Job Aid: Inter and Intra Location Transfers

*Please refer to the Template Transactions – Action Reason Codes and Descriptions job aid to find the appropriate reason code for each of these transactions

Scenario	Template(s) to use	Special Notes
Employee transfers from a non-academic staff position to another non-academic staff position within UC Irvine.	The department the employee is transferring into must initiate the **Intra-Business Unit Transfer – Staff Only** template	The effective date is the first day that the employee is active in their new position. Do not process a termination template.
Employee transfers from an academic staff position to another academic staff position within UC Irvine.	The department the employee is transferring into should initiate the **Intra-Business Unit Transfer – Academic Only** template.	The effective date is the first day that the employee is active in their new position. Do not process a termination template.
Employee transfers from an academic staff position to a non - academic staff position within UC Irvine.	Transfer to location/department initiates the **Concurrent Hire**. The transfer from location/department initiates the **Voluntary Termination** template.	The effective date for the templates has to be the same. In the notes section specify this transaction is an intralocation transfer and include the new position number the employee is transferring into.
Employee transfers from a non-academic staff position to an academic staff position within UC Irvine.	Transfer to location/department initiates the **Concurrent Hire**. The transfer from location/department initiates the **Voluntary Termination** template.	The effective date for the templates has to be the same. In the notes section specify this transaction is an intralocation transfer and include the new position number the employee is transferring into.
Employee transfer **to** UC Irvine from another UCPath school	Concurrent Hire Template	The effective date of this template must be the same as the effective date used for the Voluntary Termination template (processed by transfer from location). Both locations must communicate with each other to have effective dates that match to avoid breaks in service. In the notes section include the name of the location this employee is transferring from.
Employee transfers **from** UC Irvine to another UCPath school	Voluntary Termination template	The effective date of this template must be the same as the effective date used for the Concurrent Hire template (processed by transfer to location). Both locations must communicate with each other to have effective dates that match to avoid breaks in service. In the notes section include the name of the location this employee is transferring from.

Scenario	Template(s) to use	Special Notes
Employee transfers **to** UC Irvine from a PPS school (a location not in UCPath).	Full Hire Template	Use correct inter-location transfer reason code. Receive the UFIN 301 (benefit and payroll) forms from the PPS school and attach these forms to the Smart HR template transaction. In the notes field write the location this employee is transferring from.
Employee transfers **FROM** UC Irvine from a PPS school (a location not in UCPath)	Voluntary Termination Template	Use reason code **Transfer from UCPath PS**. Initiators will receive the UFIN 301 (benefit and payroll) forms from UCPath Center after their transaction has been processed and must send these to the PPS school.

Deployment Schedule