University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus
EMPLOYEE SERVICES

Human Capital Management: Step-by-Step Guide

Transferring an Employee to Position with New Contract

This guide describes how to transfer an employee to a new position on a new contract. A transfer is considered moving an employee from one position to another position. The department that is gaining the transferred employee will initiate the transaction.

This guide describes using template based transactions, or TBTs, for transferring an employee to a new position with a contract. Much of this procedure is similar to transferring an employee, including information about related content and how to view it. Refer to *Transferring an Employee Step-by-Step Guide* for more information.

Notes:

- If employee is currently on a contract and should continue with the same contract parameters in the new transfer position, do not use this template. Use the regular transfer template.
- If employee is currently on a contract and the new transfer position requires a new set of contract parameters, then transfer is not an option. The employee must be terminated and rehired. (If contract termination date exceeds new contract hire date, then employee must be rehired on a new record number as there cannot be overlapping contract dates).
- If the transferring employee is currently on a contract that needs to be terminated, refer to *Transferring an Employee Step-by-Step Guide*. For a Professional, the action of taking them out of the MON Pay Group (which should happen if they are no longer on a contract) and putting them in Pay Group FOT or F12, as well as changing them from BASEC to BASEM, will terminate the contract. For Students, they are likely staying in STM Pay Group, but the action of changing them from BASEC to BASEM will terminate the contract.

Contents

Before You Begin

Before you begin, you should perform the following tasks:

- Run the Job List query (CUES_HCM_JOB_LIST) to verify the most recent job data for the employee. The Job List query identifies employees that may not be in your role level security. For example, if you are at UCD and will be transferring an employee from Boulder, you can use Job list to identify that employee and basic information about that employee.

  To access the query from the HCM Community Users dashboard:
  1. Click the **HCM WorkCenter** tile.
  2. Click the **Resources** tab.
  3. If the query does not appear in the list of most used, select the **Click here for ALL** link.

- Prepare the position to which the employee is being transferred. This includes making sure the correct funding is specified for the position. Refer to *Creating a Position with Funding Step-by-Step Guide* or *Updating a Position Step-by-Step Guide* for more information.

- Check that the employee is not on a current contract. (Non-Pay Actions> Job Information> Job Data> Search and select employee. From the Compensation tab, check that the Frequency is C for contract. You will also see BASEC as the Rate Code.

Navigation tips:

▼ HCM Community Users

Procedures in this guide begin from the HCM Community Users dashboard:

1. From the portal, click **Quick Links**.
2. Click **HCM**. The Employee Self Service dashboard appears.
3. Click **Employee Self Service**.
4. Click **HCM Community Users** to display the dashboard.

The NavBar displays options for accessing other systems. Through the NavBar, you can select CU Resources to access systems on the portal.

Related content indictor. Click to view information related to the page and data you are working with. You may also see a Related Content link at the top of some pages.

The magnifying glass is called a look up and displays search results for you to select valid field values.

The book and checkmark lets you spell check text boxes.

The down arrow lets you hide, or collapse, sections you do not want to view.

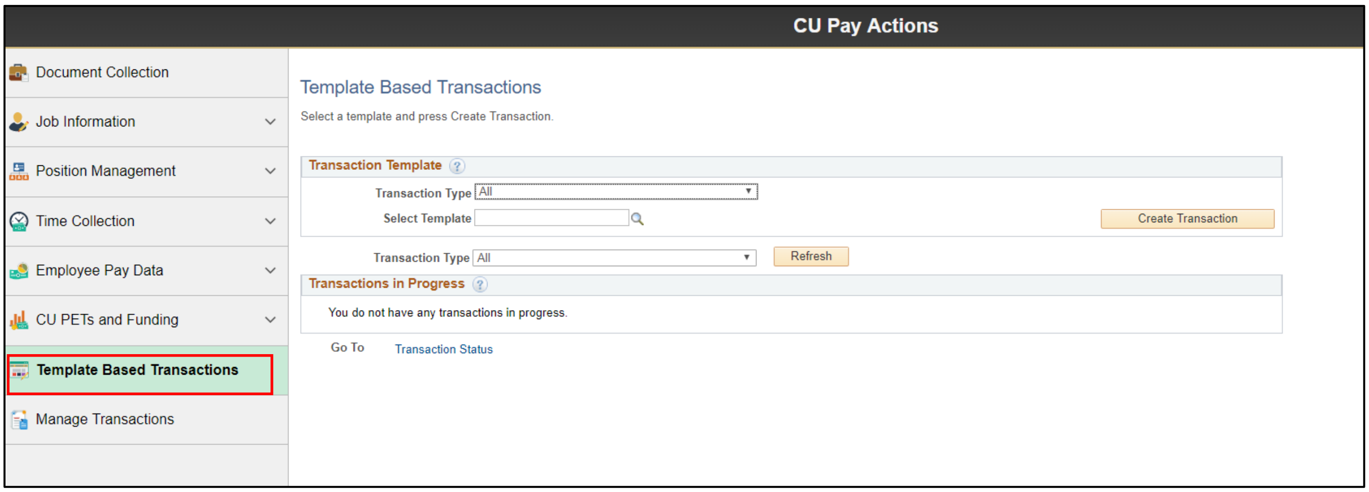
Click the arrow to expand the section.

Creating a Transfer Transaction

A transfer is created using a Template Based Transaction (TBT). A TBT provides a template-driven method of streamlining data entry.

Note: Before creating the transaction, you should create or update the vacant position to which the employee is being transferred. Refer to *Creating a Position with Funding Step-by-Step Guide* or *Updating a Position Step-by-Step Guide* for more information.

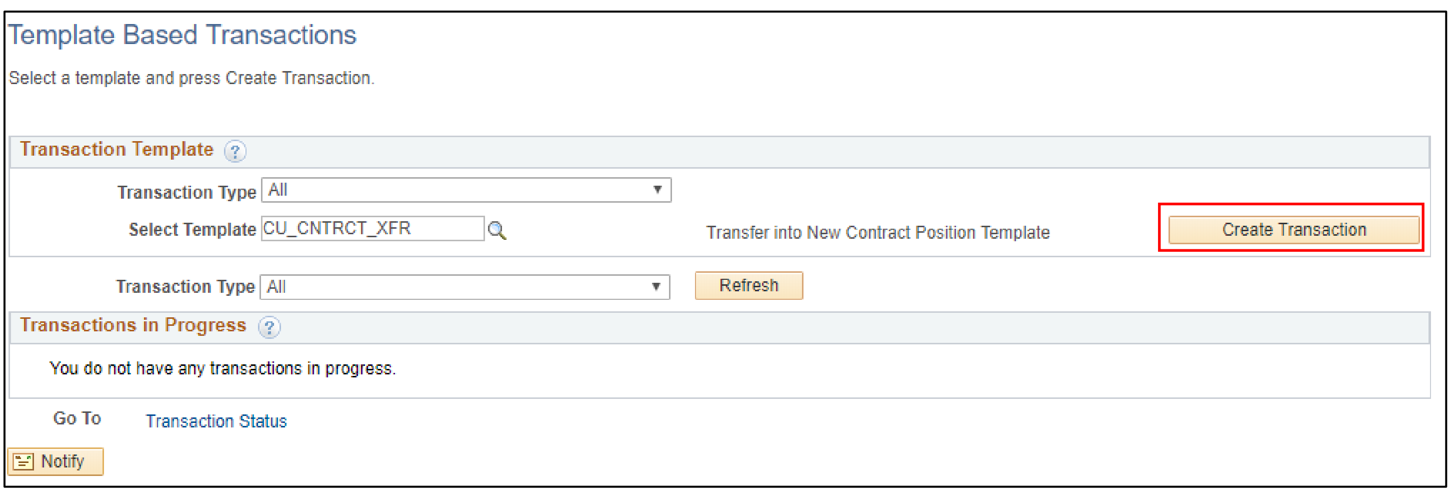
1. From the HCM Community Users dashboard, click the **Pay Actions** tile.
2. Click **Template Based Transactions**.



1. In the **Select Template** field, type **CU_CNTRCT_XFR** for the Transfer into New Contract Position Template. You can also use the lookup to search for and select the template.

   Note: CU_CNTRCT_XFR is used for new contracts only.

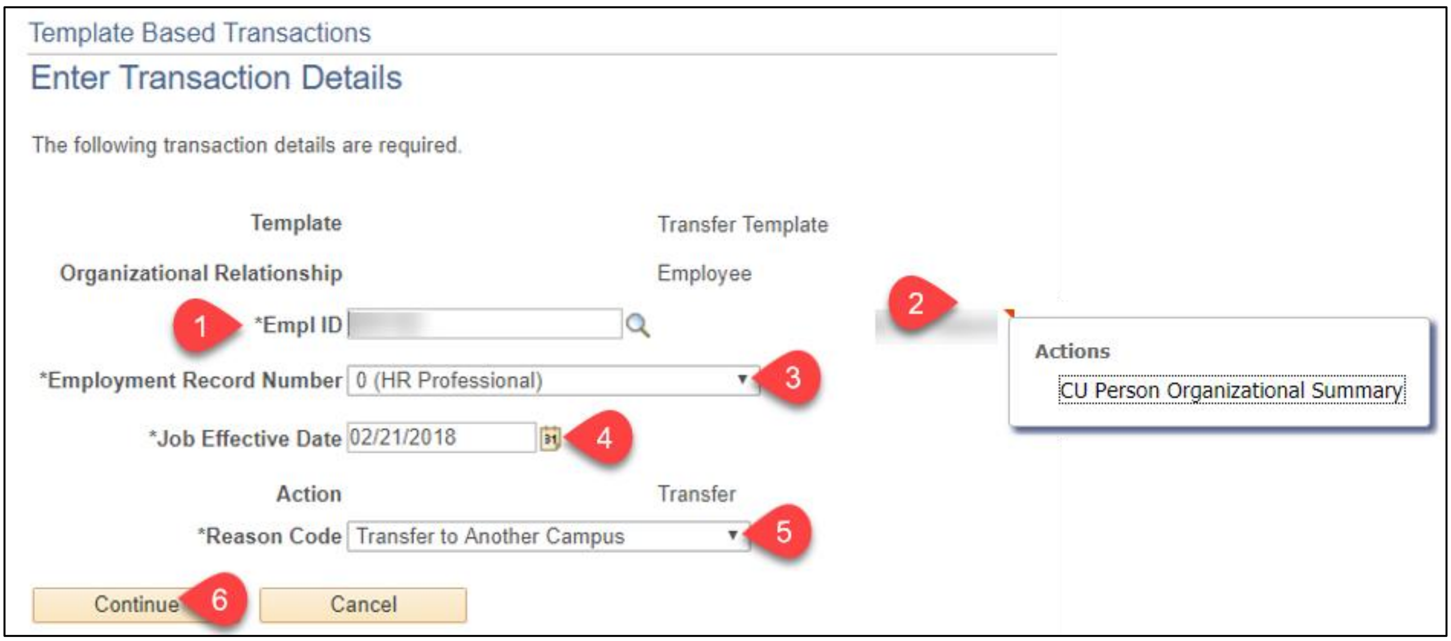
2. Click **Create Transaction**.



Entering Transaction Details

1. In the **Empl ID** field, type the employee ID and press **Tab**. The employee's name will appear to the right of the field with a related content indicator displayed.
2. Right-click the indicator and select **CU Person Organizational Summary** to make sure you have the correct employee for the transfer. Close the summary window when you have finished viewing it.
3. From the **Employment Record Number** list, select the record.
4. In the **Job Effective Date** field, type or select the effective date of your transfer transaction.

   For contracts, this date determines your choices when you reach the Select Contract Term Period field when entering Position - Job Info as described in the next section. To access a set contract codes in the contract crosswalk table, the effective date entered here must match the effective date of the contract type that is to be selected. The contract crosswalk determines what default information HCM will provide depending on the date you enter.
5. Select a **Reason Code**.



The following reason codes are available and defined in more detail in the *Transfer Actions Job Aid*:

- Temporary to Permanent
- To Another Department
- To Classified Staff
- To Faculty
- To Student
- To Temporary Staff
- To University Staff
- Transfer
- Transfer to Another Campus

6. Click **Continue**. The Position – Job Info page appears.

Entering Transaction Information for Position and Job

This section describes entering the details of your transfer. Because you prepared the position and its funding in advance, the position information should default and be ready for your transaction.

Note: Defaulted information pulled from the Position is greyed out and cannot be changed. The only fields you can update are Employee Type and Compensation Rate. Leave Compensation Rate at the default of 0.000001 for non-paid employees.

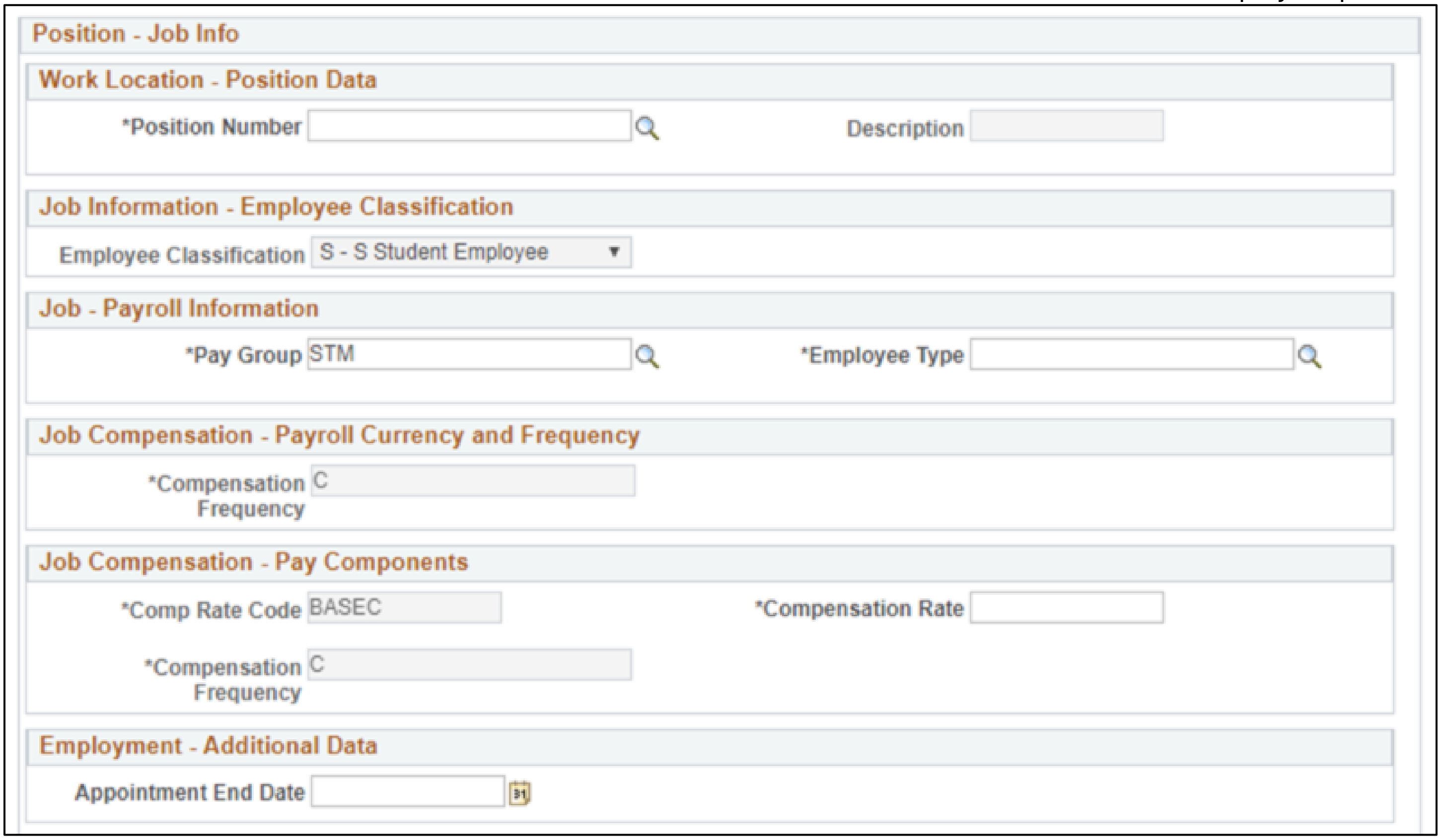
1. In the **Work Location – Position Data** section, type the **Position Number** and press **Tab** (or use the lookup to search for and select the position number). After you press Tab or select the positon, the system displays the **Employee Classification**, which is a read-only field.

   Note: The position should be prepared before creating the transfer. If you want to verify the details of the position, you can select Related Content from the top right corner of the page. The Related Content link lets you search for and view position information, position funding or run the Manage Transaction query. See the Related Content section for more information.

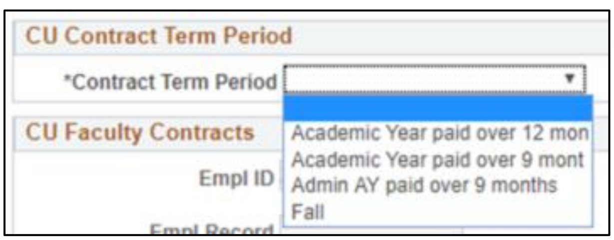
2. Notice that the **Pay Group** is already selected in the **Job – Payroll Information** section. For professional contracts, MON appears as the pay group. For student contracts, STM appears. No other pay groups should be used for contract pay.
3. Under the **Job – Payroll Information** section, type or search for **Employee Type.**
4. Notice the following defaults:
   - Under the **Job Compensation – Payroll Currency and Frequency**, the system displays **C** for the Frequency.
   - Under the **Job Compensation – Pay Components** section, the Pay Component displays BASEC as the Rate Code.

     Note: No other pay components can be added to a record coded as a contract. Other components of pay must be recorded on the Additional Pay page.

   - Appointment End Date will be greyed out if entering a contract that is defined on the contract crosswalk table. The Appointment End Date is required if the effective date/contract begin date is not within any of the parameters coded on the contract crosswalk and the contract type displays as Default Appointment Period.

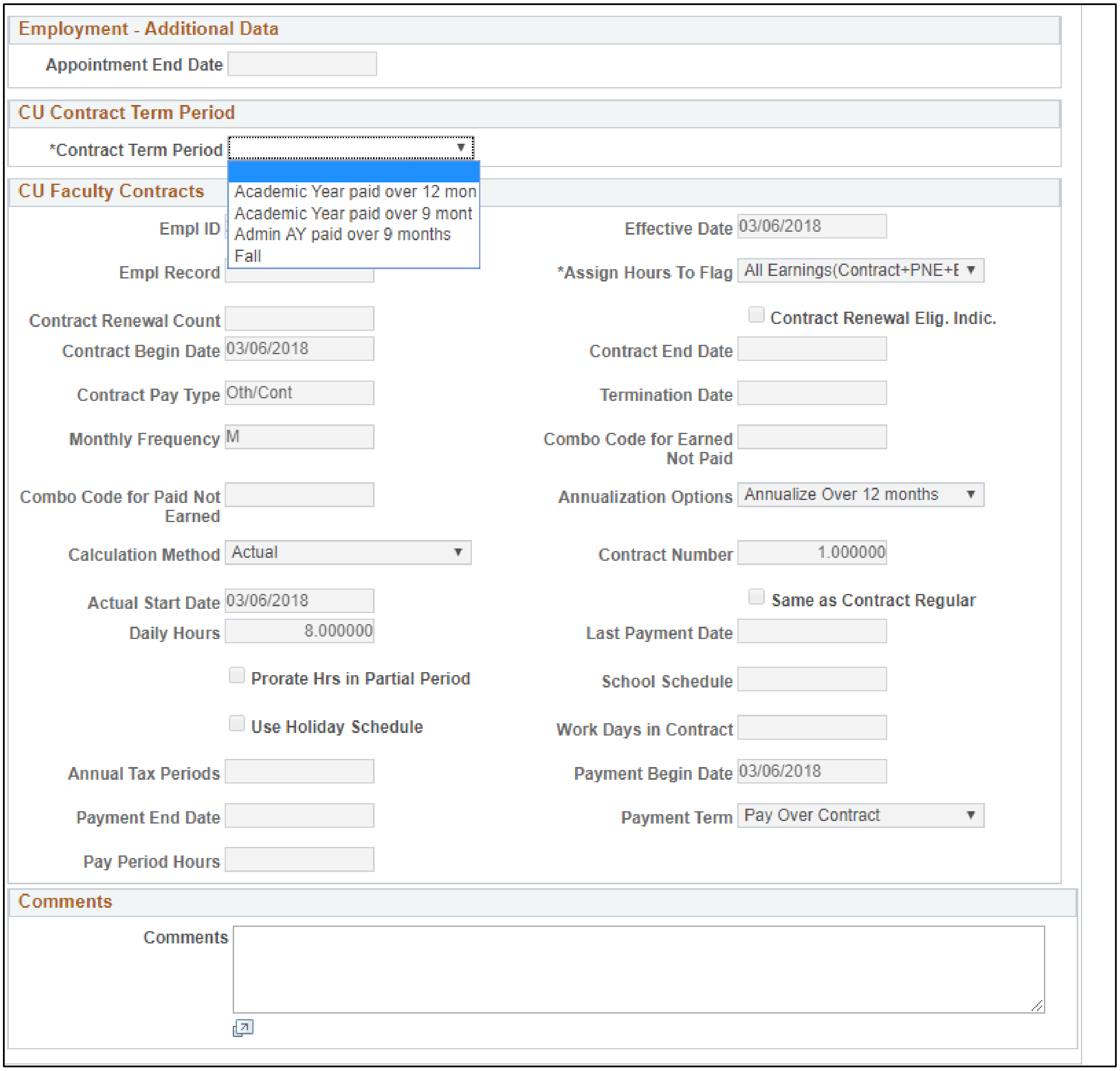


5. Select **Contract Term Period**.



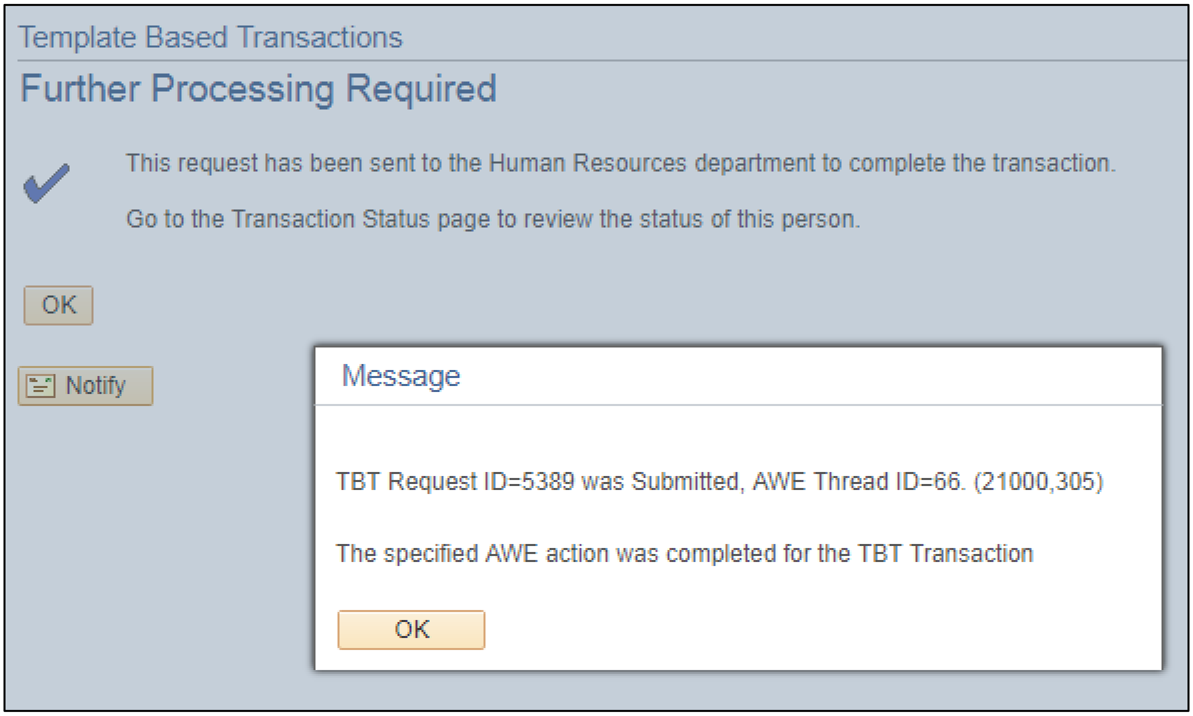
Note: If the Effective Date of the transaction does not match a Contract Begin Date on the contract crosswalk table, Default Appointment Period is the only available option for the Contract Term Period and an Appointment End Date will need to be manually entered.

After selecting a Contract Term Period, the CU Faculty Contracts section is auto-populated and is not editable:



6. Enter any comments in the **Comments** field.
7. Once you have completed the required fields, you have the following options:
   - **Save for Later—**Lets you save the transaction as a draft and come back to it at a later time. Access Transactions in Progress from the Pay Actions tile by selecting Template Based Transactions.
   - **Cancel—**Cancels the entire transaction.
   - **Save and Submit for Approval—**Saves the transaction and starts the workflow, sending it to the appropriate approver.

After clicking **Save and Submit for Approval**, you will see the following message:

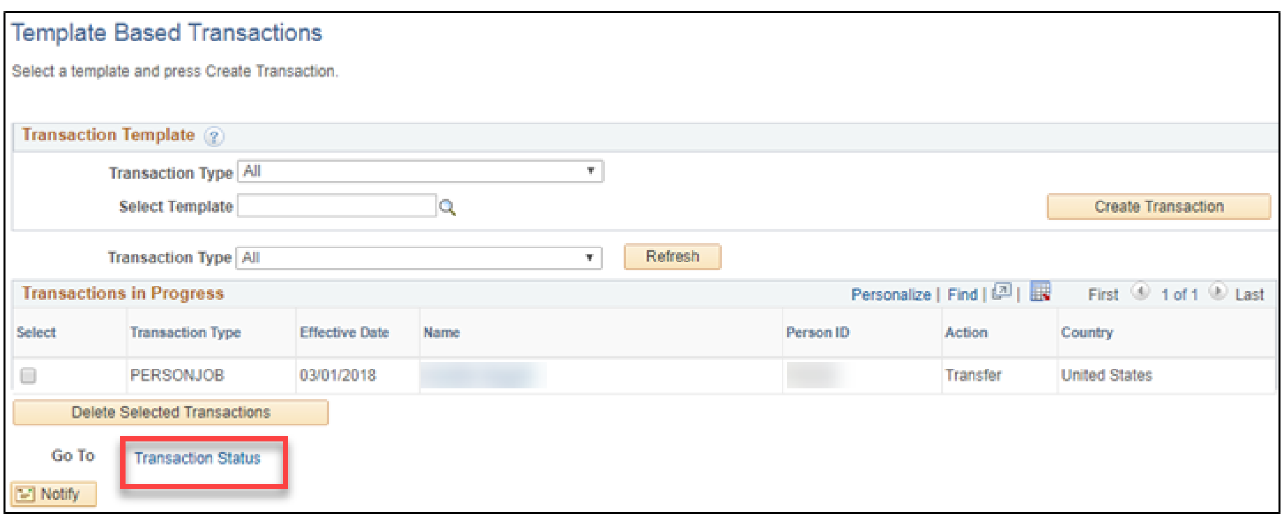


8. Make note of the TBT Request ID number for future reference.
9. Click **OK** from the Message box.
10. Click **OK** again. You can go to the Transaction Status page to review the status.

Viewing Transaction Status

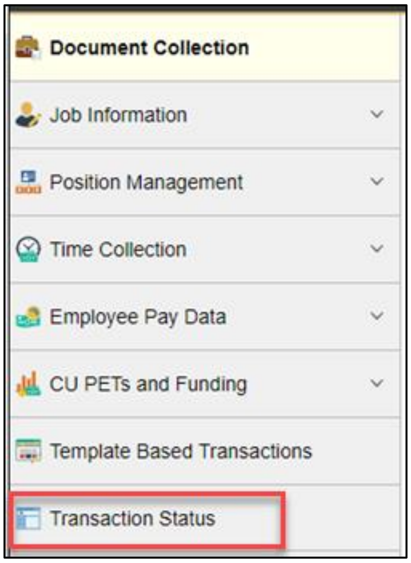
To check the status of your transfer, you can use one of the following methods:

- Click the **Transaction Status** link from the Template Based Transactions page. The system returns you to this page immediately after you submit your transaction.

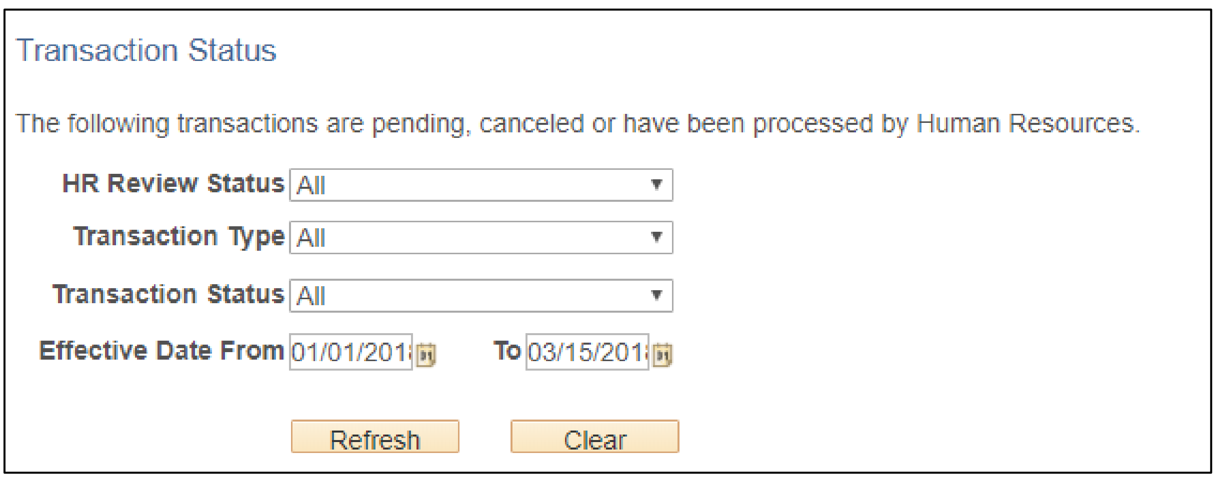


- Or, navigate to Transaction Status.

  1. From the HCM Community Users dashboard, click the **Pay Actions** tile.
  2. Click **Transaction Status**.



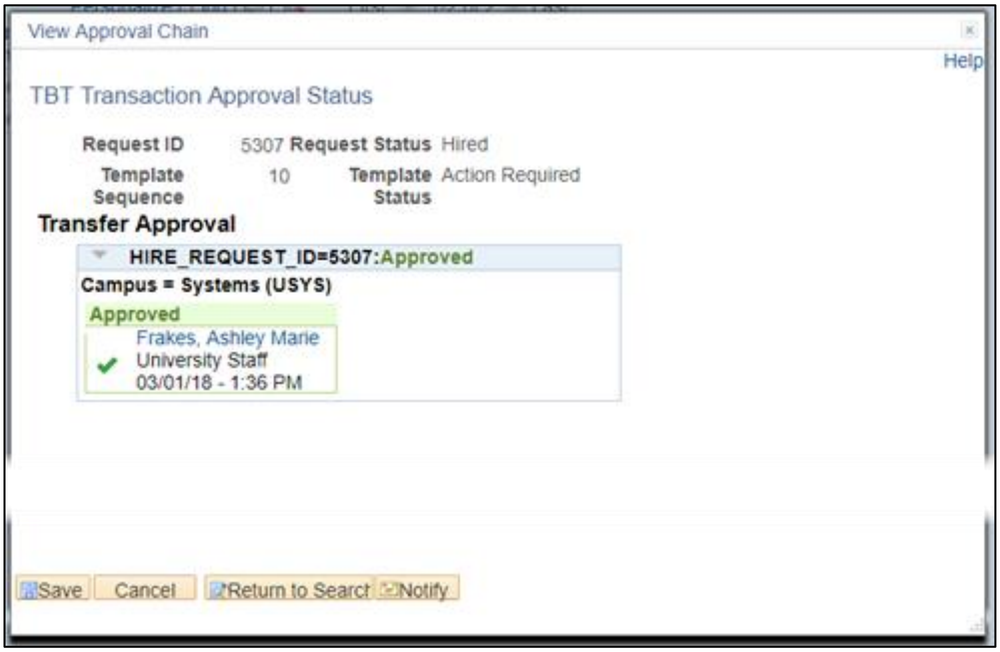
The Transaction Status page appears:



  3. Enter parameters to search for your transactions. The system displays a list of transactions matching your criteria.

4. Right-click on the Related Content indicator, and click **View Approval Chain**.

The View Approval Chain pop-up window appears:

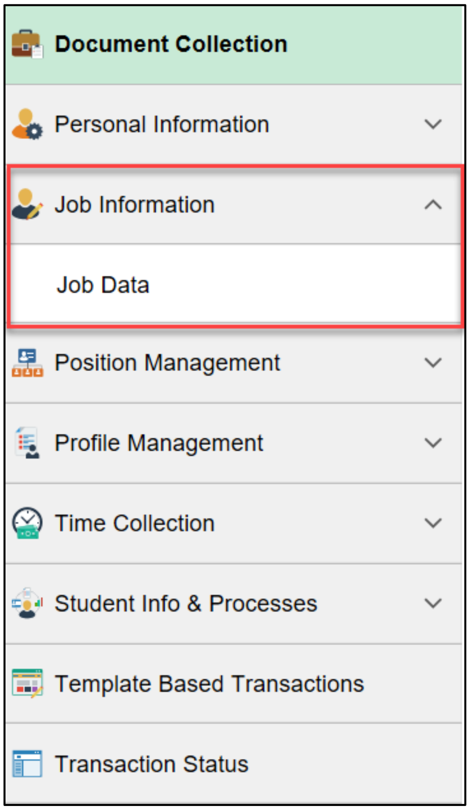


Verifying Transfer Approval

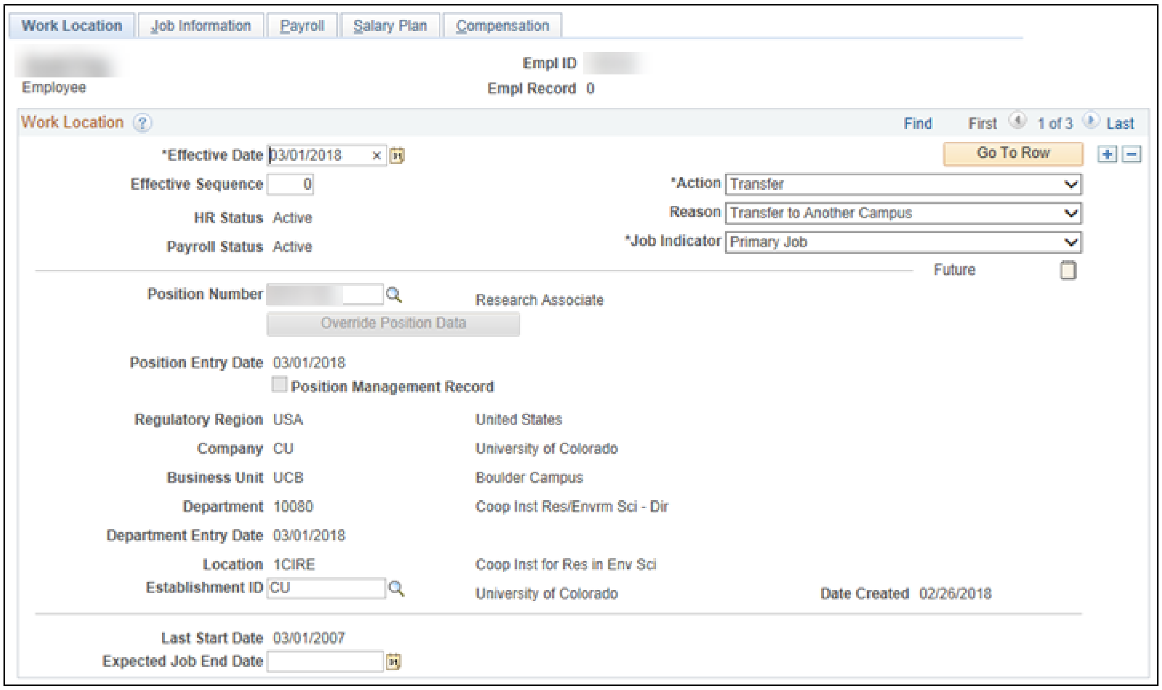
Once a transaction has been completed and approved, you need to validate that the information has been updated in Job Data and Position.

To navigate to Job Data:

1. From the HCM Community Users dashboard, click the **Non-Pay Actions** tile.
2. Click **Job Information**.
3. Click **Job Data**.



1. Enter the **Empl ID** number and click **Search**. The employee's job information appears for you to review.



2. Verify the Transfer row has been added with the correct Effective Date.

3. Verify the correct contract parameters are in place:

    a. Click **NavBar: Navigator**> **Workforce Administration**> **Job Information**> **Contract Administration**> **Update Contract Pay NA**.

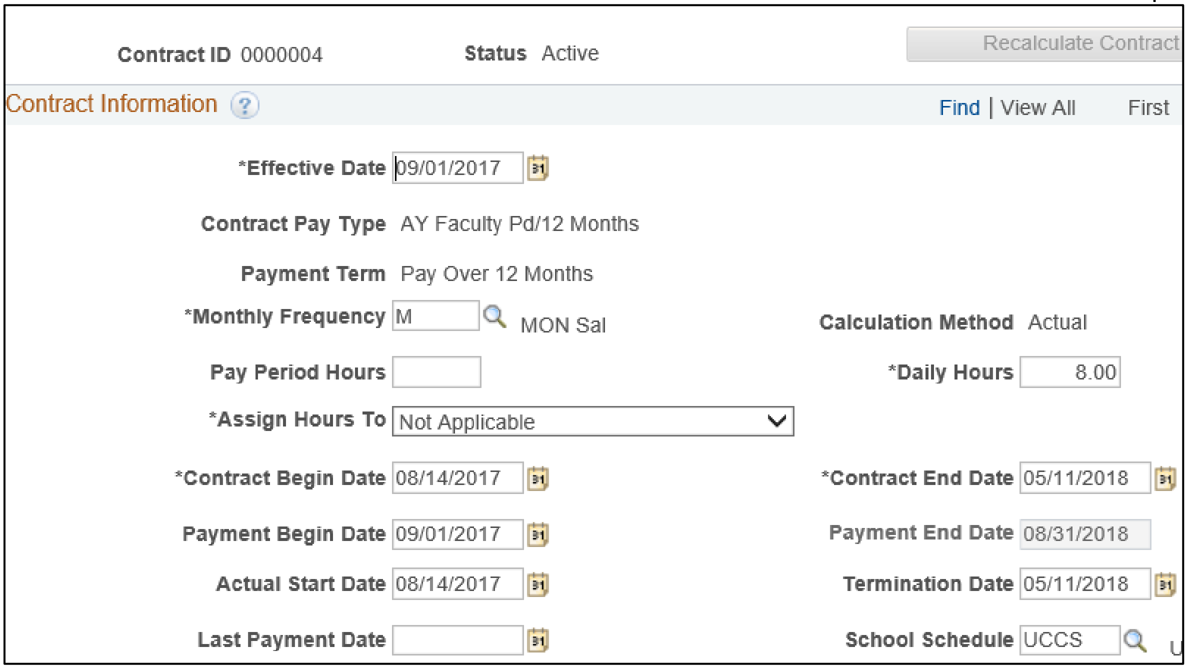
    b. Enter the **Empl ID** (and or any other search criteria) and click **Search**.

    c. Select the appropriate Job Record, and the newest contract will be the highest contract ID number.

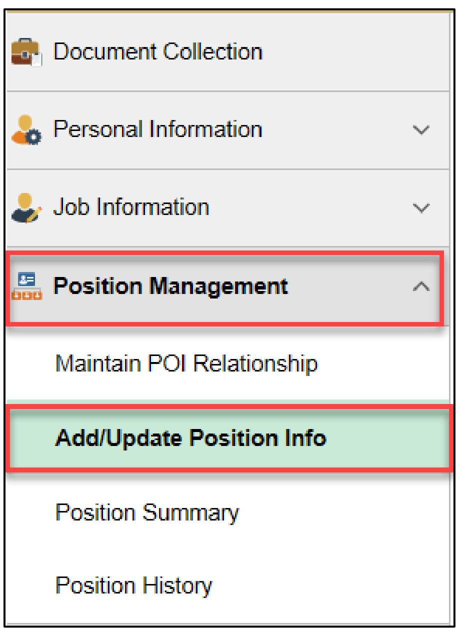
Search Results

View All

Empl ID	Empl Record	Contract ID
280143	0	1
280143	0	2
280143	0	4
280143	1	3



4. View the other tabs to verify the data you entered on the template is correct.
5. To verify position information, click **Add/Update Position Info** under Position Management.



6. Type the **Position** number (or other search criteria) and click **Search**.

7. Click the **Budget and Incumbents** tab to verify the transfer.