Initiating a ServiceLink Intra BU Transfer Request for AP

Navigation: [https://ucrsupport.service-now.com/ucr_portal/](https://ucrsupport.service-now.com/ucr_portal/)

ServiceLink Form (AP – Intra BU Transfer)

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

**Academic Intra-Campus Transfer**

*Usage:* Use when a person moves to a new department and position.

*Example:* A UCR employee is transferred to a position in a different department at UCR. There is no information on whether the transfer is a demotion (voluntary or involuntary), a lateral transfer, or a promotion. There is no break in service.

**Lateral Transfer**

*Usage:* Use for the transfer of an employee from one position to another position in a new department.

*Example:* A UCR Academic Appointee is transferred to another position in a different department at UCR with the same salary range maximum. There is no break in service.
Involuntary Demotion

Usage: Use for involuntary transfer to lower salary range maximum for disciplinary reasons in a different department

Example: A UCR Academic Appointee is involuntarily transferred (not their choice) to a position in a different department at UCR with a lower salary range maximum for disciplinary reasons. There is no break in service.

Promotion

Usage: Use to change an employee from one position to another in a new department which has a higher salary range maximum. Promotions are normally obtained through a competitive recruitment process.

Example: A UCR Academic Appointee applies for and is offered a position in a different department at UCR with a higher salary range maximum. There is no break in service. This reason code is NOT used to promote a faculty member within the same series.

Transfer – Dual Employment

Usage: Use to transfer to a concurrent dual-employment job.

Example: A UCR Academic Appointee is transferred to a concurrent dual-employment job in a different department at UCR. There is no break in service.

Voluntary Demotion

Usage: Use for voluntary transfer to a position with a lower salary range maximum in a different department.

Example: A UCR Academic Appointee is voluntarily transferred (their choice) to a position in a different department at UCR with a lower salary range maximum. There is no break in service.

Onboarding – Transfer (AP)

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 Intra BU Transfer (within UCR), the Transfer From location will always be UC Riverside Campus.
Employee Information (AP)

Employee Relationship Information (AP)

Academic Appointee on Visa/Remote Hires
Employee Work Information (AP)

Onboarding Reason (AP)

Compensation Information (AP)
Components of Pay (AP)

Recurring Additional Compensation (AP)

JED for Summer Salary (AP)
Duration Information (AP)

Onboarding Tasks (AP)

Comments & Attachment (AP)
ServiceLink Initiator

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 of only the ServiceLink Fulfiller of the submitted Onboarding Transaction.

This “Stage” icon allows you to track the transactions’ progress through fulfillment. Three green checks mean that all tasks are closed and the submitted transaction is complete.

ServiceLink Fulfiller

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.

Scroll down to the bottom of the RITM to the Catalog Task. In this area, you will see all the related tasks for the request.

The Shared Services Center will be assigned two tasks—Complete UCPATH Template Based Hire and Complete Onboarding Packet. 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.”

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.
Data Required for UCPath Onboarding Transactions

<table>
<thead>
<tr>
<th>Key Data Point</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
<td>Employee ID (or Empl ID) is generated by UCPath after a New Hire has been successfully processed.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>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.</td>
</tr>
<tr>
<td>Action</td>
<td>Actions in UCPath include Hire, Rehire, Transfer, Add Contingent Worker, and Contingent Worker Extension.</td>
</tr>
<tr>
<td>Reason Code</td>
<td>Reason Codes are the reason why the Onboarding is taking place (i.e. Action – Rehire, Reason Code – Rehire, &lt;120 days break).</td>
</tr>
<tr>
<td>Employee Record Number</td>
<td>An employee can have one or more Empl. Records.</td>
</tr>
</tbody>
</table>

Additional Data Required for UCPath Transaction (AP) – Intra BU Transfer

Job Data

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

Onboarding – Intra BU Transfer (AP)

Job Data – Job Compensation & Pay Components

<table>
<thead>
<tr>
<th>Data Point</th>
<th>Data Location on UCR Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compensation Frequency</td>
<td>ServiceLink Form – Compensation Information</td>
</tr>
<tr>
<td>Comp Rate Code</td>
<td>ServiceLink Form – Components of Pay</td>
</tr>
<tr>
<td>Compensation Rate</td>
<td>ServiceLink Form – Components of Pay</td>
</tr>
<tr>
<td>Pay Components Frequency</td>
<td>ServiceLink Form – Components of Pay</td>
</tr>
</tbody>
</table>