Job Aid: Intra-Location Transfer Between Staff & Academic Positions (Temporary Process)

This job aid reviews the process for intra-location transfers where an employee is transferring from an academic to a staff position or vice versa without a break in service. This process differs from the training materials as current configuration in UCPath does not trigger the creation of a new Employee Record. This interim process outlined below will be used until the UCPath Center develops a template or other go-forward approach.

Please note that there is a different process to transfer employees between from academic to academic positions, and from staff to staff positions. Please refer to the following job aid:

Job Aid – Intra-Location Transfers at UCLA

Part 1: Receiving Department Performs Concurrent Hire into New Position

1. The Receiving department must first create the position that the employee is transferring into.

2. Initiate a Concurrent Hire on the empl. class of the new job using the appropriate Smart HR Template transaction (staff or academic).
   a. Concurrent Hire_Staff: Choose one of the inter-BU reason codes, understanding that this is for an Intra-Location Transfer; put this in the comments
   b. Concurrent Hire_Academic: Choose academic inter-BU reason code, understanding that this is for an Intra-Location Transfer; put this in the comments

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions

3. Complete the Concurrent Hire template using the position number for the position you are hiring the employee into. Use the following links to view instructions for both staff and academic examples:

   UPK: Initiate Concurrent Hire Template Transaction (Staff)
   UPK: Initiate Concurrent Hire Template Transaction (Acad)
4. Note: There is no need to align FLSA status. In the Comments section of the Concurrent Hire template, indicate that the employee is being hired on one Employee Record and that the other Employee Record will be terminated.

*The WFA team is prepared for this process and comments will eliminate the confusion.*

**Part 2: Releasing Department Performs Termination from Old Position**

5. After employee has been hired concurrently into their new position, the Releasing department performs an Involuntary Termination template transaction from the position the employee is leaving.

*Navigation:* PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions

Alternatively, the Releasing department may enter the employee’s end date in PayPath and ensure that the “Auto Term End Date” checkbox is checked.

6. Use the following link to find instructions to perform the Involuntary Termination template transaction:

[UPK: Initiate Voluntary Termination Template Transaction](#)

7. Similar to the Concurrent Hire template, Comments should also be included in the termination template to indicate that this is a transfer process.

**Further Considerations**

- Note that this is a temporary process based on the current system configuration. Additional updates will be provided based on guidance from the UCPath Center.