

## 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.

🖐 Exi	isting Positions b	y Departme	Existing Positions by	Cost Cen 🛛	Departments by Position	•	New Positions					
Existing Positions by Department												
Years FY23	Scenario Budget	Version Working	DataType Department Working Total	Department 625102 : 625102	- Mech and Aero Engineering							

a. Locate the required department name or Cost Center in the Member field.

Select a Member			Cance!
Department "625102"			
Search Department			40
ENGINEERING		ENGINEERING DEPTS	
ENGINEERING DEPTS		625101 626101 - Civil Engineering	Current
BIOENGINEERING DEPT		✓ 625102 625102 - Mech and Aero Engine	Department
ORCE BIOENGEERING ORCE BIOENGEERING	►	625103 625103 - Electrical Engineering	
625000 625000 - Engineering		625104 825104 - Industrial Engineering	
		625105 625105 - Computer Science and	Deguired
		625108 625108 - Eng Center for Dista	Department
		✓ 625109 625109 - Material Science and	
		625111 825111 - Engineering Nano Fab	
•			•
Members Department	> ALL_DE	PTS> ENGINEERING> ENGINEERING DEP	TS> 625102

- b. Once the department is found, select the department name from the list and then click OK.
- 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.



Action Menu - Transfer Position Ruleset							
* Select Position "P10083980"	* Source Cost Center "C200118"						
* Destination Cost Center C200277	* Source Department ["625102"						
* Destination Department <b>"625102"</b>	* Select DataType Tepartment Working Tot						

\*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.