University of Colorado
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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.

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. Scroll down and select **Click here for ALL**.
  4. Select **Job List**.
  5. Type search criteria and click **View Results**.
  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 your campus business processes.

- Have the following information available:
  - Empl ID of the employee.
  - Position number to which the employee is transferring.

Navigation Tips:

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

1. From the portal, click the **HCM** tile. The Employee Self Service dashboard appears.
2. Click **Employee Self Service**.
3. 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 lookup 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.

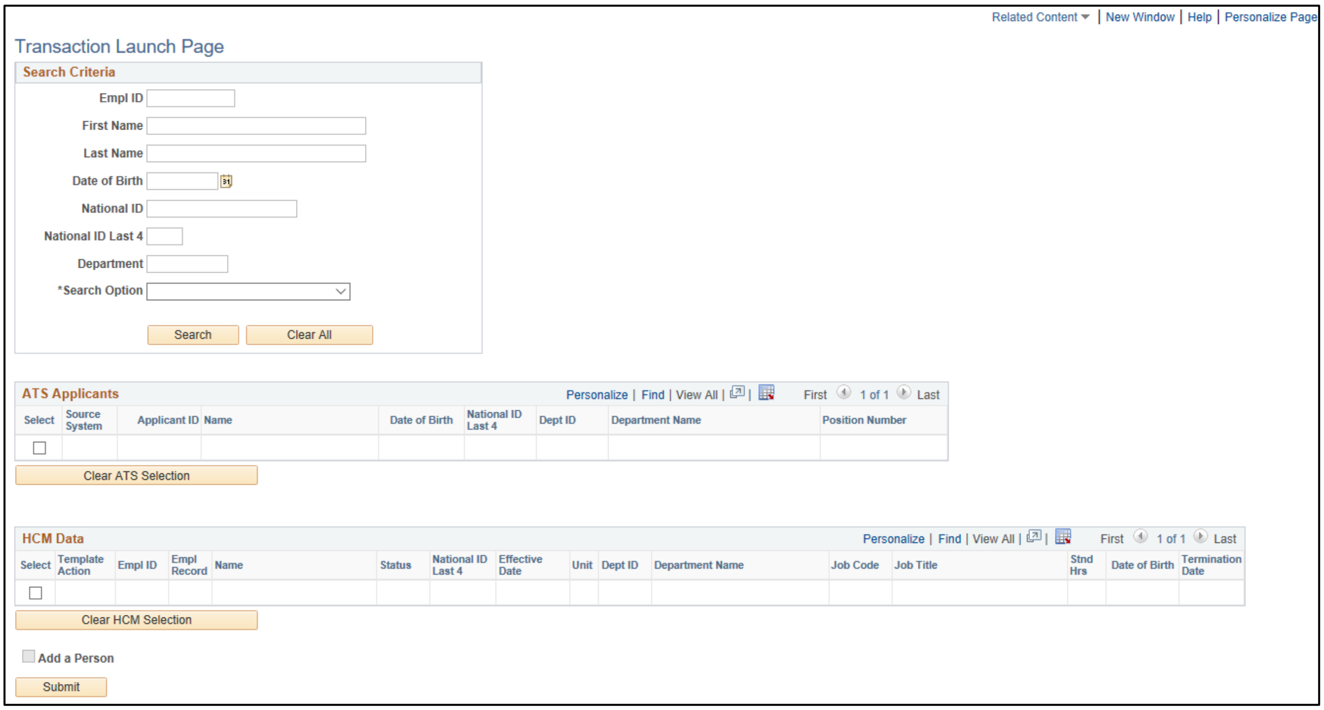
Creating a Transfer Transaction

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.

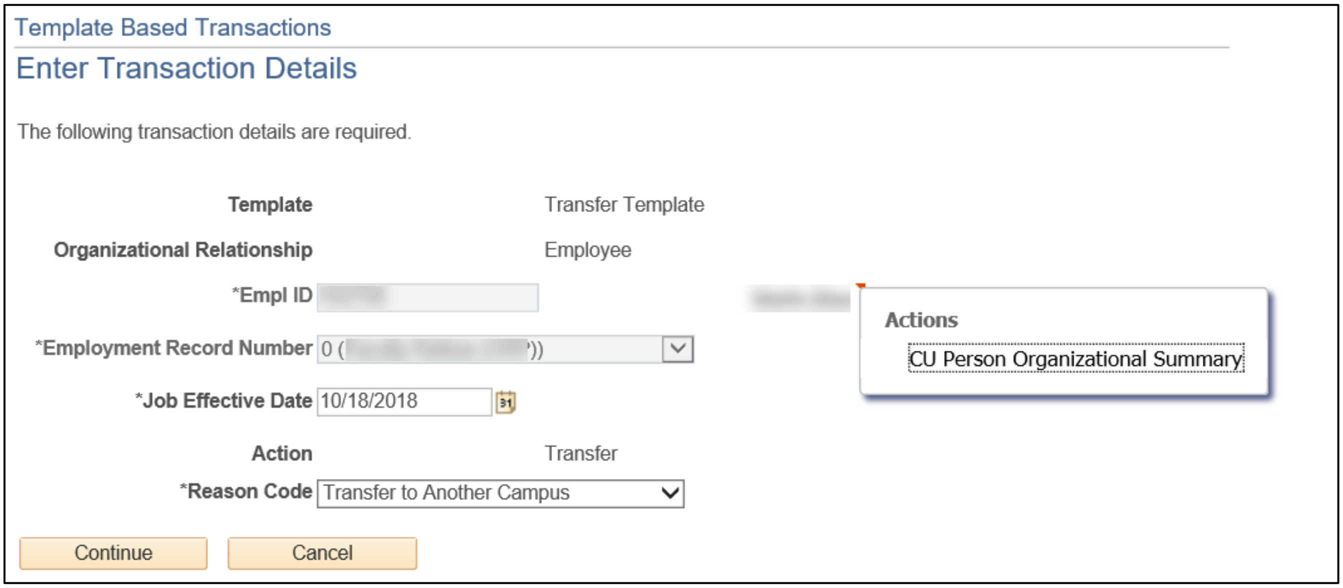
To create a transfer transaction:

1. From the HCM Community Users dashboard, click the **Transaction Launch Page** tile. The Transaction Launch Page appears. This page provides a single location for template based transactions.



2. In the Search Criteria section, type the **Last Name** or **Empl ID** of the employee being transferred.
3. From the **Search Option** list, select **Transfer Employee**. This is required. The search option helps determine which template pages to display that are correct for your transaction.
4. Click **Search**. The system displays the search results in the HCM Data listing.
5. Select the checkbox of the employee. If the employee has more than one active employee record, select one that has a Template Action of Transfer.
6. Click **Submit**. A message appears, asking if this is a contract employee.
7. Indicate whether this employee will be paid on a contract:
   - If this employee is not being paid on a contract, select **No**.
   - If the employee is currently on a contract, select **No**. This will let you transfer the employee without needing to update current contract parameters.
   - If the employee is being paid on a new contract, select **Yes**. The system prompts you for the effective date of the contract. This is the employee's contract begin date. The system populates other related contract dates based on the effective date of the contract. To view contract dates for your campus, run the Contract Crosswalk Query from Related Content.

The Enter Transaction Details page appears.



Entering Transfer Transaction Details

The page displays the Empl ID field and the Employment Record Number you selected. These are not editable. To continue with the transfer:

1. Right-click the Related Actions 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.

2. In the **Job Effective Date** field, type or select the effective date of your transfer transaction. If the transfer is to a new contract, this is the same as the contract effective date.

   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.

3. 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

4. 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 default information from Position data.

   Notes:

   - 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 to view Position Information, Position Funding and more.
   - If at any time you notice position information needs correcting, stop and click **Save as Draft**. You can then update the positon. Once the position is approved, you can then complete this transaction.
   - If the position you select does not have a Reports to value, the system displays an error. Stop and click **Save as Draft** from the bottom of the page. Then, update the position to include Reports To. Once the position change is approved, return to the draft transaction to complete the transfer as described later in this guide.
   - For information about updating a position, refer to *Updating a Position Step-by-Step Guide*.

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, select compensation values:

Field	Non-Contract Transfer	Contract Transfer
Compensation Frequency	Select how often this employee will be paid.	System displays C and is not editable.
Comp Rate Code	Select the compensation rate code.	System displays BASEC and is not editable.
Compensation Rate	Type the compensation rate that is correct for the employee type. (Hourly rate or annual salary)	Type the amount paid over the payment term of the contract.
Contract Term Period	Does not apply.	Select the term.
CU Contract End Dt	Does not apply.	Select the end date of the contract. This is the date on which payment of the contact ends.

6. If needed, add other components of pay (for non-contract employees only). Must have at least one, and can have up to three.
7. If applicable, type or select an **Appointment End Date**.

Completing the Transfer Transaction

Before you submit the transaction for approval, be sure to add any comments or attachments.

Adding Comments and Attachments

1. In the Comments section, type **Job Notes**. When this transaction is approved, these comments populate Job Notes in Job Data.
2. If needed, attach documents, such as an offer letter.
   a. Click **Add Attachment**.
   b. In **Attachment Title** field, type a name for this document, such as Offer Letter.
   c. Click **Add**  .
   d. Click **Choose File**.
   e. Select a file and click **Open**.
   f. Click **Upload**.

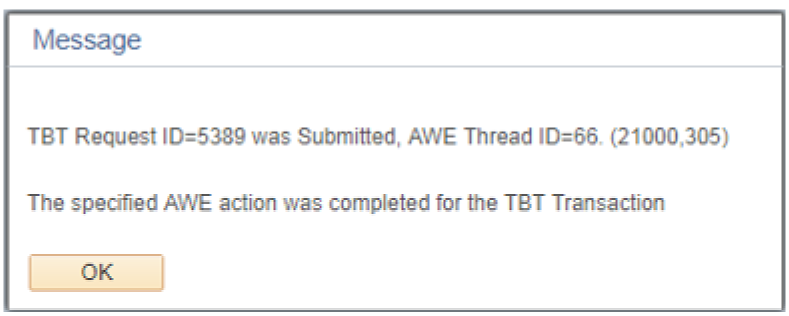
Saving and Submitting for Approval

Once you have completed creating your transaction, you have the following options:

- **Return to Enter Transaction Details Page –** Lets you go back to the first page of the transaction.
- **Save as Draft –** 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.

To save the transfer transaction:

1. Click **Save and Submit for Approval**. A message appears with the TBT Request ID. Make a note of the request ID so you can find information about its status later.
2. Click **OK** from the message box. A Further Processing Required page appears.
3. Click **OK**. The system returns you to the Enter Transaction Details page; however, it is not updated with new information.



Checking Approval Status

You can check pending approvals through the following methods:

- Transaction status, which lets you see only your transactions. (Related Content> Transaction Status> Update date range> Refresh)
- Transaction query, which lets you see all transactions within your role-level security. (Related Content> Transaction Query> Update criteria> View Results)

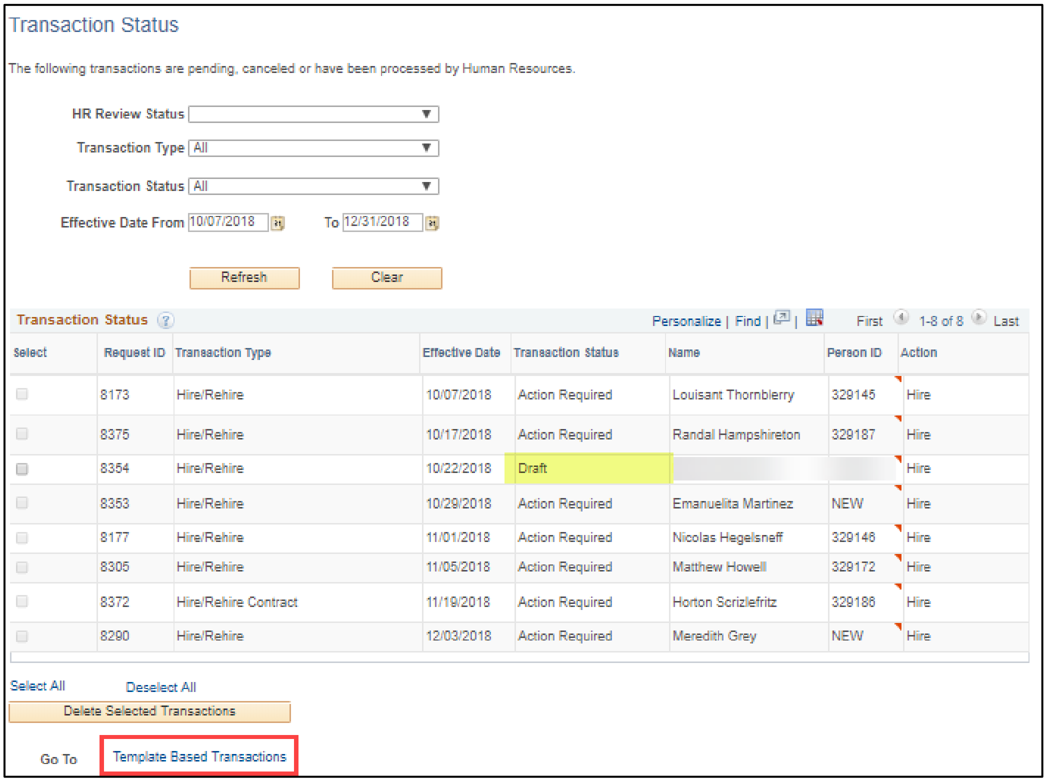
These options are available as Related Content from the Transaction Launch Page as well as from Pay Actions and Non-Pay Actions tiles, which are accessed from the HCM Community Users dashboard. Refer to *Viewing Related Content Step-by-Step Guide* for more information.

Completing a Saved Draft or Pushed Back Transaction

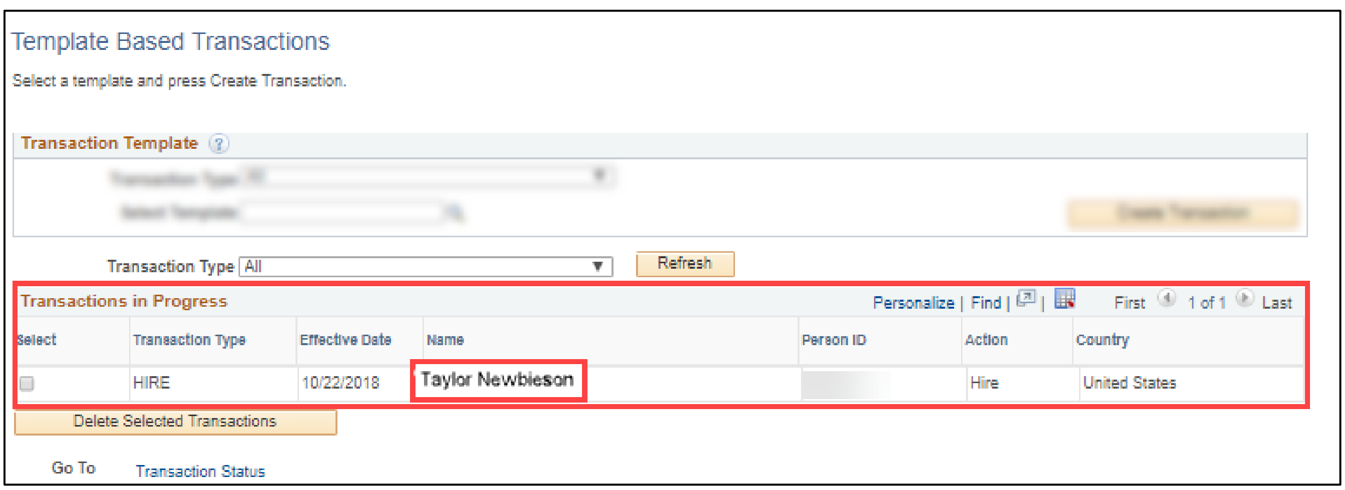
The approver reviewing your transactions can approve, deny or push back your transaction. In the case of denied or pushed back transactions, the initiator will receive an email notification. The approver should have included comments on why the transaction was denied (employee no longer interested in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

If you saved a transaction as a draft, you can return to it and complete it:

1. From the Transaction Status page, select Template Based Transactions at the bottom of the page.



The Template Based Transactions Page appears:



Note: Do not use this page to create transactions. All TBTs should be performed from the Transaction Launch Page. This page can also be accessed through NavBar> Navigator> Workforce Administration> Template Based Transactions> Template Based Transactions.

2. From the Transactions in Progress section, click the name of the person. The system displays the transaction and you can continue your work.

3. 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.

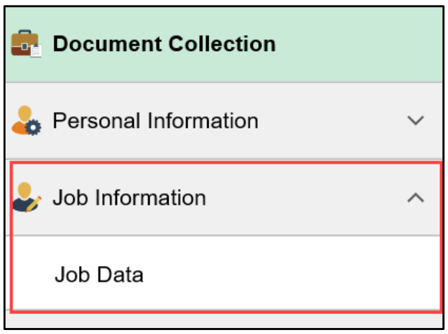
Note: For information about approving transfers, refer to *Approving Transactions Step-by-Step Guide*.

To navigate to Job Data.

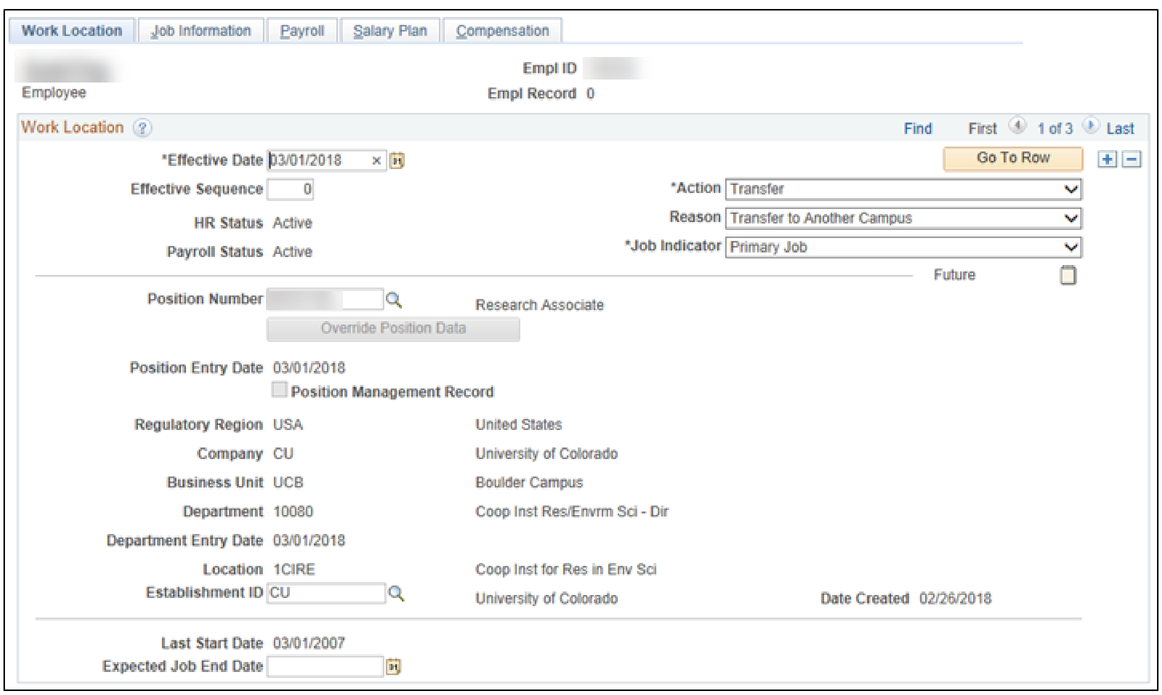
1. From the HCM Community Users dashboard, click the **Non-Pay Actions** tile.

2. Click **Job Information**.

3. Click **Job Data**.



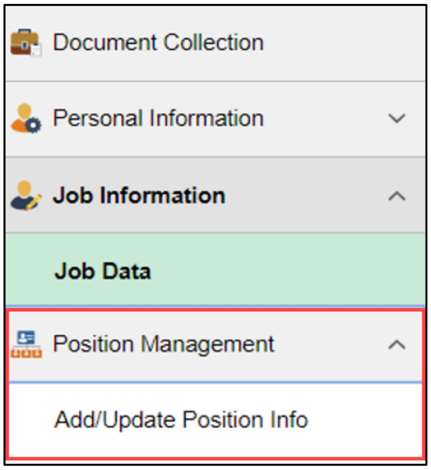
4. Enter the **Empl ID** number and click **Search**. The employee's job information appears for you to review.



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.