Job Aid: Hire for Intra-Location Transfers

To transfer active employees from one job (EMPL Rec) to another within the same Business Unit (BU) or Location but different departments, use the **Organizational Relationship** process.

Before beginning, the departments involved in the transfer must coordinate to ensure that 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 department 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 department creates the new EMPL REC using the **Organizational Relationship** process. This can be done before the termination transaction has been approved.

Completing the transactions has a time limit. If there are issues or missing information, UCPath will make two attempts to contact the departments over six business days. If there is no response the transaction will be canceled.

> ⚠ 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.**

   The appropriate **Action Reason** code for the intra-location transfer process is **Transfer-Intra Location—TIL.** To confirm, refer to the *Job Aid: Decision Tree Hire Action Reason Codes*.

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** is always labeled "**Legal Name**". Its presentation and use are restricted to protect confidentiality.
   >
   > ⚠ The **Name** field is a self-chosen or personal and/or preferred professional name used instead of a **Legal Name**. 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-2's, tax forms. If no **Name** is specified, it is defaulted from the **Legal Name.**

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

3. **Find the Employee**. Search to find the employee and then select them for processing.

   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 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.

> ⚠ If you need additional windows open to do other activities, open them before starting the process. You can select **New Window** from the **Actions** drop-down list.

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 **Transfer-Intra Location – TIL** code from the **Action Reason** drop-down.
   - Click the **Continue** button.

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 in 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.
- **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**.
- When probation is applicable, enter the **Probation Code** and **Probation End Date** 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.

5. 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.