Transfer Position/Employee

The purpose of this job aid is to explain how to transfer a position from one area to another and to transfer an employee out of one position into another existing position.

Note: Changes are updated in real time.

1. From the PBCS 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 then click **OK**.

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 one of the **Transfer** options – Transfer Position or Transfer Employee (and Vacate Source Position).
   
   a. Transfer Position – Can be used whether position is filled or vacant. If filled the position and the employee will both be transferred. Fringe attributes follow the employee. This is used to change the funding source of the position.
b. Transfer Employee (and Vacate Source Position) – Used if only the employee is transferring from one position to another. Fringe attributes follow employee.
7. **Transfer Position** – Use when transferring one position from a department or cost center to another department or cost center as long as security permits.

   ![Action Menu - Transfer Position Ruleset](image)

   *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.

   Once successful, the source position line will still display some information as historical data but all attributes will be blank. Position status will reflect as None.

8. **Transfer Employee (and Vacate Source Position)** - Use when transferring 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. Person performing transfer must have access to both departments to complete. The fringe attributes will follow the employee.

   ![Action Menu - Transfer Employee Ruleset](image)

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

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

9. After the required fields are updated, click the **Launch** button.

10. A confirmation window appears, “the action was successful”. Click **OK**.

11. 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. Adjust as necessary. The combo code is extremely important.