INTERLOCATION TRANSFER

FOM | **UCPath**
FUTURE OPERATING MODEL | PAYROLL, ACADEMIC PERSONNEL, TIME KEEPING & HUMAN RESOURCES
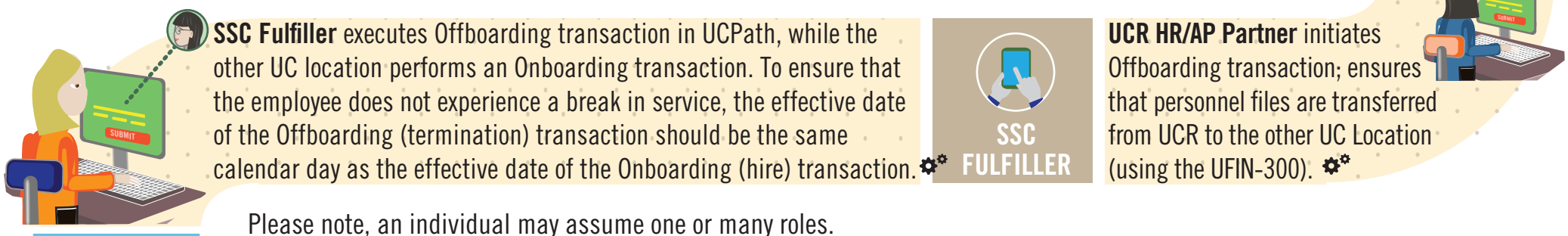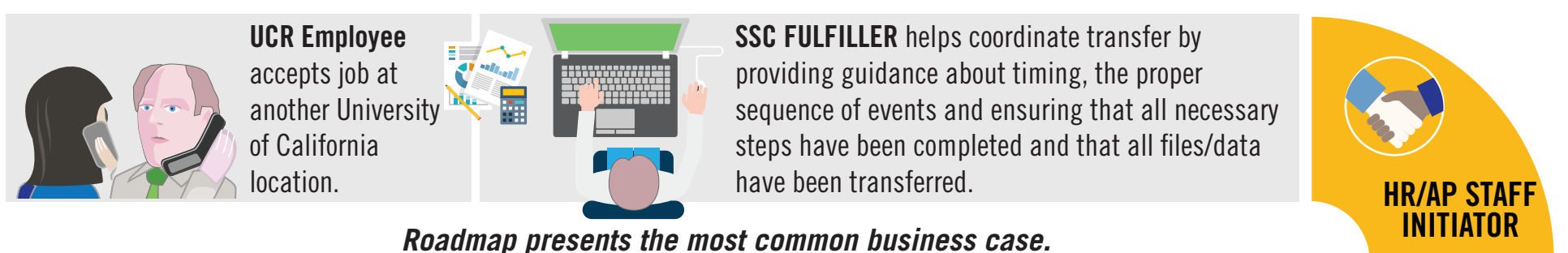*Supporting Organizational Excellence*

The **INTERLOCATION TRANSFER** process is a sub-process of Onboarding and Offboarding and is meant to define the roles and responsibilities involved in transferring an employee from one UC location to another. The process begins when a UCR employee accepts a job at another UC location, or when an employee of another UC location accepts a job at UCR. Throughout the process, the SSC fulfiller will execute the transaction.

AS-IS PAIN POINTS

> Data cannot be transferred electronically between PPS instances at different locations, requiring a manual process for transferring the employee's information by paper, and creating the possibility of missed payments, incorrectly established benefits, etc.

> Personnel files must be physically shipped to the receiving location

IMPROVEMENTS

> For transfers between two UCPath locations, employee data (including personal information, job and pay history and benefits) will transfer automatically

> UCPath and UCR have robust business processes to ensure that transactions are processed in the correct order and that employees do not experience a break in service during an Interlocation Transfer

> The employee retains their Employee ID when transferring between two UCPath Locations

BENEFITS

> Lower risk of incorrect data, breaks in service or benefits issues during Interlocation Transfers

> Greater visibility into an employee's job history across the UC System

> The UCPath Center (instead of UCR) will be responsible for using the UFIN-301 to transfer employee information between UCPath and PPS Locations

ROLES FOR INTERLOCATION TRANSFER

HR/AP STAFF INITIATOR (REQUIRED)

Initiates the Onboarding or Offboarding transaction. Ensures that local personnel files are properly transferred (either to or from UCR). Selects the appropriate action reason code for reason for Interlocation Transfer in ServiceLink.

OFFICE OF HUMAN RESOURCES

Provides policy and procedural guidance.

ACADEMIC PERSONNEL OFFICE

Provides policy and procedural guidance.

SSC FULFILLER (REQUIRED)

Shared Services Center (SSC) executes Onboarding or Offboarding transaction during an Interlocation Transfer. Responsible for assisting with the Interlocation Transfer process by providing guidance about timing, the proper sequence of events and ensuring that all necessary steps have been completed and that all files/data have been transferred.

UCPath CENTER (REQUIRED)

During Interlocation Transfers between a UCPath location and a non-UCPath location, uses the UFIN-301 to ensure that the employee is properly established in UCPath or PPS.

UCOP (CONDITIONAL)

UCOP COEs/RASC contribute to guidance if necessary to appropriately continue/reinstate an employee's benefits and service credit.

TRANSFERRING A UCR EMPLOYEE TO ANOTHER UCPATH LOCATION MAP

UCR Employee accepts job at another University of California location.

SSC FULFILLER helps coordinate transfer by providing guidance about timing, the proper sequence of events and ensuring that all necessary steps have been completed and that all files/data have been transferred.

HR/AP STAFF INITIATOR

Roadmap presents the most common business case.

SSC Fulfiller executes Offboarding transaction in UCPath, while the other UC location performs an Onboarding transaction. To ensure that the employee does not experience a break in service, the effective date of the Offboarding (termination) transaction should be the same calendar day as the effective date of the Onboarding (hire) transaction. ⚙

SSC FULFILLER

UCR HR/AP Partner initiates Offboarding transaction; ensures that personnel files are transferred from UCR to the other UC Location (using the UFIN-300). ⚙

Please note, an individual may assume one or many roles.

INQUIRER

The UCPath Center ensures that the employee's service credits, accruals and other attributes are established correctly, and that their benefits are continued (if applicable).

✓ COMPLETE

LEGEND

SSC — Shared Services Center
⚙ — System Actions
▢ — People Actions

DID YOU KNOW?

In most cases, employees should self-identify as an Interlocation Transfer. However, if they do not (or if there is some other delay in transferring employee information between campuses), the receiving campus must ensure that the employee is made whole. This may include ensuring service credits, accruals, etc. are reinstated correctly.

THE PROCESS IS SUCCESSFUL IF...

✓ An employee is appointed and paid correctly