

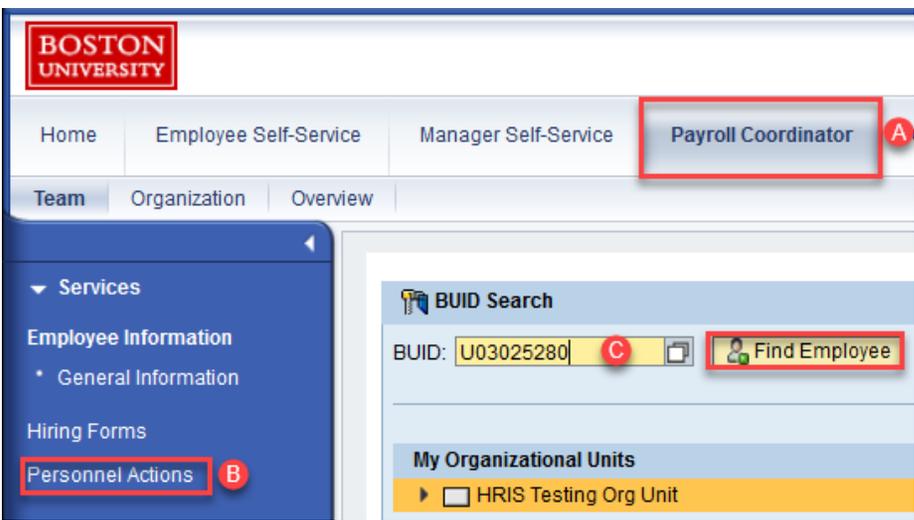
Initiation of Transfer by a Sending Manager–Quick Reference Guide

Complete an employee transfer when an employee moves from a position in one Org. unit (department) to a position reporting to a different manager in another Org. Unit. The position in the new Org. Unit cannot be accessed by the current Manager/Payroll Coordinator.

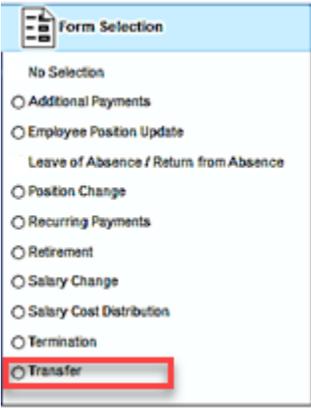
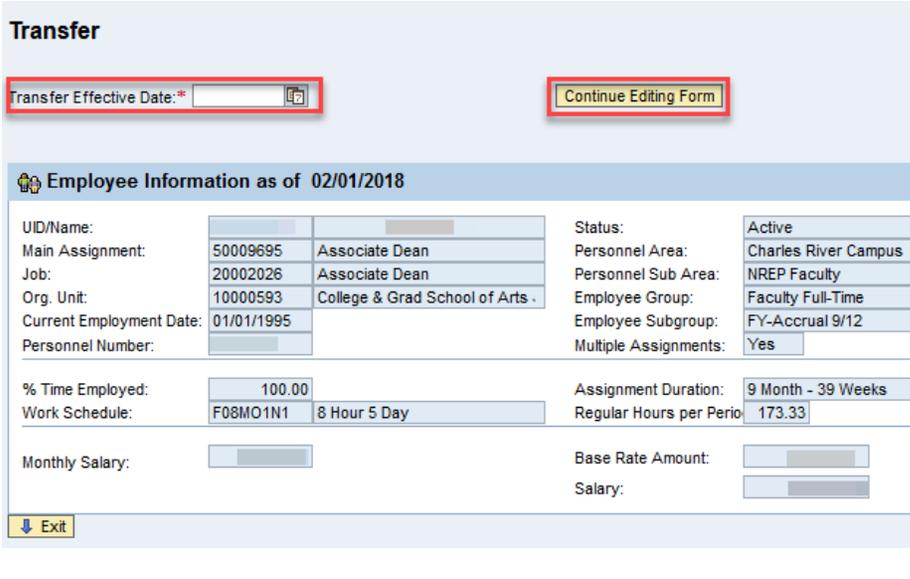
The transfer is accomplished through two steps:

1. The transferring employee’s manager initiates a transfer, releases the employee from his/her department and indicates the name of the receiving manager in the form. *This guide is meant for the Sending Manager or the initiator of the transfer.*
2. The receiving manager gets the Transfer form as an item in their worklist. They open the transfer form and assign the transferring employee to a vacant and open position in their Org. unit (department). If a vacant and open position does not already exist in their department, they will need to complete a Create/Maintain Position form and submit it for approval.

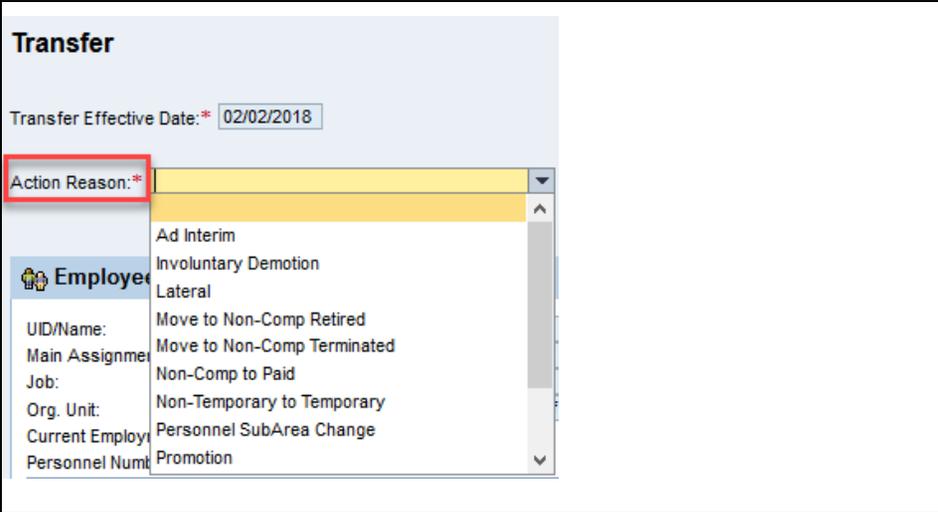
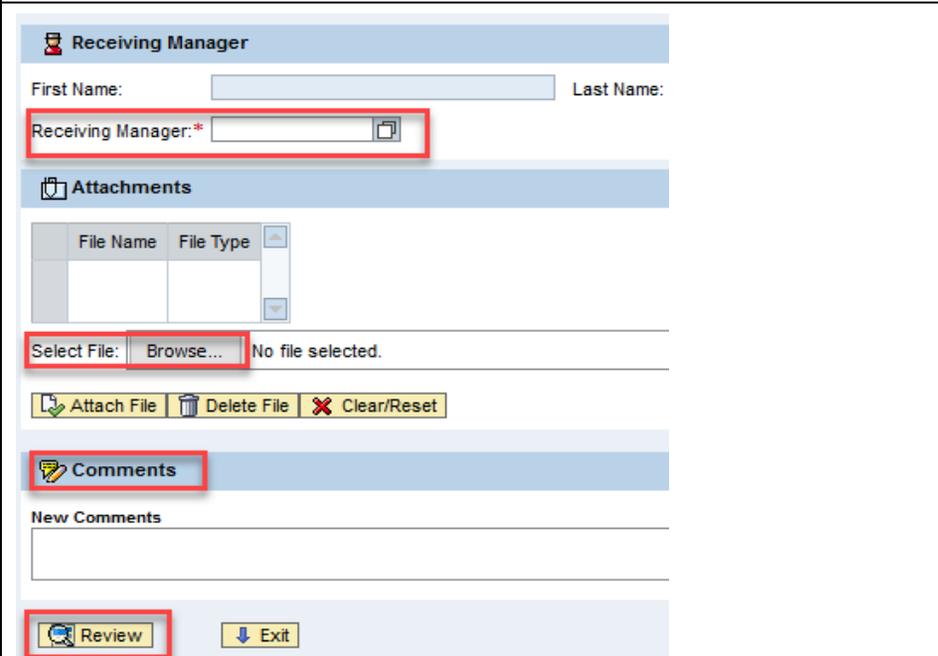
For **Faculty** transfers, the section of the transfer form labeled Faculty Contract Information must be completed. Additionally, if the transfer requires a change to the position title, or if the transfer is between different departments or schools, the appointment must be approved in FACTS prior to initiating the transfer process.

	<ol style="list-style-type: none"> 1. Log on to BUworks Central https://ppo.buw.bu.edu 2. Based on your privileges, you will see <i>either</i> the Manager Self Service OR the Payroll Coordinator tab. Click on the tab 3. Click on Personnel Actions 4. Enter a BUID and click on Find Employee <p>Alternatively, via the My Organizational Units area of the screen, click on the black arrow ▶ to expand the Org Units. Click on the specific Org. Unit of the employee belongs to and for whom you’ll be initiating the Transfer. Click on the specific employee you will be transferring. The row gets highlighted in yellow. Click on Select Form located at the bottom of the screen</p>
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 <p>Form Selection</p> <ul style="list-style-type: none"> No Selection <input type="radio"/> Additional Payments <input type="radio"/> Employee Position Update Leave of Absence / Return from Absence <input type="radio"/> Position Change <input type="radio"/> Recurring Payments <input type="radio"/> Retirement <input type="radio"/> Salary Change <input type="radio"/> Salary Cost Distribution <input type="radio"/> Termination <input checked="" type="radio"/> Transfer 	<p>6. Click on the Transfer radio button <input type="radio"/></p>																																								
 <p>Transfer</p> <p>Transfer Effective Date: * <input type="text"/> <input type="button" value="Continue Editing Form"/></p> <hr/> <p>Employee Information as of 02/01/2018</p> <table border="1"> <tr> <td>UID/Name:</td> <td><input type="text"/></td> <td>Status:</td> <td>Active</td> </tr> <tr> <td>Main Assignment:</td> <td>50009695 Associate Dean</td> <td>Personnel Area:</td> <td>Charles River Campus</td> </tr> <tr> <td>Job:</td> <td>20002026 Associate Dean</td> <td>Personnel Sub Area:</td> <td>NREP Faculty</td> </tr> <tr> <td>Org. Unit:</td> <td>10000593 College & Grad School of Arts .</td> <td>Employee Group:</td> <td>Faculty Full-Time</td> </tr> <tr> <td>Current Employment Date:</td> <td>01/01/1995</td> <td>Employee Subgroup:</td> <td>FY-Accrual 9/12</td> </tr> <tr> <td>Personnel Number:</td> <td><input type="text"/></td> <td>Multiple Assignments:</td> <td>Yes</td> </tr> <tr> <td>% Time Employed:</td> <td>100.00</td> <td>Assignment Duration:</td> <td>9 Month - 39 Weeks</td> </tr> <tr> <td>Work Schedule:</td> <td>F08MO1N1 8 Hour 5 Day</td> <td>Regular Hours per Period:</td> <td>173.33</td> </tr> <tr> <td>Monthly Salary:</td> <td><input type="text"/></td> <td>Base Rate Amount:</td> <td><input type="text"/></td> </tr> <tr> <td></td> <td></td> <td>Salary:</td> <td><input type="text"/></td> </tr> </table> <p><input type="button" value="Exit"/></p>	UID/Name:	<input type="text"/>	Status:	Active	Main Assignment:	50009695 Associate Dean	Personnel Area:	Charles River Campus	Job:	20002026 Associate Dean	Personnel Sub Area:	NREP Faculty	Org. Unit:	10000593 College & Grad School of Arts .	Employee Group:	Faculty Full-Time	Current Employment Date:	01/01/1995	Employee Subgroup:	FY-Accrual 9/12	Personnel Number:	<input type="text"/>	Multiple Assignments:	Yes	% Time Employed:	100.00	Assignment Duration:	9 Month - 39 Weeks	Work Schedule:	F08MO1N1 8 Hour 5 Day	Regular Hours per Period:	173.33	Monthly Salary:	<input type="text"/>	Base Rate Amount:	<input type="text"/>			Salary:	<input type="text"/>	<p>7. Transfer Effective Date – Enter the date the transfer should be effective on.</p> <p>8. Click on Continue Editing Form. The form automatically expands to display employee information including personnel area, sub-area, employee group, employee sub-group, employment date, status, percent time employed, salary, hourly rate and base rate, assignment duration etc.</p>
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	<p>9. Action Reason - Select a suitable reason for transfer from the Action Reason drop-down (e.g: Lateral, Promotion)</p>
	<p>10. Receiving Manager - To find the name of the Receiving Manager, click on the match code and search for the Receiving Manager</p> <p>NOTE: Use Caps to type in a last name in the search field. All employee names that start with the last name will appear in the results. Highlight the row with the appropriate manager’s name and click on OK</p> <p>11. Attachments - Attach relevant backup documentation such as letter from employee requesting the transfer</p> <p>12. Comments - Provide a descriptive, meaningful comment about the transfer</p> <p>13. Click on Review. If the data is accurate, click on Submit. This completes the first part of the transfer. Track your submission via the Request Tracker</p>