Transfer Request

When to use
• A current active employee who is moving from:
  • one position to another in same dept.
  • one department to a new dept.

• Example - Employee will be moving from Position A as a Senior Analyst (10078956) to Position B as a Manager (10086359).

❖ System allows you to see the most recent Job information

Attachments
• Any exemptions to post or dept. approvals
2. Select the Create New Request link.
3. The Initiate New eForms Request page is displayed. From the “Actions” drop down menu, select the Transfer option.
4. The Transfer eForm is displayed. Use the Justification text box to explain or “justify” the reason for the eForm action requested.

5. From the Empl ID section, select Search to populate data in Empl ID field.

Note: The most recent Job data will display for Active employees only. Inactive employees can not be modified.
All Fields need to be completed.

Once the information has been entered the information in the gray fields will populate, based on the information currently in People Soft.

If necessary, the Position Data should be updated via PAC eForm and completed before this form is initiated. This information is populated from Position Data.
• The annual rate will need to be updated based on the approvals received.
• The proposed funding for Faculty & Students will be approved based on allowable available funds.
6. When all the required fields have been completed, click the **Save** button.

   **Notice:** At the top of the form, the Request ID number has been assigned and the status of the form is now “Saved.”

7. Expand the **Attachments** or **Comments** section to attach required documentation and/or include any special comments. This includes exceptions to post, Dept. approvals, etc.

8. Click the **Submit** button.

9. Once the document is submitted, the status of the form will update and show “**Pending Approvals**.” The current approval routing is displayed at the bottom of the page.
Transfer Workflow

Transfer eForm

Creator
- Transfer eForm is submitted by department initiator

Department Approvals
- Reports To
- Funding Approver

Backoffice Review
- Budget approver
- People Excellence Approver
eForm Warning Messages

• **General Warning**- Warning message on duplicate request for a Position #/Empl ID. Please verify the additional request and wait until it is completed to submit transfer.

• **Hard Stop**- Error message for missing required fields and/or attachments, or date errors.
eForm Reminders

- **Transfers**: When transferring an employee, the receiving department should submit the Transfer eForm.

- **Search Match**: Please complete thoroughly. Creating additional EIDs causes PeopleSoft errors.

- **Position Data**: eForm will not show employee's current position information, only the data for the position they are transferring into.