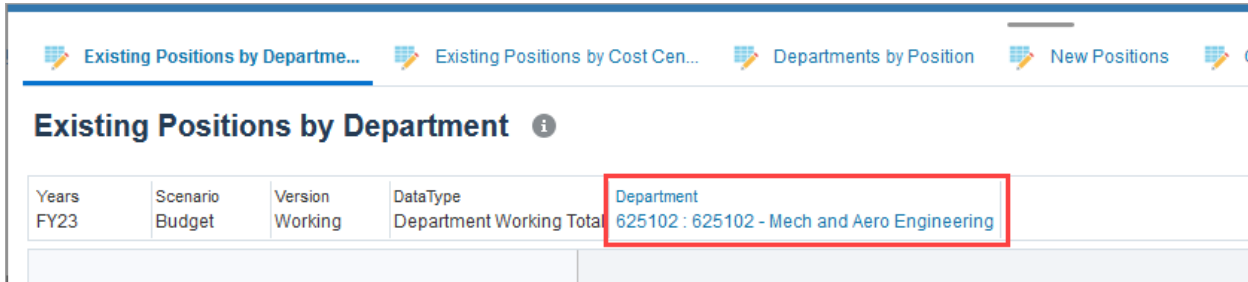


Transfer Employee in EPM

The purpose of this job aid is to explain how to transfer an employee from one position to another position within the same access or security areas. This option should be used when only the employee (not the position) is transferring from one position to another. The fringe attributes follow the employee.

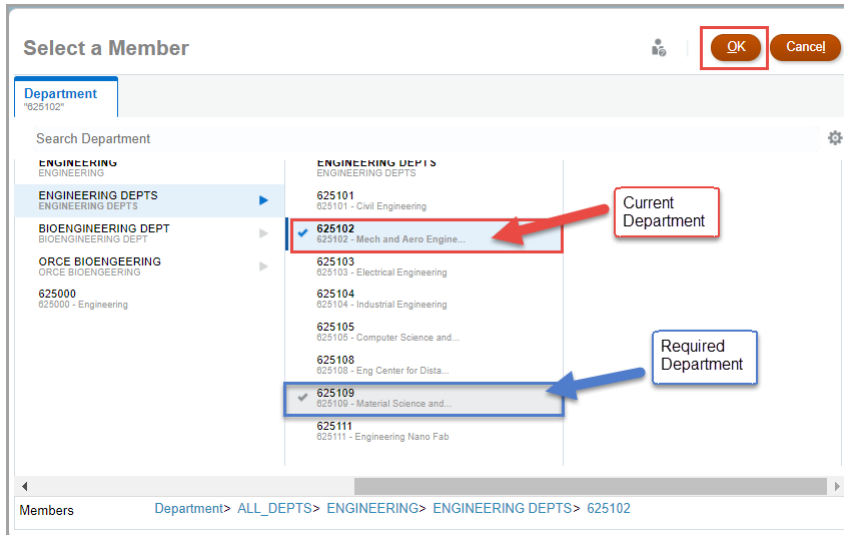
Note: Changes are updated in real time.

1. From the EPM homepage, select the **Departmental Budget** icon.
2. Select the **Position Budget Forms** icon.
3. Click **Existing Position by Department** or **Existing Position by Cost Center** on the menu.
4. If necessary, click the Department area to locate your department.



Years	Scenario	Version	Data Type	Department
FY23	Budget	Working	Department Working Total	625102 : 625102 - Mech and Aero Engineering

- a. Locate the required department name or Cost Center in the **Member** field.
- b. Once the department is found, select the department name from the list and click **OK**.



Select a Member

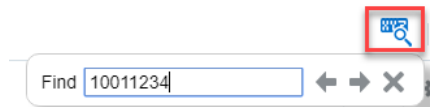
Department: 625102

Search Department

Department	Department
ENGINEERING DEPTS	ENGINEERING DEPTS
ENGINEERING DEPTS	625101 625101 - Civil Engineering
BIOENGINEERING DEPT	625102 625102 - Mech and Aero Engine...
ORCE BIOENGINEERING	625103 625103 - Electrical Engineering
625000	625104 625104 - Industrial Engineering
625000 - Engineering	625105 625105 - Computer Science and...
	625108 625108 - Eng Center for Dista...
	625109 625109 - Material Science and...
	625111 625111 - Engineering Nano Fab

Members: Department > ALL_DEPTS > ENGINEERING > ENGINEERING DEPTS > 625102

5. To locate the position you want to transfer, scroll down the worksheet or use the Find icon and enter the position name or position number.
6. Right click on the appropriate position row and select **Transfer Employee (and Vacate Source Position)**.



Find 10011234

Action Menu - Transfer Employee Ruleset

* Destination Cost Center "C200118"

* Destination Department "625102"

* Source Cost Center "C200118"

* Source Department "625102"

* Source Position "P10010152"

* Destination Position "P10010152"

* Select DataType "Department Working Tot"

Launch Cancel

*Quotation marks are not required in the fields, however if one appears at the front there must be one at the back.

Note: If security does not permit, (1) the source department will need to vacate the position and (2) the destination department will need to add the employee. (See Job Aid). The Fringe attributes will not follow and will need to be updated.

7. After the required fields are updated, click the **Launch** button.
8. A confirmation window appears, "The action was successful". Click **OK**.
9. Review existing Positions by Department or Existing Positions by Cost Center to ensure Transfer activity worked as desired.

NOTE: If NO combo code loads automatically, the department and cost center do not currently tie together. Contact your Budget Resource immediately as the combo code is extremely important.