Overview – Transfer Form

A Transfer form is used whenever an employee is departing one org unit (e.g. department) to work at another, where they’ll hold a different position under a different manager.

This form is the only Personnel Administration (PA) form completed by two individuals: the sending manager and the receiving manager.

The sending manager initiates the Transfer form and submits it. It is then routed to the receiving manager via his/her Worklist. They then complete their half of the Transfer form and submit it. It is then routed to Workflow for approval.

When to use a Transfer vs. Position Change

This guide covers the initiation of the Transfer form, and is therefore intended for the sending manager.

Transfer = Employee is going to work in a different department, in a different job, under a different manager

Position Change = Employee is remaining in their current department, in a different job, under their current manager

Transfer Prerequisites – Sending Manager

Know the name of the manager the employee is transferring to, as it is required on the Transfer form.

Prerequisites – Receiving Manager (continued)

Note: While a Transfer form is initiated by the sending manager of the employee being transferred, the second part of the form must be completed by the receiving manager. It is at this point that the receiving manager will receive a new item in their Worklist. Accessing the Transfer form sent to them, they will select the vacant position within their department that the incoming employee will hold, and then complete the Transfer form

- For the receiving manager to ensure that there is an available/vacant position to complete the transfer, he/she must complete an Org Management (OM) Create Position or Maintain Position form:
  - If the position does not currently exist, the receiving manager must complete an OM Create Position form
  - If the position does exist, the receiving manager must complete an OM Maintain Position form
  - Once the OM form is approved through Workflow, the receiving manager is notified and the transfer can occur

Additional Prerequisites - Faculty Transfers

- 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
- Be sure to notify Organizational Management if the position number should remain the same for the tracking of Faculty Slots
- A section of the Transfer form labeled Faculty Contract Information must be completed

Accessing the Transfer Form

1. As the sending manager, from the BUworks Central portal, based upon your role, begin by selecting either the Manager Self-Service or Payroll Coordinator tab.
2. Click the link labeled Personnel Actions.
3. Via the Organizational Structure area of the screen, click on the Org Unit in which the employee for whom you’ll be initiating a Transfer form is assigned.
   - Tip: You can expand the display of the Org Structure by clicking the arrow next to an Org Unit (ex. ENG Administration).
4. From the display of employees, click the Selection button to choose the specific employee being transferred. Note the row becomes yellow.
5. Click Select Form
6. Click the radio button to choose the Transfer form, which appears in a new window:

   Displayed is employee information, including: personnel area and subarea, employee group and subgroup, employment date, status, percent time employed, salary, hourly and base rate, assignment duration:

   (Proceed to the next page of this guide)
For the sending manager to initiate the Transfer form:

1. Indicate the Transfer Effective Date (e.g., 06/01/2012)
2. Click *Continue Editing Form*.

The Transfer form expands:

### Locating a Name in a List

After clicking (per step 4, above):

A. Click on the button labeled *Show Filter Criteria*.

B. Enter the name of the receiving manager you’re looking for (using the **First Name** and **Last Name** fields). Tip: As with any query, the more criteria you enter, the fewer results you’ll get back.

C. Click *Start Search*.

### Initiating the Transfer Form (continued)

3. From the dropdown menu, choose an **Action Reason** for the transfer you’re making (e.g., Lateral, Promotion).

   ![Receiving Manager]

**Note:** The **First Name** and **Last Name** fields display as non-editable.

4. **Receiving Manager** *- Click to select the name of the receiving manager that has the vacant position that the employee will be transferring into. A new window appears:

   ![New window]

   **Tip:** As with any query, the more criteria you enter, the fewer results you’ll get back.

   D. Highlight the manager’s name from the search results (the row becomes yellow).
   E. Click **OK**. The window closes and you are returned to the form.
   F. **Receiving Manager** *- Click directly in the textbox displaying the manager’s name. It becomes yellow.
   G. Click **Enter** on your keyboard. The **First name** and **Last Name** fields now display the manager’s name.

Let’s proceed with completing the remainder of the form:

5. Use > to upload any back-up documents used for approval of the transfer.

6. **New Comments** - Supply additional information pertaining to the transfer to help expedite the Workflow approval. The receiving manager can view these comments (including the sending manager’s name and time-stamp).

7. Click **Review** to review your entries.

8. Click **Submit** to submit the Transfer form. The form is forwarded to the receiving manager’s Worklist. 

This completes the sending manager’s role in initiating the Transfer form!