

# 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 in the ePAF:

1. Justification for the transfer
2. New Position number and Title
3. New Account information
4. Time and/or Leave approver's name in comments section

If the position was posted, then the hiring department will need to enter the transfer ePAF; and also include the Justification for Selection Form and Hiring Matrix Form to the Human Resource Office.

Kurtis Neal will not approve the transfer ePAF until:

1. Justification for Selection Form and 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

Item	Current Value	New Value
Contract Type:		Primary
FTE:		1
Step: (Not Overrideable)		0
Employee Class Code:	PR, Professional	
Home Organization:	60105, IT Technology Services and Refresh	61470
Distribution Orgn:	60105, IT Technology Services and Refresh	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

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
A		0100	60105	7010	6020	DES				12.97			
A		0120	61470	7010	6020	DES				45.14			
A		2000	10313	7010	1040	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 utilizing ENDJOB ePAF for the second active position/suffix.

**ID:** [REDACTED]  
**Effective Date:** Mar 01,2011  
**Approval Category:** Position Transfer, TRNSFR

**New Job Assignment, NEWJOB**

Search Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
New Job									<input checked="" type="radio"/>
Primary	998917	01	Business Analyst	60105, IT Technology Services and Refresh	Jan 28,2008		Jan 31,2011	Active	<input type="radio"/>
Secondary	998917	02	Cell Allowance	60105, IT Technology Services and Refresh	Dec 01,2009		Jan 31,2011	Active	<input type="radio"/>

Active Jobs

Go

Secondary job will need to be terminated with a second EpaF - ENDJOB

## IV. Step-by-step instructions

### Select Transfer employee to a different position ePAF

\* - indicates a required field.

ID: \*   

Effective Date: MM/DD/YYYY\*  Date when starting new job

Transaction Type: \*

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.

ID:

Effective Date: Mar 01,2011

Approval Category: Position Transfer, TRNSFR

**Termination, ENDJOB**

Search Type	Position	Suffix Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
New Job								<input type="radio"/>
Primary	999863	02 Office Coordinator II		Dec 15,2008		Jan 31,2011	Active	<input checked="" type="radio"/>

Next Approval Type

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

ID:

Effective Date: Mar 01,2011

Approval Category: Position Transfer, TRNSFR

**New Job Assignment, NEWJOB**

Search Type	Position	Suffix Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
New Job								<input type="radio"/>
Primary	999863	02 Office Coordinator II		Dec 15,2008		Jan 31,2011	Active	<input checked="" type="radio"/>

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.

ID:

Effective Date: Mar 01,2011

Approval Category: Position Transfer, TRNSFR

**New Job Assignment, NEWJOB**

Search Type	Position	Suffix Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
New Job								<input type="radio"/>
Primary	999863	02 Office Coordinator II 40090,		Dec 15,2008		Jan 31,2011	Active	<input type="radio"/>
Primary	999869	01 Office Coordinator II 40020,		Sep 01,2004	Dec 14,2008	Dec 31,2008	Terminated	<input type="radio"/>

Now you are ready to enter information concerning the New Job the employee is transferring to.

ID:

Effective Date: Mar 01, 2011

Approval Category: Position Transfer, TRNSFR

Enter the new position that the employee is transferring to with the next sequential suffix number

**New Job Assignment, NEWJOB**

Search Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
New Job	999837	03	IT Business Office Coordinator	33340, Administrative Computing System					<input checked="" type="radio"/>
Primary	999863	02	Office Coordinator II		Dec 15, 2008		Jan 31, 2011	Active	<input type="radio"/>

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.

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

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY	09/01/2010	<input type="text"/>
Personnel Date: MM/DD/YYYY	09/01/2010	<input type="text"/>
Job Status: (Not Overrideable)	Active	T <input type="text"/>
Job Change Reason:	900, Establish new job/appt/reatp	Not Selected <input type="text"/>

Effective Date for Termination of the Old Job (should be day prior New Job effective date).

**New Job Assignment, 999837-03 IT Business Office Coordinator**

Item	Current Value	New Value
Contract Type:		Primary <input type="text"/>
FTE:		1 <input type="text"/>
Step: (Not Overrideable)		0 <input type="text"/>
Employee Class Code:	OF, Office Support	<input type="text"/>
Home Organization:	40020, Communication, Mass Media & Theatre	<input type="text"/>
Distribution Orgn:	40020, Communication, Mass Media & Theatre	<input type="text"/>
Annual Salary:		<input type="text"/>
Job Begin Date: MM/DD/YYYY		<input type="text"/>
Jobs Effective Date: MM/DD/YYYY		<input type="text"/>
Personnel Date: MM/DD/YYYY		<input type="text"/>
Job Change Reason:		Not Selected <input type="text"/>

Employee Class for New Job

Org Code for New Job

New Job Effective Date - use same date as entered on first screen

## Data Entered

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

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY	09/01/2010	02/28/2011
Personnel Date: MM/DD/YYYY	09/01/2010	02/28/2011
Job Status: (Not Overrideable)	Active	T
Job Change Reason:	900, Establish new job/appt/reppt	900, Establish new job/appt/reppt

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

Item	Current Value	New Value
Contract Type:		Primary
FTE:		1
Step: (Not Overrideable)		0
Employee Class Code:	OF, Office Support	OF
Home Organization:	40020, Communication, Mass Media & Theatre	61470
Distribution Orgn:	40020, Communication, Mass Media & Theatre	61470
Annual Salary:		30000
Job Begin Date: MM/DD/YYYY		03/01/2011
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/reppt

## Scroll Down for Account Information

Current												
Effective Date: 03/01/2011												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override End Date
Q	A	Q 0120	Q 61470	Q 7010	Q 6020	Q DES				100.00		
Q		Q	Q	Q	Q	Q						
Q		Q	Q	Q	Q	Q						
Q		Q	Q	Q	Q	Q						
Q		Q	Q	Q	Q	Q						
										<b>Total:</b>	100.00	

Effective Date Entered from First Screen

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

Save and Add New Rows

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, TRANSFR

Save Submit Delete

Scroll Down for Approval Routing

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

## Routing Queue

Approval Level	User Name	Required Action	Remove
8 - (HRREVW) HR Review	LMCCORKLE Luann Emma McCorkle	Approve	
10 - (DEPT) Department Head	JSEFCIK Jeffrey J. Sefcik	Approve	
15 - (VERIF) Account Verification	LSHEPPAR Lisa J. Sheppard	Approve	
20 - (DEAN) Dean/Administrative Head	DFOX Douglas W. Fox	Approve	
30 - (VP) Vice President/Provost Office	JLIMBAUGH James Michael Limbaugh	Approve	
40 - (HR) Human Resources	KNEAL Kurtis Ross Neal	Approve	
50 - (BUDGET) Budget Office	AWRIGHT Angelina W. Wright	Approve	
90 - (PAYROL) Payroll	SHBROOKS Shonda L. Brooks	Apply	
Not Selected		Not Selected	
Not Selected		Not Selected	
Not Selected		Not Selected	
Not Selected		Not Selected	

Save and Add New Rows

Enter the following data in Comments.

Justification for the transfer

New Position number and Title

New Account information

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

### Comment

Justification: re-allocation of duties  
New Position Number: 999837  
New Position Title: IT Business Office Coordinator  
New Acct Info: A 0120 61470 7010 6020 DES 100%  
Approver: John Doe for Time Reporting

### Transaction History

Action	Date	User Name
Created:	Apr 12,2011	Julia D. Chandler


[Approval Types](#) | [Account Distribution](#) | [Routing Queue](#) | [Transaction History](#)

[Return to Top](#)

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

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

Name and ID:

Transaction: 2407

Transaction Status: Pending

Approval Category: Transfer Employee to New Position, TRNSFR

Make note of transaction number

Query Date: Mar 01,2011