Completion of Transfer by a Receiving 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 and releases the employee from his/her department.

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 the receiving manager’s department, they will need to complete a Create or Maintain Position form and submit it for approval. This guide is meant for the Receiving Manager of the employee.

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.

1. Log on to BUworks Central [https://ppo.buw.bu.edu]
2. Click on Worklist tab
3. Click on Transfer item in the worklist

The transfer form opens in a new window and displays the transferring employee’s current employment details

4. **Transfer Effective Date** – This is the date the transfer should be effective on. Click on **Continue Editing Form**

5. **Action Reason** – Select appropriate reason from drop-down.
6. **New Position** - Select **Position id** from drop-down list. The enterprise structure information is automatically displayed on the form.

**NOTE:** If you do not find a position id, make sure you complete a Create/Maintain Position to receive the incoming employee. Review the position details that are filled automatically on the form to ensure accuracy.

7. **Mail Code** - Select the new **mail code from the drop-down.**

8. **Work Schedule** – Enter the **work schedule rule**, % time employed, **assignment duration** and **hours per week**

9. **Basic Pay** - Enter salary information. Click on **Recalculate Salary**

10. **Cost Distribution** - If there is a change in the **cost distribution**, enter the updated details. Enter a **reason for change** by selecting an appropriate reason from the drop-down. If there is no change, leave the distribution as-is and do not make changes.

11. **Corporate Function** - Enter **patent policy agreement** and the **date** the information was acquired from the employee.
### Completion of Transfer by a Receiving Manager – Quick Reference Guide

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td><strong>Office Location</strong> - Enter <strong>building</strong> details and phone number for work location</td>
</tr>
<tr>
<td>13.</td>
<td><strong>Attachments</strong> - Attach relevant backup documentation such as department authorization for transfer/offer letter</td>
</tr>
<tr>
<td>14.</td>
<td><strong>Comments</strong> – Enter a descriptive comment in 1-2 lines</td>
</tr>
<tr>
<td>15.</td>
<td>Click on <strong>Review</strong>. If the data is accurate and there are no errors, click on <strong>Submit</strong>. To reject the transfer, enter a comment and click on <strong>Reject</strong>. This completes the transfer.</td>
</tr>
</tbody>
</table>