

Transfer Form, Completing – Receiving Manager


When to use


Complete a Transfer form when an employee moves from a position in one organizational structure to a position reporting to a different manager in another organizational structure (under a different Payroll Coordinator).

- If you are initiating the transfer, refer to: [Transfer - Sending Manager](#)
- If you are the receiving manager/payroll coordinator of the transfer reviewing these instructions

Forms in Order of Submission

1. [Create Position](#) or [Maintain Position](#) is processed by the department opening the position (the receiving manager in the Transfer form process)
2. The transferring employee's manager initiates the transfer form, releases the employee from their department and indicates the name of the receiving manager in the form. This guide is meant for the Sending Manager, or initiator, of the transfer.
3. 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.

 **Note:** The initiator can track if the form completed workflow by using the [request tracker](#). If the form doesn't say "Completed" under the Status than the form is still going through workflow. Initiators can also see who is reviewing the form in the request tracker under "Current Agent".

 **Warning:** The position in the new Org. Unit cannot be accessed by the current Manager/Payroll Coordinator.

Before you begin

You will need the following information:

- Effective date of action
- Action Reason
- New position number and details (position title, job, org unit, personnel area, personnel subarea, employee group, employee subgroup)
- Mail Code
- Work Schedule Rule
- Assignment Duration
- Percent Time Employed
- Hourly Rate or Semi-Monthly Pay Amount
- Cost Distribution
- Office Address and Phone Number
- A copy of the employee's offer letter

Incorrect information will result in longer processing times and may cause your form to be returned or rejected.



To prevent late payment to an employee, pay careful attention to the [form deadlines](#) and plan accordingly.









References






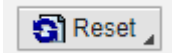
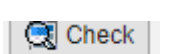

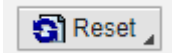
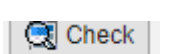

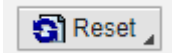
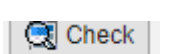
- Click [here](#) for the Data Dictionary






Transfer Form – Receiving Manager: Step-by-Step



Step	Action						
1	Log into BUWorks using your BU login and Kerberos password at the following URL: https://ppo.buw.bu.edu						
2	Click on the Worklist tab						
3	Click on the Transfer item in the worklist. If it does not appear in your worklist, confirm via the Request Tracker that you are listed as the Current Agent. If you are, refresh your worklist.  Result: The transfer form opens in a new window and displays the transferring employee's current employment details.						
4	<p>Review the Transfer Effective Date.</p> <table border="1"> <thead> <tr> <th>IF the field...</th><th>THEN...</th></tr> </thead> <tbody> <tr> <td>Is accurate</td><td>Proceed to the next step</td></tr> <tr> <td>Requires updates</td><td> <ul style="list-style-type: none"> Click the Change Effective Date button Make any necessary updates Proceed to the next step </td></tr> </tbody> </table> <p> Note: If the current position was maintained then the effective date must be on, or before, the Transfer form effective date. If the effective date on the OM form is after the effective date used on the Transfer form then updated changes will not display on the Transfer form.</p>	IF the field...	THEN...	Is accurate	Proceed to the next step	Requires updates	<ul style="list-style-type: none"> Click the Change Effective Date button Make any necessary updates Proceed to the next step
IF the field...	THEN...						
Is accurate	Proceed to the next step						
Requires updates	<ul style="list-style-type: none"> Click the Change Effective Date button Make any necessary updates Proceed to the next step 						
5	<p>Review the Action Reason selected.</p> <table border="1"> <thead> <tr> <th>IF the field...</th><th>THEN...</th></tr> </thead> <tbody> <tr> <td>Is accurate</td><td>Proceed to the next step</td></tr> <tr> <td>Requires updates</td><td> <ul style="list-style-type: none"> Make any necessary updates Proceed to the next step </td></tr> </tbody> </table>	IF the field...	THEN...	Is accurate	Proceed to the next step	Requires updates	<ul style="list-style-type: none"> Make any necessary updates Proceed to the next step
IF the field...	THEN...						
Is accurate	Proceed to the next step						
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Step	Action
6	<p>Select the employee's new position from the New Position dropdown menu.</p> <p> Note: If the position number does not appear in the dropdown, confirm the position is open by reviewing the maintain position form under 'Position Details', 'Recruitment/Hire Indicator'. If the position is marked as No/Remove recruitment or hire selection, process another Maintain Position form to open the position. The form will need to complete workflow prior to initiating the Transfer form again.</p> <p> Result:</p> <ul style="list-style-type: none"> • The Mail Code, Work Schedule, Basic Pay, Cost Distribution, Corporate Function, and Office Location fields appear. • The following fields are populated with the information for the employee's new position: <ul style="list-style-type: none"> ○ New Job ○ New Org. Unit ○ New Pers. Area ○ New Pers. Subarea ○ New Emp. Group ○ New Emp. Subgroup
7	<p>Confirm the following fields for the new position are accurate:</p> <ul style="list-style-type: none"> ○ New Job ○ New Org. Unit ○ New Pers. Area ○ New Pers. Subarea ○ New Emp. Group ○ New Emp. Subgroup <p>If they are not, cease processing and contact HR Compensation (hrcomp@bu.edu)</p>
8	<p>Enter the mail code for the new position in the New Mail Code field.</p> <p> Information: If you don't know the mail code, click the  icon to the right of the entry field. This will open a pop-up to search for the mail code.</p>
9	<p>In the Work Schedule section, select the appropriate Work Schedule Rule from the dropdown menu.</p>

Step	Action						
10	<p>In the Work Schedule section:</p> <table border="1"> <thead> <tr> <th>IF the employee is...</th><th>THEN...</th></tr> </thead> <tbody> <tr> <td>Full-time</td><td>Proceed to the next step</td></tr> <tr> <td>Part-time</td><td>Enter the percent time of employment in the Percent Time Employed field.</td></tr> </tbody> </table>	IF the employee is...	THEN...	Full-time	Proceed to the next step	Part-time	Enter the percent time of employment in the Percent Time Employed field.
IF the employee is...	THEN...						
Full-time	Proceed to the next step						
Part-time	Enter the percent time of employment in the Percent Time Employed field.						
11	In the Work Schedule section, select the Assignment Duration from the dropdown menu.						
12	<p>In the Work Schedule section:</p> <table border="1"> <thead> <tr> <th>IF the position is...</th><th>THEN...</th></tr> </thead> <tbody> <tr> <td>Exempt (semi-monthly paid)</td><td>Proceed to the next step</td></tr> <tr> <td>Non-Exempt (hourly paid)</td><td>Confirm the hours per week are correct. If they are not, cease processing the form and process a Maintain Position form. Note the hours per week in the Weekly Work Schedule field and note in the Comments the Work Schedule Rule needs to be changed by Compensation.</td></tr> </tbody> </table>	IF the position is...	THEN...	Exempt (semi-monthly paid)	Proceed to the next step	Non-Exempt (hourly paid)	Confirm the hours per week are correct. If they are not, cease processing the form and process a Maintain Position form. Note the hours per week in the Weekly Work Schedule field and note in the Comments the Work Schedule Rule needs to be changed by Compensation.
IF the position is...	THEN...						
Exempt (semi-monthly paid)	Proceed to the next step						
Non-Exempt (hourly paid)	Confirm the hours per week are correct. If they are not, cease processing the form and process a Maintain Position form. Note the hours per week in the Weekly Work Schedule field and note in the Comments the Work Schedule Rule needs to be changed by Compensation.						
13	<p>In the Basic Pay section, select the Pay Scale Level from the dropdown menu. This is typically 00 or 01, unless the position is represented by L615-SvcMaint.</p> <p> Information: When a Pay Scale Level is changed for Personnel Subarea L615-SvcMaint, the associated hourly rate is auto-populated.</p>						
14	<p>In the Basic Pay section:</p> <table border="1"> <thead> <tr> <th>IF...</th><th>THEN enter...</th></tr> </thead> <tbody> <tr> <td>The position is non-exempt (hourly paid)</td><td>The hourly rate in the Hourly Rate field.</td></tr> <tr> <td>The position is exempt (monthly paid)</td><td>The semi-monthly amount in the Amt Per Pay Period field.</td></tr> </tbody> </table>	IF...	THEN enter...	The position is non-exempt (hourly paid)	The hourly rate in the Hourly Rate field.	The position is exempt (monthly paid)	The semi-monthly amount in the Amt Per Pay Period field.
IF...	THEN enter...						
The position is non-exempt (hourly paid)	The hourly rate in the Hourly Rate field.						
The position is exempt (monthly paid)	The semi-monthly amount in the Amt Per Pay Period field.						
15	<p>Click the Recalculate Salary button.</p> <p> Result: the Estimated Annual Salary field updates with the annual salary based on the new pay scale level and pay period amount and assignment duration of the position. If this amount is not as expected, double check the information entered into the form and the assignment duration.</p>						

Step	Action								
16	<p>Review the Cost Distribution section for accuracy:</p> <table> <tr> <th>IF...</th><th>THEN...</th></tr> <tr> <td>Changes are needed</td><td>Proceed to the next step</td></tr> <tr> <td>No changes are needed</td><td>Select No Change in the Reason for Change dropdown and skip to Step 20</td></tr> </table>	IF...	THEN...	Changes are needed	Proceed to the next step	No changes are needed	Select No Change in the Reason for Change dropdown and skip to Step 20		
IF...	THEN...								
Changes are needed	Proceed to the next step								
No changes are needed	Select No Change in the Reason for Change dropdown and skip to Step 20								
17	Select the reason for changing the cost distribution from the Reason for Change dropdown menu.								
18	<p>Complete the cost distribution fields in the New Entries section:</p> <ul style="list-style-type: none"> • Cost Center, as applicable <i> Information:</i> If you don't know the cost center, click the button in the Cost Center field to search for the cost center. • Order Number, as applicable • WBS Element, as applicable • Percentage <i> Warning:</i> The Total Percentage field must equal 100%. • End Date <i> Information:</i> If the end date is invalid, it will be highlighted in red and must be changed. This is typically due to the end date entered on the form not matching the end date of the account to be charged. <p> Note: The buttons below allow you to edit input in the New Entries section:</p> <table> <tr> <th>Option</th><th>Description</th></tr> <tr> <td></td><td>Delete a line of the distribution</td></tr> <tr> <td></td><td>Restore the distribution settings to how they initially appeared on the form prior to the changes you made</td></tr> <tr> <td></td><td>Perform a check for formatting of the percent time entries up to two decimal places and populate the Description field.</td></tr> </table>	Option	Description		Delete a line of the distribution		Restore the distribution settings to how they initially appeared on the form prior to the changes you made		Perform a check for formatting of the percent time entries up to two decimal places and populate the Description field.
Option	Description								
	Delete a line of the distribution								
	Restore the distribution settings to how they initially appeared on the form prior to the changes you made								
	Perform a check for formatting of the percent time entries up to two decimal places and populate the Description field.								
19	Click the Check button to review percentages and populate the Description field. Confirm the cost distribution is correct based on the Description.								

Step	Action						
20	<p>Upload any relevant documentation in the Attachments section of the form. Please refer to the matrix if you need assistance determining what is required for attachments.</p> <table border="1"> <thead> <tr> <th>IF...</th><th>THEN...</th></tr> </thead> <tbody> <tr> <td>There are documents to attach</td><td>Proceed to the next step</td></tr> <tr> <td>There are no documents to attach</td><td>Proceed to Step 27</td></tr> </tbody> </table> <p> Warning: do not include attachments containing sensitive information such as social security number, date of birth, etc.</p>	IF...	THEN...	There are documents to attach	Proceed to the next step	There are no documents to attach	Proceed to Step 27
IF...	THEN...						
There are documents to attach	Proceed to the next step						
There are no documents to attach	Proceed to Step 27						
21	<p>Click the Browse button in the Attachments section.</p> <p> Result: The Open window appears.</p>						
22	Navigate to the appropriate file on your computer.						
23	Click the title of the file.						
24	<p>Click the Open button.</p> <p> Result: The filename appears in the Select File: field.</p>						
25	<p>Click the Attach File button.</p> <p> Result: The file now appears in the Attachments table.</p>						
26	Repeat steps 21-25 for each attachment.						
27	Enter additional information in the Comments section for both future reference and to provide additional details to the approvers. This may include comments related to discussions with the manager, your Talent Recruitment Services contact, etc.						
28	<p>Click the Review button at the bottom of the page. This will check for errors on the form.</p> <p> Result: Error messages appear at the top of the form.</p>						
29	Review the form for accuracy.						

Step	Action						
30	<table> <tr> <th>IF the form...</th><th>THEN...</th></tr> <tr> <td>Is accurate</td><td>Click the Submit button</td></tr> <tr> <td>Requires updates</td><td> <ul style="list-style-type: none"> Click the Back button Make any necessary updates Return to step 28 </td></tr> </table> <p> Result: The form is submitted for approval via workflow. You can track the form progress through Request Tracker. You will receive an email notification when the form is approved.</p> <p> Warning: Being able to submit the form does not mean the action is error free. A crash will show in the Request Tracker with the current agent “SAP” and a status of “Correction”. If an error exists, the form will crash and HR Information Systems will receive an automatic notification (ticket). No action is required on the part of the initiator; HRIS will follow up if additional information is needed. HR Information Systems will resolve the issue as soon as possible. Payroll critical items are handled first.</p>	IF the form...	THEN...	Is accurate	Click the Submit button	Requires updates	<ul style="list-style-type: none"> Click the Back button Make any necessary updates Return to step 28
IF the form...	THEN...						
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