

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.

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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:

HCM Community Users

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.

 \bigcirc 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.

								Related Conten	t≖	New Win	dow H	elp Personal
Transaction Launch Page												
Search Criteria												
Empl ID												
First Name												
Last Name												
Date of Birth												
National ID												
National ID Last 4												
Department												
*Search Option V												
Search Clear All												
Search Clear All												
			_				A					
ATS Applicants		National ID			ind View All 💷 🔣	First 🕚 1 of 1						
Select System Applicant ID Name	Date of Birth	National ID Last 4	Dept ID	Departr	nent Name	Position Nun	nber					
Clear ATS Selection												
HCM Data						Pers	onalize Find	View All 🔄 🔣		irst 🕚		
Select Template Action Empl ID Empl Record Name	Status Natio	nal ID Effecti 4 Date	ve Unit	Dept ID	Department Name	Job Code	Job Title	5	Stnd Hrs	Date of	Birth Da	rmination te
Clear HCM Selection												
Add a Person												
Submit												
Submit												

- 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.

Template Based Transactions	
Enter Transaction Details	
The following transaction details are required.	
Template	Transfer Template
Organizational Relationship	Employee
*Empl ID	Artigen
*Employment Record Number 0 ()) CU Person Organizational Summary
*Job Effective Date 10/18/2018	
Action	Transfer
*Reason Code Transfer to Another Carr	npus V
Continue Cancel	

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.

 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.
- 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	mp Rate CodeSelect the compensation rate code.System displays B 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.

Transact	ion Statu	s					
The following	transactions a	re pending, canceled or have been pr	ocessed by Human	Resources.			
HR	Review Stat	us	Ŧ				
Tr	ansaction Ty	pe All	V				
Trai	nsaction Stat	us All	Ŧ				
Effec	ctive Date Fro	m 10/07/2018 👸 To 12/31/20	18 🛐				
		Refresh Cle	ar				
Terrestia	n Status 🕜		21		Personalize Find 🖾 👪	-	I-8 of 8 Last
Select		Transaction Type	Effective Date	Transaction Status	Name	Person ID	Action
	8173	Hire/Rehire	10/07/2018	Action Required	Louisant Thornblerry	329145	Hire
							•
	8375	Hire/Rehire	10/17/2018	Action Required	Randal Hampshireton	329187	Hire
	8354	Hire/Rehire	10/22/2018	Draft			Hire
	8353	Hire/Rehire	10/29/2018	Action Required	Emanuelita Martinez	NEW	Hire
	8177	Hire/Rehire	11/01/2018	Action Required	Nicolas Hegelsneff	329146	Hire
	8305	Hire/Rehire	11/05/2018	Action Required	Matthew Howell	329172	Hire
	8372	Hire/Rehire Contract	11/19/2018	Action Required	Horton Scrizlefritz	329188	Hire
	8290	Hire/Rehire	12/03/2018	Action Required	Meredith Grey	NEW	Hire
Select All	Desele	at All					
Dele	te Selected T	ransactions					
Go To	Template	Based Transactions					

The Template Based Transactions Page appears:

Template E	Based Transacti	ons					
Select a templat	e and press Create Tran	saction.					
Transaction	Template 👔						
	erantice lage 70			*			
	Interf Template		- N				Crass Terration
Tr	ansaction Type All			▼ Refresh			
Transactions	in Progress				Personalize	Find 🖾 🔠	First 🕚 1 of 1 🕑 Last
Select	Transaction Type	Effective Date	Name		Person ID	Action	Country
	HIRE	10/22/2018	Taylor Newbieson			Hire	United States
Delete	Selected Transactions						
Go To	Transaction Status						

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.

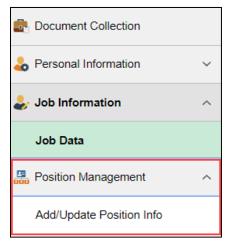
Document Collection	
🕹 Personal Information	~
Sob Information	^
Job Data	

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

Work Location Job Information	Payroll Salary Plan (Compensation	
the second se		Empl ID	
Employee		Empl Record 0	
Work Location (?)		Find 🛛 First 🚳 1 of 3 🛞 La	ast
"Effective Date	03/01/2018 × 🖲	Go To Row +	-
Effective Sequence	0	*Action Transfer	
HR Status	Active	Reason Transfer to Another Campus	
Payroll Status	Active	*Job Indicator Primary Job	
		Future	
Position Number	Q	Research Associate	
	Override Position Data	ta	
Position Entry Date	03/01/2018		
	Position Management Re	lecord	
Regulatory Region	USA	United States	
Company	CU	University of Colorado	
Business Unit	UCB	Boulder Campus	
Department	10080	Coop Inst Res/Envrm Sci - Dir	
Department Entry Date	03/01/2018		
Location		Coop Inst for Res in Env Sci	
Establishment ID	CU Q	University of Colorado Date Created 02/26/2018	
Last Start Date	03/01/2007		
Expected Job End Date	Ħ		

- 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.

Descript	tion S	pecific Inf	ormation	Budget a	nd Incumbents	CU Position E	Data				
		ion Numl ount Sta	ber tus Filled				Current Head C	count 1	out of	1	
Curre	nt Budg	et									
	Earnir	ngs	Deductio	ns	Tax	Cdn Tax	Total				
	0.0	000	0.00	0	0.000	0.000	0.00				
Curre	nt Incun	bents						Persor	nalize Find	121	1 of 1
Empl ID	Empl Record	Full/Pa	rt	Stnd Hrs/Wk	Name	Effective Date	Action	Action Reason	Override Position Data	Job Data	
	0	Full-Tir	ne	40.00		03/01/2018	Transfer	Transfer to Another Campus	N	Job Data	