

8.9 HRMS Step by Step Guide

Transfer or Rehire Employee - Workforce Administration Module

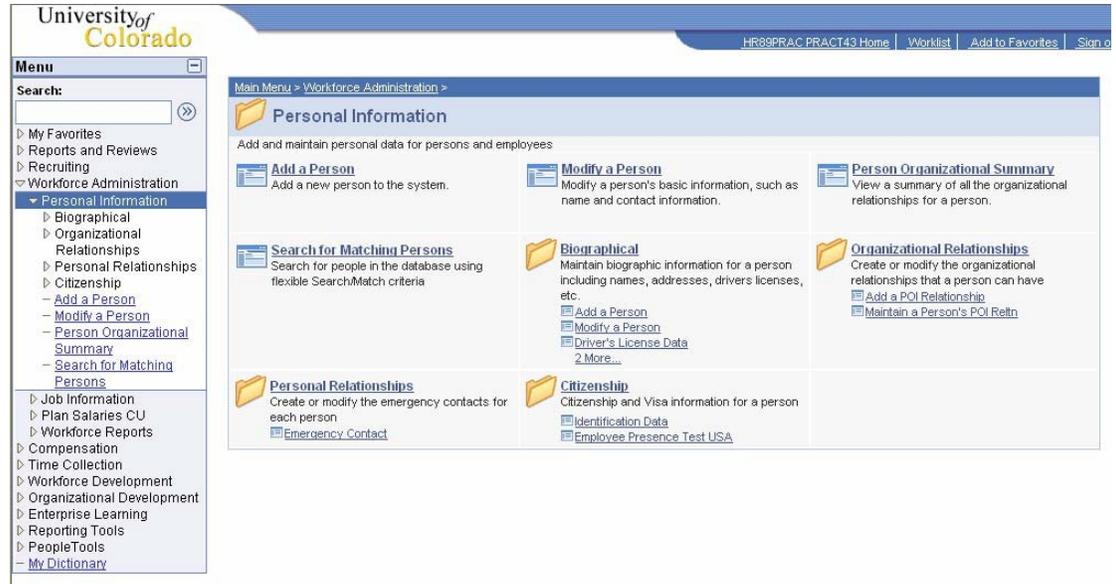
Overview: This guide provides instruction for transferring an employee from one position to another within the same department or between departments. The guide also covers rehiring a terminated employee and reusing a terminated employee record. **DO NOT** use this guide to rehire retirees; refer to the **Hiring a Retiree** step by step guide.

Note: The screen shots used in this guide may not be representative of your access.

1. Navigate to Search for Matching Persons

NAVIGATION:

- Workforce Administration
- Personal Information
- Click on [Search for Matching Persons](#)
- Verify the person exists in HRMS, and determine which job record to use for the transfer or rehire



2. Search Criteria page displays

- Enter as many fields as available
- Name fields are *Case Sensitive*
- Click [Search](#)

Search Criteria

Search Type: Person Ad Hoc Search

Search Parameter: ADHOC_CU1 ADHOC_CU1

Search Result Rule: Search Result Code: ADHOC_RES_CU Adhoc Results CU

[User Default](#) [Search](#) [Clear All](#) [Carry ID Reset](#)

Search Fields	Operand	Value
First Name	Begins With	Rachel
Middle Name	Begins With	
Last Name	Begins With	Paddock
Date of Birth	Equals	
National Id	Begins With	

3. Search Results page displays

- Click the Show all Columns icon , to show search results from both the Results tab and the Additional Information tab
- If the person does not exist, exit this step-by-step guide and refer to the appropriate Hire step-by-step guide
- If the person exists as a POI (not an employee), exit this step-by-step guide and refer to the *Add Employment Instance* step-by-step guide

4. All columns of search data displays

- Click on the [Person](#) [Organizational](#) [Summary](#) link to see more data about the person, to include the employee's job record #(s)

Search Results

Search Type: Person Ad Hoc Search
 Search Parameter: ADHOC_CU1 ADHOC_CU1
 Result Code: ADHOC_RES_CU Adhoc Results CU

Search Results Summary

[Return to Search Criteria](#)

Number of ID's Found: 2
 Search Order Number: 10 CS_AdHoc Search

Search Results							
Results Additional Information 							
	EmpID	First Name	Middle Name	Last Name	Date of Birth	National ID	
1	Carry ID 110122	Rachel	Mark	Paddock	09/09/1973	*****0123	

Search Results

Search Type: Person Ad Hoc Search
 Search Parameter: ADHOC_CU1 ADHOC_CU1
 Result Code: ADHOC_RES_CU Adhoc Results CU

Search Results Summary

[Return to Search Criteria](#)

Number of ID's Found: 2
 Search Order Number: 10 CS_AdHoc Search

Search Results							
Results Additional Information 							
	EmpID	First Name	Middle Name	Last Name	Date of Birth	National ID	
1	Carry ID 110122	Rachel	Mark	Paddock	09/09/1973	*****0123	Person Organizational Summary

5. Personal Org Summary page displays in a new window

- Determine appropriate job record (Empl Rcd#) to be used for the transfer or rehire. (Active = transfer, Terminated = rehire)

Person Org Summary

Paddock,Rachel Emplid: 110122

▼ **Employment Instances** Find | View 1 First 1-4 of 4 Last

ORG Instance: 0 **Last Hire:** 08/21/2006 **Termination Date:**

HR Status: Active **Payroll Status:** Active

Assignments Customize | Find | First 1 of 1 Last

Empl Rcd#	Home/Host	HR Status	Payroll Status	Date Last Change	Business Unit	Department	Last Asgn Start	Term Date
0	Home	Active	Active	08/21/2006	UCOLO	10175	08/21/2006	

ORG Instance: 1 **Last Hire:** 08/21/2006 **Termination Date:**

HR Status: Active **Payroll Status:** Active

Assignments Customize | Find | First 1 of 1 Last

Empl Rcd#	Home/Host	HR Status	Payroll Status	Date Last Change	Business Unit	Department	Last Asgn Start	Term Date
1	Home	Active	Active	01/09/2007	UCOLO	10160	08/21/2006	

ORG Instance: 2 **Last Hire:** 06/05/2006 **Termination Date:** 07/07/2006

HR Status: Inactive **Payroll Status:** Terminated

Assignments Customize | Find | First 1 of 1 Last

Empl Rcd#	Home/Host	HR Status	Payroll Status	Date Last Change	Business Unit	Department	Last Asgn Start	Term Date
2	Home	Inactive	Terminated	07/08/2006	UCOLO	10160	06/05/2006	07/07/2006

ORG Instance: 3 **Last Hire:** 07/11/2006 **Termination Date:** 08/11/2006

HR Status: Inactive **Payroll Status:** Terminated

Assignments Customize | Find | First 1 of 1 Last

Empl Rcd#	Home/Host	HR Status	Payroll Status	Date Last Change	Business Unit	Department	Last Asgn Start	Term Date
3	Home	Inactive	Terminated	08/12/2006	UCOLO	10160	07/11/2006	08/11/2006

Person of Interest Instance Customize | Find | First 1 of 1 Last

Person of Interest Type	Empl rcd#	Status	Begin Date/	End Date

6. Review Job List

- If more job detail about this employee is required (ex: job code or position #), refer to the Job List Review:

NAVIGATION:

- Reports and Reviews
- Job Information
- Job List

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HR09PRAC PRACT43 Home Worklist Add to Favorites Sign out

Menu

- Job Information
 - Benefits with No Earnings
 - Contract Pay
 - Employees on Leave of Absence
 - End Of Appointment
 - Job Status
 - Personnel Actions History
 - Personnel Roster
 - Salary History by Department
 - Salary History by Employee
 - Temporary Employees
 - Job List
 - Job Summary
 - Work Study
 - Leave Accrual Summary
- Payroll and Time Collection
- Personal Information
- Position
- Recruiting
- Training
- Recruiting
- Workforce Administration

Main Menu > Reports and Reviews >

Job Information

Job Information

Benefits with No Earnings Benefits with No Earnings	Contract Pay Contract Pay	Employees on Leave of Absence Employees on Leave of Absence
End Of Appointment End Of Appointment	Job Status Job Status	Personnel Actions History Personnel Actions History
Personnel Roster Personnel Roster	Salary History by Department Salary History by Department	Salary History by Employee View each salary change for an employee during a specified time period.
Temporary Employees View a list of all employees marked as temporary.	Job List Job List	Job Summary Displays job information and compensation rates for an employee.
Work Study Work Study	Leave Accrual Summary Leave Accrual Summary	

7. Job List search page displays

- Enter one or more search fields

Click 

- Click



8. Job list page displays

- Review basic information for all employee's records

- Transfer:** Look at jobs in active (A) status to determine Record # of position OUT of which employee is transferring; make note of position number

- Rehire:** Look at jobs in terminated (T) status to determine Record # to be reused for the rehire; make note of position number

- You are now ready to enter the transfer or rehire data



Rec #	Eff Date	Job Code	Description	Reg/Temp	%Time	Pay Group	FTE	Pay Status	Appoint End Dt	DeptID	Description	Comp Freq	Position
0	08/21/2006	1105	Instructor	R	100.00	MON	1.000000	A	05/09/2008	10175	Integrative Physiology	C	00677704
1	01/09/2007	1105	Instructor	R	25.00	MON	0.130000	A	05/11/2007	10160	Ecology & Evolutionary Biology	C	00665379
2	07/08/2006	1419	Lecturer	T	67.00	MON	0.330000	T	07/07/2006	10160	Ecology & Evolutionary Biology	C	00650062
3	08/12/2006	1419	Lecturer	R	21.00	MON	0.110000	T	08/11/2006	10160	Ecology & Evolutionary Biology	C	00666957

9. Navigate to Job Data Transfer/Rehire only menu

- Workforce Administration
- Job Information
- Click [Job Data Transfer/Rehire only](#)

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HR89PRAC.PRACT43 Home | Worklist | Add to Favorites | Sign Out

Main Menu > Workforce Administration >

Job Information
Maintain information about a person tied to a specific job record

- Add Employment Instance**
Add Employment Instance or Add Hire/Rehire Row
- Job Data**
Enter job information including work location and compensation details.
- Update Contract Pay NA**
Add or update contract pay details including payment type, term, and period
- Job Data Transfer/Rehire only**
Job Data Transfer/Rehire only
- Job Approval**
Maintain data about a current job.
- Contract Administration**
Maintain contract pay information
Update Contract Pay NA
- Review Job Information**
Review pages and reports that show work information for a person
Job Summary
Work Study
Job List
- Company Property**
Enter the assignments of company property.
- Reports**
Contains reports based on Job Data
Employees on Leave of Absence
Temporary Employees

10. Job Data Transfer/Rehire search page displays

- Enter one or more search fields
- Click

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HR89PRAC.PRACT43 Home | Worklist

Job Data Transfer/Rehire only
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmpID: begins with

Empl Rcd Nbr: =

Name: begins with

Last Name: begins with

Department: begins with

HR Status: =

Employee Status: =

[Basic Search](#)

11. Entire list of employee's job records displays

- Select Empl Recd Nbr to be used for Transfer or Rehire

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HR89PRAC.PRACT43 Home | Worklist

Job Data Transfer/Rehire only
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmpID: begins with

Empl Rcd Nbr: =

Name: begins with

Last Name: begins with

Department: begins with

HR Status: =

Employee Status: =

[Basic Search](#)

Search Results

View All First 1-4 of 4 Last

EmplID	Empl Rcd Nbr	Name	Last Name	Department	HR Status	Employee Status
110122	0	Paddock,Rachel	PADDOCK	10175	Active	Active
110122	1	Paddock,Rachel	PADDOCK	10160	Active	Active
110122	2	Paddock,Rachel	PADDOCK	10160	Inactive	Terminated
110122	3	Paddock,Rachel	PADDOCK	10160	Inactive	Terminated

12. Work Location page displays

- Click  to insert a row

Work Location | Job Information | Payroll | Compensation | Employment Information

Save | Return to Search | Next in List | Previous in List | Refresh | Update/Display | Include History

Paddock,Rachel EMP ID: 110122 Empl Rcd #: 1

Work Location Find | View All First 1 of 1 Last

HR Status: Active Empl Status: Active

Effective Date: 01/09/2007 Sequence: 0 Job Notes

Action / Reason: Data Change APT Change Appointment End Date

Position Number: 00665379 Instructor Position Entry Date: 01/09/2007

Regulatory Region: USA United States Position Data

Company: CU University of Colorado Appointment End Date: 05/11/2007

Business Unit: UCOLO University of Colorado

Department: 10160 Ecology & Evolutionary Biology Department Entry Date: 08/21/2006

Location: 1RAMY Ramaley Biology

Establishment ID: CU University of Colorado

Last Updated by: B01542 Garwood,Douglas Last Upd DtTm: 12/06/2006 4:51:34PM Date Created: 12/06/2006

Save | Return to Search | Previous in List | Next in List | Notify | Refresh

13. Work Location page, cont.

- Effective date defaults to current date. Enter effective date (start date) of transfer or rehire
- Enter appropriate Reason
- Enter position number to which employee is being transferred or into which employee is being rehired *
- Enter additional information on subsequent pages such as Percent of Time, Compensation, Appointment End Date
- Review your work and 

Work Location | Job Information | Payroll | Compensation | Employment Information

Save | Return to Search | Next in List | Previous in List | Refresh | Update/Display | Include History

Paddock,Rachel EMP ID: 110122 Empl Rcd #: 1

Work Location Find | View All First 1 of 2 Last

HR Status: Active Empl Status: Active

Effective Date: 02/22/2007 Sequence: 0 Job Notes

Action / Reason: Transfer XFR Transfer

Position Number: 00602899 Asst Professor Position Entry Date: 02/22/2007

Regulatory Region: USA United States Position Data

Company: CU University of Colorado Appointment End Date: 05/11/2007

Business Unit: UCOLO University of Colorado

Department: 10206 Anthropology Department Entry Date: 02/22/2007

Location: 1HALE Hale Science Bldg

Establishment ID: CU University of Colorado

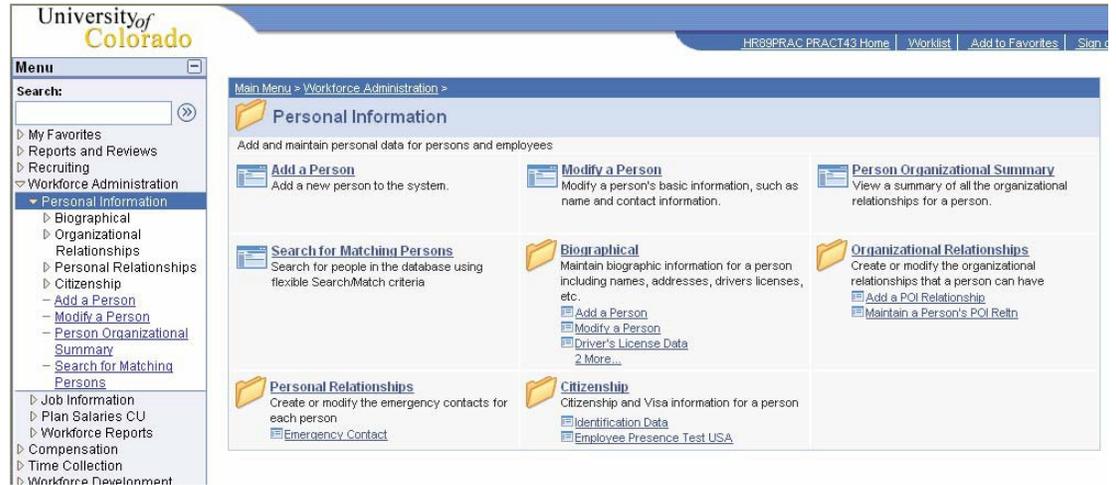
Last Updated by: B01542 Garwood,Douglas Last Upd DtTm: 12/06/2006 4:51:34PM Date Created: 02/22/2007

Save | Return to Search | Previous in List | Next in List | Notify | Refresh

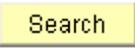
Note: * If the transfer/rehire date is prior to the effective date of the position **or** if the position has not been approved, you will not be able to save the transfer/rehire. A position in Proposed status will have to be approved before proceeding. Once the position has been approved, navigate to Transfer/Rehire to complete the transfer/rehire. (Workforce Administration / Job Information / Transfer/Rehire)

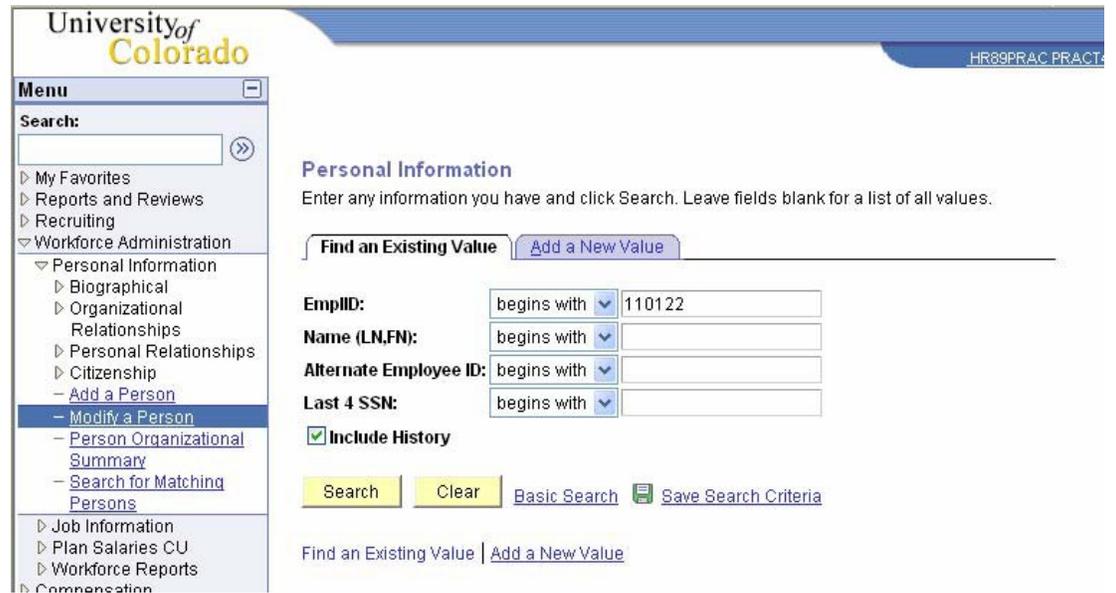
14. Update Personal Information, to include new Home Department and Campus Box, if applicable

- Workforce Administration
- Personal Information
- Modify a Person

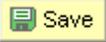


15. Personal Information search page displays

- Enter one or more of the search fields
- Click 



16. Biographical Details page displays

- Update all applicable fields such as Home Department, Campus Box, contact phone #'s, emails
- Review your work and 

Biographical Details | [Contact Information](#) | [Identity/Diversity](#)

Person ID: 110122 Paddock,Rachel
EMP Employee

Primary Name [Find](#) | [View All](#) First 1 of 1 Last
Eff Date for Name: 09/01/1997 [+](#) [-](#)
Format Type: English
Display Name: Paddock,Rachel [View Name](#)

Biographic Information

***Date of Birth:** 09/09/1973 [31](#) 33 Years 5 Months **Date of Death:** [31](#)

Biographical History [Find](#) | [View All](#) First 1 of 2 Last

***Effective Date for PERSONAL DATA:** 09/01/2006 [+](#) [-](#)

Gender: Male [v](#)

***Highest Education Level:** I-Master's Level Degree [v](#)

Language Code: English [v](#) **FERPA Flag**

Military Status: Not Indic. [v](#)

Previous Non-Employee T-ID:

Home Department: 10175 [magnifying glass](#) Kinesiology&Applied Physiology

Campus Box: 354 UCB [magnifying glass](#) Kinesiology,Applied Physiology

Transfer or Rehire Employee complete