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.

   ![Existing Positions by Department](image)

   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](image)

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)**.
*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.