effect. At the top right corner of the frame, there is a blue trident symbol with three upward-pointing arrows.

UC Path

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Health Sciences