Transfer Form, Initiating – Sending 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).

Note:

- If you are initiating the transfer continue here.
- If you are the receiving manger/payroll coordinator of the transfer, refer to the following instructions: Transfer - Receiving Manager

Warning: If the employee is moving to a position within the same department use the **Position Change** form.

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
- Name or username of receiving manager

References

- Click here for the Data Dictionary

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Transfer Form – Sending Manager: Step-by-Step

Step	Action
1	Initiate the **Transfer** form. ***Warning:*** Forms must be completed one at a time; do not open multiple forms in multiple tabs. ***Reference:*** Initiate a Personnel Administration (PA) Form
2	Enter the effective date for the transfer in the **Transfer Effective Date** field in mm/dd/yyyy format. If preferred, click the **Calendar Lookup** icon to select the effective date of hire from the calendar. ***Note:*** The effective date should be discussed between the sending and receiving managers prior to initiating the Transfer form. ***Warning:*** To avoid potential delays in payment to the employee, take note of the assigned PA deadline for the intended pay period and plan accordingly.
3	Click the **Continue Editing Form** button. ***Result:*** • The **Employee Information as of** section is populated with the employee's information as of the effective date used. • The **Receiving Manager**, **Attachments,** and **Comments** sections of the form appear.
4	Select the reason for the position transfer from the **Action Reason** dropdown menu.
5	To find the name of the Receiving Manager, click on the icon and search for the Receiving Manager. ***Note:*** All caps (i.e. CAPS) must be used in the search fields. Proper casing or lowercase letters will not find a match. When all Caps is used, all employee names that include the search string will appear in the results. Select the row with the appropriate manager’s name and click OK.
6	Upload relevant documentation in the **Attachments** section. Please refer to the matrix if you need assistance determining what is required for attachments. **IF… → THEN…** There are documents to attach → Proceed to the next step There are no documents to attach → Proceed to Step 13 ***Warning:*** do not include attachments containing sensitive information such as social security number, date of birth, etc.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>Click the Browse button in the Attachments section.

✔ Result: The Open window appears.</td></tr>
<tr><td>8</td><td>Navigate to the appropriate file on your computer.</td></tr>
<tr><td>9</td><td>Click the title of the file.</td></tr>
<tr><td>10</td><td>Click the Open button.

✔ Result: The filename appears in the Select File: field.</td></tr>
<tr><td>11</td><td>Click the Attach File button.

✔ Result: The file now appears in the Attachments table.</td></tr>
<tr><td>12</td><td>Repeat steps 7-11 for each attachment.</td></tr>
<tr><td>13</td><td>Enter additional information in the Comments section for both future reference and to provide additional details to the receiving manager and/or approvers. This may include comments related to discussions with the manager, your Talent Recruitment Services contact, etc.</td></tr>
<tr><td>14</td><td>Click the Review button at the bottom of the page. This will check for errors on the form.

✔ Result: Error messages appear at the top of the form.</td></tr>
<tr><td>15</td><td>Review the form for accuracy.</td></tr>
<tr><td>16</td><td><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>Click the Back button
Make any necessary updates
Return to step 14</td></tr>
</table>
✔ Result: The form is submitted for approval via workflow. You can track the form progress through <u>Request Tracker</u>. You will receive an email notification when the form is approved.

⚠ 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.</td></tr>
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