| Initiating a ServiceLink Intra BU Transfer Request for AP |

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

ServiceLink Form (AP – Intra 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

COMING soon
Onboarding - Concurrent
Add a job to an existing employee

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 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)

You can type in the employee's name (last name, first name) in the Employee Name field directly or click on the magnifying glass icon to search. You can search using different criteria, including Employee Name, Job Code, Job Description, etc. Based on the person selected, the Employee First Name, Middle Name, Employee Last Name, Suffix, UCR Employee ID, and UCR NetID will populate automatically. This data is pulled from UCPath via HRDW and is accurate as of 24 hours ago.

UCR Employee Information

Employee Name (Last Name, First Name)	Employee First Name	Middle Name	Employee Last Name
ASLAN, REZA	REZA		ASLAN

Suffix	UCR Employee ID	UCR NetID	Personal Email
	10008076	aslanr	raslan@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 Type is "Academic"

Employee Relationship Information

Organizational Relationship Type	Employee Type	Job Effective Date
Employee	Academic	07/01/18

☐ On a Visa   ☐ Remote Hire

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 Type	Job Effective Date
Employee	Academic	07/01/18

☐ 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 (AP)

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 (AP)

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

- Academic Intra-Campus Transfer
- Involuntary Demotion
- Lateral Transfer
- Promotion
- Transfer Dual Employment
- Voluntary Demotion

Compensation Information (AP)

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)

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.

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.

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).

Recurring Additional Compensation (AP)

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

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

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)

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

Enter the maximum number of rows (1-2) needed to enter the academic appointee's JED for Summer Salary.

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

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

Enter the percentage of distribution.

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

Duration Information (AP)

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)

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)

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.

Two SSC tasks are required; the rest are optional. 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 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.

Updated 9/18/2018

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-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.

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

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

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) – Intra BU Transfer

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

Onboarding – Intra BU Transfer (AP)

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