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:

The receiving department initiates the Transfer

Getting started: Navigating to the new template

Entering Employee ID, Job Effective Date and Transfer Reason

Entering comments and pay information: Frequency, Rate, etc.

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.

Note: Click any image to enlarge it.
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.

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

1. For both Transfers with and without a new contract, enter the **Position Number**. **Helpful hint:** Proverity the details of the position, users will be able to select **Related Content** from the top right corner of the page. This feature will allow them to search for and view position funding or run the **Manage Transaction** query.
2. The **Pay Group** will already be selected. Users can update this field if necessary.

3. Type or search for the **Employee Type**.

4. Type or search for the **Compensation Frequency**.

5. 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.

6. Type or select an **Appointment End Date** if applicable.

7. Enter comments.

Helpful hint: MON appears as the pay group for professional contracts and STM appears for student contracts. No other pay groups should be used for contract pay.

The system will display **C** for Compensation Frequency.

The **Comp Rate Code** displays **BASEC** as the Rate Code.

Helpful hint: No other pay components can be added to a record coded as a contract. Other components of pay must be recorded on the Additional Pay page. Appointment End Date will be greyed out if entering a contract defined on the contract crosswalk table. The Appointment End Date is required if the effective date or contract begin date is not within any of the parameters coded on the contract crosswalk and the contract type displays as Default Appointment Period. Enter comments and select **Contract Term Period**. After selecting a Contract Term Period, the CU Faculty Contracts section is auto-populated and is not editable.

Helpful hint: If the transaction's Effective Date does not match a Contract Begin Date on the Contract Crosswalk Table, Default Appointment Period will be auto-populated for the Contract Term Period and an Appointment End Date will need to be manually entered.
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.

![Message](image)

**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.

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

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

3. If this transaction is for an employee with a new contract, verify the correct contract parameters are in place.

Click NavBar: Navigator > Workforce Administration > Update Contract Pay NA. Enter the Employee ID and click Search. The newest contract ID will be listed.

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

<table>
<thead>
<tr>
<th>Empl ID</th>
<th>Empl Record</th>
<th>Contract ID</th>
</tr>
</thead>
<tbody>
<tr>
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<td></td>
</tr>
<tr>
<td>280143 1</td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>

**Contract Information**

*Effective Date* 09/01/2020

Contract Pay Type AY Faculty

Payment Term Pay Over

*Monthly Frequency* M

Pay Period Hours

*Assign Hours To* Not Applicable

*Contract Begin Date* 08/14/2020

Payment Begin Date 09/01/2020

Actual Start Date 08/14/2020

Last Payment Date
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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