

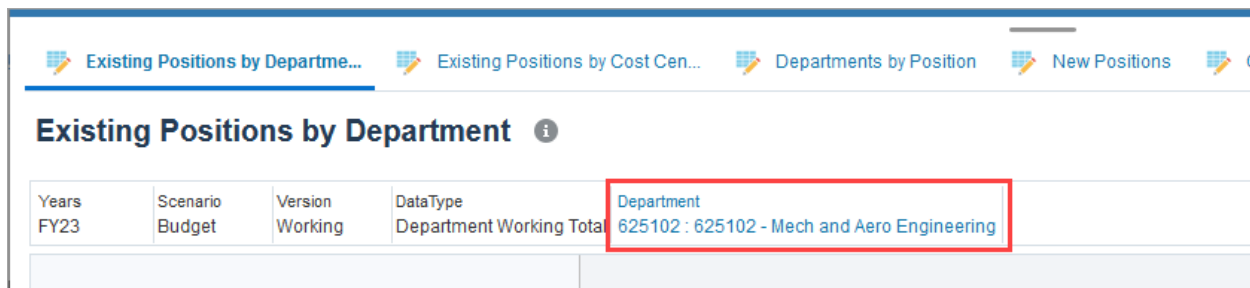
Transfer Position in EPM

The purpose of this job aid is to explain how to transfer one position from a department or cost center to another department or cost center as long as security permits, i.e. change the funding source.

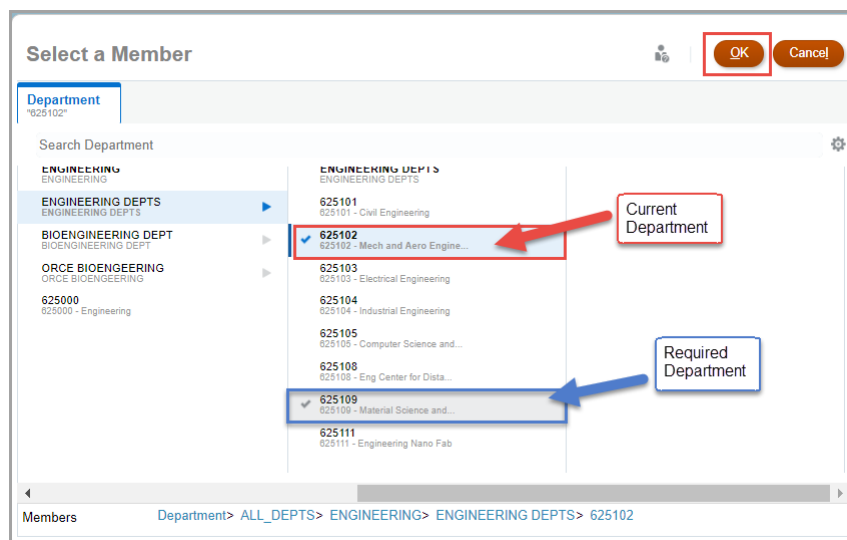
Transfer Position can be used whether the position is filled or vacant. If filled, the position and the employee will both be transferred. Fringe attributes follow the employee.

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.



- 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 then click **OK**.
5. To locate the position you want to transfer, scroll down the worksheet
 Alternately, use the Find icon and enter the position name or position number.



6. Right click on the appropriate position row and select the **Transfer Position** option.



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

Note: If security access does not permit, the only way to complete the transfer is to have the source department delete the position and the destination department add the position using the “Add New Position 1, 2, 3, etc.” The Fringe selections will need to be updated using the drop-downs on the New Position Form.

7. After the required fields are updated, click the **Launch** button.
8. A confirmation window appears, “the action was successful”. Click **OK**.

Note: Once successful, the source position will display with a Position Status of “None” but all attributes will be blank.

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.