# Job Aid: Hire for Inter-Location Transfers

To transfer active employees from a job (EMPL Rec) in one Business Unit (BU) or Location to another in a different, unrelated Business Unit or Location, use the **Organizational Relationship** process.

Before beginning, both BUs must coordinate to ensure there is no break in service for the employee. It is vital that the effective dates of the termination and the hire match.

The releasing BU submits a termination transaction using the appropriate Smart HR Template, which routes to UC Path for review and approval. UCPath will notify BUs via Case upon identification of the corresponding transaction and will not approve either until both have been submitted. The only exception is if payroll activities are in progress; in such cases, the population will be excluded from review until payroll activities are confirmed.

The receiving BU creates the new EMPL REC using the **Organizational Relationship** process. This can be done before the termination transaction has been approved.

UCPath will contact the departments twice to complete or resolve the transactions. If there is no response, they will wait six business days before canceling the transactions.

> ⚠ Location transactors with the role **ULSHR_HR_WFA_INQUIRY** will have view access to the **Manage Human Resources (Tile) > Organizational Relationship (Tile)** but will be unable to transact.
>
> To ensure you have the correct permissions to transact, see *Reference Guide for Hires*.

1. **Determine the appropriate Action Reason and Process.**

   Refer to the *Job Aid: Decision Tree Hire Action Reason Codes* to determine the appropriate action reason code.

2. **Collect required data.**

   **Collect the following required items for the process:** Employee ID, Legal Name, Effective Date, Reason Code, Position Number and Employee Classification.

   > ⚠ **Legal Name** identifies a person for legal or certain official purposes. In UCPath, the **Legal Name** filed is always labeled "**Legal Name**". Its presentation and use are restricted to protect confidentiality.
   >
   > ⚠ The **Name** fields are the self-chosen or personal and/or preferred professional names used instead of **Legal Names**. The **Name** fields (First, Middle & Last) are the data typically returned in searches and reports throughout the system, while the **Legal Name** fields are usually reserved for legal documentation such as W-2s, tax forms, etc. If **Name** is not entered, it is defaulted from **Legal Name**.

   Refer to the *Reference Guide for Hires* for more detailed information.

3. **Find the Employee**.

   You can search for the person using the search page provided in this process or use **Person Organization Summary**. Refer to the *View Person Organization Summary* simulation for more information.

**Navigation**: Workforce Administration (Homepage) > Manage Human Resources (Tile) > **Organizational Relationship (Tile)**

Use **Search Criteria** to find the employee and then select them for processing:

- **Empl ID** (employee number) if used, is the only field needed.
- Any of the name fields can be used in any combination.

Review the results.

- If there's an exact match the system automatically takes you to step 4 below.
- If no matches are returned, review the **Search Criteria** field values, adjust as needed, click the **Search** button and review the results again.
- If multiple matches are returned, review the results:
  - If the person is not found, adjust the **Search Criteria** and search again.
  - If a match exists in the list, click the **Continue** button at the end of that row.

4. **Review Employment Records.**
   - Review the employee's EMPL Recs as listed in the **Assignments** table to verify that a new record will not cause issues with pay or benefits.
   - Click the **Add Organizational Relationship** button to create their new EMPL Rec.
   - Ensure that the **Effective Date** is the same date as the coordinated termination date.
   - Select the appropriate **Transfer-Inter BU** code from the **Action Reason** drop-down.
   - Click the **Continue** button.

If you need additional windows open to do other UCPath activities, open them before starting the process. Select **New Window** from the **Actions** drop-down list.

5. **Enter Job Data.**

   **Required fields:** Effective Date, Reason Code, Position Number and Employee Classification.

   - Enter the employee's position, salary, compensation, and job experience data. Many fields default from existing employee and employment data.
   - Enter or select data for required fields and, if known, for any open non-required items. Many fields default from position, job and other values selected or entered.
   - In **Work Location**, review the defaulted **Effective Date** and **Reason** and update if necessary. Then, enter the **Position Number**, a required field. If applicable, enter the **Expected Job End Date**.
   - **Job Information** requires **Employee Class**. This is defaulted in for academic positions.

- In the **Salary and Compensation** section, add **Pay Components** as appropriate. If range-based, select **Pay** or **Rate Code** as applicable, enter **Compensation Rate**, and then click the **Calculate Compensation** button. If step-based, enter step information under **Salary Plan**.
- In **UC Job Data**, enter appropriate details based on employee type. For example, enter the **Probation Code** and **Probation End Date** for career employees in the **Probation Details** section.
- Click the **Next** button to run validation

  If there are data issues, **Validation Messages** appear.

  - **Errors** cause hard stops and must be corrected before continuing. Correct and then click the **Next** button to rerun validation.
  - **Warnings** are informational and can be accepted without any action taken. However, you should review the warnings and ensure they are acceptable. After warnings have been reviewed and no additional changes are necessary, select the **Proceed with warning** check box and then click the **Next** button to proceed.

  Refer to the *Job Aid: Manage Human Resources Errors and Warnings* for more information.

  If there are no **Validation Messages**, the next section, **Summary**, displays.

  - Review any messages displayed and take corrective actions if needed, then click the **Next** button to re-run validation.
  - After resolving all errors and carefully reviewing all warnings, click the **Proceed with warning** check box and then the **Next** button to continue.

**6. Review the Summary.**

- Review and ensure that the information is complete and accurate.
- If corrections are needed, click the **Previous** button to return to the previous steps and correct or input as appropriate.
- If there are issues with updating data, record the **EMPL ID**, exit out of the transaction instead of submitting for approval and then go to **Organizational Relationship** and add the **Job Data** there with the correct data.
- To complete the process, click the **Submit** button.
  - The **Comments** box appears. Enter any useful or applicable comments, then click the **Submit** button to continue.
  - The transaction is automatically routed for approval.
- The **Submit Confirmation** page appears next, listing the approvers.

Once UCPath receives the termination and hiring transactions, it will review and approve them as appropriate. Upon approval, the process is completed, and the employee will have the new **EMPL Rec** in the UCPath system.