

# HR Templates:

## Person Data – Transfer – Termination – Retirement

### Templates

- UC\_TRANSFER
- UC\_INVOL\_TERM
- UC\_PERSON\_DATA
- UC\_TRANSFER\_AC
- UC\_VOL\_TERM
- UC\_RETIREMENT

### Decision Points

1. UCB Initiator
2. UCB Approver(s)

### Data needed for transactions

Person Data	
<b>With Validation</b>	<ul style="list-style-type: none"> <li>• Employee ID</li> <li>• Effective Date</li> <li>• Name, Address, Phone, Email</li> </ul>
Transfer	
<b>With Validation</b>	<ul style="list-style-type: none"> <li>• Employee ID, Employment Record Number</li> <li>• Effective Date</li> <li>• Action-Reason</li> <li>• Job Data               <ul style="list-style-type: none"> <li>○ Position Number <i>populates Job Data from Position</i></li> <li>○ Employee Classification</li> <li>○ Probation End Date, Review Type/Date, Expected Job End Date, Academic Duration of Appointment</li> <li>○ Salary Step or Compensation</li> </ul> </li> <li>• Earnings Distribution/Additional Pay <i>if applicable</i> <ul style="list-style-type: none"> <li>○ Distribution Type/Percent, Earnings Code, Comp Rate</li> <li>○ Effective Date, Earnings End Date, Reason for Addl. Pay</li> </ul> </li> </ul>
Voluntary / Involuntary Termination & Retirement	
<b>With Validation*</b>	<ul style="list-style-type: none"> <li>• Employee ID, Employment Record Number</li> <li>• Effective Date</li> <li>• Action-Reason</li> <li>• Last Day Worked</li> <li>• *Comments (<i>free form field</i>)</li> </ul>

## Guiding Principles

### Sponsor Alignment

- Develop efficiency in end-to-end business process
- Use UCPath delivered functionality
- Minimize additional cost
- Eliminate double data entry

### Diverse Campus Stakeholders

- Involve both academics and staff (at multiple levels)
- Maintain a customer focus

### Disciplined Process

- Ensure implementation focus
- Use UCPath delivered templates and approval workflow
- Document decisions for clarity and commitment

### Openness to Change

- Maintain enterprise-wide perspective
- Be open to process and role changes
- Be transparent with communications