

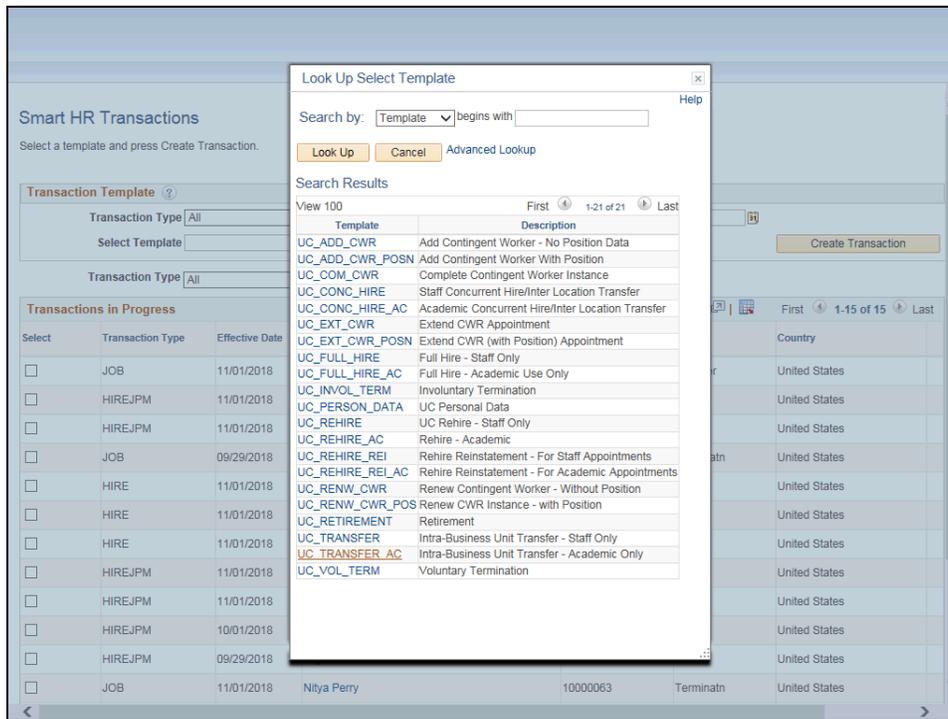
Use this task to initiate an intralocation transfer template transaction for an academic employee.

**Navigation:** Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

OR

Workforce Administration (Homepage) HR Tasks (Tile) > Smart HR Templates > **Smart HR Transactions**

Step	Action
1.	Use the <b>Smart HR Transactions</b> page to initiate an intralocation transfer template.
2.	Click the <b>Look up Select Template</b> button.  <b>Note:</b> The <b>Transaction Type</b> field is not used by UC.



Step	Action
3.	<p>Select the appropriate transfer template. Notice there are two transfer templates, one for staff and one for academic.</p> <p>Click the <b>UC_TRANSFER_AC</b> list item.</p> <p><b><u>UC TRANSFER AC</u></b></p>
4.	<p>The <b>Effective Date</b> field is the effective date of the selected template action. The date you enter in this field automatically populates the <b>Effective Date</b> field on the <b>Enter Transaction Details</b> page.</p> <p>Click in the <b>Effective Date</b> field.</p> <p><input type="text"/></p>
5.	<p>Enter the desired information into the <b>Effective Date</b> field.</p> <p>For this example, enter <b>11/1/18</b>.</p>
6.	<p>Click the <b>Create Transaction</b> button.</p> <p><b>Create Transaction</b></p>

**Smart HR Transactions**

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Smart HR Transactions

**Enter Transaction Details**

The following transaction details are required.

Template Intra-Business Unit Transfer - Academic Only

Category Code UC Transfer

\*Employee ID

\*Employment Record Number

\*Effective Date

Action Transfer

\*Reason Code

Step	Action
7.	<p>In the <b>Employee ID</b> field, enter the employee’s ID number or use the lookup to search for and select it. You have access only to employee records within your business unit.</p> <p>Click in the <b>Employee ID</b> field.</p> <div style="border: 1px solid black; width: 100px; height: 15px; margin-left: 20px;"></div>
8.	<p>Enter the desired information into the <b>Employee ID</b> field.</p> <p>For this example, enter <b>10070270</b>.</p>
9.	<p>The <b>Employment Record Number</b> defaults to the first record number for which you have departmental access (in this example, <b>0</b>). Select the correct <b>Employment Record Number</b> for the transfer.</p>
10.	<p>The <b>Effective Date</b> is populated based on your entry on the previous page. Ensure this is the date on which the employment in the new position begins.</p> <p>If necessary, click the <b>Cancel</b> button to return to the previous page and correct the <b>Effective Date</b>.</p>
11.	<p>Click the button to the right of the <b>Reason Code</b> field.</p> <div style="border: 1px solid black; width: 20px; height: 15px; margin-left: 20px; text-align: center; line-height: 15px;">v</div>

**Smart HR Transactions**

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Smart HR Transactions

**Enter Transaction Details**

The following transaction details are required.

**Template** Intra-Business Unit Transfer - Academic Only

**Category Code** UC Transfer

\*Employee ID   Peter Rueda

\*Employment Record Number

\*Effective Date

**Action** Transfer

\*Reason Code

- Academic Intra-Campus Transfer
- COVID-19 Re-Deployment
- COVID-19 Return from Re-Deplmt
- Involuntary Demotion
- Lateral Transfer**
- Move to Multi-Headcount Posn
- Move to Single-Headcount Posn
- Pay Entity Transfer
- Promotion
- Temp Out of Class Assignment
- Voluntary Demotion

Step	Action
12.	<p>Select the appropriate <b>Reason Code</b>.</p> <p>For this example, click the <b>Lateral Transfer</b> list item.</p> <div style="background-color: #0070c0; color: white; padding: 2px; display: inline-block;">Lateral Transfer</div>
13.	<p>Click the <b>Continue</b> button.</p> <div style="background-color: #f4a460; padding: 5px; display: inline-block; border: 1px solid black;">Continue</div>

**Smart HR Transactions**

Smart HR Transactions  
Enter Transaction Information

Click here to Hide Header Details

Template: UC\_TRANSFER\_AC      Name: Peter Rueda  
Effective Date: 11/01/2018      Action/Action Reason: XFR/LAT (Lateral Transfer)  
Employee ID: 10070270      Employee Record: 0 (TEACHG ASST-GSHIP)

Job Data | Job Earnings Dist

**Employee Information**

**Work Location - Position Data**

\*Position Number

**Work Location - Job Fields**

Business Unit       Department   
Location Code       Establishment ID

**Job Information - Job Code**

Job Code

**Job Labor - Union Code**

Union Code       Union Seniority Date

**Job Information - Reporting Information**

Reports To Position Number

**Job Information - Employee Classification**

Employee Classification       Classified/Unclassified Ind

Step	Action
14.	The transfer template appears.  The top of the page displays header data, which you can show/hide as needed.
15.	The transfer template includes two tabs: <b>Job Data</b> and <b>Job Earnings Dist</b> .
16.	Enter the appropriate position number or search for it using the look up. You have access only to position numbers within your business unit or related business unit.  Click in the <b>Position Number</b> field. <input type="text"/>
17.	Enter the desired information into the <b>Position Number</b> field.  For this example, enter <b>40008479</b> .
18.	Press [ <b>Tab</b> ] to automatically populate the position-related fields.

**Smart HR Transactions**

Smart HR Transactions  
Enter Transaction Information

[Click here to Hide Header Details](#)

**Template:** UC\_TRANSFER\_AC      **Name:** Peter Rueda  
**Effective Date:** 11/01/2018      **Action/Action Reason:** XFR/LAT (Lateral Transfer)  
**Employee ID:** 10070270      **Employee Record:** 0 (TEACHG ASST-GSHIP)

[Job Data](#) | [Job Earnings Dist](#)

**Employee Information**

**Work Location - Position Data**

\*Position Number 40008479

**Work Location - Job Fields**

Business Unit RVCMP      Department D01038  
 Location Code P5403      Establishment ID UCR

**Job Information - Job Code**

Job Code 002310

**Job Labor - Union Code**

Union Code BX      Union Seniority Date

**Job Information - Reporting Information**

Reports To Position Number 40011416

**Job Information - Employee Classification**

Employee Classification 11      Classified/Unclassified Ind Academic

Step	Action
19.	Click the scroll bar.

**Smart HR Transactions**

New Window |

**Job Information - Employee Classification**

Employee Classification 11      Classified/Unclassified Ind Academic

**Job Information - Standard Hours**

Standard Hours 20.000000      FTE 0.500000

**Job Information - United States**

FLSA Status Exempt

**Job - Salary Plan**

Salary Administration TD18  
 Plan  
 Salary Grade  
 Step

**Job Compensation - Pay Components**      Personalize | Find | View All | First 1 of 1 Last

Comp Rate Code	Compensation Rate	Compensation Frequency	Rate Code Source
1			

**Work Location - Expected Job End Date**

Expected Job End Date       End Job Automatically

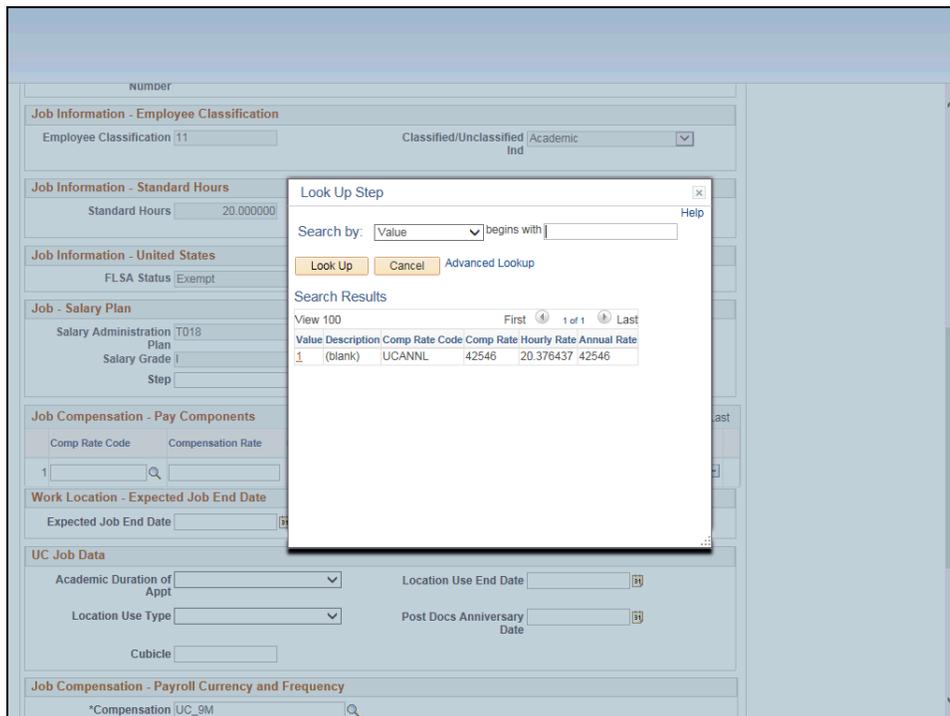
**UC Job Data**

Academic Duration of Appt      Location Use End Date  
 Location Use Type      Post Docs Anniversary Date  
 Cubicle

**Job Compensation - Payroll Currency and Frequency**

\*Compensation UC\_9M

Step	Action
20.	For academic employees, the <b>Employee Classification</b> field automatically populates based on the job code and cannot be changed.
21.	<p>Some job codes have steps associated with them. When a <b>Step</b> is entered, UCPath automatically updates the <b>Job Compensation - Pay Components</b> fields and the compensation information cannot be changed.</p> <p>Some job codes do not have steps associated with them, in which case the <b>Job Compensation - Pay Components</b> fields must be entered manually.</p> <p>If the job has above scale component of pay, then step does not need to be selected. Enter applicable above scale comp rate codes in the <b>Job Compensation - Pay Components</b> section.</p> <p>For contract-based pay hires, refer to the <i>Initiate Full Hire Contract Pay Template Transaction</i> simulation for specific steps on contract pay entries.</p>
22.	<p>For this example, the job has associated steps.</p> <p>Click the <b>Look up Step</b> button.</p> 



The screenshot displays the UCPath interface with a 'Look Up Step' dialog box open. The background form shows 'Job Information - Employee Classification' with 'Employee Classification' set to '11' and 'Classified/Unclassified' set to 'Academic'. Other sections include 'Job Information - Standard Hours', 'Job Information - United States', 'Job - Salary Plan', 'Job Compensation - Pay Components', 'Work Location - Expected Job End Date', 'UC Job Data', and 'Job Compensation - Payroll Currency and Frequency'.

The 'Look Up Step' dialog box contains the following search results:

Value	Description	Comp Rate Code	Comp Rate	Hourly Rate	Annual Rate
1	(blank)	UCANNL	42546	20.376437	42546

Step	Action
23.	Use caution when selecting the appropriate step value. For some jobs, there are half steps, so be sure to review the <b>Hourly Rate</b> to ensure that you are selecting the correct step value.
24.	Select the appropriate <b>Step</b> .  For this example, click the <b>1</b> list item.  <b>1</b>
25.	If the employment is a short term assignment or temporary, enter the date the position ends in the <b>Expected Job End Date</b> field.  An expected end date is required for the following employee classes: <b>3</b> - Academic: Recall <b>11</b> - Academic: Academic Student <b>23</b> - Academic: Post Docs  An expected end date is recommended but not required for the following employee class: <b>22</b> - Academic:Deans/Faculty Admin
26.	Click in the <b>Expected Job End Date</b> field.  <input data-bbox="391 989 613 1024" type="text"/>
27.	Enter the desired information into the <b>Expected Job End Date</b> field.  For this example, enter <b>6/30/19</b> .
28.	For academic templates, the <b>End Job Automatically</b> check box displays.  If the <b>End Job Automatically</b> check box is selected the UCPath Center will run a process to terminate the employee as of the <b>Expected Job End Date</b> .
29.	In the <b>UC Job Data</b> section, enter or select the appropriate values as applicable.  For this example, accept the defaults.
30.	Click the scroll bar.

**Smart HR Transactions**

**Job Compensation - Pay Components** Personalize | Find | View All | First 1 of 1 Last

Comp Rate Code	Compensation Rate	Compensation Frequency	Rate Code Source
1 UCANNL	42546.000000	A	Salary Step

**Work Location - Expected Job End Date**

Expected Job End Date: 8/30/19  End Job Automatically

**UC Job Data**

Academic Duration of Appt:  Location Use End Date:

Location Use Type:  Post Docs Anniversary Date:

Cubicle:

**Job Compensation - Payroll Currency and Frequency**

\*Compensation Frequency: UC\_9M

**Comments**

Comments:

Return to Enter Transaction Details Page

[Supporting documents](#)

Transaction ID: NEW

Initiator Comments:

Requester ID: 10095340 Ima Gudadmin

Requested:

Step	Action
31.	<p>The payroll-related <b>Compensation Frequency</b> field automatically populates based on the job code. This field defines how the total compensation is paid out to the employee per paycheck.</p> <p>This field is changed only for specific exceptions, such as contract based pay. Any time this field is changed from the default enter a <b>Comment</b> to explain why the field was changed.</p>
32.	<p>Use the <b>Comments</b> field to enter specific details or an explanation regarding the transaction. For example, this field can be used to enter details about a contract pay transaction, such as contract begin date and contract end date.</p> <p>This field is referenced by UCPC WFA Production to assist with the processing of the transaction.</p> <p>Click in the <b>Comments</b> field.</p>
33.	<p>Enter the desired information into the <b>Comments</b> field.</p> <p>For this example, enter <b>Intralocation transfer to a new position within RVCMP..</b></p>
34.	<p>Click the scroll bar.</p>

**Smart HR Transactions**

Smart HR Transactions New Window | Help | Personalize Page |

**Enter Transaction Information**

Click here to Hide Header Details

**Template:** UC\_TRANSFER\_AC    **Name:** Peter Rueda  
**Effective Date:** 11/01/2018    **Action/Action Reason:** XFR/LAT (Lateral Transfer)  
**Employee ID:** 10070270    **Employee Record:** 0 (TEACHG ASST-GSHIP)

**Employee Information**

**Work Location - Position Data**

\*Position Number 40008479

**Work Location - Job Fields**

Business Unit RVCMP    Department D01038  
 Location Code P5403    Establishment ID UCR

**Job Information - Job Code**

Job Code 002310

**Job Labor - Union Code**

Union Code BX    Union Seniority Date

**Job Information - Reporting Information**

Reports To Position Number 40011416

**Job Information - Employee Classification**

Employee Classification 11    Classified/Unclassified Academic Ind

Step	Action
35.	Click the <b>Job Earnings Dist</b> tab.  <div style="border: 1px solid gray; padding: 2px; display: inline-block; background-color: #e0e0e0;">Job Earnings Dist</div>

**Smart HR Transactions**

Smart HR Transactions New Window | Help | Personalize Page

**Enter Transaction Information**

Click here to Hide Header Details

**Template:** UC\_TRANSFER\_AC    **Name:** Peter Rueda  
**Effective Date:** 11/01/2018    **Action/Action Reason:** XFR/LAT (Lateral Transfer)  
**Employee ID:** 10070270    **Employee Record:** 0 (TEACHG ASST-GSHIP)

**Employee Information**

**Job Earnings Distribution Type**

Earnings Distribution Type None    Compensation Rate

**Job Earnings Distribution** Personalize | Find | View All | First 1 of 1 Last

Earnings Code	Compensation Rate	Percent of Distribution
1		

Return to Enter Transaction Details Page

Transaction ID: NEW

Initiator Comments:

Requester ID: 10095340    Ima Gudadmin

Requested:

Step	Action
36.	In most cases, the <b>Job Earnings Distribution</b> section is automated. If the <b>Comp Rate</b> code entered on the <b>Job Data</b> tab has a mapped <b>Earnings Code</b> , the <b>Job Earnings Distribution</b> section is updated automatically.
37.	<p>The <b>Job Earnings Distribution</b> section also can be used to manually enter distribution information. Use the <b>Earnings Distribution Type</b> field to enter distribution <b>By Amount</b> or <b>By Percent</b>. After the <b>Earnings Distribution Type</b> is selected, the <b>Aggregate Comp Rate</b> field is populated with the monthly amount.</p> <ul style="list-style-type: none"> <li>• If <b>By Amount</b> is selected, the total of all compensation rates entered must add up to the monthly comp rate.</li> <li>• If <b>By Percent</b> is selected, the total of all percentages entered must add up to 100%.</li> </ul>
38.	For certain academic comp rate codes, such as Health Science Comp Plan, earnings codes are defaulted based on the <b>Comp Rate Code</b> entered in <b>Job Compensation - Pay Components</b> section. Also in those cases, earnings distribution type is <b>By Amount</b> and amounts are automatically calculated.
39.	Use the <b>Supporting documents</b> link to attach supporting documents for the transfer.
40.	<p>Enter comments for the Approver in the <b>Initiator Comments</b> field.</p> <p>Comments you enter here appear only with the request; they do not appear on the employee's record after the transaction is processed to completion. You can enter <b>Initiator Comments</b> on any of the tabs within this template.</p>
41.	<p>Click the <b>Save and Submit</b> button.</p> <div style="text-align: center; margin-top: 10px;">  </div>

**Smart HR Transactions**

Smart HR Transactions New Window | Help | Personalize Page

**Submit Confirmation**

The submit was successful. The Human Resources department will review the person's data and update the HR system.  
Go to the Transaction Status page to review the status of this person.

Step	Action
42.	Click the <b>OK</b> button. 

**Smart HR Transactions**

Smart HR Transactions New Window | Help | Personalize Page

Select a template and press Create Transaction.

**Transaction Template**

Transaction Type:  Effective Date:

Select Template:

Transaction Type:

**Transactions in Progress** Personalize | Find |  |  First 1-16 of 16 Last

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	JOB	11/01/2018	Claire Ramirez	10005571	Transfer	United States
<input type="checkbox"/>	HIRE.JPM	11/01/2018	Cassandra Perry	NEW	Hire	United States
<input type="checkbox"/>	HIRE.JPM	11/01/2018	Gus Gonzalez	NEW	Hire	United States
<input type="checkbox"/>	JOB	09/29/2018	Grisby, Elizabeth N	10000841	Terminatn	United States
<input type="checkbox"/>	HIRE	11/01/2018	Tam Triet Ngo Duc	10008356	Hire	United States
<input type="checkbox"/>	HIRE	11/01/2018	Cheong Yankura	10087236	Hire	United States
<input type="checkbox"/>	HIRE	11/01/2018	Kirstin Bright	10000008	Hire	United States
<input type="checkbox"/>	HIRE.JPM	11/01/2018	Maricar Sherck	10000023	Rehire	United States
<input type="checkbox"/>	HIRE.JPM	11/01/2018	Randy Sacks	10000098	Rehire	United States
<input type="checkbox"/>	HIRE.JPM	10/01/2018	Anthony Perez	10130745	Rehire	United States
<input type="checkbox"/>	HIRE.JPM	09/29/2018	Taylor Baker	10130925	Rehire	United States
<input type="checkbox"/>	JOB	11/01/2018	Nitya Perry	10000063	Terminatn	United States

Step	Action
43.	The template transaction is routed for approval and appears in the <b>Transactions in Progress</b> section until it is processed.
44.	You have initiated an intralocation transfer template transaction for an academic employee. <b>End of Procedure.</b>