

## **Preview Transfer's new Template Based Transaction approach, learn about additional upgrades** <sup>[1]</sup>

March 14, 2018 by [Employee Services](#) <sup>[2]</sup>

As part of an effort to migrate HCM away from Smart ePAR transactions to delivered functionality, changes to Transfers will occur **April 14**.

Learn more about the new Template Based Transaction framework and other changes to Transfer, then [sign up for training](#) <sup>[3]</sup>.

**Note:** Click on any of the images below to enlarge them.

### **What is a Template Based Transaction?**

A Template Based Transaction (TBT) is a framework within HCM replacing Smart ePAR for Transfer transactions. This new method will be used to complete **Transfers** and **Transfers with a New Contract**.

Users will see this approach used more in the system throughout the year, as Hire and Rehire transactions will transition to this framework in December.

### **How are Template Based Transactions different from Smart ePARs?**

Compare the current Smart ePAR process to the future TBT process:

#### **Current Process**

Currently, multiple stages and roles are involved in the Transfer process:

- A department user initiates the request to transfer the employee.
- The current department reviews the transaction and releases the employee to the new department.
- The initiator updates the transaction with position information and submits it for final workflow approval through SmartERP.

#### **New Process**

In the future, data entry will be streamlined on a one-page template and the following process changes will occur:

- The receiving department will initiate the transfer.
- Relaxed row-level security will allow users to see employees at other campuses and departments in order to initiate the transfer.

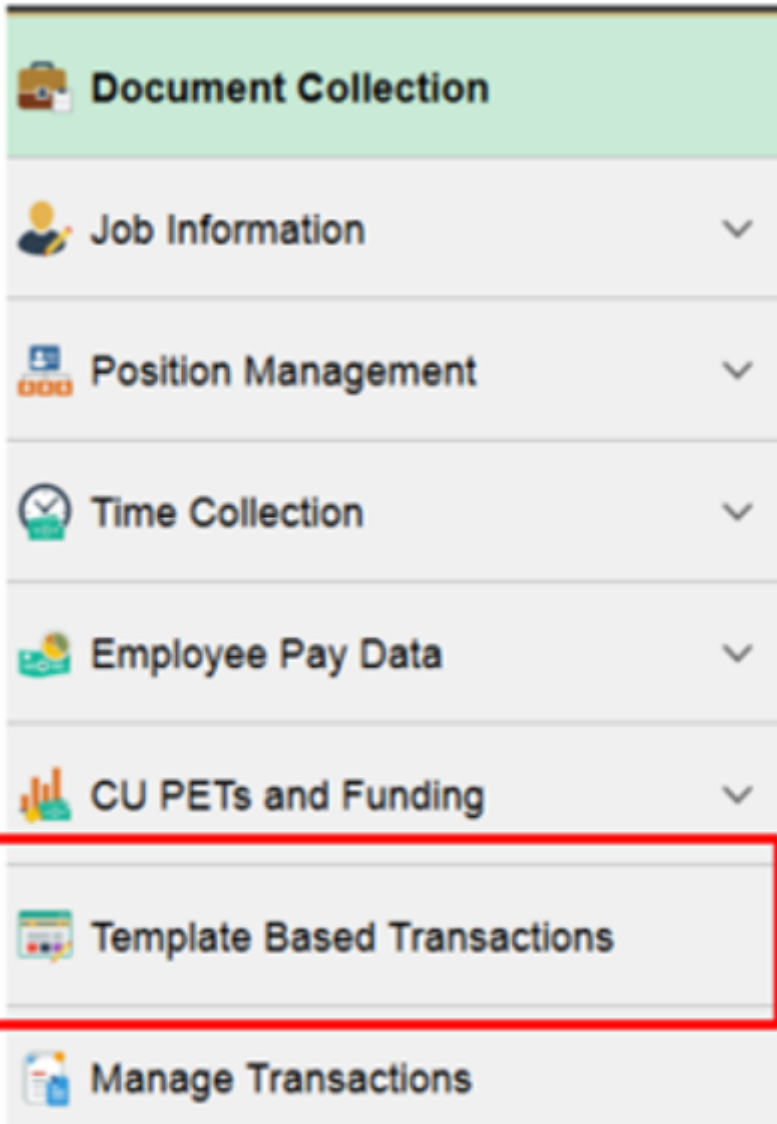
- Users will not need to complete the current employee release request.
- Notification messages will be sent to the transferring employee and transaction initiator when the transfer is approved.

## Navigation

In addition to the process changes, navigation will also be restructured.

### Current navigation

At this time, users access the Smart ePAR form using this path: HCM Community Users Workcenter > Pay Actions Tile > Smart ePAR Pay Actions dashboard.

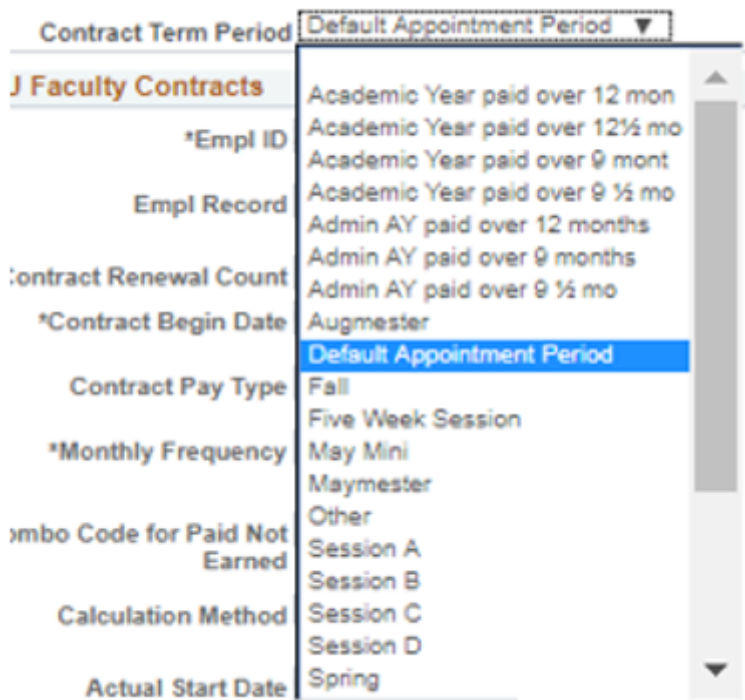


Do not use **Classic Home**. Instead, they should use HCM Community Users Workcenter > Pay Actions Tile > Template

## What else is changing with Transfer?

In addition to Template Based Transactions, these changes are being made to improve the process and prevent data errors:

- Auto-population of position description.
- Default pay group on both transfer templates (editable).
- Default employee classification (view only).
- Ability to enter multiple pay components on the transfer.
- Ability to view position information, position funding and transaction history query via **Related Content** feature.
- Ability to see the transferring employee's CU Person Organizational Summary using the field-level **Related Action** feature.
- Compensation edit check for limits based on Comp Rate:
  - Daily - 4 places - 9,999.999
  - Hourly - 3 places - 999.999
  - Monthly - 5 places - 99,999.999
- Save for later function – transaction will be available in **draft status** to edit later.
  
- Ability to create a new contract when transferring an employee to a contract position using the **Transfer with New Contract template**:
  - The contract dates will populate automatically based on the selection made for the **Contract Term Period**. This field leverages a lookup table that has common contract periods as defined by the campuses. They are available in a drop-down list.
  - If the contract needs specific dates, selecting **Default Appointment Period** allows



[5]

## Learn more with webinars and structured labs

Prepare for Transfer and POI changes [6] by attending webinars and structured labs on your campus.

### Webinars

Two webinars covering Transfer and POI updates will be offered from **9:30 a.m. – noon April 2**. Attendance is highly suggested, but not required. If you would like to participate, please register below.

#### Person of Interest Webinar

**Description:** Review the new process for adding a POI using delivered PeopleSoft functionality.

**Time:** 9:30 - 10:30 a.m.

[Register](#) [7]

#### Transferring an Employee Webinar

**Description:** Review the new process for transferring an employee using a TBT approach.

**Time:** 11:00 a.m. - noon

[Register](#) [8]

### Structured labs

From **April 9-12**, engage with experts during structured labs. **Note:** Boulder and Denver | Anschutz users are required to attend structured labs.

To view full schedules and registration instructions, please [visit the HCM Projects webpage](#) [9].

[Template Based Transaction](#) [10], [HCM development](#) [11], [HCM project](#) [12], [Transfer](#) [13], [HCM Training](#) [14]

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