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. To process a transfer, complete the following steps:

1) Begin by navigating to the Main Menu > HRMS > UTZ Customizations > eForms for HR/Payroll Actions > Action Request

   **Alternate Navigation:** From the eForms pagelet, located on the UT Share homepage, click “Create New Request”. Proceed to step three.

   **Note:** If the eForms pagelet is not appearing on the homepage, click the “Content” link, in the upper-left corner of the homepage, to add the pagelet.

2) Click the **Add New Value** tab.

3) The **Initiate New eForms Request** page is displayed. Select **Transfer within Institution** from the Actions drop-down menu.

   ![Initiate New eForms Request](image)

   - The **Status** displays the current status of the eForm once saved and/or submitted.
   - The **Request ID** number and **Request Date** are assigned once saved and/or submitted. This number may be used to identify and track the request.
   - The **Processing Messages** link displays messages (i.e. warnings) received after the form has been fully processed.
   - The **Request History** link provides workflow history; which includes names, dates, times and actions taken.

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

   ![Transfer within Institution](image)
5) The **Employee Information** section is used to identify the employee transferring to another position.

   a. Enter or lookup the employees **Empl ID**. The table below displays all the existing assignments for the employee.

   b. If necessary, select the checkbox for the appropriate job record.
      
      **Note:** You will only have the option to select the assignments that you have access to in your department. This is dependent on your permissions in UT Share.

   ![Employee Information Table]

   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.

   ![Current and Future Incumbents]

6) 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]
7) 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:**

   ![Proposed Job Information](image1)

   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.

   **If the request is for a Faculty, complete the following fields and then proceed to step eight:**

   ![Proposed Job Information](image2)

   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) The funding section displays **Current Funding** and **Proposed Funding**. Use the **Proposed Funding** section to make changes to the existing funding source(s) or distribution(s). Complete the following fields:

<table>
<thead>
<tr>
<th>Start Date</th>
<th>Payroll ID</th>
<th>Cost Center</th>
<th>Cost Center Descr</th>
<th>Project/Grant</th>
<th>Project Descrip</th>
<th>Funding End Date</th>
<th>Distrib %</th>
<th>Est. Expense</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/01/2017</td>
<td>12345678</td>
<td>310118</td>
<td>HR/Financ PS Project</td>
<td></td>
<td></td>
<td></td>
<td>100.000</td>
<td></td>
</tr>
</tbody>
</table>

**Proposed Funding**

<table>
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<tr>
<th>Start Date</th>
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**Proposed Funding**

- **a.** Enter the effective date for the Proposed Funding in the **Start Date** field.
- **b.** Enter the **Cost Center, Cost Share** or **Project/Grant** funding the position.
- **c.** Enter the **Funding End Date**.
  
  **Note:** 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.** Enter the funding **Distribution %**.
  
  **Note:** 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.

If you need 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.
9) Once the required fields (indicated with an *asterisk) are completed, click Save. Notice, a Request ID number (e.g. 00002500) is assigned and the form status is displaying “Saved”.

10) Next, click the Check Funds button to view available funds for the Cost Center, Cost Share, and/or Project used in the Proposed Funding section. The Review Available Funds page is used to view the current condition of your Budget.
   - 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.

   **Note:** Currently, the Check Funds button is not a hard stop for the eForm request. If the Cost Center or Project is overdrawn, the form will still move forward. The end user will only receive a warning.

11) Expand the Attachments section and click the Add/Delete button to upload relevant support documentation. (Optional)

12) Expand the Comments section and click the Add/Edit button to include any special remarks. (Optional)
13) If applicable, expand the Contact Information section to add the name and telephone number of a secondary contact for the Transfer within Institution form.

14) 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.