

PAYROLL: INTERLOCATION TRANSFERS AND APPOINTMENTS

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PAYROLL: INTERLOCATION TRANSFERS AND APPOINTMENTS

I. INTRODUCTION

This chapter outlines the procedures to be followed when an employee transfers either permanently or temporarily from one University location to another, including the Lawrence Berkeley National Laboratory (LBNL) and Hastings College of the Law, or when an employee holds concurrent appointments at two or more locations.

The intent of these procedures is to maintain continuity in an individual's University employment history and benefits coverages when an individual is employed by more than one location or has transferred between locations with no break in service.

The procedures specified in this chapter are not intended to change existing intralocation routing and processing requirements.

II. PERMANENT INTERLOCATION TRANSFERS--SINGLE-LOCATION APPOINTMENTS

An interlocation transfer is considered permanent when an employee terminates employment at one location and accepts employment at another location, *without a break in service, regardless of the length of the appointment if there is no intent that the employee will return to the original location. The transfer is considered temporary when there is no break in service and the appointment is not greater than twelve months.*

The procedures presented in this section apply to all permanent interlocation transfers except transfers under the Education Abroad Program (EAP). (The procedures for such transfers are presented in section V, below.)

A. TERMINATING LOCATION

1. Department

At the request of the hiring location department, the terminating location should use the online Employee Database Entry/Update system or prepare a personnel action form (PAF) or it's equivalent or the Laboratory equivalent documents to record the

transfer. If the On-line EDB Entry/Update system is used, print a copy of the Summary of Separation Action IDOC¹.

On the Summary of Separation Action IDOC or PAF/equivalent or the Laboratory equivalent documents, write: PERMANENT INTERLOCATION TRANSFER FROM _____ LOCATION, _____ DEPARTMENT, TO _____ LOCATION, _____ DEPARTMENT, EFFECTIVE _____.

Vacation and Sick Leave

If applicable for intercampus transfers, indicate the accrued vacation and sick leave hours transferable to the hiring location on the Permanent Interlocation Transfer Terminating Location - Employee Data Sheet - UFIN301 (see Appendix A). If the amount of accrued vacation or sick leave is unknown, annotate that this information will be forwarded to the hiring location on the date of the transfer.

Accrued vacation leave balances can only be transferred between campuses. The terminating department should report the accrued vacation hours that the hiring campus should add to the employee's employment record.

* Since the Laboratory and Hastings College of the Law are separate entities, locations cannot transfer accrued vacation leave balances between these locations or between a Laboratory or Hastings and a campus. Therefore, if an employee transfers to/from a Laboratory or Hastings to a campus, vacation balances must be paid to the employee. Sick leave balances, which are notational, can be transferred between all locations.

2. Staff Personnel or Academic Affairs Office

Upon approval of the Summary of Separation IDOC or PAF/equivalent or Laboratory equivalent documents, by the staff personnel or academic affairs office, route the form to the terminating location accounting office.

¹ The term IDOC refers to an employee document generated from the On-line EDB Entry/Update system, used by campuses and Hastings. The Laboratory should use its equivalent forms and/or documents.

II. PERMANENT INTERLOCATION TRANSFERS--SINGLE-LOCATION APPOINTMENTSA. TERMINATING LOCATION2. Staff Personnel or Academic Affairs Office (Cont'd.)

* Immediately inform hiring staff personnel or academic affairs office that the transfer has been approved. A copy of the approved Summary of Separation IDOC or PAF/equivalent or Laboratory equivalent documents must be sent to the *hiring* location staff personnel or academic affairs office, along with the transferring employee's personnel file. (Some locations may wish to retain the file and send the history card only.)

* Obtain a copy of the hiring New Hire/Rehire IDOC or PAF/equivalent or Laboratory equivalent documents and route it to the accounting office of the terminating location.

3. Accounting Office

Prepare the following forms: 1) Permanent Interlocation Transfer, Terminating Location - Transmittal Sheet ([UFIN 300](#)) (Appendix B); and 2) Permanent Interlocation Transfer, Terminating Location - Employee Data Sheet ([UFIN 301](#)) (Appendix A).

Note: It is important for the terminating location to complete the Employee Data Sheet with as much information as possible and to report all applicable year-to-date totals to the new location.

Accrued Vacation

Assessments for vacation leave accrual made at the former location will remain at that location; therefore, no interlocation transfer of vacation accrual liability (i.e., dollars) is required. All future payments for vacation leave taken will be funded by the new location. *Accrued vacation is paid to a transferring employee only if the transfer is to a classification/appointment that is not eligible for vacation credit accrual or if the employee is transferring between: 1) a campus and a Laboratory or Hastings; 2) between Laboratories; or 3) between a Laboratory and Hastings. (See Accounting Manual chapter [P-196-13](#), Payroll: Attendance, Time Reporting, and Leave Accrual Records, for more information.)*

OASDI and Medicare Contributions

Intercampus Transfers:

If the employee's total earnings are expected to be greater than the OASDI taxable wage base, employer and employee year-to-date OASDI and Medicare contributions are transferred to the hiring location as follows:

- (1) Indicate on the Employee Data Sheet that the liability is being transferred;
- (2) Transfer funds to cover the OASDI and Medicare employer and employee year-to-date liability by preparing an intercampus financial journal;
- (3) Prepare a Balance Adjustment Worksheet form to remove the covered wages from the employee's payroll records;
- (4) Send copies of these forms to the hiring location accounting office.

If the employee's earnings are not expected to exceed the OASDI taxable wage base, the OASDI and Medicare liability should be retained by the terminating location. The applicable OASDI and Medicare taxes withheld by each location must be reported on the Form W-2 prepared for the employee by each location.

Interlocation Transfers:

OASDI and Medicare balances or funds are not transferred between the Laboratories, Hastings, and the campuses. The old location retains the employee's balances and reports them on the employee's Form W-2 at the end of the year. The new location begins taking deductions and also reports the covered earnings and taxes withheld on the employee's Form W-2 from that location. If there is an overpayment of OASDI taxes, the employee can claim a refund when his or her tax return is filed.

II. PERMANENT INTERLOCATION TRANSFERS--SINGLE-LOCATION APPOINTMENTS

A. TERMINATING LOCATION

3. Accounting Office (Cont'd.)

Severance Pay Plan (SPP) Contributions/Funds²

If the employee is a participant in the Senior Management Severance Pay Plan (SMSPP) the following transfers are made:

(1) Intercampus Transfers

Prepare an intercampus financial journal to transfer the SPP contributions (principal) and the employee's SPP (interest) to the new location's financial control. The terminating location is responsible for any interest that may accrue on an employee's SPP funds until the transfer of the contributions and interest is completed.

Campus Accounting:

At fiscal year-end the SMSPP liability (including interest) must be recorded. Using the expenditure accounts and fund numbers established to record the compensated absences accrual, the following reversing journal entry should be made in the June 30 preliminary ledger:

Dr. Expense	X-XXXXXX-XXXXX-X-1970
Cr. SMSPP Liability	X-XXXXXX

This expenditure should be reported in the campus financial schedules as part of the compensated absences accrual total. Object code 1970 is used to identify the SMSPP accrual.

(2) Campus/Laboratory Transfers

If the employee is transferring from a campus to a Laboratory, the campus should prepare an intercampus financial journal. This journal should transfer both the contributions and

² Hastings does not participate in the University's SPP program,
* however the Laboratory does participate.

accrued interest to the Office of the President, Laboratory Administration. The campus should notify the Laboratory of the employee's total plan balance.

If the employee is transferring from a Laboratory to a campus, the Laboratory should request, in writing, a transfer of the contributions and interest from OP Laboratory Administration to the new location. OP Laboratory Administration will prepare the intercampus financial journal.

(3) Terminating Location

- * Send the above documents, a copy of the Summary of Separation IDOC or PAF/equivalent documents, and the employee's payroll file, including all insurance enrollment forms or the Laboratory's equivalent forms, to the hiring location accounting office.

B. HIRING LOCATION

1. Department

- * Request a copy of the *terminating* location Summary of Separation IDOC or PAF/equivalent or Laboratory equivalent documents from the *terminating* location department.

- * Prepare a hiring New Hire/Rehire IDOC or PAF/equivalent documents. On the New Hire/Rehire IDOC or PAF/equivalent documents write: PERMANENT INTERLOCATION TRANSFER FROM _____ LOCATION, _____ DEPARTMENT, TO _____ LOCATION, _____ DEPARTMENT, EFFECTIVE _____.

- * Obtain the appropriate local approvals required for hiring the transferring employee and route the New Hire/Rehire IDOC or PAF/equivalent or Laboratory equivalent documents to the staff personnel or academic affairs office.

2. Staff Personnel or Academic Affairs Office

Upon approval by the staff personnel or academic affairs office, route the form(s) to the hiring location accounting office.

In addition, a copy of the approved form(s) is sent to the *terminating* location staff personnel or academic affairs office.

II. PERMANENT INTERLOCATION TRANSFERS--SINGLE-LOCATION APPOINTMENTS

B. HIRING LOCATION

2. Staff Personnel or Academic Affairs Office (Cont'd.)

* Obtain a copy of the *terminating* location Summary of Separation Action IDOC or PAF/equivalent or the Laboratory equivalent documents and route it to the hiring location accounting office.

3. Accounting Office

* On the hiring New Hire/Rehire IDOC or PAF/equivalent or Laboratory equivalent documents, enter the employee number and other data, as required.

Send a copy of the above form(s), to the *terminating* location accounting office.

Upon receipt of the *terminating* location intercampus Financial Journals, if applicable, prepare the appropriate responding entries.

Prepare a Balance Adjustment Worksheet form to add the dollar amounts to the employee's OASDI and Medicare records, if applicable.

C. DELAYED PROCESSING - TERMINATING LOCATION

If the terminating location is a campus and an overpayment is made to the employee, the campus should prepare an Employee's Earnings Record adjustment in the Payroll/Personnel System (PPS) to reverse the overpayment. This will produce the following entry:

Dr. Payroll Adjustment Clearing Account
 Dr. Other Liability Accounts
 Cr. Departmental Expense

The overpayment should not be transferred to the hiring location. The terminating location is responsible for contacting the employee to negotiate a repayment schedule. If the employee does not agree to a reasonable repayment schedule or refuses to reimburse the University for the overpayment, the collection procedures described in Accounting Manual chapter [R-212-2](#), Receivables Management, should be implemented.

To move the receivable from the clearing account, the following entry is prepared:

Dr. Refund Due from Employee
 Cr. Payroll Adjustment Clearing Account

When the overpayment is recovered from the employee, the following entry is required:

Dr. Location Cash Account
 Cr. Refund Due from Employee

If the terminating location is a Laboratory or Hastings, the accounting office should follow similar procedures to recover the overpayment.

** D. BENEFITS PROCESSING

The terminating location should complete the Permanent Interlocation Transfer Terminating Location - Employee Data Sheet ([UFIN 301](#)) (see Appendix A). In order to insure that the employee has continuous coverage and no duplicate benefit coverage occurs, the terminating location should complete the "Covered Through" column in the Enrolled Benefits section of the form for each benefit plan, as appropriate. The new location can then begin the employee's coverage with no overlap.

III. TEMPORARY INTERLOCATION TRANSFERS AND MULTILLOCATION APPOINTMENTS

The procedures detailed in this Section, except where specifically indicated, apply to both temporary interlocation transfers and multilocation appointments.

A. DEFINITIONS

1. Temporary Interlocation Transfers

An interlocation transfer is considered temporary when an employee at one location, designated the home location, accepts a position at another location, the host location, *for a period of twelve months or less*, with the intention of returning to work for the home location at the end of this period.

2. Multilocation Appointments

Multilocation appointments occur when an employee is employed by two or more locations simultaneously. The location at which the employee holds his or her primary employment is the home location. The location that employs the

III. TEMPORARY INTERLOCATION TRANSFERS AND MULTILLOCATION APPOINTMENTS

A. DEFINITIONS

2. Multilocation Appointments (Cont'd.)

employee on an additional basis is the host location. Multilocation appointments may be of either short or long duration.

If the employee is initially hired at multiple locations simultaneously, one location must be designated as the home location. The following factors should be considered: largest percentage of time worked, longest duration of appointment, location with academic standing, etc. Under no circumstances should the employee's appointments exceed 100 percent.

B. GENERAL PROCEDURES

The procedures for temporary interlocation transfers and multilocation appointments are identical in most respects, and both require ongoing communication between the home and host locations.

Payroll and personnel files are retained at the home location, which continues to issue paychecks to the employee. For employees paid against general assistance subbudgets, the home department is responsible for providing the home location accounting office with the necessary pay documents.

The amount earned during the period of the temporary interlocation transfer or multilocation appointments is paid by the home location and the expense applicable to the host location is transferred to that location. The home location account initially charged for amounts applicable to the host location is subsequently cleared to the appropriate financial control account. For transactions between a campus and a Laboratory or Hastings, a Form 5 or Purchase Order must be used to pay the amounts due to the home location.

When a temporary interlocation transfer ends, it is not necessary to prepare a separate set of documents to return employees to their original status on the home location. When the appointment on the host location ends, the home location accounting office can automatically reinstate the employee records to their original status.

C. HOST LOCATION PROCEDURES

Department

Notify the *home* location staff personnel or academic affairs office, as appropriate, of the intention to process a temporary interlocation transfer or a multilocation appointment.

Prepare a UPAY 560-T, Temporary Interlocation Transfer or Multilocation Appointment Form (Appendix III). Include all information relevant to the proposed appointment on the host location. Obtain the appropriate local approvals for the appointment. Complete a Form 5 or Purchase Order if one or both of the locations (host or home) is a Laboratory or Hastings. If a campus is the host location and a Laboratory is the home location, the payroll burden rate from the Laboratory must be obtained in order to request the appropriate amount on the Form 5 or Purchase Order.

For campuses, if payment for service on the host location is drawn from general assistance funds, provide the home location accounting office with monthly pay documents.

Staff Personnel or Academic Affairs Office

When the appropriate approvals have been obtained, route the completed UPAY 560-T to the *home* location staff personnel or academic affairs office.

D. HOME LOCATION PROCEDURES

Staff Personnel or Academic Affairs Office.

Upon receipt of the UPAY 560-T from the *host* location, obtain appropriate local approval for the appointment, route the form to the accounting office for processing, and send a copy to the home location department.

Accounting Office

Process the UPAY 560-T form for payment through regular payroll procedures.

For transactions between campuses, transfer the expenditure applicable to the host location to that location via a financial journal entry. Attach a copy of the UPAY 560-T form to the journal entry and route

III. TEMPORARY INTERLOCATION TRANSFERS AND MULTILLOCATION APPOINTMENTS

D. HOME LOCATION PROCEDURES (Cont'd.)

to the host location accounting office. If the host location UPAY 560-T form is not available, the home location New Hire/Rehire IDOC or PAF/equivalent documents should be used to support the financial journals until the host location UPAY 560-T form is available.

- * The Laboratory and Hastings should follow their local procedures when payment is received with the UPAY560-T form.

E. ACCOUNTING CODES

For payments generated by the home location for temporary transfers or multilocation appointments, charge expenditure account 8895X0 (X represents the host location code), fund number 6999X (X is location option), and sub 0, 1, 2, or 7. Object codes 1000 and 1100 are used to transfer the gross salary, and object code 8910 is used to accumulate the staff benefits. This charge is subsequently cleared by financial journal.

- * The Laboratory and Hastings should use their equivalent accounting procedures.

F. BENEFIT CHARGES

For multicampus appointments, including Hastings, the home campus should include prorated benefits in its costs. For campus/Laboratory appointments, if the campus is the home location, it should charge the prorated amount for benefits. If the Laboratory is the home location, it must charge the campus its prorated payroll burden rate.

- ** The home campus records the payroll costs in a reportable expense account with Account Group Code (AGC) 300010 through 300130. A campus may use the same account currently being charged but must change the AGC of the accounts in the Corporate Account Fund Profile submission. The home campus is the source of the detailed benefits recorded in the Corporate Financial Reporting (CFR) System via the payroll expense distribution process. A copy of the expense distribution report is to be provided to the host campus. Both the home and host campuses are to use

- ** object code 8910 to record the transfer of the benefits expenditures (credit at the home campus, debit at the host campus). Object code 8910 (on a consolidated basis) and the expense accounts (by campus) must have a financial balance of zero at the end of the fiscal year.
- ** Each campus must ensure that all costs have been transferred to the host campus by fiscal year end.

IV. ONE-TIME INTERLOCATION PAYMENTS

A one-time interlocation payment is required when an employee at one location (home location) is eligible to receive a payment originating from another location (host location) for an event or service of short duration. A one-time interlocation payment should be paid from the home location. The procedures are identical to the procedures for temporary interlocation transfers except that the host department should prepare a UPAY 644C-T, Interlocation One-Time Payment Form (Appendix D), instead of a UPAY 560-T.

V. EDUCATION ABROAD PROGRAM (EAP) INTERLOCATION TRANSFERS

Employees transferring under the EAP should be paid by the home location, regardless of the duration of the transfer. The procedures to be followed for such transfers are similar to the procedures for Temporary Interlocation Transfers presented in Section III, above. However, EAP will prepare a one-time expense transfer crediting the home location department for the salary, benefits, and related expenses of the replacement position, i.e., an academic year Associate Professor appointment (step one). This transfer will be prepared by EAP at the beginning of the fiscal year as a financial journal entry and will eliminate the need for the home location to process any payroll transfers. Refer to Accounting Manual chapter [E-227-35](#), Education Abroad Program: Interlocation Transactions, for more information.

VI. RESPONSIBILITIES

The primary responsibility for expediting the processing of applicable forms rests with the academic affairs office for an academic appointee and the staff personnel office for a staff appointee. Since, in every case, authorization is required from more than one location, all approvals must properly identify the name, department, and location of the transferring employee.

VII. REFERENCES

Accounting Manual chapters:

[E-227-35](#) Education Abroad Program: Interlocation Transactions

[P-196-13](#) Payroll: Attendance, Time Reporting, and Leave Accrual Records.

[P-196-30](#) Payroll: OASDI and Medicare Contributions.

Assistant Vice President John Plotts, Memorandum to Accounting Officers on Intercampus Transfers, August 13, 1996.

Assistant Vice President John Plotts, Memorandum to Accounting Offices on Senior Management Severance Pay Plan (SMSPP) Liability, February 27, 1997.

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*APPENDIX A

UNIVERSITY OF CALIFORNIA
 PERMANENT INTERLOCATION TRANSFER
 TERMINATING LOCATION - EMPLOYEE DATA SHEET
 UFIN 301 (R3/08)

TRANSFERRING		FROM:				TO:				EFF. DATE OF TRANSFER				
EMPLOYEE NAME (LAST, FIRST, MI)								SOCIAL SECURITY NUMBER		LAST PAY DATE		SEX M <input type="checkbox"/> F <input type="checkbox"/>		
BIRTH DATE	CIT.	VISA	EAD*	8233 EXP. DATE	COUNTRY OF RESIDENCY	ORIGINAL HIRE DATE	HIRE DATE	OATH DATE	I-9 DATE	LEAVE BALANCES VAC HRS	SICK HRS	VAC/SICK LEAVE BALANCES AS OF		
FEDERAL FILING STATUS MAR PERS MAX ADDL STAT ALLOW W/H \$				CALIFORNIA FILING STATUS MAR PERS ITEM MAX ADDL STAT ALLOW DED W/H \$				RETIRE-MENT SYSTEM	DCP FUND	OASDI/MED	PRIOR SERVICE MONTHS	SERVICE CREDIT MONTHS	HRS TOWARDS BENEFITS	HRS TOWARDS CAREER
OASDI COVERED GROSS				TRANSFERRING OASDI/MED LIABILITY TO NEW LOCATION? YES <input type="checkbox"/> NO <input type="checkbox"/>				IF NO, PROVIDE REASON FOR NOT TRANSFERRING:						
MEDICARE COVERED GROSS														
RET. COVERED GROSS														
SAFE HARBOR GROSS														
UCRP FISCAL YTD COV. COMP														
COVERED COMP. LIMIT CODE				G <input type="checkbox"/> N <input type="checkbox"/>										
ENROLLED BENEFITS								OTHER DEDUCTIONS**						
MEDICAL	PLAN NAME		COV CODE		COVERED THROUGH		DESCRIPTION				DED. AMOUNT \$			
MCB	<input type="checkbox"/> UNDER 45K <input type="checkbox"/> 45,001 to 89,000 <input type="checkbox"/> 89,001 to 133,000 <input type="checkbox"/> OVER 133,001													
DENTAL	<input type="checkbox"/> D1 <input type="checkbox"/> D2		COV CODE								\$			
VISION			COV CODE								\$			
LEGAL			COV CODE								\$			
STATE DOMESTIC PARTNER FORM	YES <input type="checkbox"/> NO <input type="checkbox"/>		COV CODE								\$			
SUPPLEMENTAL LIFE	PLAN CODE		ANNUAL SALARY \$				COMMENTS							
DEPENDENT LIFE	PLAN CODE		ANNUAL SALARY \$											
SUPPLEMENTAL DISABILITY	WAITING PERIOD		MONTHLY SALARY \$											
AD&D	COV CODE		PRINCIPAL SUM \$											
DEPCARE	MONTHLY AMOUNT \$		EFFECTIVE DATE		YTD AMOUNT \$									
HCRA***	ANNUAL AMOUNT \$		DECLINING BALANCE \$		YTD AMOUNT \$									
	MONTHLY AMOUNT \$		TERM DATE											
TAX DEFERRED PLAN	%RATE OF FLAT AMT.		EFFECTIVE DATE											
403(b)														
457(b)														
403(b) YTD CONTRIBUTIONS \$			403(b) MAC ****											
457(b) YTD CONTRIBUTIONS \$			457(b) MAC ****											
UCRP BUYBACK <input type="checkbox"/>	DED. AMOUNT \$		DECLINING BALANCE \$		PREPARED BY									
UCRP LOAN(S) <input type="checkbox"/>	DED. AMOUNT \$		DECLINING BALANCE \$		E-MAIL ADDRESS									
						PHONE NUMBER () DATE								

* EAD = EMPLOYMENT AUTHORIZATION DOCUMENT

** AFTER TAX, UNION DUES, SALARY ATTACHMENTS, TAX LEVIES, OTHER STATE TAX (ATTACH UPAY 830).

*** HEALTH CARE REIMBURSEMENT ACCOUNT.

**** THE 403(b) AND THE 457(b) MAC AT THE HIRING LOCATION SHOULD BE SET TO THE SAME VALUE AS THE MAC PREVIOUSLY ESTABLISHED AT THE TERMINATING LOCATION.

RETN: ACCOUNTING: 5 YEARS AFTER SEPARATION, EXCEPT IN CASES OF DISABILITY, RETIREMENT, OR DISCIPLINARY ACTION, IN WHICH CASE RETAIN UNTIL AGE 70.

OTHER COPIES: 0-5 YEARS AFTER SEPARATION.



*APPENDIX B

**UNIVERSITY OF CALIFORNIA
PERMANENT INTERLOCATION TRANSFER
TERMINATING LOCATION - TRANSMITTAL SHEET
UFIN 300 (R12/02)**

TRANSFERRING	FROM:	TO:	
EMPLOYEE NAME (LAST, FIRST, MI)		SOCIAL SECURITY NO.	EFFECTIVE DATE

- | | |
|--------------------------|--|
| ATTACHED | NEEDED |
| <input type="checkbox"/> | <input type="checkbox"/> EMPLOYEE DATA SHEET |
| <input type="checkbox"/> | <input type="checkbox"/> TERMINATION INFORMATION (IGEN) OR SUMMARY OF SEPARATION ACTION IDOC |
| <input type="checkbox"/> | <input type="checkbox"/> NEW HIRE/REHIRE IDOC |
| <input type="checkbox"/> | <input type="checkbox"/> EMPLOYEE FILE |
| <input type="checkbox"/> | <input type="checkbox"/> EMPLOYEE EARNINGS RECORD |
| <input type="checkbox"/> | <input type="checkbox"/> OASDI/MEDICARE DOLLAR BALANCE ADJUSTMENT (UPAY649) |
| <input type="checkbox"/> | <input type="checkbox"/> OASDI/MEDICARE JOURNAL |
| <input type="checkbox"/> | <input type="checkbox"/> INSURANCE INFORMATION |
| <input type="checkbox"/> | <input type="checkbox"/> COPY OF OVERPAYMENT DETAIL |
| <input type="checkbox"/> | <input type="checkbox"/> SEVERANCE PAY PLAN RECORDS |

COMMENTS

FROM	E-MAIL ADDRESS		
PHONE NUMBER	FAX NUMBER	DATE	

RETN: ACCOUNTING: 5 YEARS AFTER SEPARATION, EXCEPT IN CASES OF DISABILITY, RETIREMENT, OR DISCIPLINARY ACTION, IN WHICH CASE RETAIN UNTIL AGE 70.

OTHER COPIES: 0-5 YEARS AFTER SEPARATION.

APPENDIX C

UPAY 560-T



Temporary Interlocation Transfer or Multilocation Appointment Form
UPAY 560-T (R6/01)

HOME LOCATION: HOME DEPARTMENT: HOME SCHOOL:

HOST LOCATION: HOST DEPARTMENT: HOST SCHOOL:

Form sections: HOME LOCATION INFO, HOST LOCATION INFO, REASON. Includes fields for Employee Name, ID Number, Position Title, Title Code, Step/Grade, Salary, Appointment %, Current Appointment Dates, Host Location Temporary or Multilocation Position Title, Title Code, Step/Grade, Salary, Appointment %, Pay Period Dates, Hours to be Paid, Description of Service (DOS) Code, Host Location Fund Source to be Charged, LABORATORY/Hastings Fund Source to be Charged.

*For employees paid against general assistance subbudgets, the home department is responsible for providing the home location accounting office with the necessary pay documents.

Host Location Fund Source Authorization

Host Location Dean's Office/Academic or Staff Personnel

Home Location Dean's Office/Academic or Staff Personnel

Host Contact Phone #

Home Contact Phone #

RETN ACCOUNTING: 5 YEARS AFTER SEPARATION, EXCEPT IN CASES OF DISABILITY, RETIRMENT, OR DISPLINARY ACTION, IN WHICH CASE RETAIN UNTIL, AGE 70. OTHER COPIES: 0-5 YEARS AFTER SEPARATION.

CC: EMPLOYEE'S HOME DEPARTMENT LABORATORY ACCOUNTING OFFICE

*APPENDIX D UPAY 644-C-T



INTERLOCATION ONE-TIME PAYMENT FORM
UPAY 644-C-T (R6/01)

HOME LOCATION: _____ HOME DEPARTMENT: _____ HOME SCHOOL: _____

HOST LOCATION: _____ HOST DEPARTMENT: _____ HOST SCHOOL: _____

HOME LOCATION INFO.	Employee Name _____ Employee ID Number _____
	Home Location Position Title _____ Title Code _____ Step/Grade _____
	Salary _____ / _____ <input type="checkbox"/> 09/09 <input type="checkbox"/> 09/12 <input type="checkbox"/> 11/12 <input type="checkbox"/> 12/12 Appointment % _____ (Annual) (Monthly/Hourly)
HOST LOCATION INFO.	Host Location Temporary Position Title _____ Title Code _____ Step/Grade _____
	Event/Service Dates _____ to _____ One-Time Payment \$ _____ Hours to be Paid _____ Pay Rate _____
	Description of Service (DOS) Code (For example: BYA, By-Agreement; HON, Honorarium; etc.): _____
	Host Location Fund Source to be Charged _____ <small>(Location/Account/Cost Center/Fund/Project Code/Sub) (Name of Account)</small>
	Laboratory/Hastings Fund Source to be Charged _____
EVENT INFO.	Please explain details of event/service and compensation:

Host Location Fund Source Authorization _____

Host Location Dean's Office/Academic or Staff Personnel _____

Home Location Dean's Office/Academic or Staff Personnel _____

Host Contact _____ () _____
Phone # _____

Home Contact _____ () _____
Phone # _____

FOR PAYROLL USE:

EMPLOYEE NAME		TR CODE	PAY PERIOD END			PAY CYCLE TYPE	ACCT DIST NO.	E R C	T Y P	D U C	TITLE CODE	LOC / ACCOUNT / COST CENTER / FUND / PROJECT / SUB													
1	9		10	11	12							17	18	19	20	90	91	92	22	25	26	27	32	33	36
		A P	MM	DD	YY																				

RATE AMOUNT	A H	REGULAR TIME				OVERTIME OR LEAVE TIME				W S P					
		DESC SERV	TOTAL REGULAR TIME ON PAY STATUS	H %	DESC SERV	TIME IN HOURS	DESC SERV	TIME IN HOURS							
56	62	64	66	67	71	72	73	75	76	80	81	83	84	88	89

RETN ACCOUNTING: 5 YRS SUBJECT TO CONTRACT AND GRANT REQUIREMENTS
OTHER COPIES: 0 - 5 YEARS

CC: EMPLOYEE'S HOME DEPARTMENT