

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

Initiating a Transfer Request eForm

Employee Self Service eForm

View Existing Requests
Create New Request
Budget Overview
Reports

My Requests Personalize | Find | View All | First | Prev 1 of 1 Next | Last

Request ID	eForms Action	Status	Name
1	URL		

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.

Initiate New eForms Request

Action

Actions: [Dropdown Menu]

Justification: [Text Field]

Status: [Text Field]

Contact Information

Entered By: [Text Field]

Name: [Text Field]

Phone: [Text Field]

Email ID: [Text Field]

Dept ID: [Text Field]

Secondary Contact: [Text Field]

Transfer Request

Initiating a Transfer eForm

Transfer Within Institution

Action

Actions: Transfer Request Status

*Justification: Moving to new position

Request ID
Request Date
Processing Messages
Request History

Employee Information

*Empl ID: 6001165389 Serrano, Cynthia Marie Search Show Current Additional Pay

Select	Empl RCD	Job Indicator	Company	HR Status	Payroll Status	Eff Date	Action	Reason	Dept ID
1 <input checked="" type="checkbox"/>		0 Primary	ELP	Active	Active	09/01/2019	Pay Rate Change	Permanent Additional Duties	301100

*Transfer Date: 02/01/2020
 Position: 10080103
 Expected End:
 Transfer Action: Promotion
 Transfer Action Reason: Promotion

Current and Future Incumbents

Empl ID	Empl Rcd	Name
	0	

- The **Transfer** eForm is displayed. Use the **Justification** text box to explain or “justify” the reason for the eForm action requested.
- 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.

Initiating a Transfer eForm

Current Position Information		Proposed Position Information	
Position	10026905 Profile ID	Position	10026905
Status	Active	Status	Active
Company	University of Texas, San Anton	Company	University of Texas, San Anton
Business Unit	UTS03 VP of Business Affairs	Business Unit	UTS03 VP of Business Affairs
Department	BFA004 FINANCIAL SVCS & UNIV BURSAR	Department	BFA004 FINANCIAL SVCS & UNIV BURSAR
Job Code	19190 FINANCIAL AFFAIRS COORDINATOR	Job Code	19190 FINANCIAL AFFAIRS COORDINATOR
Job Title	FINANCIAL AFFAIRS COORDINATOR	Job Title	FINANCIAL AFFAIRS COORDINATOR
Reg/Temp	Regular	Reg/Temp	Regular
Full/Part Time	Full-Time	Full/Part Time	Full Time
FLSA Status	Exempt	FLSA Status	Exempt
Empl Class	Classified	Empl Class	Classified
Sal Plan	UTSA Classified	Sal Plan	UTSA Classified
Budgeted Amt	41931.70	Budgeted Amt	41931.70
FTE	1.000000	*FTE	1.000000
Std Hrs/Wk	40.00	Std Hrs/Wk	40.00
Max Head Cnt	1	Max Head Cnt	1
Reports To Pos	10025387	Reports To Pos	10025387
Reports To	Shyam Suwal	Reports To	Shyam Suwal
Reports To Email	Sam.Suwal@utsa.edu	Reports To Email	Sam.Suwal@utsa.edu
Location Code	JPL	Location Code	JPL
Mail Drop ID	05200	Mail Drop ID	05200
Officer Code	Not Applicable	Officer Code	Not Applicable
<input checked="" type="checkbox"/> Budgeted Position		<input checked="" type="checkbox"/> Budgeted Position	

- 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.

Initiating a Transfer eForm

Proposed Job Information

Empl Class

Comp Frqncy

FTE Std Hrs/Wk

*Annual Rate @100%

Annual Rate @FTE

Proposed Annualized Rate

Monthly Rate @FTE

- 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.

Current Funding

Find First 1 of 1 Last

Start Date 09/01/2019

Ern Cd	Cost Center	Cost Center Descr	Project	Project Descr	Funding End Date	Distrb %	Est. Expense
	14021300	BUDGET OFFICE				100.000	
CDA	19021300	Budget Office Ope Expenses				100.000	

Proposed Funding

Find First 1 of 1 Last

*Start Date

Ern Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense		
	<input type="text" value="14021300"/>	<input type="text" value="BUDGET OFFICE"/>	<input type="text"/>		<input type="text" value=""/>	<input type="text" value="100.000"/>		<input type="button" value="+"/>	<input type="button" value="-"/>
CDA	19021300	Budget Office Ope Expenses				100.000		<input type="button" value="+"/>	

Initiating a Transfer eForm

The screenshot shows the following sections and elements:

- Attachments:** A table with columns: Type, Note, Attached File, Attach Date/Time, By. Below the table is a red-bordered button labeled "Add/Delete".
- Comments:** A text input area with a red-bordered "Add/Edit" button to its right. A red arrow points from a circled "7" to this button.
- Form Procedures:** A section containing a red-bordered "Save" button (with a circled "6" above it) and a red-bordered "Submit" button (with a circled "8" above it). Other buttons include "Approve", "Deny", "CallBack", and "Sendback".

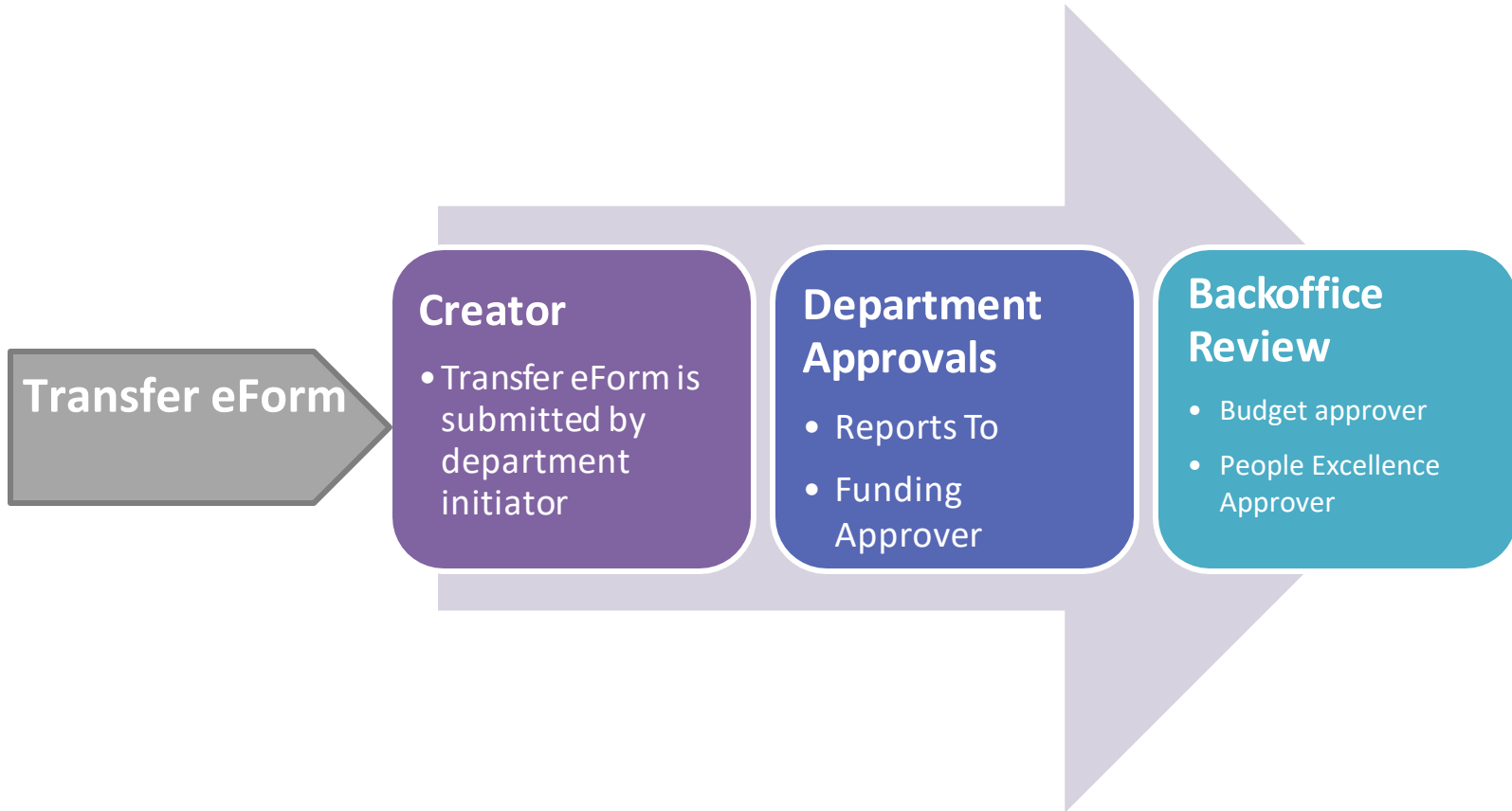
6. When all the required fields have been completed, click the **Save** button.

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.

The approval routing section is titled "Department Approvals" and includes:

- Department Approvals:** REQUEST_ID=00107877:Pending. Status: Pending. Approver: Brandon L Jones, New Position Reports To.
- Funding Approvals:** REQUEST_ID=00107877:Awaiting Further Approvals. Status: Not Routed. Approver: Multiple Approvers, FMS Cost Center Approver.
- Business Office Approvals:** REQUEST_ID=00107877:Awaiting Further Approvals. Status: Not Routed. Approver: Sarah Christine Garcia, Recruitment. Next Approver: Multiple Approvers, EDM.

Transfer Workflow



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.