

| Initiating a ServiceLink Inter BU Transfer Request for AP |

Navigation: https://ucrsupport.service-now.com/ucr_portal/

Onboarding – Inter BU Transfer (AP)

Human Resources & Academic Personnel
Welcome to the HR and AP ServiceLink request page. These requests will route to your Shared Service provider for fulfillment in UCPath

Onboarding - New Hire
Hire a new UC employee/contingent worker

Onboarding - Rehire
Rehire an employee/contingent worker previously employed at a UC Location

Onboarding - Transfer
Transfer in a current employee from another UC location or within UCR

Onboarding - Concurrent
Add a job to an existing employee

COMING SOON

The same ServiceLink Form – Onboarding – Transfer is used to Transfer (both Intra and Inter BU) Staff and Academic Appointees. Transferred employees must NOT have a break in service.

This transfer type is for transfers OUTSIDE UCR (BU=Campus/Location)

Academic Inter BU Transfer
Usage: Use for an inter location transfer of an academic employee
Example: A faculty member from UCLA is transferred to a new position at UCR. There is no break in service.

Onboarding – Transfer (AP)

UNIVERSITY OF CALIFORNIA
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Onboarding – Transfer

Initiator: Kathleen Cool

Request Date: 07/06/18

* Transfer From: UC Davis Campus

The Initiator and Request Date fields will populate automatically. These cannot be changed/updated.

Select from the dropdown where the employee is coming from. For an Inter BU Transfer (Location other than UCR to UCR), the Transfer From location will always be a UC Campus OTHER than UCR.

Employee Information (AP)

Incumbent's First Name

Incumbent's Last Name. All other fields are optional (Middle Name, Suffix, and Phone Number).

Employee Information

*: First Name
Wilbur

Middle Name

*: Last Name
Liu

Suffix
-- None --

Phone Number

*: Personal Email
zzzfu@gmail.com

A personal email is needed for all Onboarding transactions. This email address will be used to send the incumbent the Onboarding packet via DocuSign. This same email will also be used by the UCPATH Center to communicate with the employee regarding benefits and benefit eligibility.

Employee Relationship Information (AP)

Employee Relationship Information

Organizational Relationship Type
Employee

*: Employee Type
Academic

*: Job Effective Date
07/01/18

On a Visa

Remote Hire

Employee Type is "Staff"

Organizational Relationship Information is "Employee"

Job Effective Date is the first day an employee is on pay status at UCR

Academic Appointee on Visa/Remote Hires

Employee Relationship Information

*: Organizational Relationship Type
Employee

*: Employee Type
Staff

*: Job Effective Date
07/30/18

On a Visa

Remote Hire

If the incumbent is on a Visa, check the "On a Visa" box in the Employee Relationship Information section. Checking this box will prompt the system to send an email notification to International Students and Scholars Office. This email is for informational purposes only. When the SSC Fulfiler verifies documents and files paperwork, they will send an email notification to payroll Glacier.

If the incumbent is a Remote Hire, or will not be able to attend an in-person Onboarding session, check the "Remote Hire" box. Checking this box will NOT prompt any ServiceLink tasks or automatic email notification. It is the responsibility of the SSC Fulfiler to make alternate arrangements, such as securing a notary, if the incumbent is unable to attend their Onboarding session.

Employee Work Information (AP)

Employee Work Information

Position Number: 40024624

FTE: 1

Job Description: ASST PROF-AY

Organization Code: ORG12

Organization Description: Coll of Hum, Arts & Social Sci

Division Code: DIV167

Division Description: Social Sciences

Department Code: D01627

Department Description: Ethnic Studies

Onboarding Reason: -- None --

Callouts:

- Position Number can be entered directly or searched by clicking on the magnifying glass icon
- Based on the Position Number selected, Job Code, Job Description, Organization, Organization Description, Division Code, Division Descriptions, Department Code, and Department Description populate based on Position Data.
- There is only one Transfer code for this type of request for Academic Appointees.

Compensation Information (AP)

Compensation Information

Compensation Frequency: UC 9/12 - AY

Input maximum rows for Components of Pay: 2

Callouts:

- Choose how many rows for Components of Pay you would like to display (1-6). Row 1 is for stepped academic appointees and will automatically default once a step is selected. Row 2 will default for HSCP members with both X and X' components. If the academic appointee has additional components of pay that do not default (e.g. off-scale amounts, Y payments) or if the appointee is not stepped (e.g. BYA appointments, above-scale faculty), enter compensation on Rows 3-6. Keep in mind that data cannot be manually entered on the first two compensation rows.
- Choose a pay frequency from the dropdown. Select from the following:
 - Monthly
 - Hourly
 - Contract
 - UC 9/12 FY
 - UC 1/9th Rate
 - UC 1/10th Rate
 - UC 1/11th Rate
 - UC 1/12th Rate
 - UC 12/12 FY

Components of Pay (AP)

Components of Pay

Notes:
 Compensation row(s) for stepped academic appointees will automatically default once a step is selected. For most academic appointees, one row will default. For HSCP members, both the X and X' components will default. If the academic appointee has additional components of pay that do not default (e.g., off-scale amounts, Y Payments) or if the appointee is not stepped (e.g., BYA appointments, above-scale faculty), please enter their compensation on the third or fourth compensation row after selecting the correct Comp Rate Code. Data cannot be manually entered on the first two compensation rows.

Comp Rate Code	Comp Rate	Job Compensation Frequency

Callouts:

- Compensation Row 1 is for stepped academic appointees. It will automatically default once a step is selected. Data cannot be manually entered in this compensation row.
- Compensation Row 2 is for HSCP members. Both the X and X' components will default. Data cannot be manually entered in this compensation row.
- To add Recurring Additional Compensation, check this box.
- To add Job Earnings Distribution (JED) for Summer Salary, check this box (can also be paid under additional pay).
- If the academic appointee has additional components of pay that do not default (e.g., off-scale amounts, Y Payments) or if the appointee is not stepped (e.g., BYA appointments, above-scale faculty), enter their compensation on Rows 3-6 after selecting the correct Comp Rate Code and Comp Rate.

Recurring Additional Compensation (AP)

Add Recurring Additional Compensation? ← When "Add Recurring Additional Compensation?" box is checked, the "Recurring Additional Compensation" section appears.

Recurring Additional Compensation

Input maximum rows for Recurring Additional Compensation: 1 ← Enter the maximum number of rows (1-4) needed to enter the academic appointee's Recurring Additional Compensation.

* Earnings Code HSG	* Pay Amount 8000.00	* Effective Date 07/01/18	* End Date 09/01/18
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Enter appropriate Earnings Code for academic appointee's Recurring Additional Compensation. Up to 4 Earnings Codes can be entered on 4 different rows.

Enter the Pay Amount (in dollars) of the Recurring Additional Compensation for the entered Earnings Code.

Enter the first day of the academic appointee's Recurring Additional Compensation.

Enter the last day of the academic appointee's Recurring Additional Compensation.

JED for Summer Salary (AP)

Add Job Earnings Distribution for Summer Salary? ← When "Add Job Earnings Distribution for Summer Salary?" box is checked, the "Distribution" section appears.

Distribution

▼ More information
Enter the appropriate Summer Salary Earnings code and associated percentage. In most cases it will be ACR or AFR at 100%.

Input maximum rows for summer salary distribution: 1 ← Enter the maximum number of rows (1-2) needed to enter the academic appointee's JED for Summer Salary.

Earnings Code ACR	% of Distribution 100	Comp Rate 8000.00
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Total Distribution %: 100

Enter appropriate Earnings Code for academic appointee's JED for Summer Salary. Up to 2 Earnings Codes can be entered on 2 different rows.

Enter the percentage of distribution.

Total Distribution Percentage will default from % of Distribution field for Row 1 & 2 (if used).

Enter the Comp Rate (in dollars) of the JED for Summer Salary for the entered Earnings Code.

Duration Information (AP)

Duration Information

Academic Duration of Employment: -- None --

- Continuing (Unit 18)
- Indefinite
- Potential Security
- Tenure Track (Ladder Rank)
- Security (LSOE)
- Tenured
- End Date (Academic Term Appts)

Select appropriate Academic Duration of Employment. Choose from:

- Continuing (Unit 18)
- Indefinite
- Potential Security
- Tenure Track (Ladder Rank)
- Security (LSOE)
- Tenured
- End Date (Academic Term Appts)

Expected Job End Date: []

Post Docs Anniversary Date: []

End Job Automatically?

If the academic appointee is in one of the following Appointee Classes or Academic Duration of Employment, an Expected Job End Date is required:

- Academic – Post Docs
- Academic – Recall
- Academic – Academic Student
- Potential Security
- Tenure Track
- Academic Term Appts.

If the incumbent is in the Academic Post Doc EMPL Class, the Post Doc Anniversary Date class is required. It reflects their first year anniversary as a Post Doc (e.g., if hired 1/1/18, the anniversary date would be 1/1/19).

The "End Job Automatically" checkbox is initially unchecked for all Academic New Hires. If checked, the academic appointee's job will automatically end in UCPath once the End Date has been reached.

Onboarding Tasks (AP)

Onboarding Tasks (select all that apply)

Note:
 If "Create a single task for all Task listed below" is left checked, then only a single task for this transaction will be created.
 If "Create a single task for all Task listed below" is unchecked. At least one task has to be selected to submit request and for each task selected an individual task will be created.

Accountability Structure

- Create a single task for all Task Listed Below
- Order Required Equipment
- Grant System Access
- Update Enterprise Directory
- Monitor Completion of Background Check
- Issue Equipment and Assets
- Confirm FAU is Correct
- Building Access (keys, alarms, key cards)
- Background Check (HireRight)
- Assign Space
- Phone/Phone Line Request
- Remote Worker (Travel Arrangements)

Shared Services

- Complete UCPath Template Based Hire
- Schedule Day 1 In-Person Session
- Complete Onboarding Packet
- Conduct Day 1 In-person Session
- Verify Documents and File Paperwork
- Update Required UCPath Checklist Items (Oath and Patent/Patent Waiver)

You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the "Create a single task for all Task Listed Below" will create one task that will need to be closed once completed. Individual tasks can also be selected. All selected tasks will be generated at once. Tasks assigned to the Shared Services Center will also be generated simultaneously.

All SSC tasks are required (except Complete Onboarding Packet) and cannot be modified. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Onboarding transaction.

Comments & Attachment (AP)

Comments

Attachment

Note:
 Appointment/Offer Letter must be attached

+ Add Attachment

Comments can be added to ensure that all needed data to complete a UCPath Onboarding transaction is included.

ServiceLink Onboarding requests require that the Initiator attach an Offer Letter. For Staff, the Offer Letter contains additional information required for the SSC Fulfiller to transact in UCPath.

ServiceLink Initiator

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Thank you, your request has been submitted

Request Number: RES003958

Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK)

Number	Description	Stage
RITM0020001	Onboarding - Transfer	• ✓ ✓ ✓

Clicking on the RITM Number and Description will take you to a view-only of the ServiceLink Fulfiller of the submitted Onboarding Transaction.

This "Stage" icon allows you to track a transactions' progress through fulfillment. Three green checks means that all tasks are closed and the submitted transaction is complete.

Once a ServiceLink form is successfully submitted, the Initiator will be directed to this confirmation page.

ServiceLink Fulfiller

Data Required for UCPath Onboarding Transactions

Key Data Point	Definition
Employee ID	Employee ID (or Empl ID) is generated by UCPath after a New Hire has been successfully processed.
Effective Date	The JOB Effective Date (different from the Position Effective Date) is the first day a given employee should be paid or the first day a contingent worker is performing services for UCR.
Action	Actions in UCPath include Hire, Rehire, Transfer, Add Contingent Worker, and Contingent Worker Extension.
Reason Code	Reason Codes are the reason why the Onboarding is taking place (i.e. Action – Rehire, Reason Code – Rehire, <120 days break).
Employee Record Number	An employee can have one or more Empl. Records.

Additional Data Required for UCPATH Transaction (AP) – Inter BU Transfer

Personal Data

Data Point	Data Location on UCR Forms
First & Last Names	ServiceLink Form – Employee Information & UCR Personal Data Form
Date of Birth	UCR Personal Data Form
Highest Education Level	UCR Personal Data Form
Gender	UCR Personal Data Form
National ID Type & National ID	UCR Personal Data Form, in-person, via phone
Address Line 1, City, State, Postal Code	UCR Personal Data Form
Email Address	ServiceLink Form – Employee Information & UCR Personal Data Form
Phone	UCR Personal Data Form

Job Data

Data Point	Data Location on UCR Forms
Position Number	ServiceLink Form – Employee Work Information
Establishment ID	Defaults from Position data, but is editable
Standard Hours	Defaults from Position data, but is editable
FTE	ServiceLink Form – Employee Work Information
Step (for step-based positions only)	ServiceLink Form – Employee Work Information
Expected Job End Date (for Post Docs, Academic Recall, Academic Student)	ServiceLink Form – Duration Information
Academic Duration of Appointment (if Job Record End Date exists)	ServiceLink Form – Duration Information

Job Data – Job Compensation & Pay Components

Data Point	Data Location on UCR Forms
Compensation Frequency	ServiceLink Form – Compensation Information
Comp Rate Code	ServiceLink Form – Components of Pay
Compensation Rate	ServiceLink Form – Components of Pay
Pay Components Frequency	ServiceLink Form – Components of Pay
UFIN 301	Receive from Terminating Location