# Transfer an employee to a different position electronic Personnel Action Form

# Contents

I.	General Information	. 2
II	If new job has labor distributed over more than one account.	3
	Additional action required if employee transferring has more than one active position/suffix.	
IV.	Step-by-step instructions	. 5

## 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)

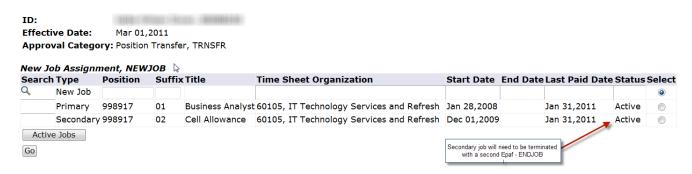
# II. If new job has labor distributed over more than one account.

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.

New Job Assignment, 998978-04 Technology Servs Proj Mgr **Current Value** Contract Type: Primary Step: (Not Overrideable) **Employee Class Code:** PR. Professional Q **Home Organization:** 60105, IT Technology Services and Refresh Q  $_{61470}$ Distribution Orgn: 60105, IT Technology Services and Refresh 9 61470 **Annual Salary:** Job Begin Date: MM/DD/YYYY Jobs Effective Date: MM/DD/YYYY Personnel Date: MM/DD/YYYY Job Change Reason: Not Selected Current Effective Date: 03/01/2011 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date New Effective Date: MM/DD/YYYY 03/01/2011 Percent Encumbrance Override End Date COA Organization Activity Index Fund Account Program Location **Project** Q A Q 0100 60105 7010 Q 6020 Q DES 12.97 Q A Q <sub>0120</sub> Q 7010 Q 6020 Q 61470 Q DES 45.14 Q 2000 Q A Q 10313 Q 7010 Q 1040 Q RES 41.89

# 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



Enter id if known or select search to find.

Enter Effective Date of when New Job will begin.

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.

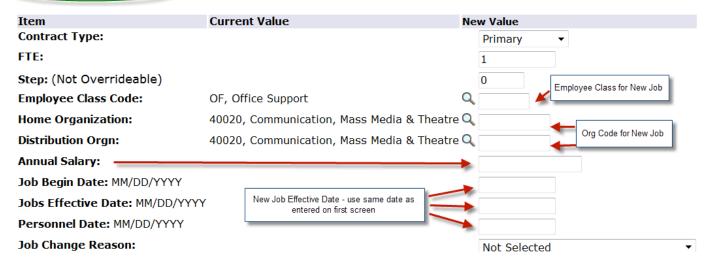
Now you have the detail information concerning the transfer to enter.

The Termination Effective Date and Personnel Date is the day before the start date of the new Job. There should <u>NOT</u> be a date gap between Old and New Jobs.

# Termination 999863-02 Office Coordinator II, Last Paid Date: Jan 31,2011

Item	Current Value	New Value		Effective Date for Termination of the Old Job (should be day prior New Job	
Jobs Effective Date: MM/DD/YYYY	09/01/2010			effective date).	W JOD
Personnel Date: MM/DD/YYYY	09/01/2010				
Job Status: (Not Overrideable)	Active	T			
Job Change Reason:	900, Establish new job/appt/reappt	Not Selected		•	

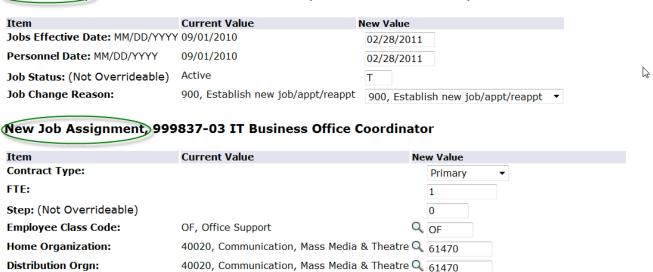
### New Job Assignment 999837-03 IT Business Office Coordinator



#### **Data Entered**

**Annual Salary:** 

#### Termination 999863-02 Office Coordinator II, Last Paid Date: Jan 31,2011



Job Begin Date: MM/DD/YYYY
Johs Effective Date: MM/DD/YYYY

 Jobs Effective Date: MM/DD/YYYY
 03/01/2011

 Personnel Date: MM/DD/YYYY
 03/01/2011

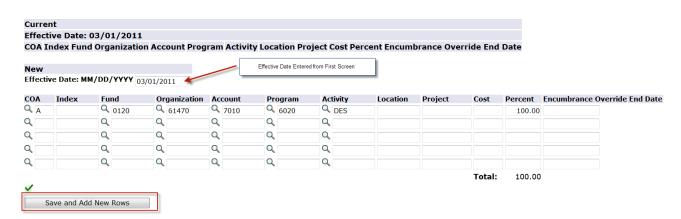
Job Change Reason:

900, Establish new job/appt/reappt ▼

30000

03/01/2011

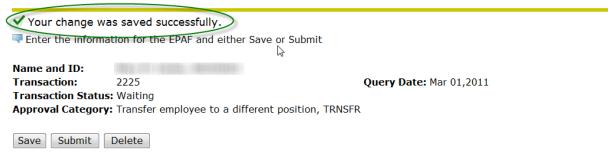
#### Scroll Down for Account Information



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**



## Scroll Down for Approval Routing

Enter User Name from pull-down for each Approval Level Listed. Scroll down.

#### **Routing Queue**

^		
LMCCORKLE	Luann Emma McCorkle	Approve
Q JSEFCIK	Jeffrey J. Sefcik	Approve
Q LSHEPPAR	Lisa J. Sheppard	Approve
Q DFOX	Douglas W. Fox	Approve
Q JLIMBAUGH	James Michael Limbaugh	Approve
Q KNEAL	Kurtis Ross Neal	Approve
AWRIGHT	Angelina W. Wright	Approve
SHBROOKS	Shonda L. Brooks	Apply
Q		Not Selected ▼
	Q JSEFCIK Q LSHEPPAR Q DFOX Q JLIMBAUGH Q KNEAL Q AWRIGHT Q SHBROOKS Q Q	Q   JSEFCIK   Jeffrey J. Sefcik   Q   LSHEPPAR   Lisa J. Sheppard   Q   DFOX   Douglas W. Fox   Q   JLIMBAUGH   James Michael Limbaugh   Q   KNEAL   Kurtis Ross Neal   Q   AWRIGHT   Angelina W. Wright   Q   SHBROOKS   Shonda L. Brooks   Q   Q   Q   Q   Q   Q   Q   Q   Q

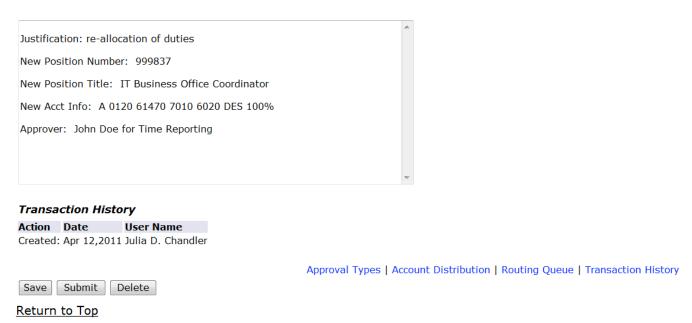
Enter the following data in Comments.

Justification for the transfer

**New Position Title** 

Web Time and/or Leave approver's name in comments section.

#### Comment



Press Save Button.

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

#### Comment



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**

