TRANSFER

(To be used if the employee is moving to another position in the same pay band. If the employee is moving out of your budget center – follow the directions under the section “Transfer to Another Budget Center”.)

(Workforce Administration, Job Information, Job Data)

Employee ID (enter 6 digit number) – Search

Work Location

1. Insert a row.
2. Enter the Effective Date (Must be the beginning of a pay period. Choose the appropriate date depending on whether the employee is current or lag.)
3. Action – Transfer
4. Reason – Transfer
5. Position Number – Enter the 8 digit position number of the new position the employee is moving into

Job Information

This information should default in from the position. If any corrections need to be made notify HR immediately.

Payroll

This information usually remains the same. However, if needed change should be made at this time.

Salary Plan

1. Review Rating – Leave the rating code as shown (do not change to ‘N’).
2. Next Review Date – (a) If the title does not change the Next Review Date should not be changed.
   (b) If the title changes this puts the employee in Trial Status and the Next Review Date is to be changed to six months from the effective date.
   (c) If the employee is currently in probationary status and the title changes the Next Review Date is to be changed to show 1 year from the effective date of the Transfer.

Compensation

Salary changes are not made on the Transfer row. You will have to insert another row as Pay Rate Change/Additional Duties and enter the new salary.

Employment Data

1. Business Title – should default in from the position (if corrections needed notify HR immediately)
2. Position Phone - should default in from the position (if corrections needed notify HR immediately)

CU Business Address

Make changes as needed.

Save
TRANSFER TO ANOTHER BUDGET CENTER

(If the employee is transferring to a position that is outside of your budget area – you will need to find out the effective date, department and position number. Before using the action/reason of Transfer you need to determine if the employee is moving up in band.)

(Workforce Administration, Job Information, Job Data)

Employee ID (enter 6 digit number) – Search

Work Location

1. Insert a row.
2. Enter the Effective Date (Must be the beginning of a pay period. Choose the appropriate date depending on whether the employee is current or lag.)
3. Action – Transfer
4. Reason – Transfer
5. Position Number – Enter the 8 digit position number of the new position the employee is moving into

Save

The employee’s record will now be available to the new department and they will be responsible for entering the new salary, review information, earnings distribution, etc and notifying HR of any changes they are not able to make.

ENTERING SALARY CHANGE and OTHER INFORMATION

(As the receiving department you are responsible for entering any salary change, change to review date and other information as needed.)

(Workforce Administration, Job Information, Job Data)

Employee ID (enter 6 digit number) – Search

Work Location

1. Insert a row.
2. Enter the Effective Date (Must be the same effective date as transfer. Must also be the beginning of a pay period. Choose the appropriate date depending on whether the employee is current or lag.)
3. Action – Pay Rate Change
4. Reason – Transfer

Job Information

This information should default in from the position. If any corrections need to be made notify HR immediately.

Payroll

This information usually remains the same. However, if needed change should be made at this time.
Salary Plan

1. **Review Rating** – Leave the rating code as shown (do not change to ‘N’).
2. **Next Review Date** –
   - (a) If the title does not change the Next Review Date should not be changed.
   - (b) If the title changes this puts the employee in Trial Status and the Next Review Date is to be changed to six months from the effective date.
   - (c) If the employee is currently in probationary status and the title changes the Next Review Date is to be changed to show 1 year from the effective date of the Transfer.

Compensation

Pay Components

1. **Rate Code** – Choose NAANNL (annual) or NAHRLY (hourly) as needed
2. **Comp Rate** – Enter the new salary
3. **Calculate Compensation**

Earnings Distribution

Make changes as needed.

Employment Data

1. **Business Title** – should default in from the position (if corrections needed notify HR immediately)
2. **Position Phone** - should default in from the position (if corrections needed notify HR immediately)

CU Business Address

Make changes as needed.

Save