Transfer an employee to a different position
electronic Personnel Action Form

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I. General Information

When transferring an employee to a different position, two personnel actions must be done. First, we must end his/her current primary position; then, secondly, we must create a new primary position record. The TRNSFR ePAF will enable you to do both of these personnel actions with one ePAF.

If an employee is transferring to a new position without the position being posted, the hiring department needs to include the Justification for the transfer in the comment section of the ePAF.

If the position was posted, then the hiring department will need to enter the transfer ePAF and send the Hiring Matrix Form to the Human Resource Office. Also, the hiring department needs to include the Justification for the transfer in the comment section of the ePAF.

Human Resources will not approve the transfer ePAF until:

1. Hiring Matrix Form is received in HR
2. Transcripts received in HR (if required)
3. Background Check completed (if required)
II. If new job has labor distributed over more than one account.

If the new job that the employee is transferring is being paid by more than one account, use the org code of the highest percentage account as the Home Organization and Distribution Organization when entering data for the new job.
III. Additional action required if employee transferring has more than one active position/suffix.

If the transferring employee has an additional position/suffix that is active (i.e. Cell Phone Allowance), that position/suffix will also need to be terminated by creating an additional ePAF.
IV. Step-by-step instructions

Select **Transfer employee to a different position ePAF**

* - Indicates a required field.

**ID:** Enter id if known or select search to find.

**Effective Date:** Enter Effective Date **of when New Job will begin.**

**Transaction Type:** Select **Transfer employee to a different position** from approval category pull-down. Select **GO.**

Select the **ACTIVE** primary position. This is the job the employee is leaving. Press Next Approval Type Button.

Press All Jobs Button. This will allow you to see what the last suffix used for the employee regardless of position (see below). You use the next sequential suffix when creating the new job assignment regardless of position number.
Now you are ready to enter information concerning the New Job the employee is transferring to.

Enter the new position number with the next sequential suffix number. Press GO Button.

Now you have the detail information concerning the transfer to enter. The Termination Effective Date and Personnel Date is the day before the start date of the new Job. There should NOT be a date gap between Old and New Jobs.
At this point - Press the **Save and Add New Rows** Button to ensure that you have not left anything out.

If no errors are found, you will be sent to top of ePAF with a ‘Your change was saved successfully’ as seen below.
Electronic Personnel Action Form

Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit.

**Name and ID:**

**Transaction:** 2225  
**Query Date:** Mar 01, 2011

**Transaction Status:** Waiting  
**Approval Category:** Transfer employee to a different position, TRNSFR

**Routing Queue**

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>User Name</th>
<th>Required Action Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>8 - (HRREV-W) HR Review</td>
<td>LMCCORKLE</td>
<td>Approve</td>
</tr>
<tr>
<td>10 - (DEPT) Department Head</td>
<td>JSEFCIK</td>
<td>Approve</td>
</tr>
<tr>
<td>15 - (VERU) Account Verification</td>
<td>LSHEPPAR</td>
<td>Approve</td>
</tr>
<tr>
<td>20 - (DEAN) Dean/Administrative Head</td>
<td>DFOX</td>
<td>Approve</td>
</tr>
<tr>
<td>30 - (VP) Vice President/Provost Office</td>
<td>JLIMBAUGH</td>
<td>Approve</td>
</tr>
<tr>
<td>40 - (HR) Human Resources</td>
<td>KNEAL</td>
<td>Approve</td>
</tr>
<tr>
<td>50 - (BUDGET) Budget Office</td>
<td>AWRIGHT</td>
<td>Approve</td>
</tr>
<tr>
<td>90 - (PAYROL) Payroll</td>
<td>SHBROOKS</td>
<td>Not Selected</td>
</tr>
</tbody>
</table>

**Action Options:**

- Save
- Submit
- Delete

Scroll Down for Approval Routing

Enter User Name from pull-down for each Approval Level Listed. Scroll down.
Enter the following data in Comments.
Justification for the transfer
New Position Title
Web Time and/or Leave approver’s name in comments section.

NOTE: Yellow Notepad to right of Comment Box denotes comment(s) are present.

If errors occur, review the Errors and Warning Messages Section at top of ePAF.

If no errors exist, Press Submit to start the approval process!

Electronic Personnel Action Form

The transaction has been successfully submitted.

Enter the information for the EAPF and either Save or Submit

Name and ID: 
Transaction: 2407 
Transaction Status: Pending 
Approval Category: Transfer Employee to New Position, TRNSFR

Query Date: Mar 01, 2011

Make note of transaction number