

Human Capital Management: Step-by-Step Guide

Transferring an Employee

This guide describes how to transfer an employee, either within the same campus (**To Another Department**) or across campuses (**To Another Campus**). Because the transfer affects both the transferred employee’s new department (the one he or she is transferring to) and old department (the one he or she is transferring from), there are multiple stages and roles involved in completing this procedure.

The process for transferring an employee involves the following stages (links are provided to the section of this document where each stage is described):







1. [Initiate a request to transfer the employee.](#) In this step, you identify the employee you want to transfer and submit a request to transfer that employee to a new position. This step is completed by someone whom this document refers to as the **Transfer Release Requestor/Initiator**.
2. After the request to transfer an employee is submitted, there are one or more approvers, referred to as the **Transfer Release Approvers**, who are notified via email. After these approvers receive the transfer request, they [retrieve the transaction, review transfer details, and approve the transfer.](#)
3. After the request to transfer an employee is approved, the **Transfer Release Requestor/Initiator** is notified and is then able to [update the transaction with position information and submit it for final workflow approval.](#)

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Before You Begin

Here are a few tips:

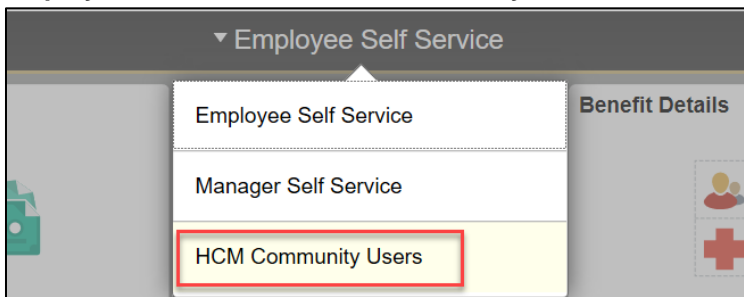
-  The NavBar displays options for accessing other systems. Through the NavBar, you can select CU Resources to access systems on the portal.
 -  The magnifying glass is called a look up and displays search results for you to select valid field values.
 -  The book and checkmark lets you spell check text boxes.
 -  The trashcan lets you remove an item.
 -  The down arrow lets you hide, or collapse, sections you do not want to view.
- Click the  arrow to expand the section.

Beginning the Transaction—Initiating the Request for Transfer

The first step in transferring an employee is to submit a request to transfer that employee.

Note: Prior to beginning this transaction, it is important that you create or update the vacant position to which the employee is being transferred.

- Navigate to ePAR Transfer.
 - Go to HCM Community Users dashboard: **NavBar > CU Resources > Business Tools > HCM > Employee Self Service > HCM Community Users**



The HCM Community Users dashboard appears.

- Click the **Pay Actions** tile.
- Under **ePAR Transfer**, click **Add**.



Step 1: Employee Selection

1. Enter search criteria to find the employee being transferred:

University of Colorado
 Boulder | Colorado Springs | Denver | Anschutz Medical Campus
 User: [redacted] on Database: HCMTST

Step 1 of 3: ePAR - Employee Selection

Transaction Details

PAR Action: Transfer Action: Document ID: ePAR Transfer
 Request ID: NEXT Reason Code: Document Instance: 0
 ePAR Status: Initial Effective Date: 01/27/2016 Document Status: Initial / Add Entry
 Effective Seq: 0

Search Criteria

Empl ID: [redacted] [redacted]
 First Name:
 Last Name:
 Department:
 Position Number:
 Search Clear

Search Results

Empl ID	First Name	Last Name	Empl Record	Position Number	Description	Department	Description	Job Code	Description
<input checked="" type="checkbox"/>	[redacted]	[redacted]	0	00658957	Hr Director	60043	ADM-R/CHR Administration	2440	HR Director

Next

2. Select the checkbox next to the name of the employee, and click **Next**.

Step 2: Action/Reason

1. From the **Action** list, select **Transfer**.
2. From the **Reason** list, select the reason for the transfer (To Another Department or Transfer to Another Campus).
3. Select or type an **Effective Date** for the transfer.
4. Type the **Employee's New Dept.** number, and click **Next**.

Step 2 of 3: ePAR - Action/Reason

Transaction Details

PAR Action: Transfer Action: Transfer Document ID: ePAR Transfer
 Request ID: NEXT Reason Code: To Another Department Document Instance: 0
 ePAR Status: Initial Effective Date: 01/22/2016 Document Status: Initial / Add Entry
 Effective Seq: 0

Employee Details

Name: Empl ID: Empl Rod: 0
 Profile Type: Profile ID: Last Personnel Action:
 Last Transaction Date:

Action/Reason Selection

*Action: Transfer
 *Reason: To Another Department
 To Another Department
 Transfer to Another Campus

Old Effective Date: 12/01/2015
 Old Effective Sequence:
 Effective Date: [redacted] Effective Sequence:
 Requester's Dept ID: 51000 Employee Services
 Current Empl Department: 450
 Employee's New Dept: [redacted]

Comments:

Previous Next

Step 3: ePAR Transfer Release Initiation

1. Enter any **Comments** you would like the Transfer Release Approvers (reviewers) to see:

2. Select the checkbox to indicate that you confirm the information is accurate, and click **Confirm**.

3. Click **OK**.

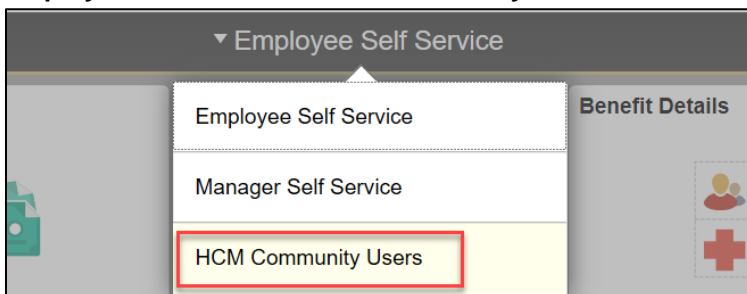
Transfer Release—Approving the Transfer Request

Once the Transfer Request is confirmed by the initiator, the Transfer Release Approvers, as defined by the workflow, receive an email notification, alerting them to the transfer request. The following steps outline the process of retrieving, reviewing, and approving the request.

Retrieving the Transfer Request

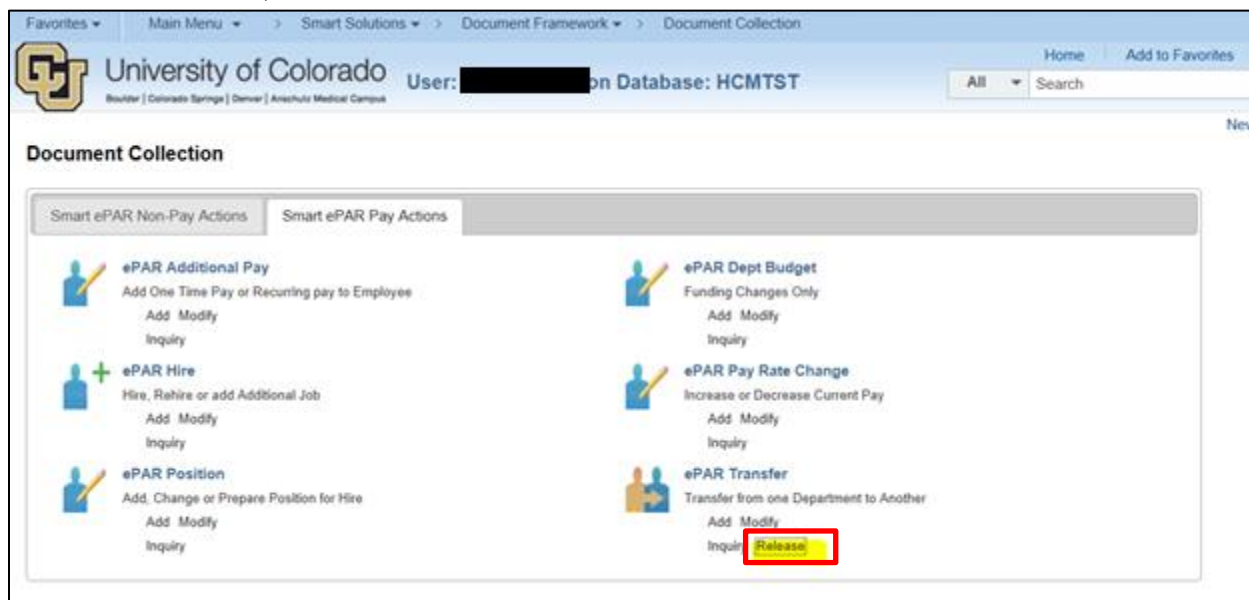
Transfer Release Approvers retrieve the Transfer Request as follows:

2. Navigate to ePAR Transfer.
 - a) Go to HCM Community Users dashboard: **NavBar > CU Resources > Business Tools > HCM > Employee Self Service > HCM Community Users**

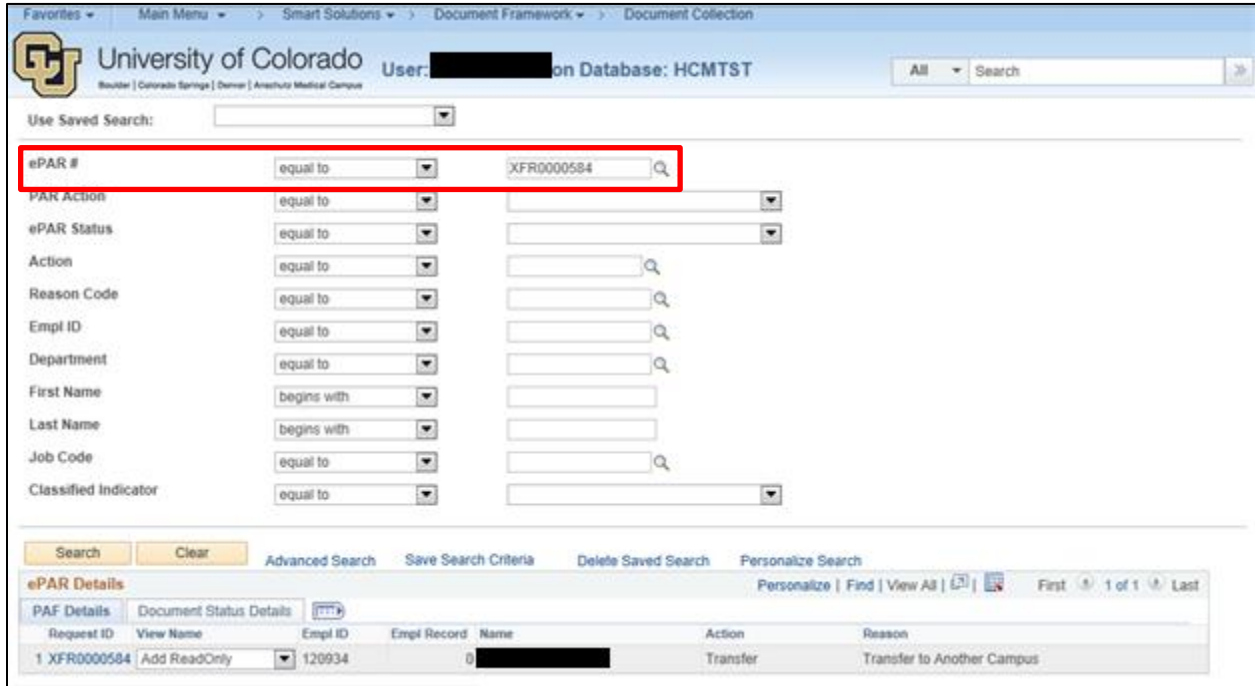


The HCM Community Users dashboard appears.

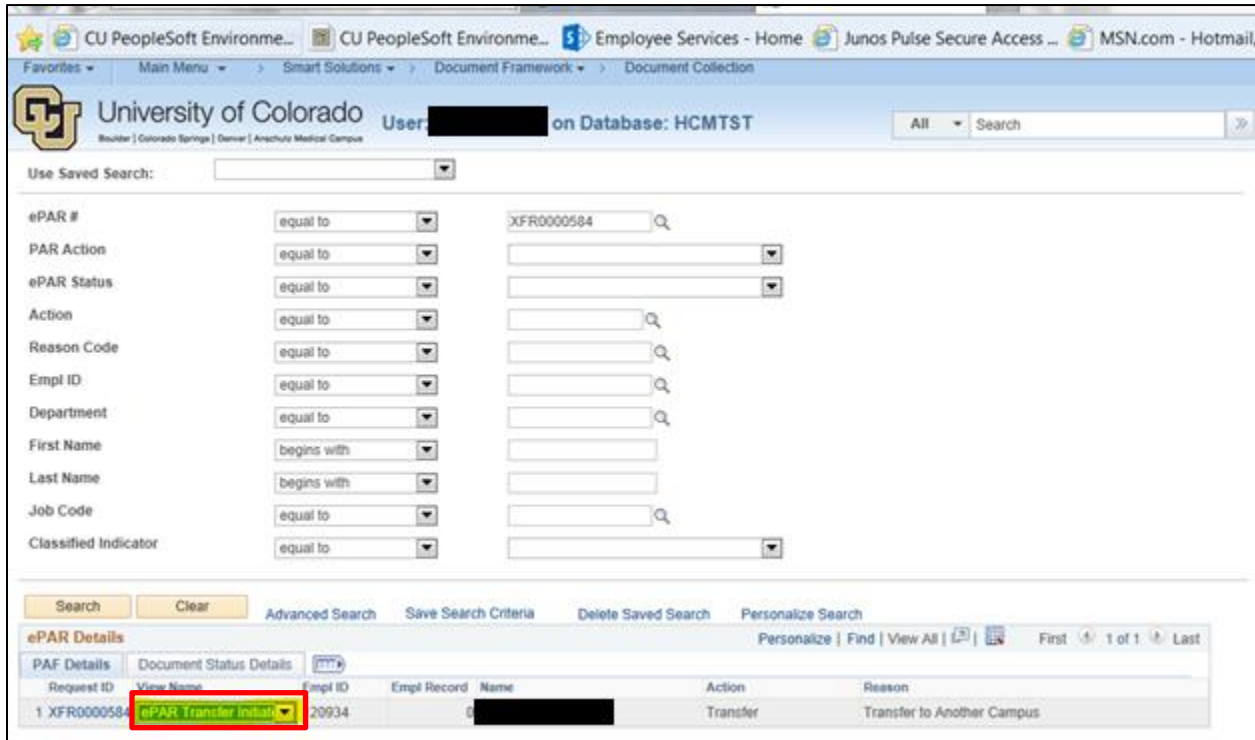
- b) Click the **Pay Actions** tile.
1. Under ePAR Transfer, click **Release**.



- Type the ePAR# (which can be found in the email notification) into the search field:



- Before clicking on the link to view the request, you must click the drop-down under **View Name**, and change the value to **ePAR Transfer Initiation**:



- Click the link for the **Request ID**:

Reviewing the Transfer—Step 1: Action/Reason (Display Only)

In Steps 1 and 2 of this part of the transfer transaction, the screens display the details of the Transfer Request; none of the information can be changed or modified:

ePAR Transfer Release

Step 1 of 3: ePAR - Action/Reason (Display Only)

Transaction Details

PAR Action:	Transfer	Action:	Transfer	Document ID:	ePAR Transfer
Request ID:	XFR0000584	Reason Code:	Transfer to Another Campus	Document Instance:	600
ePAR Status:		Effective Date:	02/01/2016	Document Status:	Initial / Initiated
		Effective Seq:	0		

Employee Details

Name:	[REDACTED]	Empl ID:	[REDACTED]	Empl Rod:	0
Profile Type:		Profile ID:		Last Personnel Action:	
				Last Transaction Date:	

Action/Reason Selection

*Action:	Transfer	*Reason:	Transfer to Another Campus	
Old Effective Date:	12/01/2015	Old Effective Sequence:	0	
*Effective Date:	02/01/2016	Effective Sequence:	0	
Requester's Dept ID:	10507	Human Resources	Fiscal Year:	2016
Current Empl Department:	60043	Employee's New Dept:	10507	Human Resources

Comments:

[Next](#)

Click **Next**.

Reviewing the Transfer—Step 2: ePAR Transfer Release Initiation

The second page (also display only) shows additional details about the transfer and any comments added by the initiator:

ePAR Transfer Release

Step 2 of 3: ePAR Transfer release initiation

Entered By: [REDACTED] Entered On: 01/27/2016 9:50AM Document Status: Initial
 Updated By: [REDACTED] Updated On: 01/27/2016 9:50AM Sub Status: Initiated [Additional Info](#)

Please check the box below to request release of this employee to your Department.

Comments:
 Department releasing this employee's comments

✔ Confirmed on 27-Jan-2016, 09:50 AM by [REDACTED]

[Previous](#) [Next](#)

Click **Next**.

Approving the Transfer–Step 3: ePAR Transfer Release Initiation

On the third page of the release, the Transfer Release Approver must:

1. Type a **Comment** in the text box.
2. Click the checkbox next to **I confirm releasing the employee.**
3. Click the **Release Confirm** button:

Save Collaborate Attach Print Lifecycle Viewer Preview

ePAR Transfer Release

Step 3 of 3: ePAR Transfer Release ? Help

Entered By: [redacted] Entered On: 01/27/2016 4:09PM Document Status: Initial
 Updated By: [redacted] Updated On: 01/27/2016 4:09PM Sub Status: Initiated [Additional Info](#)

Please check the box below to release this employee to the requesting Department.

Comments:

I confirm releasing the Employee

Release Confirm Previous

Jump To: Step 3) ePAR Transfer Release

4. Click **OK**.



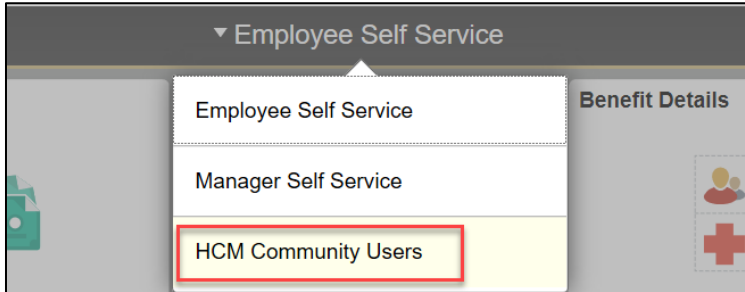
Create ePAR Transfer Update

Once the transfer has been approved by the reviewers, and the employee is released, the **Transfer Release Requestor/Initiator** will update the transaction to include position data. The following steps outline the process of retrieving the transaction and updating it for final submission.

Retrieving the Transfer Request

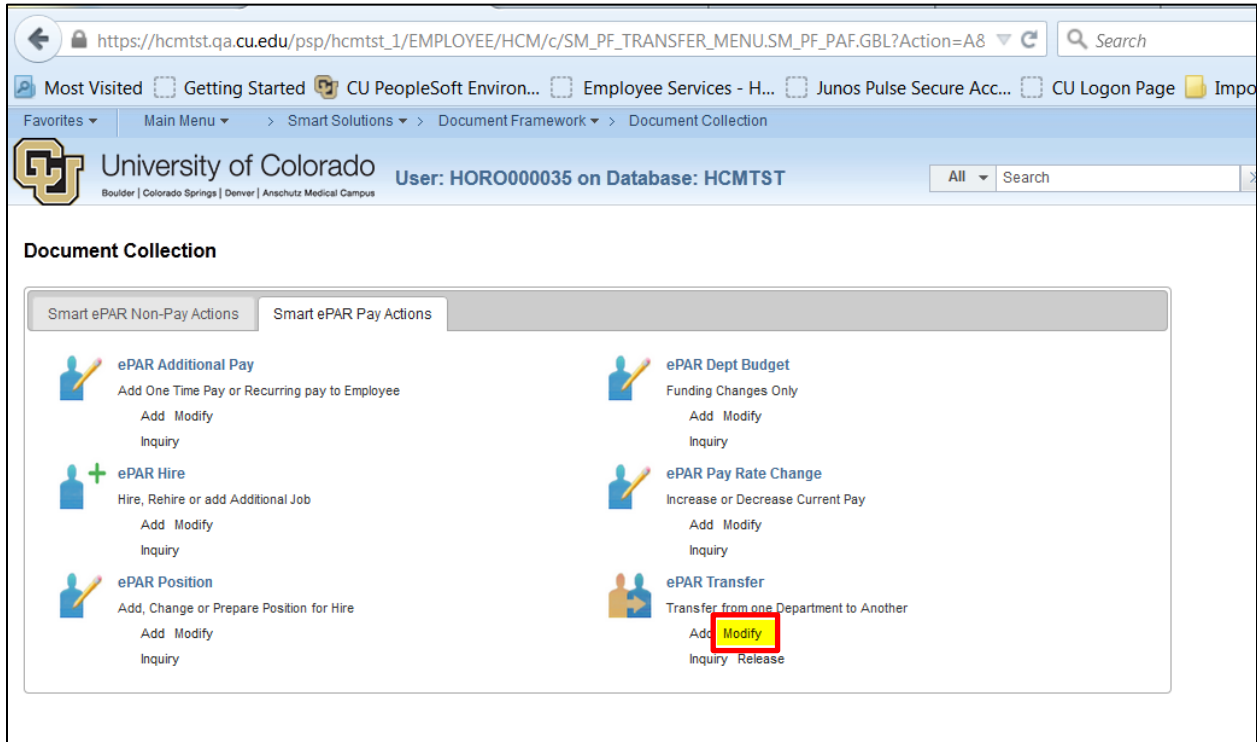
To retrieve the Transfer Request, the **Transfer Release Requestor/Initiator** will go to the Modify option under Transfer:

1. Navigate to ePAR Transfer.
 - a) Go to HCM Community Users dashboard: **NavBar > CU Resources > Business Tools > HCM > Employee Self Service > HCM Community Users**



The HCM Community Users dashboard appears.

- b) Click the **Pay Actions** tile.
2. Under ePAR Transfer, click **Modify**.



3. Next, type the **ePAR Number** in the search field and press **Enter** (or click **Search**):

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

User: [REDACTED] on Database: HCMTST

Document Console

Use Saved Search: [Dropdown]

Search criteria fields:

- ePAR #: equal to [XFR0000584]
- PAR Action: equal to [Dropdown]
- ePAR Status: equal to [Dropdown]
- Action: equal to [Text]
- Reason Code: equal to [Text]
- Empl ID: equal to [Text]
- Department: equal to [Text]
- First Name: begins with [Text]
- Last Name: begins with [Text]
- Job Code: equal to [Text]
- Classified Indicator: equal to [Dropdown]

Buttons: Search (highlighted), Clear, Advanced Search, Save Search Criteria, Delete Saved Search, Personalize Search

ePAR Details | First | 1 of 1

Request ID	View Name	Effective Date	Action	Reason	Document Status
1	XFR0000584 ePAR Transfer Rea	02/01/2016	Transfer	Transfer to Another Campus	Initial Released

4. Click the **Request ID**.

Note: The drop-down for **View Name** must remain on the default value, **ePAR Transfer Ready**.

Step 1: Action/Reason (Display Only)

In Step 1 of this part of the transfer transaction, the screen displays the initial details of the Transfer Request; none of the information can be change or modified:

The screenshot shows the University of Colorado HCM interface. At the top, it says "User: HORO000035 on Database: HCMST". Below that, there are navigation tabs: "Employee Details", "Action/Reason Selection", and "Comments".

Employee Details:

- Name: [Redacted]
- Empl ID: [Redacted]
- Empl Rcd: 0
- Profile Type: [Redacted]
- Profile ID: [Redacted]
- Last Personnel Action: [Redacted]
- Last Transaction Date: [Redacted]

Action/Reason Selection:

- *Action: Transfer
- *Reason: Transfer to Another Campus
- Old Effective Date: 12/01/2015
- Old Effective Sequence: 0
- *Effective Date: 02/01/2016
- Effective Sequence: 0
- Fiscal Year: 2016
- Requester's Dept ID: 10507 Human Resources
- Current Empl Department: 65043
- Employee's New Dept: 10507 Human Resources

At the bottom, there is a "Next" button.

Click **Next**.

Step 2: ePAR Transfer- Job Information

1. Enter the new **Position Number**:

The screenshot shows the "Create ePAR Transfer Update" screen, Step 2 of 4: ePAR Transfer- Job Information. It is divided into three main sections:

Transaction Details:

- PAR Action: Transfer
- Request ID: XFR0000588
- ePAR Status: [Redacted]
- Action: Transfer
- Reason Code: Transfer to Another Campus
- Effective Date: 02/01/2016
- Effective Seq: 0
- Document ID: ePAR Transfer
- Document Instance: 604
- Document Status: Initial / Released

Employee Details:

- Name: [Redacted]
- Empl ID: [Redacted]
- Empl Rcd: 0
- Profile Type: [Redacted]
- Profile ID: [Redacted]
- Last Personnel Action: XFR0000585
- Last Transaction Date: 01/27/2016 10:59AM

Work Information:

	Current Value	New Value
Job Indicator:	Primary Job	
Position Number:	00704220	<input type="text"/>
Position Title:		<input type="text"/>
Department:	60043 ADM-AVCHR Administration	<input type="text"/>
Location Code:	3LW Lawrence Street	<input type="text"/>
Reports To:	00664273 Hr Director [Redacted]	<input type="text"/>

The "Position Number" field in the "New Value" column is highlighted with a red box.

2. Press **Tab**, and the fields below will auto-populate. Review and update as necessary.
3. Click **Next**.

Step 3: ePAR Transfer- Compensation

As with the information in the last page, the values on this page will be pulled from the position.

1. Review and update as necessary:

Collaborate Attach Print Lifecycle Viewer Preview

Step 3 of 4: ePAR Transfer- Compensation

Transaction Details

PAR Action: Transfer	Action: Transfer	Document ID: ePAR Transfer
Request ID: XFR0000584	Reason Code: Transfer to Another Campus	Document Instance: 600
ePAR Status:	Effective Date: 02/01/2016	Document Status: Initial / Released
	Effective Seq: 0	

Employee Details

Name: [REDACTED]	Empl ID: [REDACTED]	Empl Rcd: 0
Profile Type:	Profile ID:	Last Personnel Action:
		Last Transaction Date:

Compensation

	Current Value	New Value
Salary Admin Plan:	244 Human Resources	244 Human Resources
Salary Grade:	A00 HR Director	A07 HR Senior Prof
Compensation Rate:	8,416.670000	9,000.000000
Comp Freq:	M Monthly - Salary	M Monthly - Salary
Total Comp Rate Change:	0.000000	583.330000
Total Comp Percent Increase:	0.000	6.931

Job Pay Components

Current Pay Components		New Pay Components	
Rate Code	Comp Rate	Rate Code	Comp Rate
1 BASEM	8416.67	1 BASEM	9000.000000


Previous Next

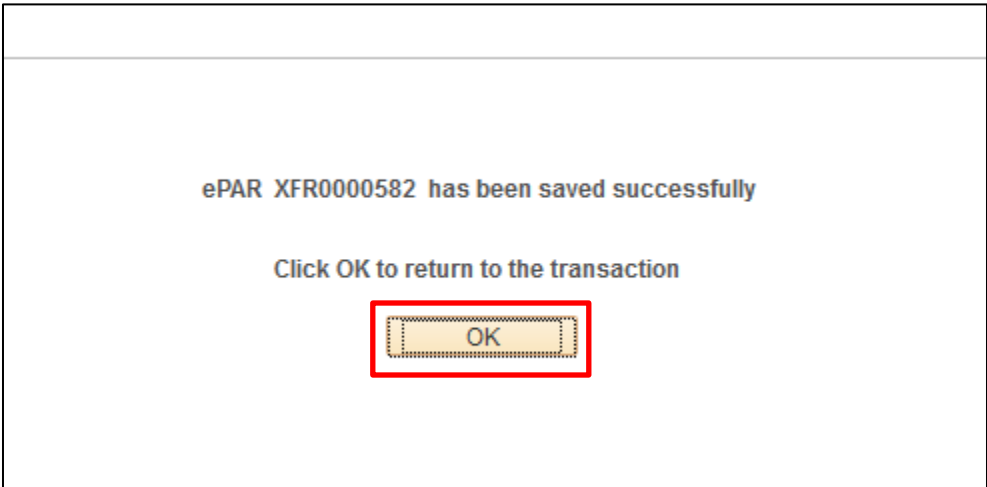
2. Click **Next**.

Step 4: ePAR – Department Budget

Review and update the Department Budget information as necessary:

Saving and Submitting the Transfer for Workflow Approval

1. Click **Save** from the top left corner. 



2. Click **OK**.
3. Click **Submit**. 