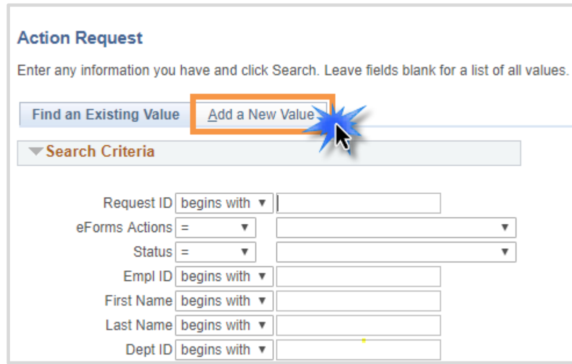
Transfer within Institution

The Transfer within Institution form is used to transfer an employee from one position to another within the same department or institution, without a break in service. *This process must be completed by the receiving department.* To process a transfer, complete the following steps:

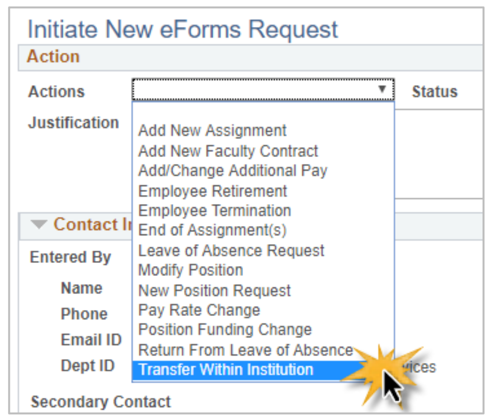
1) In UT Share, navigate to the Action Request page

   NavBar > Menu > HRMS > UTZ Customizations > eForms for HR/Payroll Actions > Action Request



2) Click the Add a New Value tab.

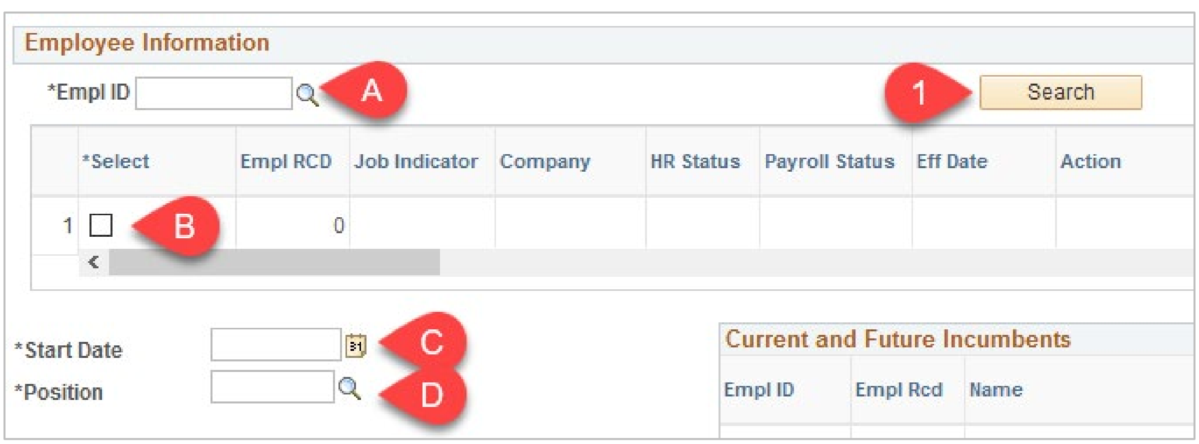
3) Select the Transfer within Institution Request Form



4) Use the **Justification** text box to explain or justify the reason for the request. (Optional)

5) Complete the Employee Information section.

   The **Employee Information** section is used to identify the employee transferring to another position.



A. If the transferring employee is currently within your security access Enter or lookup the employees **Empl ID**. The table below displays all the existing assignments for the employee.

   1. If the employee is outside of your current security access, click the Orange **Search** button to the right.

2. The Search Match page is displayed. Enter the new hire Name (First and Last) * and Empl ID (if known) and then click Search.
3. If a match is found, click the Select button to return to main page. If a match is not found, click Cancel and proceed to the next step.

B. If necessary, select the checkbox for the appropriate job record.

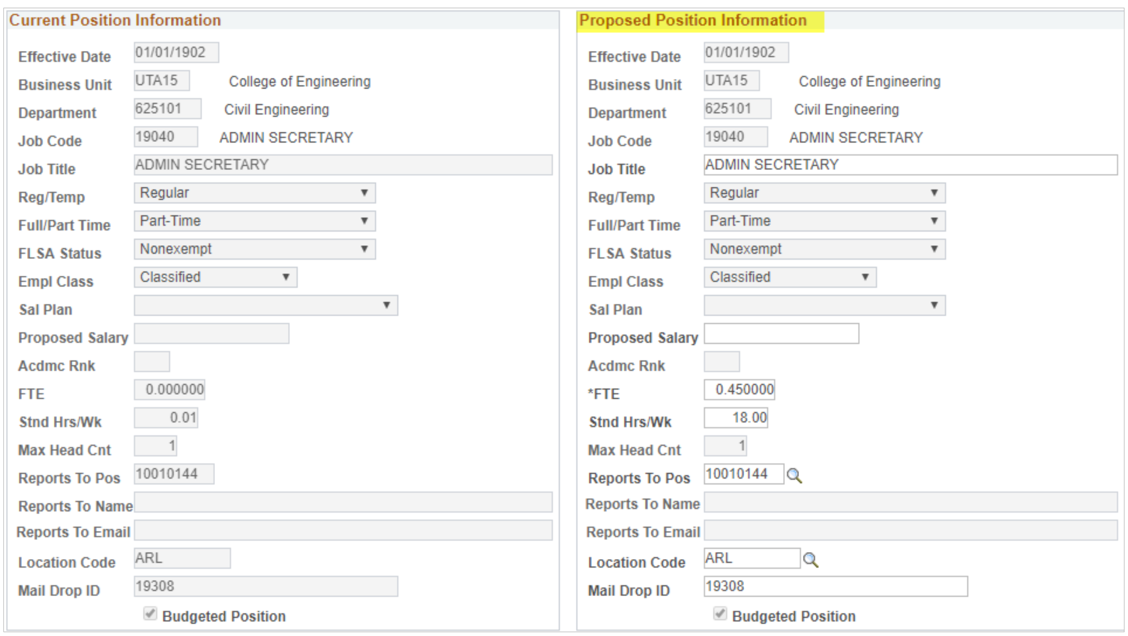
C. Enter the **Start Date** for the transfer.

D. Enter the **Position** number the incumbent is transferring to. If the position is currently filled, the associated table displays the employee assigned to the position.

Note: If necessary, use the **Position** lookup icon to search for the position number by Description, Department number, Job Code, etc.

6) Complete the Proposed Position Information section.

Based on the Position number entered in the **Employment Information** section, the **Current Position Information** displays. Use the **Proposed Position Information** to make any changes such as **FTE**, **Std Hrs/Wk**, and the **Reports To**.

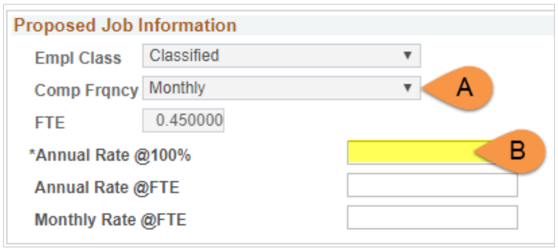


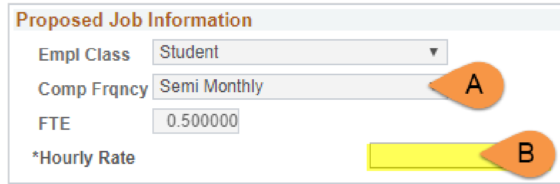
Current Position Information		Proposed Position Information	
Effective Date	01/01/1902	Effective Date	01/01/1902
Business Unit	UTA15 College of Engineering	Business Unit	UTA15 College of Engineering
Department	625101 Civil Engineering	Department	625101 Civil Engineering
Job Code	19040 ADMIN SECRETARY	Job Code	19040 ADMIN SECRETARY
Job Title	ADMIN SECRETARY	Job Title	ADMIN SECRETARY
Reg/Temp	Regular	Reg/Temp	Regular
Full/Part Time	Part-Time	Full/Part Time	Part-Time
FLSA Status	Nonexempt	FLSA Status	Nonexempt
Empl Class	Classified	Empl Class	Classified
Sal Plan		Sal Plan	
Proposed Salary		Proposed Salary	
Acdmc Rnk		Acdmc Rnk	
FTE	0.000000	*FTE	0.450000
Stnd Hrs/Wk	0.01	Stnd Hrs/Wk	18.00
Max Head Cnt	1	Max Head Cnt	1
Reports To Pos	10010144	Reports To Pos	10010144
Reports To Name		Reports To Name	
Reports To Email		Reports To Email	
Location Code	ARL	Location Code	ARL
Mail Drop ID	19308	Mail Drop ID	19308
Budgeted Position		Budgeted Position	

7) Complete the Proposed Job Information Section.

The **Proposed Job Information** section is used to enter compensation details:

If the request is for a Staff or Student, complete the following fields and proceed to step eight:

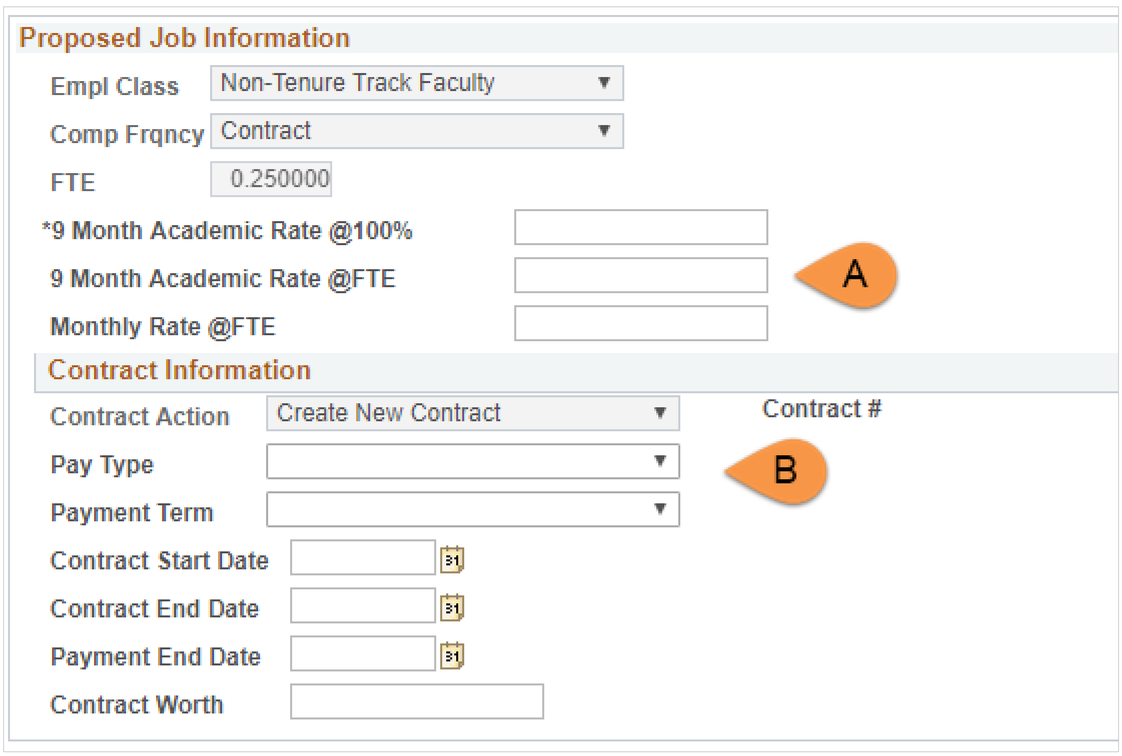




a. **The Compensation Frequency** and **FTE (Full Time Equivalency)** defaults with the appropriate value based on the Position number.

b. Depending on the position type, enter the proposed **Annual Rate**, or **Hourly Rate** and press enter or tab-out of the field.

<u>If the request is for a Faculty, complete the following fields and then proceed to step eight:</u>



A. **Proposed 9 MO Academic Rate @ 100%:** Use this field to provide the proposed salary based on a 100% appointment.
   - **Proposed 9 MO Academic Rate @ FTE:** Based on the position's FTE, this field will reflect what the faculty member will be paid (using the 100% 9-month academic rate and FTE).
   - **Proposed Monthly @ FTE:** Based on the position's FTE, this field will reflect what the faculty member will be paid on a monthly basis (using the 100% 9-month academic rate and FTE).

   Note: Instead of entering the **9 mo Academic Rate** or **Monthly Rate**, complete the **Contract Information** section. Once the **Contract Worth** is entered, the 9 mo Academic and Monthly Rate will default with the appropriate values.

B. Enter the **Contract Information**:
   - Select the contract **Pay Type** from the drop-down menu. The options are:
     - **Faculty 9/9** – paid over 9 months

- **Pay Over Contract** – paid over a specific period of time (e.g. mini-semesters)

- Based on the "Contact Pay Type" selected, the **Payment Term** will default to the appropriate value:
  - **Pay Over 'X' Dates**
  - **Pay Over 1.5 Months**
  - **Pay Over 4.5 Months**
- Provide the **Contract Start Date, Contract End Date**, and **Payment End Date**.
- Enter the **Contract Worth**.

8) Complete the Proposed Funding section

Use the **Proposed Funding** section to enter funding information for the new position.

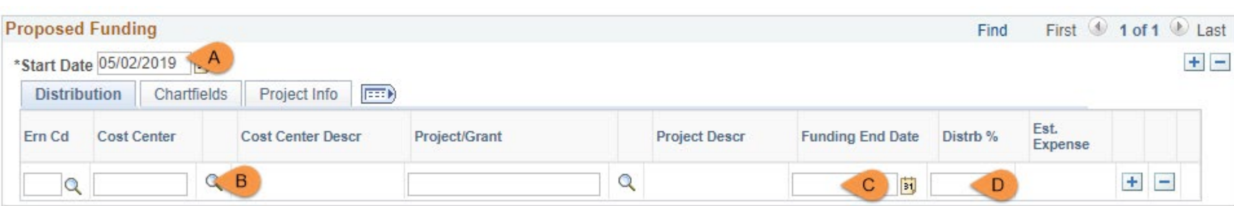
Note: The Proposed Funding section should show the funding for the entirety of the fiscal year (beginning September 1) regardless of the effective date of the funding change. For example, if the position funding change is to be effective March 1, the Proposed Funding section should show the prior funding with Start Date September 1 and a Funding End Date of February 28, then an additional Funding Period row added, with Start Date March 1.

If the position effective date (aka the date the position was created) was within the Fiscal Year (after September 1), the Start Date should reflect the date the position was initially made effective.

Also, position funding from a Project will need to include a Funding End Date of either the end of the Fiscal Year (August 31) or the end of the Project, whichever comes first.

Enter the following fields:

A. Start Date
   Enter the effective date for the Proposed Funding in the Start Date field.
B. Cost Center, Cost Share or Project/Grant
   Enter the Cost Center, Cost Share or Project/Grant funding the position.
C. Funding End Date
   The Funding End Date for Projects or Cost Shares should be the end of the assignment, the project or fiscal year; whichever date is first. If the funding source is a Cost Center, leave the Funding End Date field blank.
D. Distribution percentage
   Enter the funding Distribution %. Funding may be split between different Cost Centers, Cost Shares or Projects. The total distribution percentage must equal 100%. Use the plus [+] or minus sign [-] to add/remove an additional funding source.



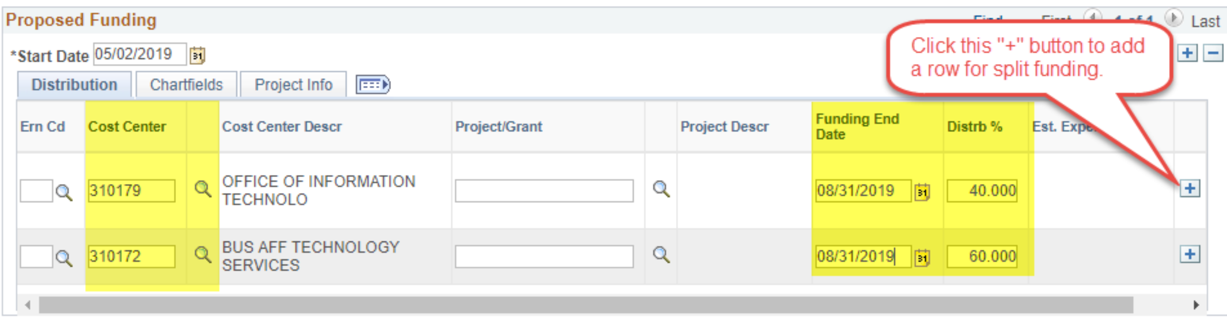
8a. Add additional or split funding

You may add split funding to the eForm by adding distribution rows and/or adding funding periods. To do so use the plus signs [+] at the end of the rows and in the upper-right corner of the Proposed Funding section.

8b. Add a Distribution Row

To enter split funding for the same time period, click the plus sign [+] in the right column of the **distribution tab** to insert a new row.

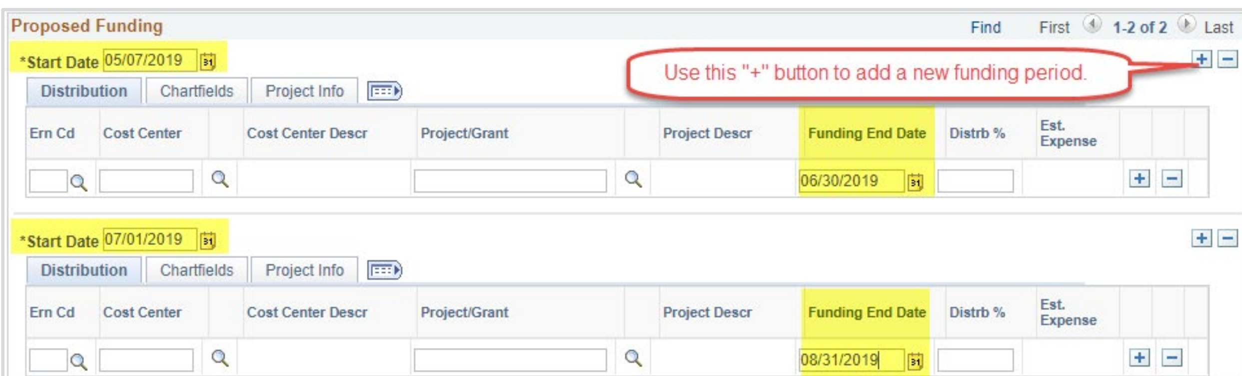
Below is an example of a 60/40 funding split for two cost centers beginning on May 2, 2019.



8c. Add a Funding Period

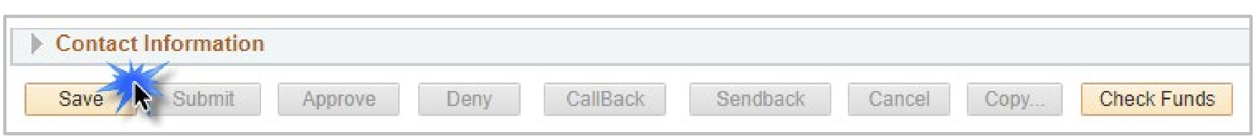
To enter funding with a different, **Start Date**, click the plus sign [+] in the upper-right corner of the **Proposed Funding** section to insert a new row.

Below is an example of Split funding over two funding periods (May/June & July/August).



9) Click Save and Review Available Funds

Once the required fields (indicated with an *asterisk) are completed, click **Save**. Once the form is saved, a **Request ID** number (e.g. 00002476) is assigned and the form status is displaying “Saved” at the top of the form.



The **Review Available Funds** page will automatically display once you have clicked save. This page is used to view the current condition of your Budget.

If the Cost Center, Cost Share or Project is overdrawn, take necessary actions or revise the funding sources for the position on the eForm prior to submitting it. If the form is submitted with an overdrawn budget the budget office will not approve the form.

- The Requested Amount column displays the estimated expense for the current request and the estimated expenses for any other pending requests on the same cost center or project.
- Click **OK** to return to the main page of the form.

Review Available Funds

Cost Center 312345 Department Name

Request ID	Account	Account Descr	Budget	Assoc Rev	Expenses	Encumbrance	Pre-Encumb	Available Bal	Requested Amt	Current Encumb	Additional Funds	Net Balance
	A1000	Staff Salaries	1,279,745.00	0.00	-426,956.11	199,870.16	0.00	652,918.73	23,787.88	0.00	23,787.88	645,494.49
00000049	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	8,181.82	0.00	8,181.82	0.00
00000046	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	8,181.82	0.00	8,181.82	0.00
00000047	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	7,424.24	0.00	7,424.24	0.00
	A1200	Wages	72,045.00	0.00	-84,292.05	0.00	0.00	-12,247.05	0.00	0.00	0.00	-12,247.05
	A2000	Faculty & TA Salaries	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	A3000	Payroll Related Costs	468,853.00	0.00	-149,175.75	0.00	0.00	319,677.25	0.00	0.00	0.00	319,677.25
	A4000	Operating Expenses	1,371,885.27	0.00	-240,505.21	2,212.00	0.00	1,129,168.06	0.00	0.00	0.00	1,129,168.06
	A7000	Expense Transfers	551,275.00	0.00	-551,275.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Totals		3,743,803.27	0.00	-1,452,204.12	202,082.16	0.00	2,089,516.99	23,787.88	0.00	23,787.88	2,065,729.11

OK Cancel

Row colors on the Review Available Funds Page indicate the following:

Blue = the current eForm request

Pink = other pending eForm requests

Yellow = the budgetary account line is overdrawn

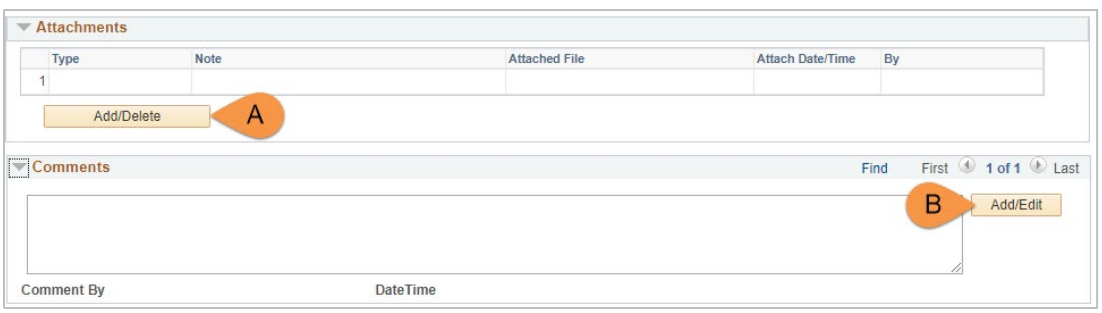
Red = overall budget is overdrawn

10) Add Attachments and Comments

A. Expand the Attachments section and click the Add/Delete button to upload relevant support documentation.

B. Expand the Comments section and click the Add/Edit button to include any special remarks. (Optional)

Note: Attachments and Comments cannot be added unless you have clicked Save.



11) Add a Secondary Contact (if needed) and Submit the Form to Workflow

A. If applicable, expand the **Contact Information** section to add the name and telephone number of a secondary contact for the New Position Request form.

B. After completing the eForm, click the **Submit** button to send the document for approval. The eForm **Status** changes to "Pending Approvals" and the current routing is displayed.