1. A receiving manager must ensure that there is an available/vacant position in their department to complete the transfer. For that purpose, he/she must complete a Create/Maintain Position action.

2. Once a sending manager has initiated the transfer, the receiving manager gets the Transfer form as an item in their worklist. Click on the item to open it.

### Entering Position Information

1. Indicate the **Transfer Effective Date** (e.g., 02/27/2017)

2. Click on **Continue Editing Form**. The Transfer form expands.

3. From the dropdown menu, choose an **Action Reason** for the transfer (e.g., 

4. Select position id from drop-down list. Review the position details that are filled automatically.

5. Enter the new mail code, work schedule rule, % time employed, assignment duration and hours per week.

6. Enter pay related details in the Basic Pay area. Click on Recalculate Salary.

7. If there is a change in the cost distribution, please enter updated details. Enter a reason for change by selecting an appropriate reason from the drop-down list. If there is no change, leave the distribution as-is.

8. For faculty positions, enter patent policy agreement in the Corporate Function area.

9. Enter **building** location.

10. Add department approvals in attachments.

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

12. **New Comments** - Supply any additional information pertaining to the transfer to help expedite the Workflow approval.

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

14. Click **Submit** to submit the Transfer form. The form is forwarded for additional approvals in the workflow. The item disappears from the receiving manager’s worklist.

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

15. The status for the form changes to “Completed” in the sending manager’s request tracker.

Congratulations! The transfer action is now complete and the employee has now been transferred to your department.

3/3/2017