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

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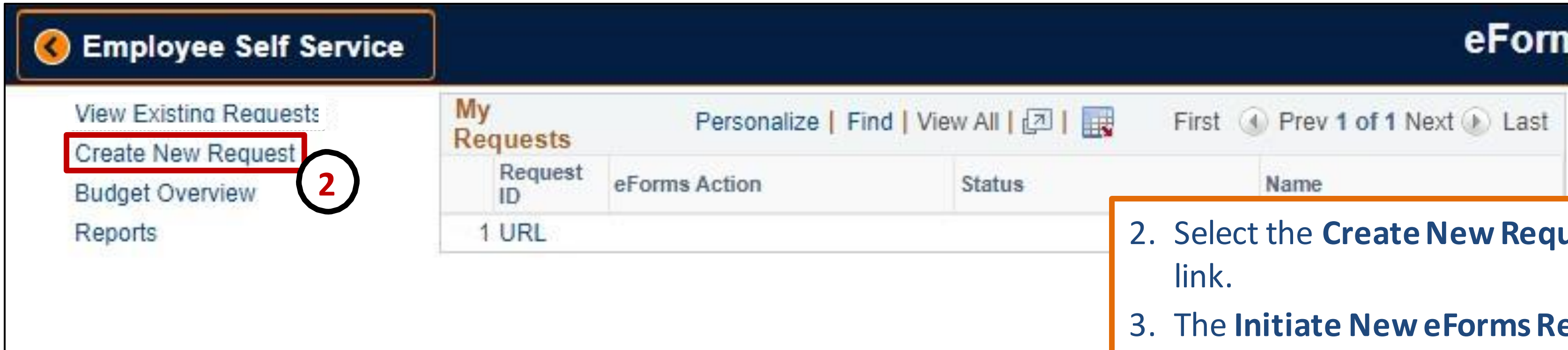
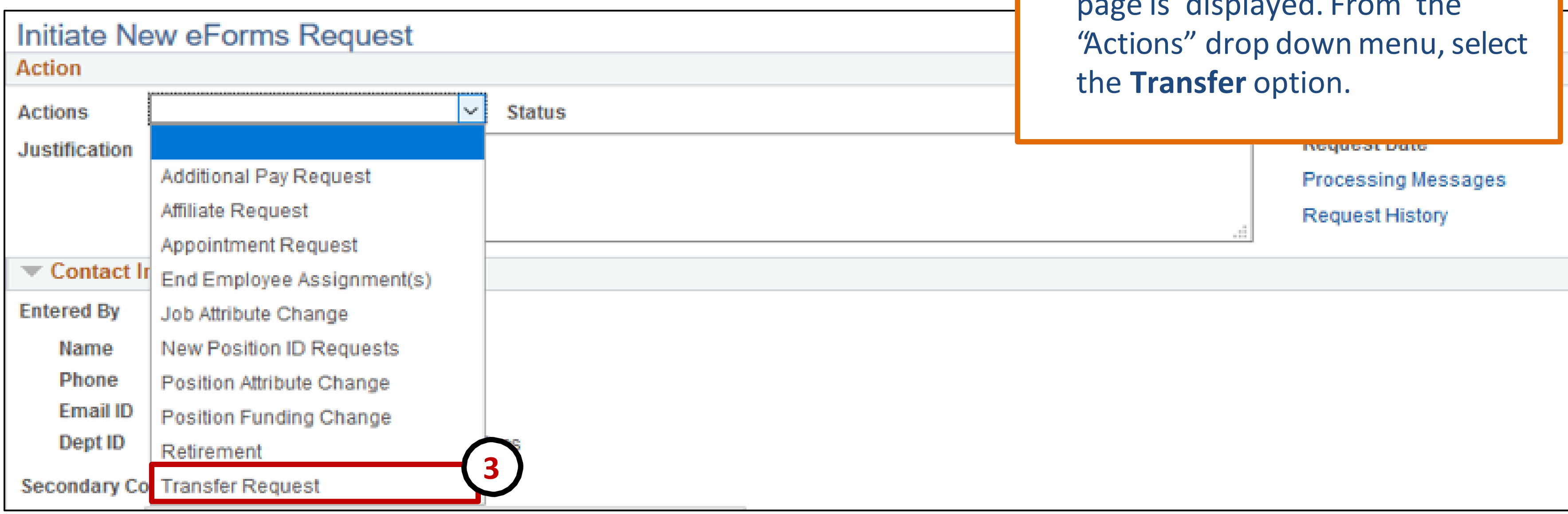
Initiating a Transfer Request eForm



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.



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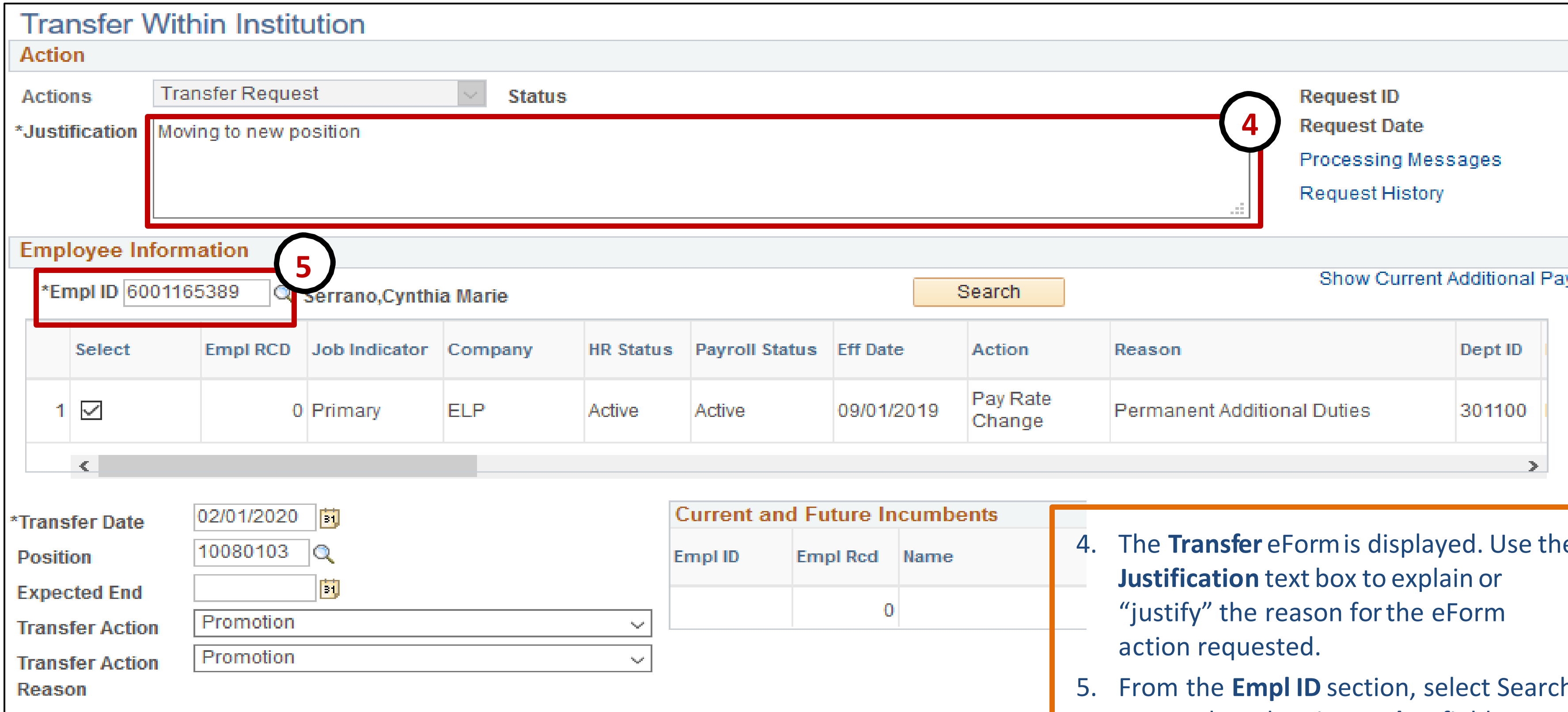
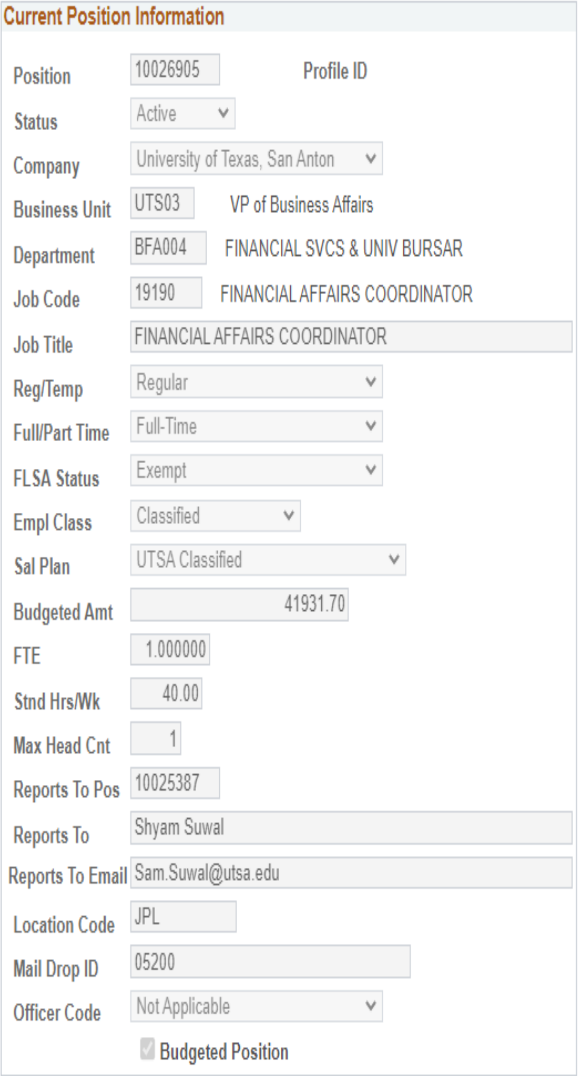


4. The **Transfer** eForm is displayed. Use the **Justification** text box to explain or "justify" the reason for the eForm action requested.
5. From the **Empl ID** section, select Search to populate data in **Empl ID** field.

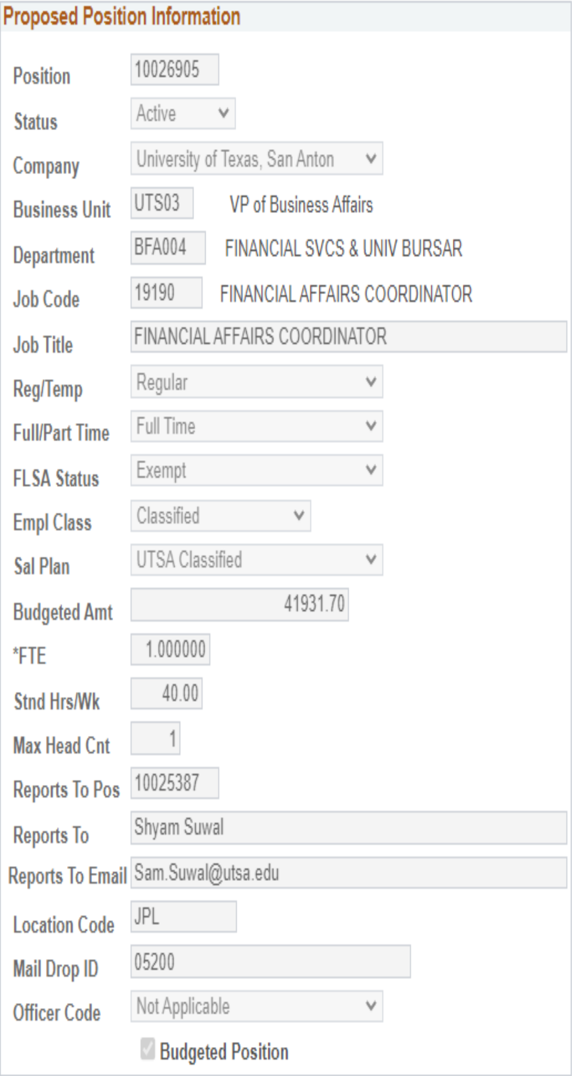
   Note: The most recent Job data will display for Active employees only. Inactive employees can not be modified.

Initiating a Transfer eForm



Current Position Information

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



Proposed Position Information

Position	10026905	
Status	Active	
Company	University of Texas, San Anton	
Business Unit	UTS03	VP of Business Affairs
Department	BFA004	FINANCIAL SVCS & UNIV BURSAR
Job Code	19190	FINANCIAL AFFAIRS COORDINATOR
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*FTE	1.000000	
Stnd Hrs/Wk	40.00	
Max Head Cnt	1	
Reports To Pos	10025387	
Reports To	Shyam Suwal	
Reports To Email	Sam.Suwal@utsa.edu	
Location Code	JPL	
Mail Drop ID	05200	
Officer Code	Not Applicable	
	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.

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Initiating a Transfer eForm

- 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.

Proposed Job Information

Empl Class	Administrative / Professional
Comp Frqncy	Monthly
FTE	1.000000
Stnd Hrs/Wk	
*Annual Rate @100%	
Annual Rate @FTE	
Proposed Annualized Rate	
Monthly Rate @FTE	

Current Funding Find First 1 of 1 Last

Start Date 09/01/2019

Distribution | Chartfields | Project Info

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 09/01/2019

Distribution | Chartfields | Project Info

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

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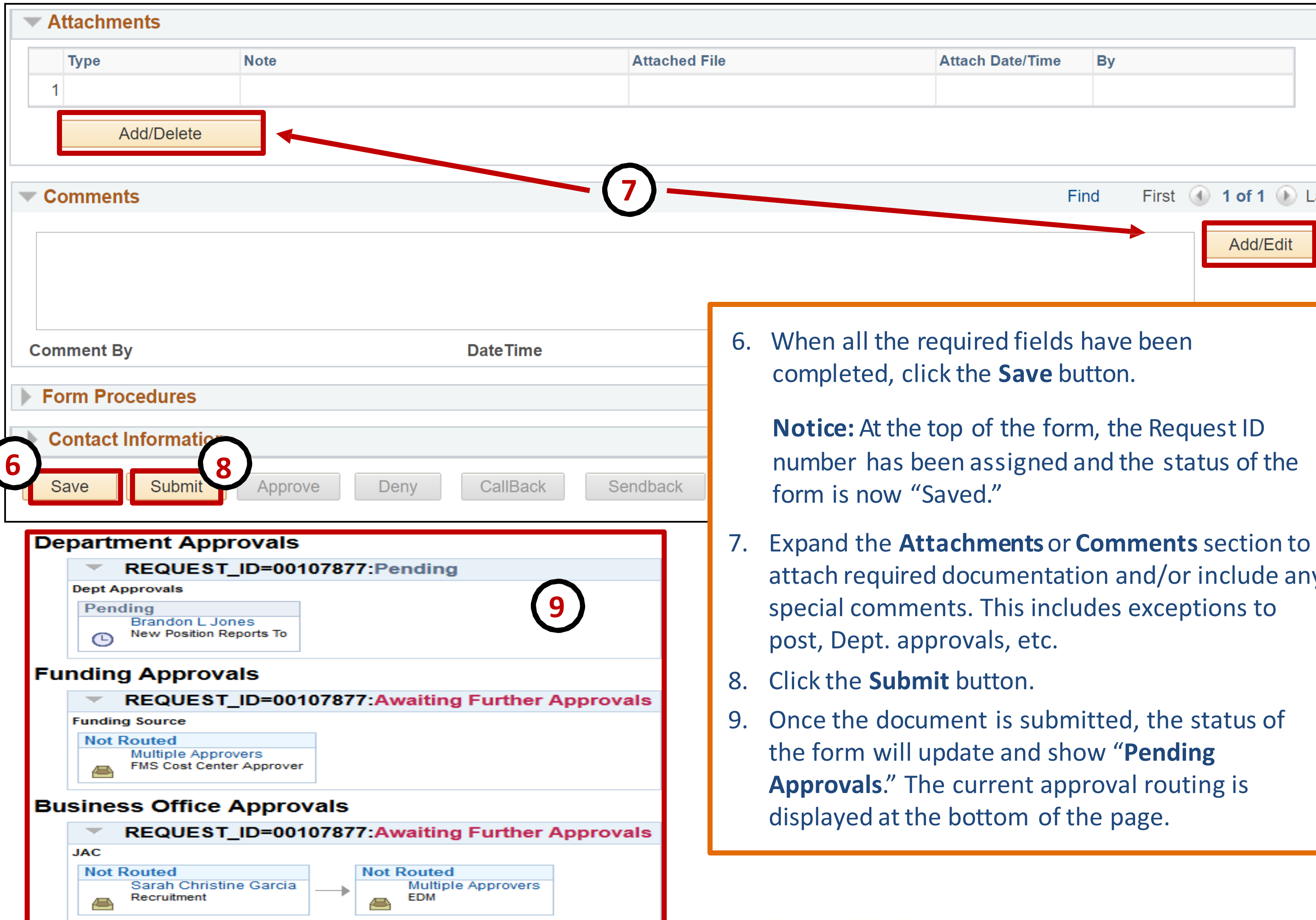
Initiating a Transfer eForm



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.