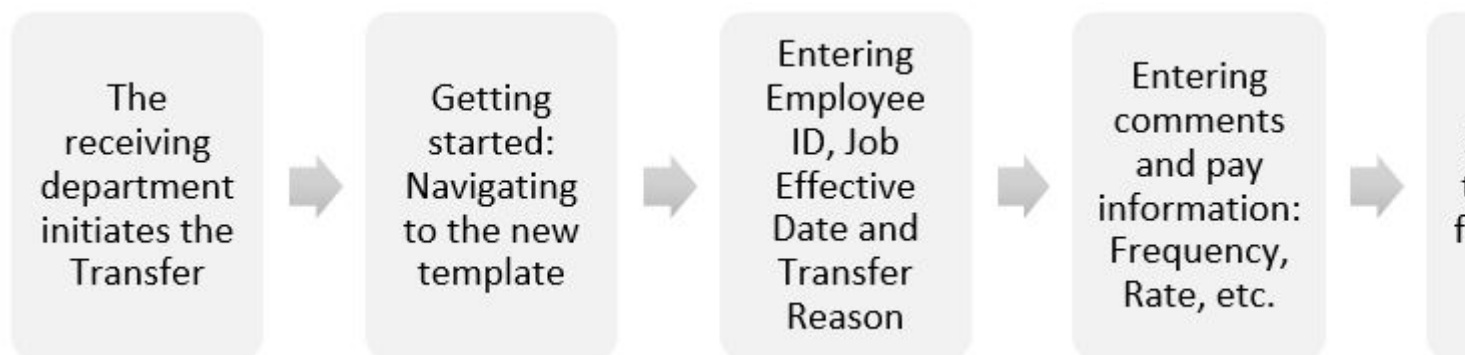


See how Transfer processes will change after April 14 upgrade ^[1]

April 10, 2018 by [Employee Services](#) ^[2]

HCM upgrades arrive on **April 14**. Catch up on Transfer navigational and process changes, then watch recorded webinars to learn more.

The following cycle will be described in detail below:



^[3]

Note: Click any image to enlarge it.

Before beginning: Collect information

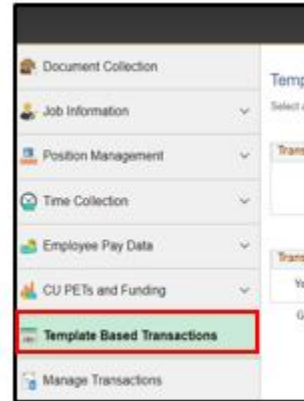
Before beginning a Transfer, users will need the employee's **Employee ID number**, an **Effective Date**, the **Position Number** for the position the employee is transferring into and information about whether the position will be funded with a **new contract**.

After this information is collected, the **Job List query (CUES_HCM_JOB_LIST)** will need to be run by following this path from the HCM Community Users dashboard: **HCM WorkCenter tile > Resources tab**. Select the **Click here for ALL** link if the query does not appear in the list of most used.

The position the employee is transferring into must be prepared by ensuring the correct funding is specified and all position updates are made. This may include changes to Location, Standard Hours, FLSA, etc. **Helpful hint:** If the transaction is for a position with a new contract, verify the employee is not on a current contract by navigating to **Non-Pay Actions > Job Information > Job Data > Search and select employee**. From the **Compensation** tab, check that the Frequency is C for contract. BASEC will have been populated as the Rate Code.

Begin the transaction

Users will create a Transfer using a Template Based [4] Transaction (TBT) [4]. The TBT can be accessed by navigating to the **HCM Community Users dashboard**, clicking the **Pay Actions** tile and selecting **Template Based Transactions**.



[5]

If the Transfer is not on a new contract, **CU_XFR** should be typed in the **Select Template** field. If the Transfer has a new contract, type **CU_CNTRCT_XFR**. **Helpful hint:** The magnifying glass can also be used to search for and select the template.

Enter transaction details

Users will be required to enter the following information:

1. **Employee ID.** **Helpful hint:** Pressing tab after entering the Employee ID will populate the employee's name to the right of the field with a related content indicator displayed. Right clicking the indicator and selecting **CU Person Organizational Summary** will ensure this is the correct employee for the Transfer.
2. Select the record from the **Employment Record Number** list.
3. The **Effective Date** of the Transfer transaction. **Helpful hint:** For contracts, this date determines users' choices when they reach the **Select Contract Term Period** field. To access a set contract code in the contract crosswalk table, the effective date entered here must match the effective date of the contract type that is to be selected.
4. A **Reason Code:**
 - Temporary to Permanent
 - To Another Department
 - To Classified Staff
 - To Faculty
 - To Student
 - To Temporary Staff
 - To University Staff
 - Transfer
 - Transfer to Another Campus

Entering transaction information for Position and Job

Next, users will need to enter their Transfer details. This procedure differs slightly between transactions with and without a new contract. Both processes are outlined below:

Process for a Transfer without a new contract

Process

1. For both Transfers with and without a new contract, enter the **Position Number**. **Helpful hint:** Pr
verify the details of the position, users will be able to select **Related Content** ^[6] from the top right
position funding or run the **Manage Transaction** query.

- 2.
- 3.
- 4.
- 5.

The **Pay Group** will already be selected. Users can update this field if necessary. Type or search for the **Employee Type**.

6. Type or search for the **Compensation Frequency**.
7. Type or search for **Comp Rate Code, Compensation Rate and Compensation Frequency** field values. Helpful hint: Users have the option to enter additional pay components under Job Compensation, Pay Components and Job Compensation and Pay Components.
Type or select an **Appointment End Date** if applicable.
Enter comments.

Template Based Transactions

Enter Transaction Information

Enter the following Employee or Contingent Worker information.

[Return to Enter Transaction Details Page](#)

Position - Job Info

Work Location - Position Data

*Position Number *Description

Work Location - Job Indicator

*Job Indicator ▼

Job Information - Employee Classification

Employee Classification ▼

Job - Payroll Information

*Pay Group *Employee Type

Job Compensation - Payroll Currency and Frequency

*Compensation Frequency

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

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After required fields are completed, the following options will be available:

- Template Based Transactions
- Further Processing Required
-  This request has been sent to the Human Resources department to complete the transaction.
Go to the Transaction Status page to review the status of this person.

OK

 Notify

Message

TBT Request ID=5389 was Submitted, AWE Thread ID=66. (21000,305)

The specified AWE action was completed for the TBT Transaction

OK

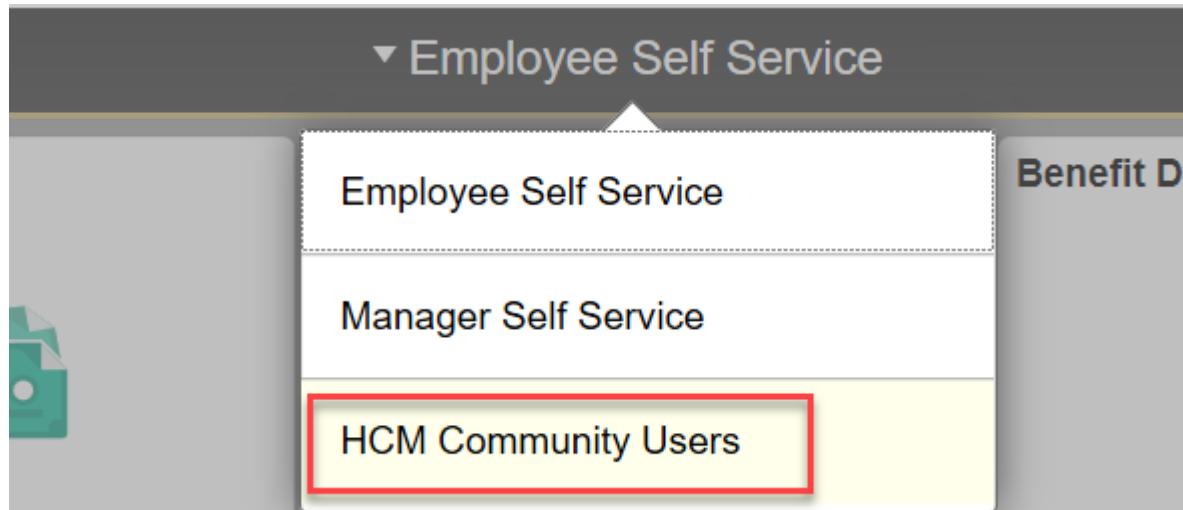
[9]

Helpful hint: Users should make note of the **TBT Request ID** for future reference.

View the transaction status

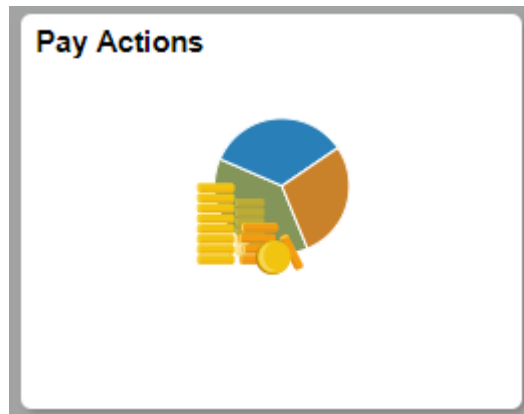
After the transaction is submitted for approval, there will be an option to view where it sits in the approval chain by following these steps:

1. Visiting the HCM Community Users dashboard using this path:
NavBar > CU Resources > Business Tools > HCM > Employee Self Service > HCM Community Users.



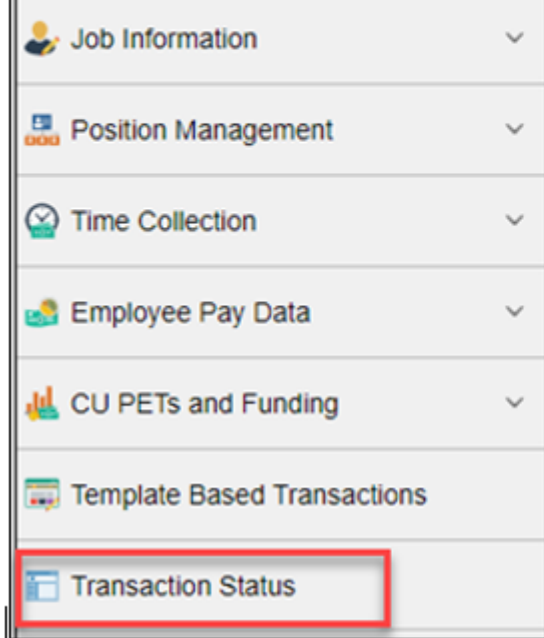
- 2.

Clicking the **Pay Actions** tile.

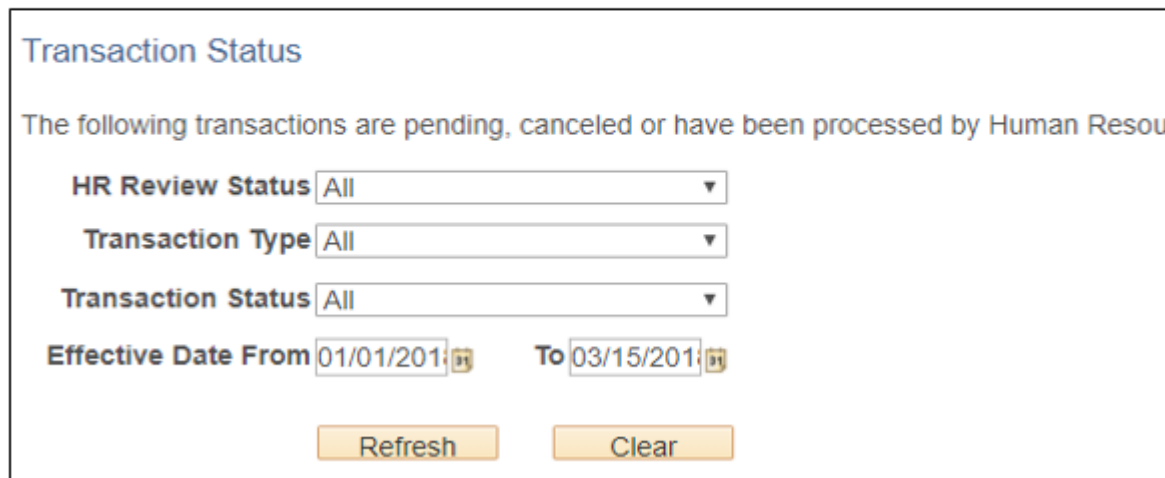


[11]

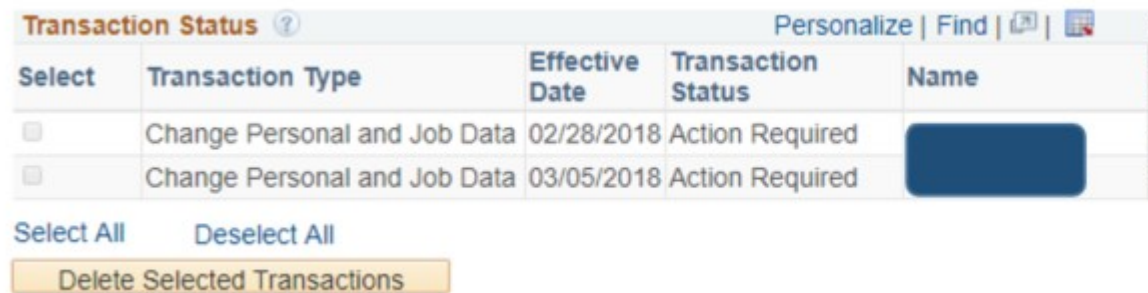
3.



Clicking **Transaction Status**.



4. Entering parameters to search for transactions. The system displays a list of transactions matching this criteria. [13]



5. Right-clicking on the **Related Content** indicator and clicking **View Approval Chain**.
Helpful hint: Some faculty transfers on the Boulder campus will show two approvers in the Approved box.

Select	Transaction Type	Effective Date	Transaction Status	Name	Person ID	Action
<input type="checkbox"/>	Change Personal and Job Data	02/28/2018	Action Required	[Redacted]	100010	Actions <input type="button" value="View Approv..."/>
<input type="checkbox"/>	Change Personal and Job Data	03/05/2018	Action Required	[Redacted]	217875	

Select All Deselect All

Transfer Approval

▼ HIRE_REQUEST_ID=5307:Approved

Campus = Systems (USYS)

Approved

✓ Frakes, Ashley Marie
 University Staff
 03/01/18 - 1:36 PM

Verifying Transfer Approval

Once the Transfer transaction has been approved, users can verify the information has been updated. To do this, navigate to Job Data from the HCM Community Users dashboard:
Non-Pay Actions tile > Job Information > Job Data.

Work Location	Job Information	Payroll	Salary Plan	Compensation
Employee		Empl ID		
Empl Record 0				
Work Location ?		Find First 1 of 3 Last		
*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	
Position Number		Research Associate	Future	
Override Position Data				
Position Entry Date	03/01/2018	<input type="checkbox"/> Position Management Record		
Regulatory Region	USA	United States		
Company	CU	University of Colorado		
Business Unit	UCB	Boulder Campus		
Department	10080	Coop Inst Res/Envrn Sci - Dir		
Department Entry Date	03/01/2018			
Location	1CIRE	Coop Inst for Res in Env Sci		
Establishment ID	CU	University of Colorado	Date Created 02/26/2018	
Last Start Date	03/01/2007			
Expected Job End Date				

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

3.

3. If this transaction **is** for an employee with a new contract, click NavBar: **Navigator > Workforce Administration > Update Contract Pay NA**. Enter the **Employee ID** and select the **next contract ID**.

Search Results

View All

Empl ID	Empl Record	Contract ID
280143 0		1
280143 0		2
280143 0		4
280143 1		3

[16]

If this transaction **is not** for an employee with a new contract, verify the Transfer row has been added with the correct Effective Date.

Contract ID 0000004

Contract Information ?

*Effective Date 09/01/20

Contract Pay Type AY Faculty

Payment Term Pay Over

*Monthly Frequency M

Pay Period Hours

*Assign Hours To Not Applicable

*Contract Begin Date 08/14/20

Payment Begin Date 09/01/20

Actual Start Date 08/14/20

Last Payment Date

[17]

- 4.
- 5.

A vertical navigation menu with the following items: Document Collection, Personal Information (with a dropdown arrow), Job Information (with a dropdown arrow), Position Management (with an up arrow and highlighted with a red box), Maintain POI Relationship, Add/Update Position Info (highlighted with a green background and a red border), Position Summary, and Position History.

Description	Specific Information	Budget and Incumbent		
Position Number				
Headcount Status	Filled			
Current Budget				
Earnings	Deductions	Tax		
0.000	0.000	0.000		
Current Incumbents				
Empl ID	Empl Record	Full/Part	Std Hrs/Wk	Name
	0	Full-Time	40.00	

Learn more with recorded webinars

Want to learn more about the upgrades that are on the way? Watch recorded POI and Transfer webinars on the [HCM Current Projects page](#) [19].

[HCM development](#) [20], [HCM project](#) [21], [Transfer](#) [22]

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Links

[1] <https://www.cu.edu/blog/hcm-community/see-how-transfer-processes-will-change-after-april-14-upgrade>

[2] <https://www.cu.edu/blog/hcm-community/author/10695>

[3] <https://www.cu.edu/sites/default/files/Transfer%20Cycle%20overview.JPG>

[4] <https://www.cu.edu/blog/hcm-community/preview-transfer%E2%80%99s-new-template-based->

transaction-approach-learn-about-additional

[5] <https://www.cu.edu/sites/default/files/Navigating%20to%20TBT.JPG>

[6] <https://www.cu.edu/blog/hcm-community/hcm-development-take-your-first-look-related-action-and-related-content>

[7] <https://www.cu.edu/sites/default/files/Template%20Based%20Transactions.JPG>

[8] <https://www.cu.edu/sites/default/files/Contract%20Term%20period.JPG>

[9] <https://www.cu.edu/sites/default/files/Save%20and%20Submit%20Message.png>

[10] https://www.cu.edu/sites/default/files/Employee%20Self%20Service_0.png

[11] https://www.cu.edu/sites/default/files/Pay%20Actions_0.png

[12] <https://www.cu.edu/sites/default/files/Transaction%20Status.PNG>

[13] <https://www.cu.edu/sites/default/files/Transaction%20Status.jpg>

[14] <https://www.cu.edu/sites/default/files/Transfer%20Approval.JPG>

[15] <https://www.cu.edu/sites/default/files/Work%20Location.png>

[16] <https://www.cu.edu/sites/default/files/Search%20Results.png>

[17] <https://www.cu.edu/sites/default/files/Job%20record.png>

[18] <https://www.cu.edu/sites/default/files/Budget%20Incumbents.JPG>

[19] <https://www.cu.edu/hcm-community/hcm-projects/current-projects>

[20] <https://www.cu.edu/blog/hcm-community/tag/hcm-development>

[21] <https://www.cu.edu/blog/hcm-community/tag/hcm-project>

[22] <https://www.cu.edu/blog/hcm-community/tag/transfer>