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
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.
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)

<table>
<thead>
<tr>
<th>Person Org Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paddock, Rachel</td>
</tr>
</tbody>
</table>

### Employment Instances

<table>
<thead>
<tr>
<th>ORG Instance</th>
<th>Last Hire</th>
<th>Termination Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>09/21/2006</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
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<table>
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<tr>
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<th>Payroll Status</th>
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<tbody>
<tr>
<td>Active</td>
<td>Active</td>
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</tbody>
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### Assignments

<table>
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<tr>
<th>Empl Rcd</th>
<th>Home Host</th>
<th>HR Status</th>
<th>Payroll Status</th>
<th>Date Last Change</th>
<th>Business Unit</th>
<th>Department</th>
<th>Last Asgn Start</th>
<th>Term Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Home</td>
<td>Active</td>
<td>Active</td>
<td>08/21/2006</td>
<td>UCOLO</td>
<td>10175</td>
<td>08/21/2006</td>
<td></td>
</tr>
</tbody>
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<tbody>
<tr>
<td>1</td>
<td>09/05/2006</td>
<td>07/07/2006</td>
</tr>
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<tbody>
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<td>Terminated</td>
<td>07/09/2006</td>
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<tbody>
<tr>
<td>2</td>
<td>07/11/2006</td>
<td></td>
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<tr>
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### Person of Interest Instance

### Reports and Reviews

- Job Information
- Job List
- Payroll and Time Collection
- Personal Information
- Position
- Reimbursement
- Training
- Work Study
- Leave Accrual Summary

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
7. Job List search page displays
- Enter one or more search fields
  - Click Search

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
9. Navigate to Job Data Transfer/Rehire only menu

☐ Workforce Administration
☐ Job Information
☐ Click
  - Job Data Transfer/Rehire only

10. Job Data Transfer/Rehire search page displays

☐ Enter one or more search fields
☐ Click Search

11. Entire list of employee’s job records displays

☐ Select Empl Recd Nbr to be used for Transfer or Rehire
12. **Work Location page displays**

- Click to insert a row

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 [Save](#)

**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 Search
16. Biographical Details page displays

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

Transfer or Rehire Employee complete