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

Human Capital Management: Step-by-Step Guide

Transferring an Employee

This guide describes how to transfer an employee in HCM. A transfer is considered the moving of an employee from one position to another position. The department that is gaining the transferred employee initiates the transaction. This guide describes using template based transactions, or TBTs, for transferring an employee to a new position. **Do not use** this guide for transferring an employee to a new contract. Refer to *Transferring an Employee to a Position with New Contract Step-by-Step Guide* for information about how to transfer an employee that needs a new contract.

Contents

Before You Begin

Before you begin, 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 Denver and will be transferring an employee from Boulder, you can run Job List to identify that employee and basic information about that employee.

  To run 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.
  4. Select **Job List**.
  5. Type search criteria and press **Enter**.
  6. Verify current job data and confirm that the Eff Date in Job List is on or before the intended transfer date.

  Note: The Transfer Template will allow a row to be inserted before a more current row in Job Data.

- 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. If you use non-person profiles, refer to *Creating or Updating a Non-Person Profile Step-by-Step Guide*. You may also want to check you campus business processes.

Before transferring an employee, you should have the following information available:

- Empl ID of the employee.
- Position number to which the employee is transferring.

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 actions indicator. **Right-click** to access related actions for the item you are working with. You may also see a Related Content link at the top of some pages to access related information.

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.

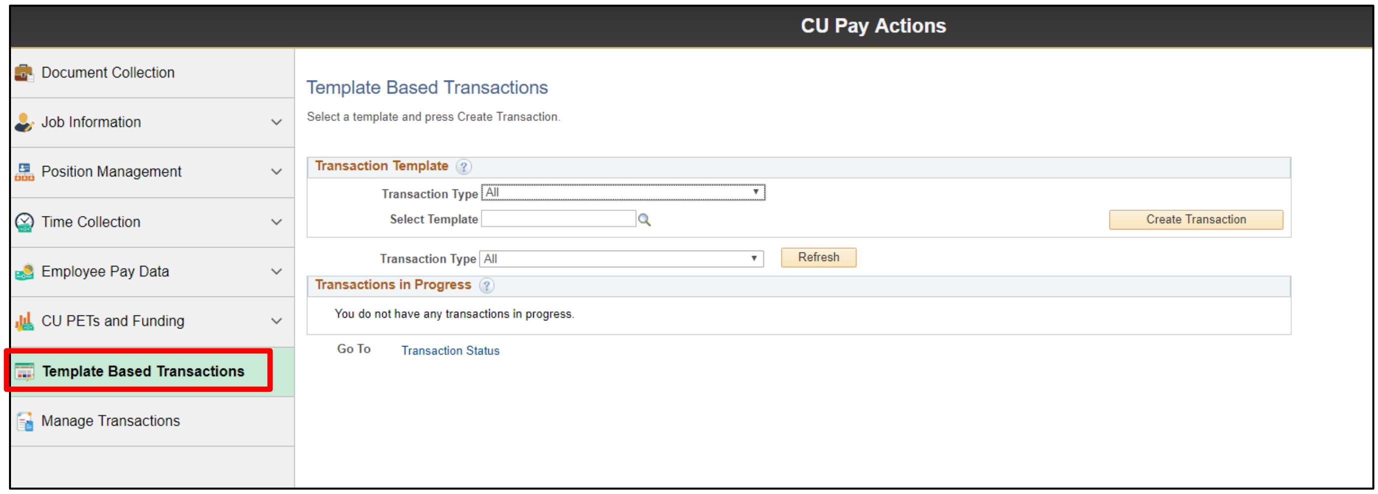
Creating a Transfer Transaction

The department receiving the transferred employee initiates a transfer. A transfer is created using a Template Based Transaction (TBT). A TBT provides a template-driven method of streamlining data entry.

Note: Prior to beginning this transaction, it is important that you 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.

To create a transfer transaction:

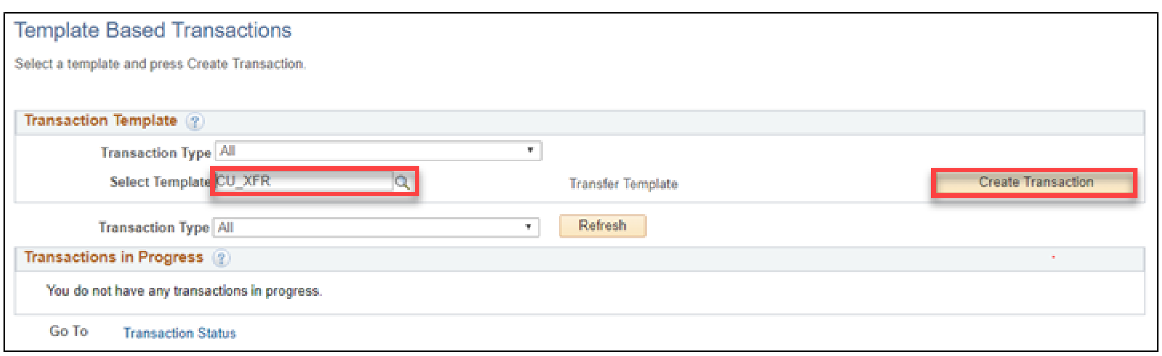
1. From the HCM Community Users dashboard, click the **Pay Actions** tile.
2. Click **Template Based Transactions**.



3. In the **Select Template** field, type **CU_XFR** for the Transfer template. You can also use the lookup to search for and select the template.

   Note: CU_CNTRCT_XFR is used for new contracts only. If you are transferring a non-contract employee to a contract position, STOP and refer to the instructions in *Transferring an Employee to a New Position with Contract Step-by-Step Guide*. If you are transferring an employee and want to keep the contract the same, or a contract is not involved, continue with the following procedure.

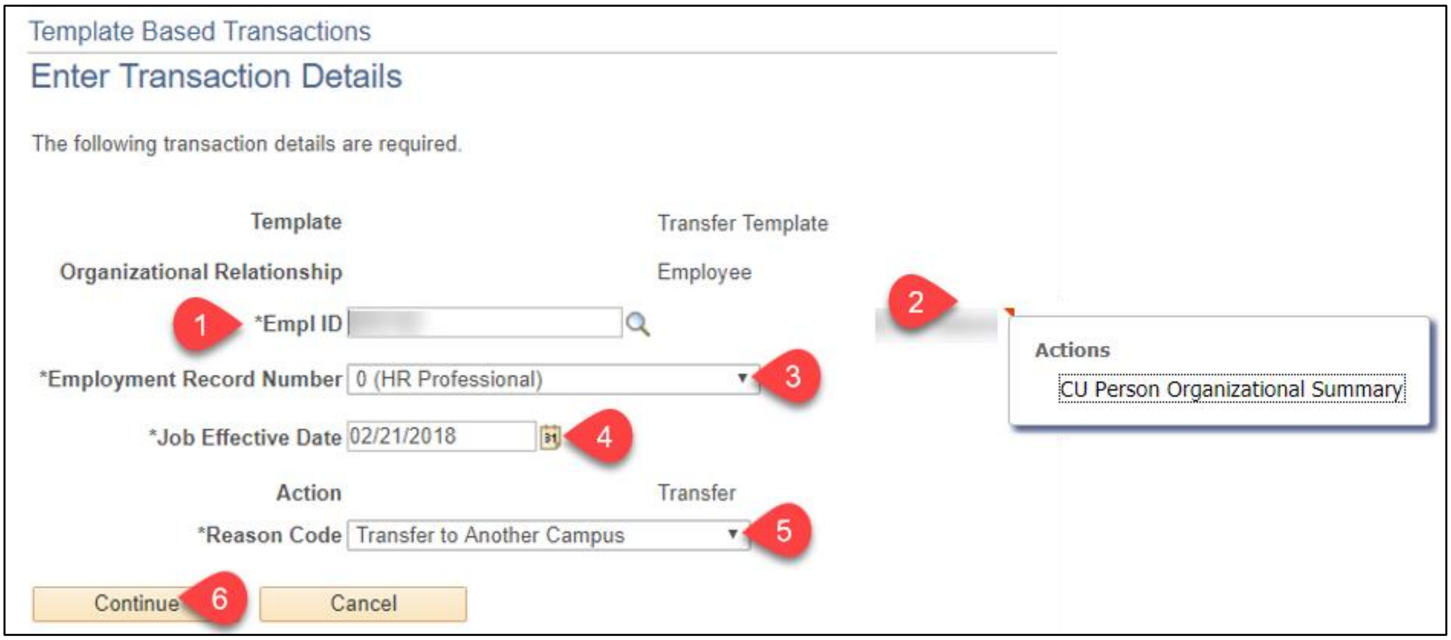
4. Click **Create Transaction**.



Entering Transfer 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 actions 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. There may be more than one record.
4. In the **Job Effective Date** field, type or select the effective date of your transfer transaction.

   Note: Even if a more current row exists in Job Data, no message will appear. The transfer row will be inserted into Job Data. If more current rows exist for a previous position, those rows will require an additional effective sequence update.
5. Select a **Reason Code**.



   The following reason codes are available:
   - 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

In this section, you will enter the details of your transfer. Because the position, and its funding, should already be prepared, the position information should already be updated and ready for your transaction.

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**. This is a read-only field.

   Note: The position should be prepared before creating the transfer. If you want to verity 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.

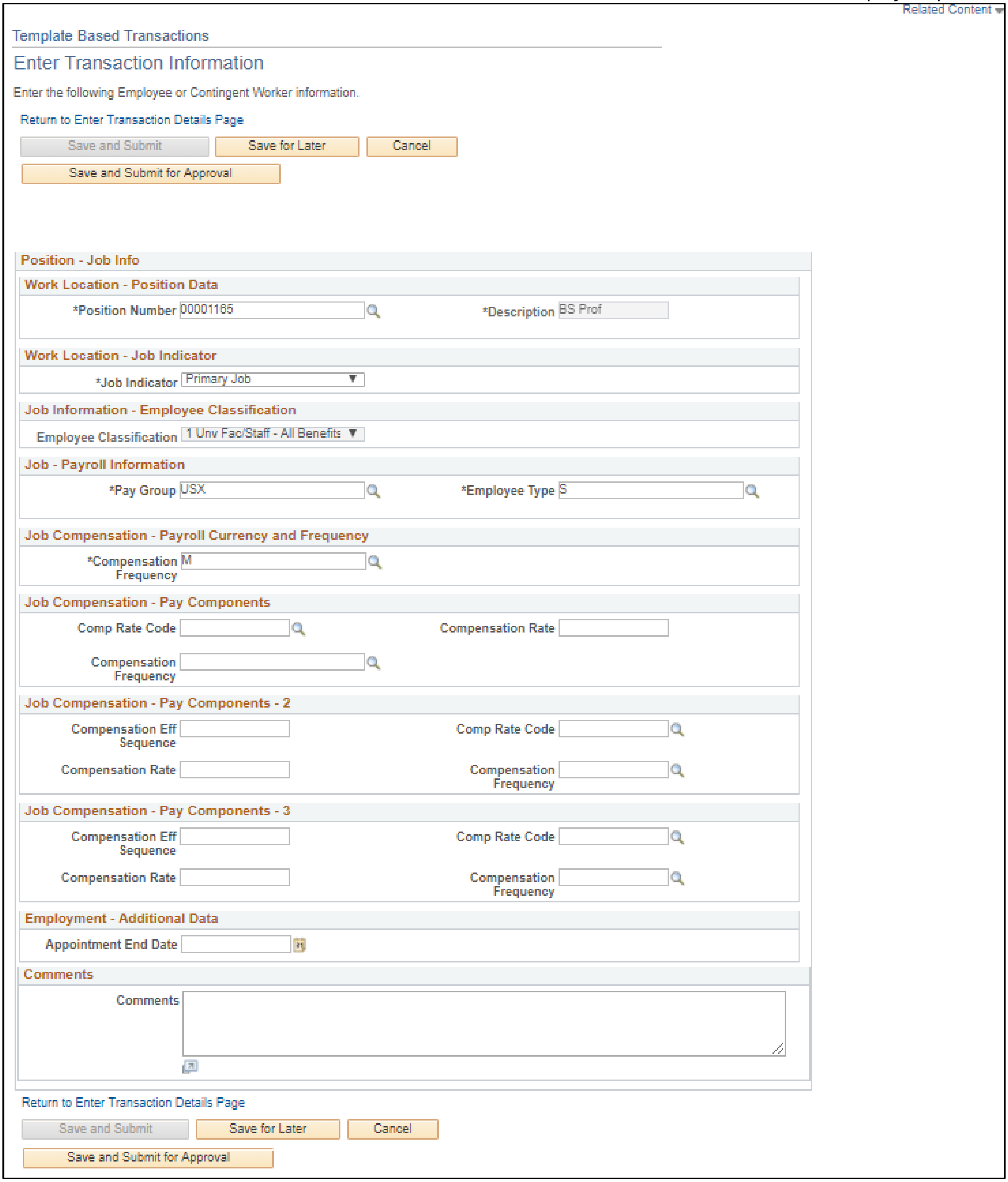
2. Notice that the **Pay Group** is already selected in the **Job – Payroll Information** section. Update this field, if necessary.
3. Also in the **Job – Payroll Information** section, type or search for the **Employee Type.**

   Important: All Job Compensation codes must match the selected Employee Type or your submission will be pushed back or denied.

4. Under the **Job Compensation – Payroll Currency and Frequency** section, type or search for the **Compensation Frequency**.
5. Under the **Job Compensation – Pay Components** section, type (or look up and select) the following field values:
   a. **Comp Rate Code**
   b. **Compensation Rate**
   c. **Compensation Frequency**

   Note: You have the option to enter additional pay components under Job Compensation – Pay Components -2 and Job Compensation – Pay Components – 3.

6. If applicable, type or select an **Appointment End Date**.
7. Enter any comments in the **Comments** section.



Related Content

Template Based Transactions

Enter Transaction Information

Enter the following Employee or Contingent Worker information.

Return to Enter Transaction Details Page

Save and Submit | Save for Later | Cancel

Save and Submit for Approval

Position - Job Info

Work Location - Position Data

*Position Number 00001165 | *Description BS Prof

Work Location - Job Indicator

*Job Indicator Primary Job

Job Information - Employee Classification

Employee Classification 1 Unv Fac/Staff - All Benefits

Job - Payroll Information

*Pay Group USX | *Employee Type S

Job Compensation - Payroll Currency and Frequency

*Compensation Frequency M

Job Compensation - Pay Components

Comp Rate Code | Compensation Rate

Compensation Frequency

Job Compensation - Pay Components - 2

Compensation Eff Sequence | Comp Rate Code

Compensation Rate | Compensation Frequency

Job Compensation - Pay Components - 3

Compensation Eff Sequence | Comp Rate Code

Compensation Rate | Compensation Frequency

Employment - Additional Data

Appointment End Date

Comments

Comments

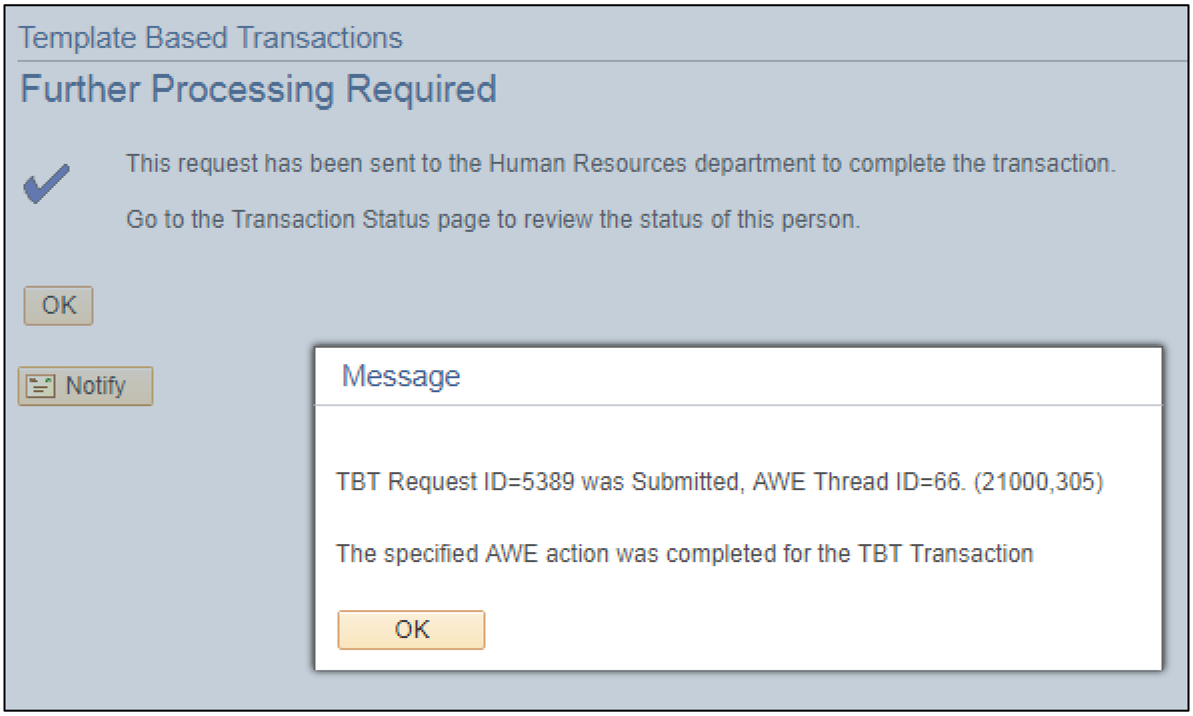
Return to Enter Transaction Details Page

Save and Submit | Save for Later | Cancel

Save and Submit for Approval

8. Once you have completed the required fields, you have the following options:
   - **Return to Enter Transaction Details Page**—Lets you go back to the first page of the transaction.
   - **Save for Later—**Lets you save the transaction as a draft and come back to it at a later time.
   - **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:

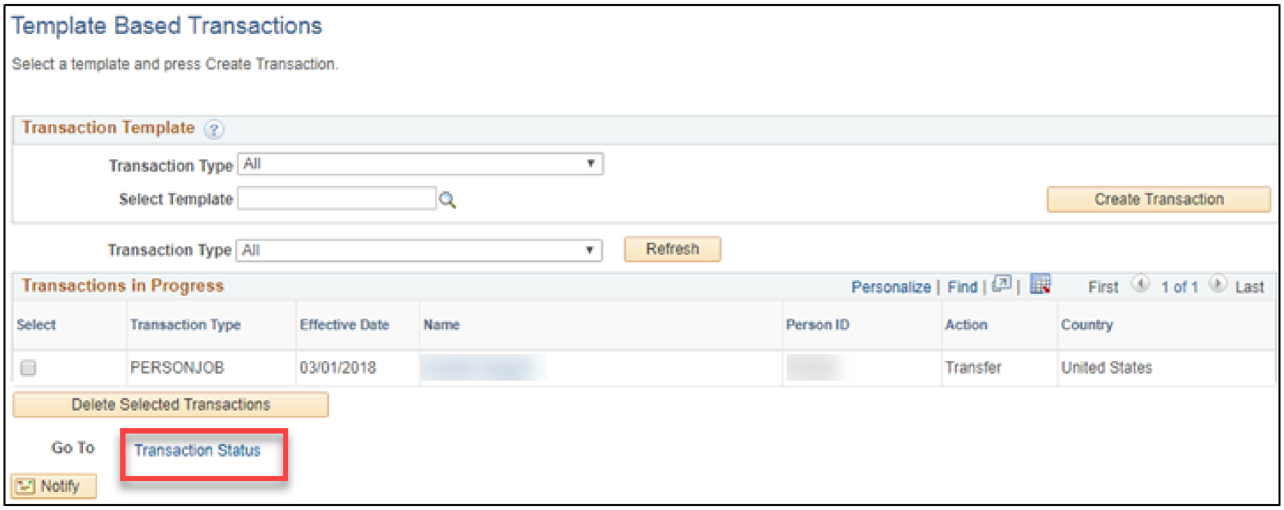


9. Make note of the TBT Request ID number for future reference.
10. Click **OK** from the Message box.
11. Click **OK** again. You can check the status from Transaction Status page, as described in the following section.

Viewing Transaction Status

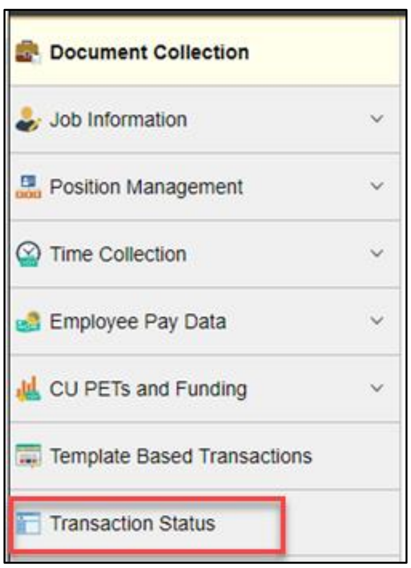
To check the status of your transfer, you can use any of the following methods:

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

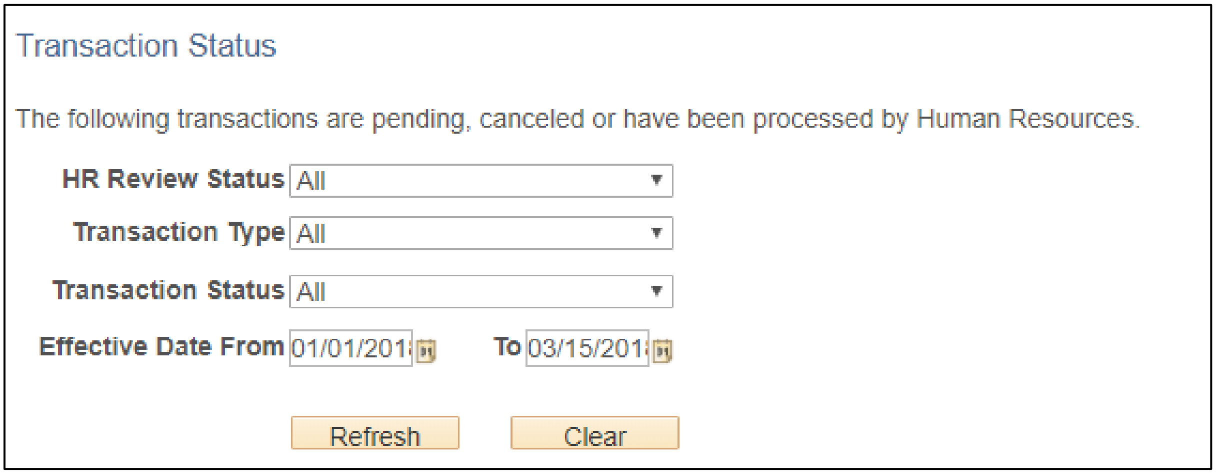


- Or, navigate to Transaction Status.

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

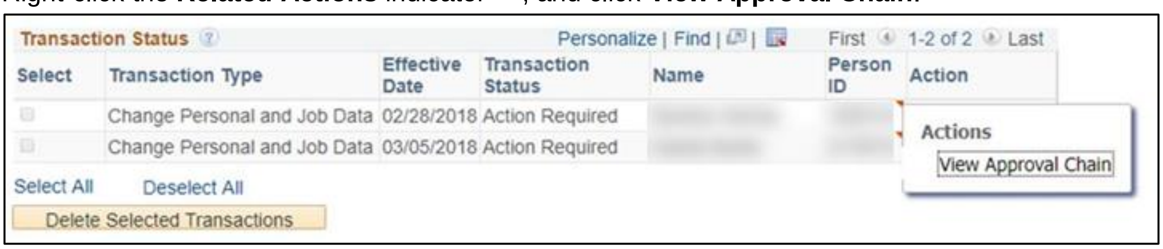


The Transaction Status page appears:

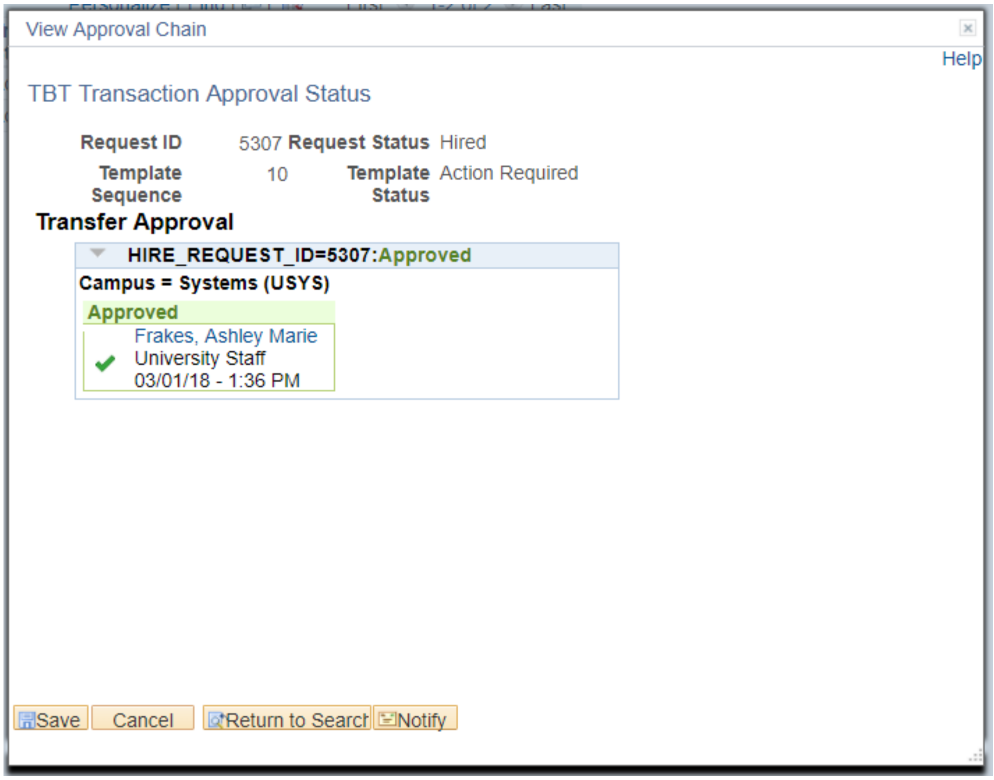


3. Enter parameters to search for your transactions. The system displays a list of transactions matching your criteria.
4. Check the Effective Date field to be sure the range is correct for your search.

5. Right-click the **Related Actions** indicator, and click **View Approval Chain**.

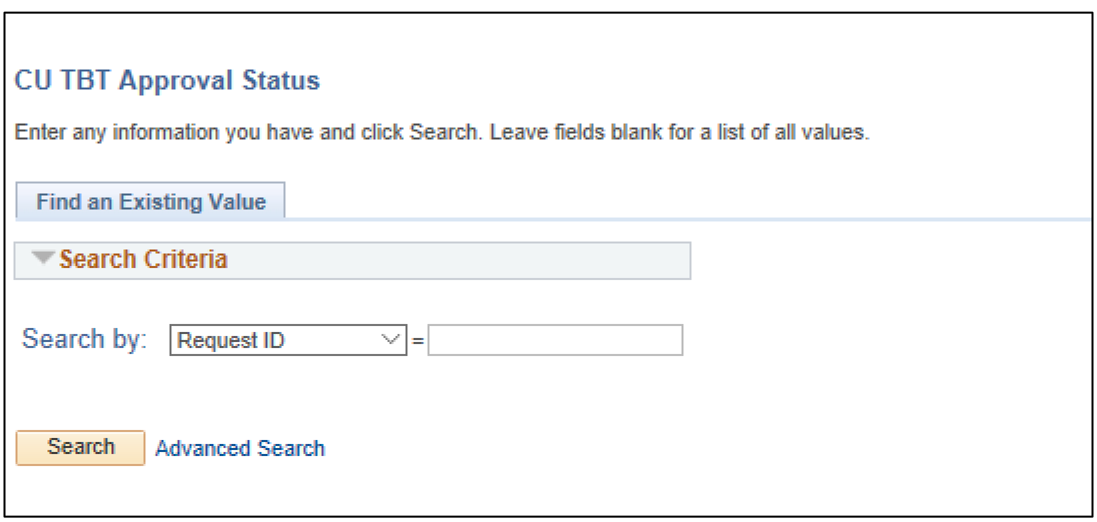


The View Approval Chain pop-up window appears:



- Or, to search for transaction status by Request ID:

1. From the **NavBar: Navigator**, click **Human Capital Mgmt**.
2. Click **Workforce Administration**.
3. Click **Template Based Transactions**.
4. Click **CU TBT Approval Status**. The CU TBT Approval Status window appears.



5. From the **Search by** list, select **Request ID** and type the request ID number.
6. Click **Search**.

Resubmitting Pushed Back Transactions

The approver reviewing your transactions can approve, deny or push back your transaction. In the case of denied or pushed back transactions, the initiator will receive an email notification. The approver should have included comments on why the transaction was denied (employee no longer interested in the transfer or took another position) or pushed back.

If the transaction was pushed back, edit and resubmit the transaction for approval.

1. From the HCM Community Users dashboard, click the **Pay Actions** tile.
2. Click **Template Based Transactions**. The Transactions in Progress section, displays the transactions that are in draft status.
3. Select the person's name link.
4. Enter details and click **Save and Submit for Approval**.

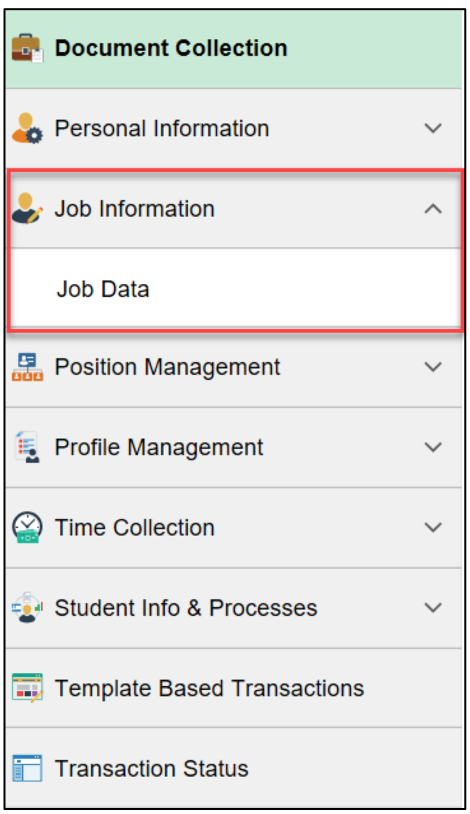
Verifying Transfer Approval

Once the transfer transaction has been approved, you should verify that the information has been updated in Job Data and Position.

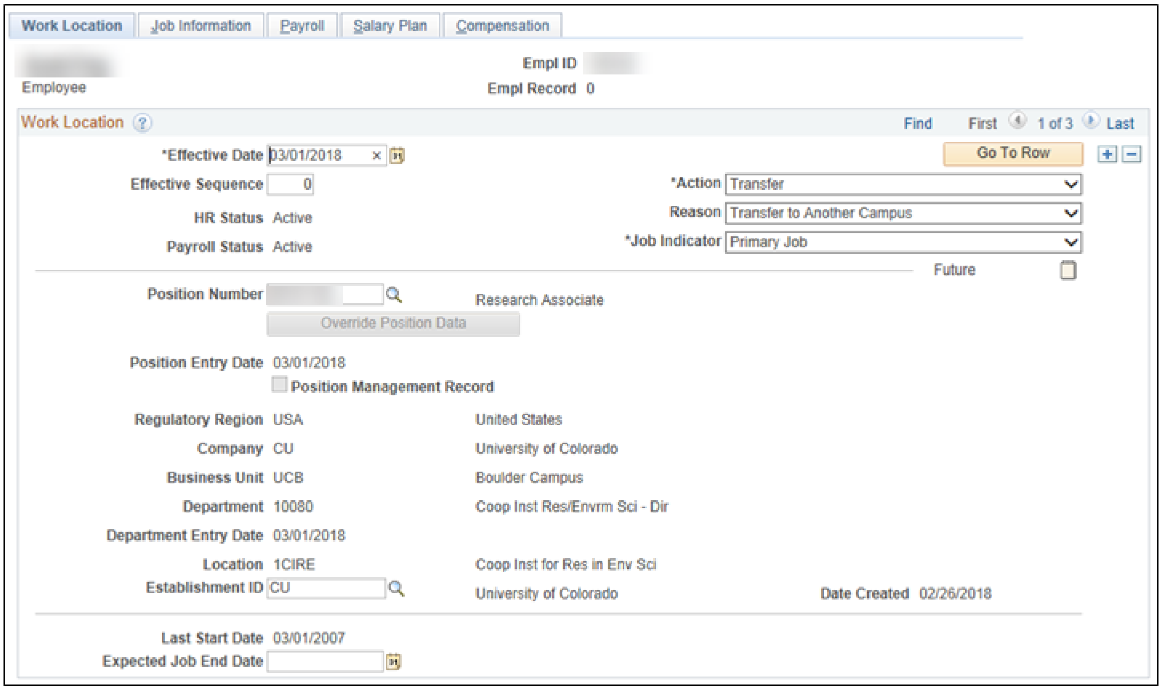
Note: For information about approving transfers, refer to *Approving Transfers Step-by-Step Guide*.

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**.



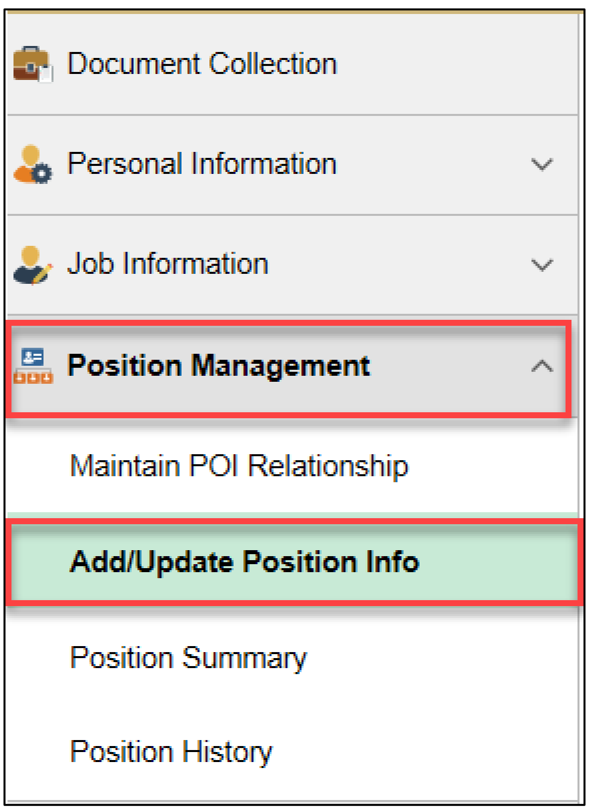
4. Enter the **Empl ID** number and click **Search**. The employee's job information appears for you to review.



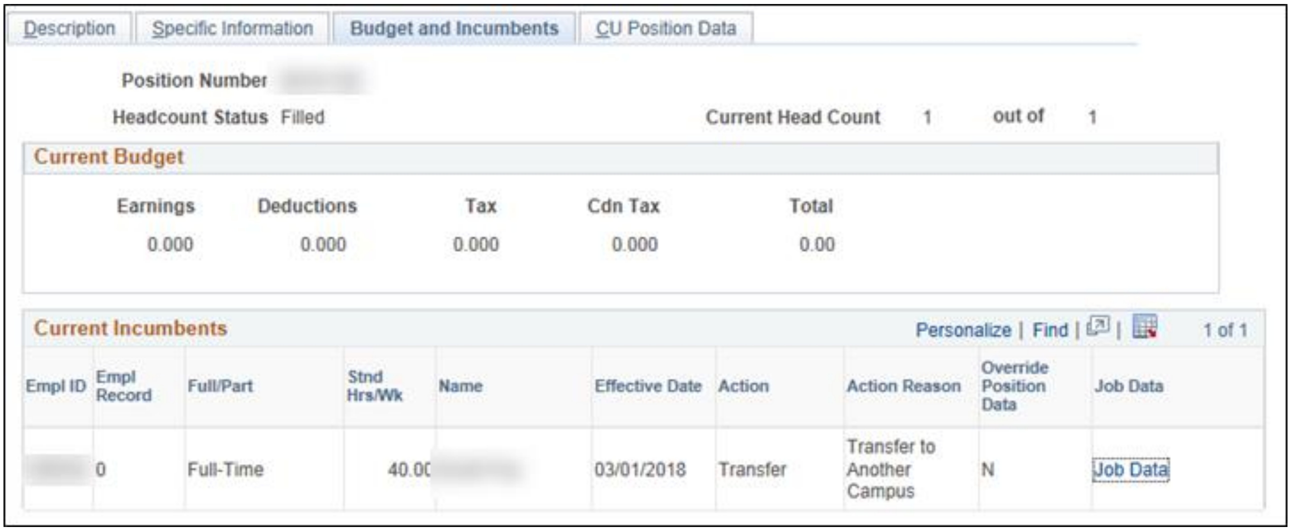
5. Verify the Transfer row has been added with the correct Effective Date.

6. View the other tabs to verify the data you entered on the template is correct.

7. Under **Position Management**, click **Add/Update Position Info**.

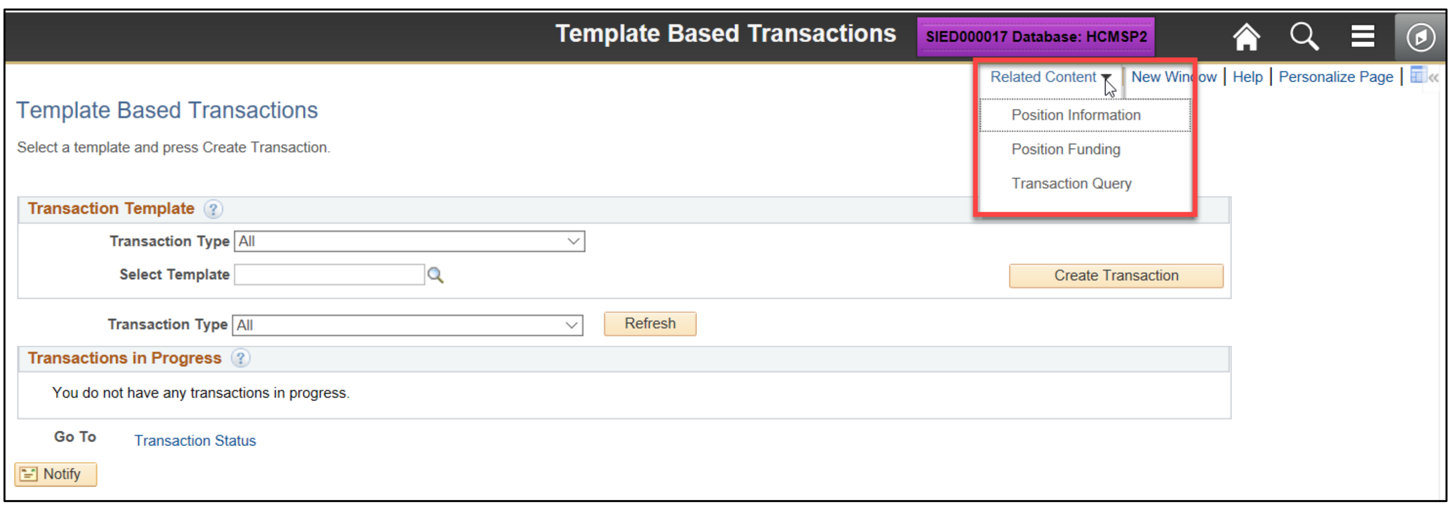


8. Type the **Position** number and click **Search**.
9. Click the **Budget and Incumbents** tab to verify the transfer.

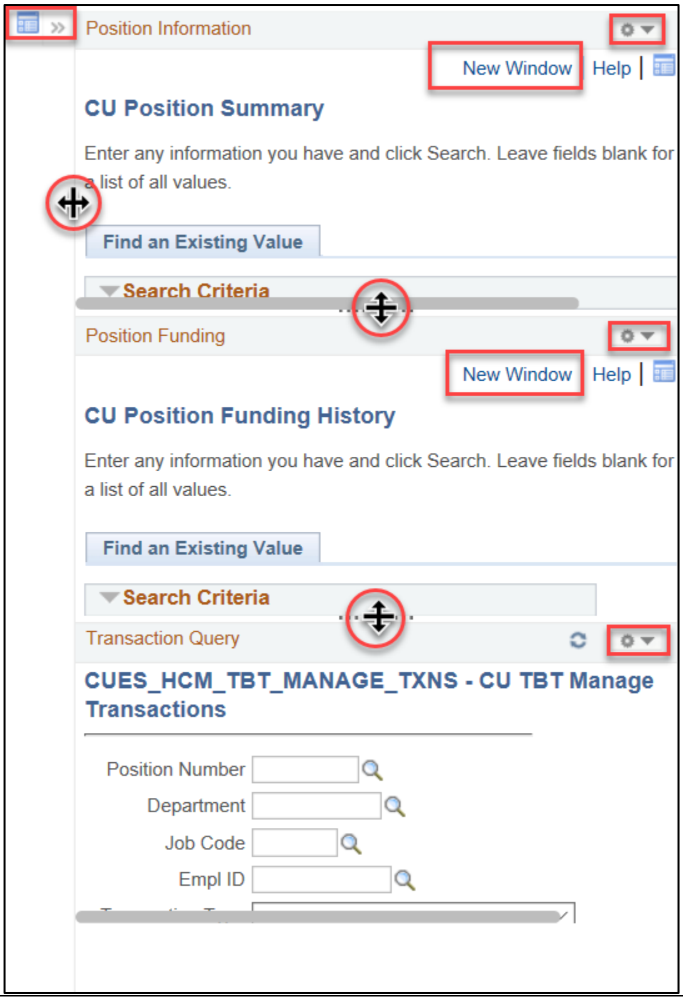


Viewing Related Content

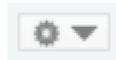
Related content is available when creating a TBT and can be located using the Related Content link in the top right corner of the window (shown below). Click **Related Content** to display a menu of options: Position Information, Position Funding and Transaction Query.

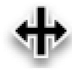


After selecting an option, the window expands to include all of the options. You can modify your display of these options in several ways:



 Collapse Related Content.

 Click settings to expand or collapse a section.

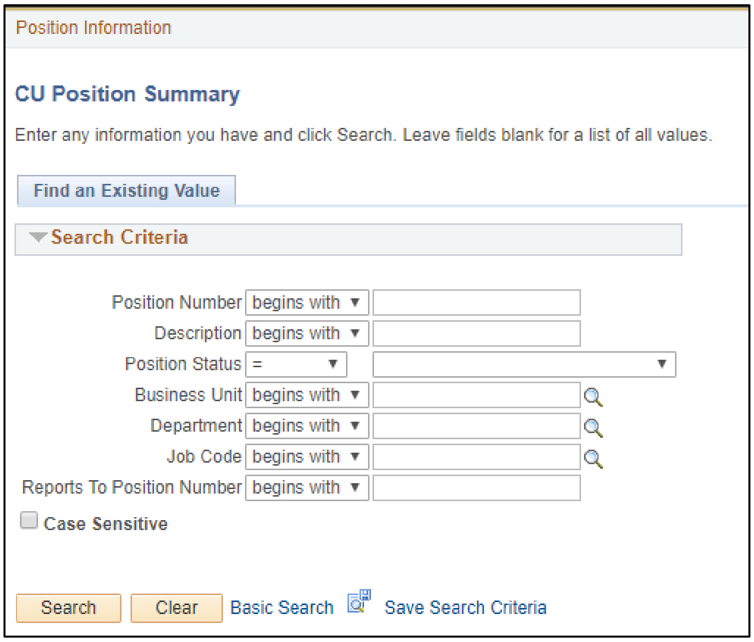
 Drag borders to make the column wider or each section taller or shorter.

. New Window Display related content in a new window.

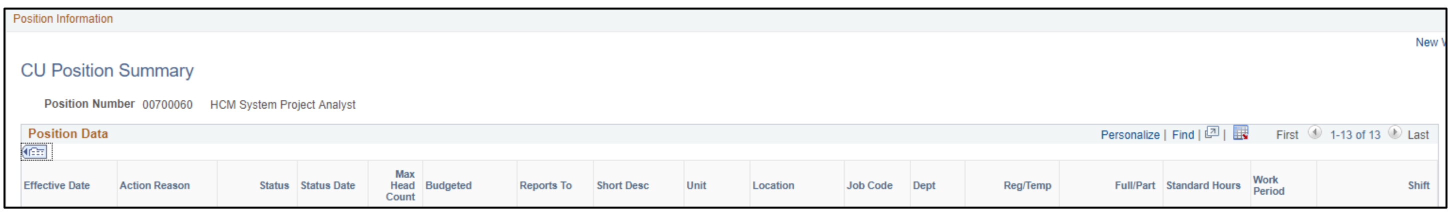
Each of these options is described in the following sections.

Viewing Position Information

Enter search parameters and click **Search**.



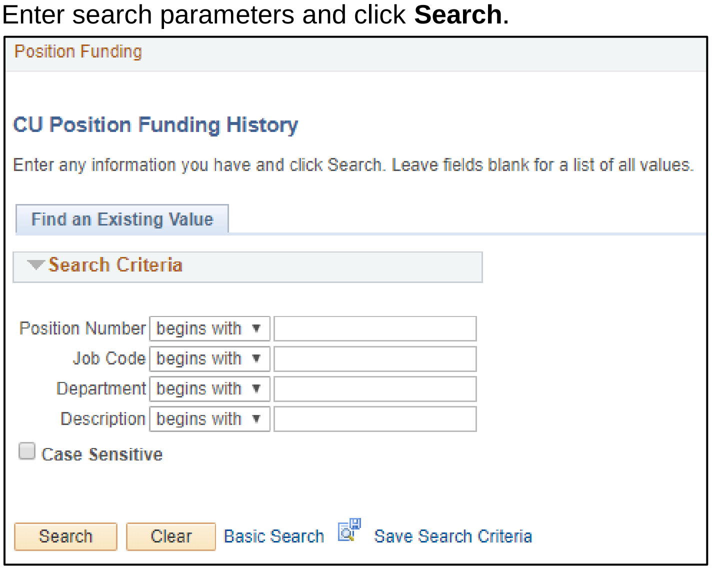
HCM displays your results:



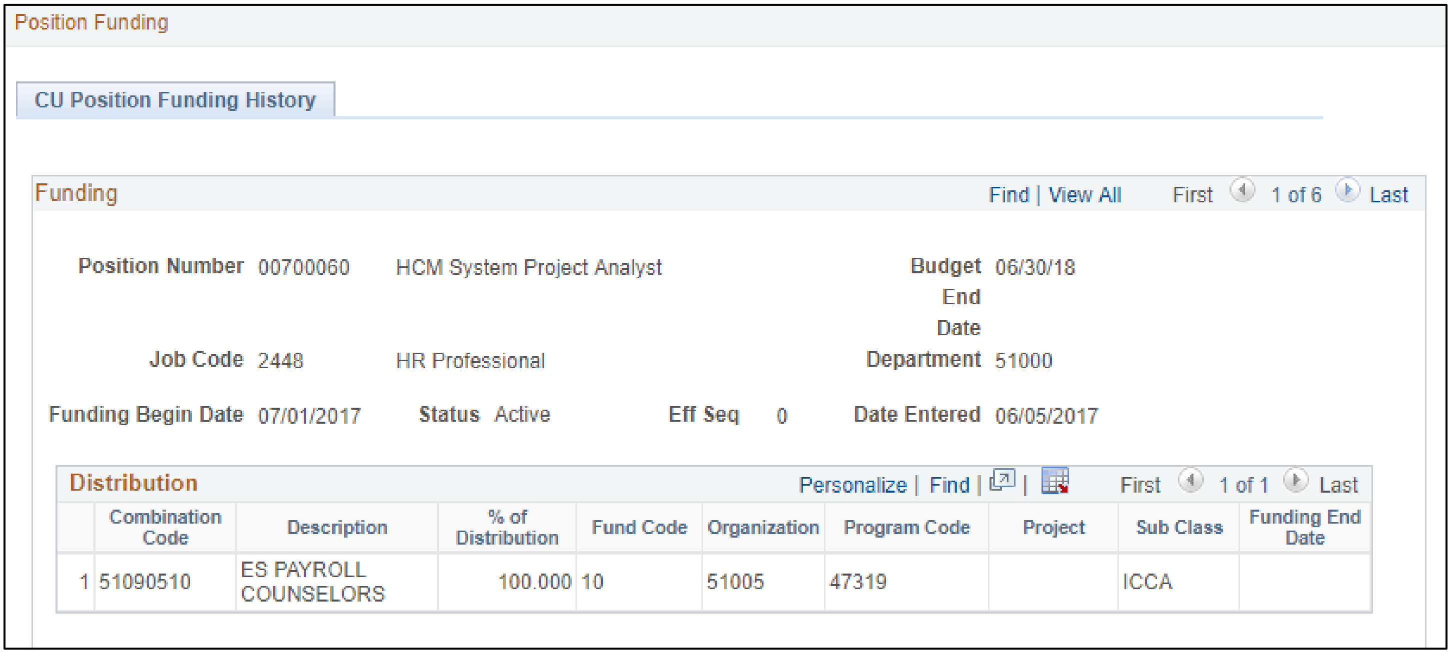
Note: Click this icon  to expand to all fields.

Viewing Position Funding

Enter search parameters and click **Search**.



HCM displays your results:


Position Funding

CU Position Funding History

Funding — Find | View All — First 1 of 6 Last

Position Number 00700060 HCM System Project Analyst — Budget End Date 06/30/18

Job Code 2448 HR Professional — Department 51000

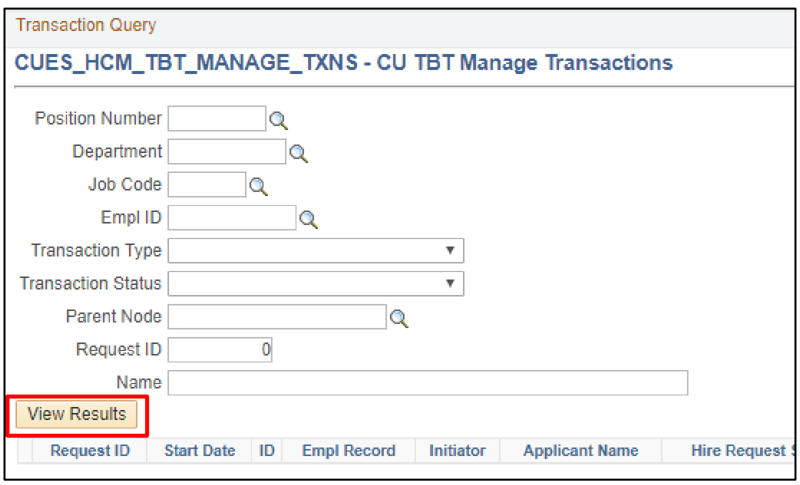
Funding Begin Date 07/01/2017 — Status Active — Eff Seq 0 — Date Entered 06/05/2017

Distribution — Personalize | Find | — First 1 of 1 Last

	Combination Code	Description	% of Distribution	Fund Code	Organization	Program Code	Project	Sub Class	Funding End Date
1	51090510	ES PAYROLL COUNSELORS	100.000	10	51005	47319		ICCA	

Running the Transaction Query

1. Enter search parameters or the Request ID and click **View Results**:


Transaction Query

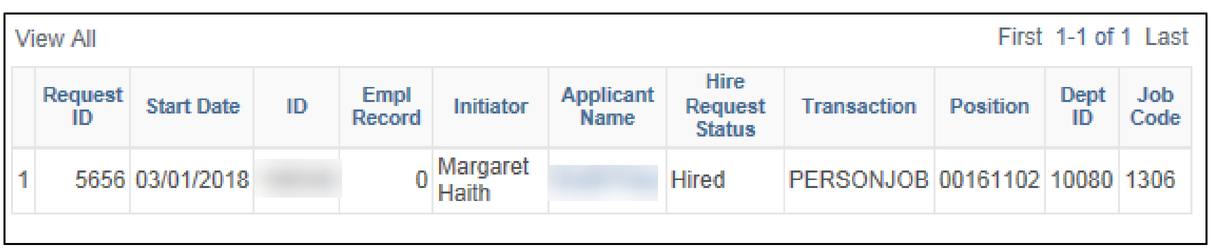
CUES_HCM_TBT_MANAGE_TXNS - CU TBT Manage Transactions

Position Number
Department
Job Code
Empl ID
Transaction Type
Transaction Status
Parent Node
Request ID 0
Name

View Results

Request ID	Start Date	ID	Empl Record	Initiator	Applicant Name	Hire Request S

2. From the results, click a link under Applicant Name for more information:


View All — First 1-1 of 1 Last

	Request ID	Start Date	ID	Empl Record	Initiator	Applicant Name	Hire Request Status	Transaction	Position	Dept ID	Job Code
1	5656	03/01/2018	[redacted]	0	Margaret Haith	[redacted]	Hired	PERSONJOB	00161102	10080	1306

The Manage Hire Details page appears from which you can click on the following links to more information:

- View Template
- Person Organizational Summary
- View/Edit Personal Data
- View/Edit Job Data