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) In UT Share, navigate to the Action Request page

   Navigator > 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) Enter a Justification

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

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<td>Transfer Within Institution</td>
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5) Complete the Employee Information section.

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

A. Enter or lookup the employee's **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.

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.
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:**

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

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 to complete a budget transfer 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.
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 (e.g. A1200)
- **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.