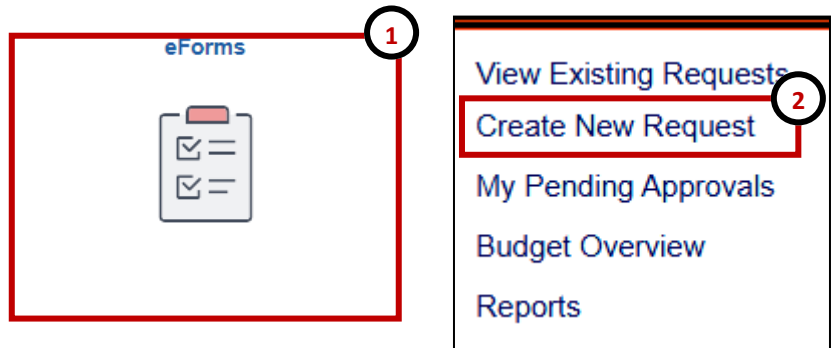


Transfer Request

Use when transferring an employee from one position to another, either within the same department or from one department to another.

1. After logging into PeopleSoft, click the **eForms** tile on the Employee Self Service home page.
2. From the “eForms Portal Pagelet” select the **Create New Request** link.



3. The **Initiate New eForms Request** page is displayed. From the “Actions” drop down menu, select the **Transfer Request** option.
4. The **Transfer Within Institution** eForm is displayed. Use the **Justification** text box to explain or “justify” the reason for the eForm action requested.

The screenshot shows the 'Transfer Within Institution' eForm. A red box labeled '3' highlights the 'Transfer Request' option in the 'Actions' dropdown menu. Another red box labeled '4' highlights the '*Justification' text box.

5. Under **Employee Information** enter the **Empl ID**. For additional search options, you can use the magnifying glass or you can also use the Search Match feature by clicking on the **Search** button.
6. Select the check box of the position(s) that needs to be transferred.

The screenshot shows the 'Employee Information' section. A red box labeled '5' highlights the 'Search' button. Another red box labeled '6' highlights the checkbox for the second position in the table.

Select	Empl RCD	Job Indicator	Company	HR Status	Payroll Status	Eff Date	Action	Reason	Dept ID
1 <input type="checkbox"/>		0 Primary	ELP	Active	Active	09/01/2019	Pay Rate Change	Merit	720100
2 <input checked="" type="checkbox"/>		1 Secondary	ELP	Active	Active	09/01/2019	Rehire	Rehire - Same Institution	720100

The screenshot shows the 'Current and Future Incumbents' section. Red boxes labeled '7', '8', '9', and '10' highlight the 'Transfer Date', 'Position', 'Expected End', and 'Transfer Action' fields respectively.

Empl ID	Empl Rcd	Name	Position Entry Date

7. Enter the **Transfer [Start] Date**.
8. Enter the **Position Number** that the employee is transferring to.

Note: If the positions is currently filled, the information will appear in the **Current and Future Incumbents** section.

9. Enter **Expected End Date**, if applicable.
10. Select the **Transfer Actions**.

Transfer Request

Current Position Information

Position 10020361 Profile ID
Company University of Texas, El Paso

Proposed Job Information

Empl Class Regular Faculty
FTE 0.500000
*9 Month Academic Rate @100% 30000.000
9 Month Academic Rate @FTE 15000.000
Monthly Allocation 1666.667

Current Position Information will show position information which cannot be modified.

11. Under Proposed Job Information, enter the **pay rate** based on the compensation frequency.

Current Funding

Start Date 09/01/2019

Distribution Chartfields Project Info

Em Cd	Cost Center	Cost Center Descr	Project
	14021600	PEOPLESFT VPBA	

12. The **Current Funding** section is also “view only” and displays the position's current funding information. If changes need to be made, follow step 13; otherwise, continue to step 14.

Proposed Funding

*Start Date 09/01/2019

Distribution Chartfields Project Info

Em Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
	14021600	PEOPLESFT VPBA				100.000	
			226000000A		08/31/2020		

13. In the **Proposed Funding** section update the funding source information, as needed.

13a. Verify the start date is correct.

13b. Enter the new cost center or project ID (in the respective field), add the funding end date (if applicable) and enter the distribution percentage.

13c. If adding more than one funding source click the + button next to the **Est. Expense** column. A new line will appear, repeat step 12b.

13d. If adding an additional funding source with a different “start date” click the + button on the upper right corner of the **Proposed Funding** field, an additional funding section will appear. Add the start date and repeat step 12b.



PeopleSoft Tip

When making changes to the funding source:

- The new funding source must hold sufficient funds
- The funding distribution should always equal 100%
- If using a Project/Grant, the funding start/end date must fall within the project start date.

Transfer Request

14. Once all the required fields have been completed, click the **Save** button at the bottom of the form.

Notice: At the top of the form, the **Request ID** number has been assigned and the status of the form is now **"Saved."**

15. Expand the **Attachments** or **Comments** section to attach required documentation and include any special comments.

16. After adding any attachments and comments (if needed), click the **Submit** button.

The screenshot displays the bottom portion of a web form. The **Attachments** section contains a table with columns: Type, Note, Attached File, Attach Date/Time, and By. Below the table is an **Add/Delete** button. The **Comments** section features a large text area and an **Add/Edit** button. Below these are expandable sections for **Form Procedures** and **Contact Information**. At the bottom, a row of action buttons includes **Save**, **Submit**, **Approve**, **Deny**, **CallBack**, **Sendback**, **Cancel**, **Copy...**, and **Check Funds**. Red boxes and circles highlight the **Add/Delete** button (labeled 15), the **Save** button (labeled 14), and the **Submit** button (labeled 16).

17. Once the document is submitted, the status of the form will update and show **"Pending Approvals."** The current approval routing is displayed at the bottom of the page.

This section shows the approval workflow for the request. It is divided into three main categories: **Department Approvals**, **Funding Approvals**, and **Business Office Approvals**. Each category shows the request ID (00107861) and its current status. Under **Department Approvals**, the status is **Pending** with a routing card for John Smith (New Position Reports To). Under **Funding Approvals**, the status is **Awaiting Further Approvals** with a routing card for Multiple Approvers (FMS Cost Center Approver). Under **Business Office Approvals**, the status is **Awaiting Further Approvals** with a routing card for Multiple Approvers (EDM). A red box and circle highlight the top right corner of this section (labeled 17).