

| Initiating a ServiceLink Inter BU Transfer Request for Staff |

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

ServiceLink Form (Staff – Inter BU Transfer)

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.

Onboarding – Inter BU Transfer (Staff)

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

Transfer-Inter BU, Demotion
Usage: Use for an Inter-Business Unit transfer where there is no break in service and the transfer is a voluntary demotion for the employee. This is a transfer from a non-UCPath location to a UCPath location.
Example: A staff employee at UC Davis is transferred to a new position at UCR with a lower maximum salary range. There is no break in service.


Transfer-Inter BU, Lateral
Usage: Use for an Inter-Business Unit transfer where there is no break in service and the transfer is a lateral move for the employee. This is a transfer from a non-UCPath location to a UCPath location.
Example: A UC San Diego staff employee is transferred to a new position at UCR with the same maximum salary range. There is no break in service.



Transfer-Inter BU, Promotion

Usage: Use for Inter-Business Unit transfer where there is no break in service and the transfer is a promotion for the employee. This is a transfer from a non-UCPath location to a UCPath location.

Example: A UC San Fransisco staff employee is transferred to a position at UCR with a higher maximum salary range. There is no break in service.

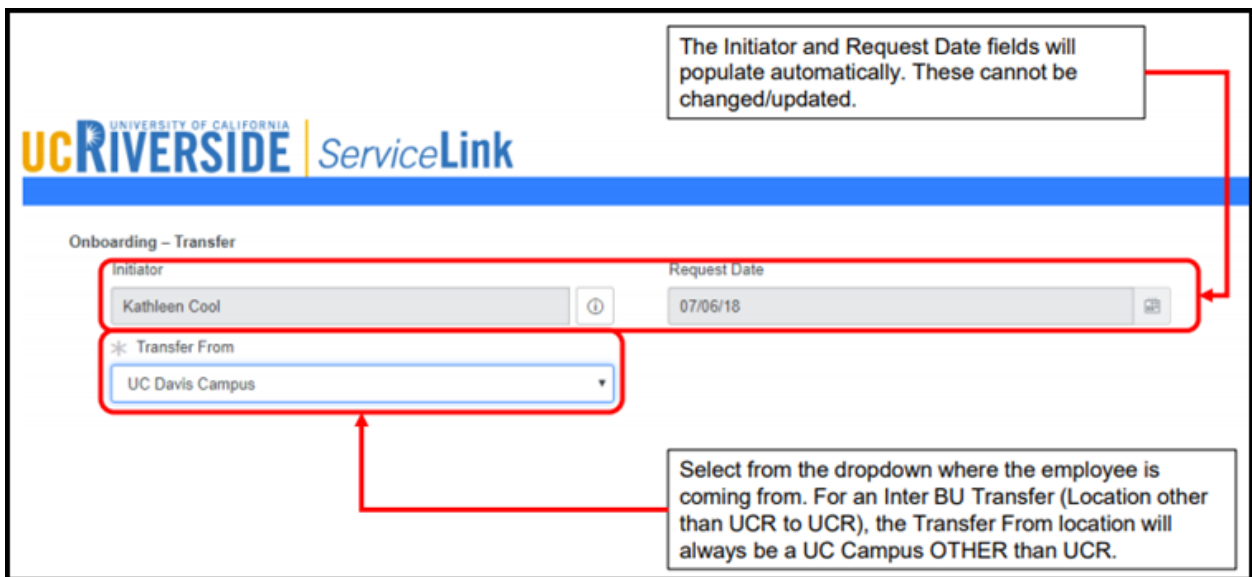


Transfer-Inter BU, Undefined

Usage: Use for intercampus transfers when there is no way of knowing if the transfer is a promotion, lateral, or demotion.

Example: A UC Santa Barbara staff employee is transferred to a new position at UCR. There is no way of knowing if the transfer is a demotion, a lateral transfer, or a promotion. There is no break in service.

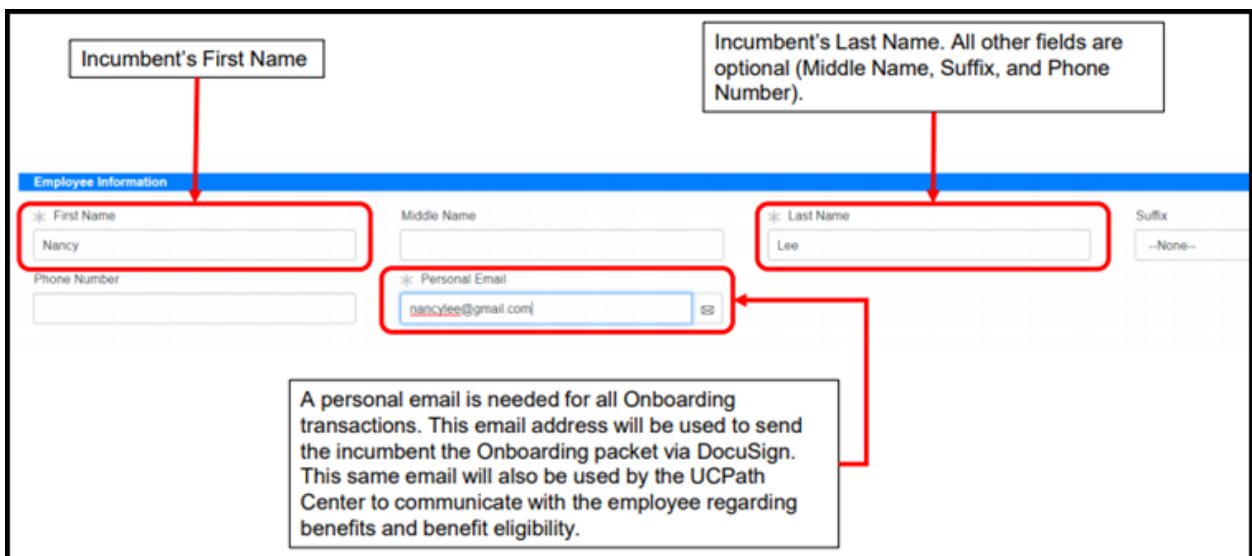
Onboarding – Transfer (Staff)



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 (Staff)



Incumbent's First Name

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

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 (Staff)

Employee Relationship Information

Organizational Relationship Type: Employee

Employee Type: Staff

Job Effective Date: 07/30/18

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

Employees 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 Fulfiller 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 Fulfiller to make alternate arrangements, such as securing a notary, if the incumbent is unable to attend their Onboarding session.

Employee Work Information (Staff)

Employee Work Information

Position Number: 40007460

Job Code: 000547

Job Description: ADMIN MGR 1

Organization Code: ORG12

Organization Description: Coll of Hum, Arts & Social Sci

Division Code: DIV104

Division Description: CHA&SS - General

Department Code: D01008

Department Description: CHA&SS Dean's Office

Onboarding Reason: -- None --

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.

Onboarding Reason (Staff)

Onboarding Reason

-- None --

Transfer - Inter BU, Demotion - TDE

Transfer - Inter BU, Lateral - TLA

Transfer - Inter BU, Promotion - TPR

Transfer-Inter BU, Undefined - TUK

Onboarding Reason in ServiceLink is equivalent to Reason Code in UCPath. Select the appropriate Onboarding Transfer Reason from the following options:

- Demotion
- Lateral
- Promotion
- Undefined

Onboarding Tasks (Staff)

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 (Staff)

Comments

Attachment

Note:
 Appointment/Offer Letter must be attached

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

UCRIVERSIDE | ServiceLink

Thank you, your request has been submitted.

Request Number: REQ0003956

Number	Description	Stage
RITM0020901	Onboarding - Transfer	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

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

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

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.

Requested Item
RITM0020001

Manage Attachments (1) ELA Scenarios.docx [filename].docx [view]

Number: RITM0020001
 Item: Onboarding - Transfer
 Opened: 07/06/18 14:27:33
 Requested for: Shannon Minter
 State: Open

Assignment group: []
 Assigned to: []
 Request: REQ0019968
 Stage: Fulfillment in Progress

Initiator: Kathleen Cool
 Request Date: 07/06/18

Transfer From: []
 UCR Employee Information

Clicking on the RITM (from previous screen) will take you to your request. This page has information that will tell you the stage of the ticket as well as who is working on your request.

The Stage field gives information pertaining to the status of your request. Once all tasks associated with this request are closed, the stage will update automatically to "Closed Complete." This means that your request has been successfully completed and transacted in UCPATH.

ServiceLink Fulfiller

Catalog Tasks (7) Approvers Group approvals

Request Item

Number Short description Assignment group

SCTASK0035465	Enter Employee ID	UCPath Harvest Onboarding Shared Service...	Open
SCTASK0035463	All Tasks Completed for this Transaction	UCPath ORG 12 Onboarding Accountability 3...	Open
SCTASK0035468	Conduct Day 1 In-person Session	UCPath Harvest Onboarding Shared Service...	Open
SCTASK0035464	Schedule Day 1 In-Person Session	UCPath Harvest Onboarding Shared Service...	Open
SCTASK0035467	Update Required UCPATH Checklist Items (Oath and Patent/Patient Waiver)	UCPath Harvest Onboarding Shared Service...	Open
SCTASK0035466	Verify Documents and File Paperwork	UCPath Harvest Onboarding Shared Service...	Open
SCTASK0035462	Complete UCPATH Template Based Hire	UCPath Harvest Onboarding Shared Service...	Open

Actions on selected rows

Remember that we requested that only one task be assigned to the Accountability Structure Fulfiller. Once all tasks relating to the Onboarding have been completed, the designated Onboarding Accountability Structure fulfiller should change the state of the task from "Open" to "Closed." This can be done by selecting the task and clicking on the Actions on selected rows button highlighted below in yellow.

The Shared Services Center will be assigned a total of 6 tasks. The SSC fulfiller will change the state of the task from "Open" to "Closed" when completed. When all tasks reflect a "Closed" state, the RITM stage will automatically change to "closed complete."

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 (Staff) – 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

Onboarding – Inter BU Transfer (Staff)

Job Data

Data Point	Data Location on UCR Forms
Position Number	ServiceLink Form – Employee Work Information
Employee Classification	Offer Letter (Attached to ServiceLink form)
Establishment ID	Defaults from Position data, but is editable
Standard Hours	Defaults from Position data, but is editable
FTE	Offer Letter (Attached to ServiceLink form)
Step (for step-based positions only)	Offer Letter (Attached to ServiceLink form)

Data Point	Data Location on UCR Forms
Probation Code	Offer Letter (Attached to ServiceLink form)
Probation End Date	Offer Letter (Attached to ServiceLink form)
PY Career Duration (partial-year Empl Classes only)	Offer Letter (Attached to ServiceLink form)
Expected Job End Date (for Contract, Casual/Restricted, Floater, and Staff Rehired Retiree)	Offer Letter (Attached to ServiceLink form)

Job Data – Job Compensation & Pay Components

Data Point	Data Location on UCR Forms
Compensation Frequency	Offer Letter (Attached to ServiceLink form)
Comp Rate Code	Offer Letter (Attached to ServiceLink form)
Compensation Rate	Offer Letter (Attached to ServiceLink form)
Pay Components Frequency	Offer Letter (Attached to ServiceLink form)
UFIN 301	Receive from terminating location