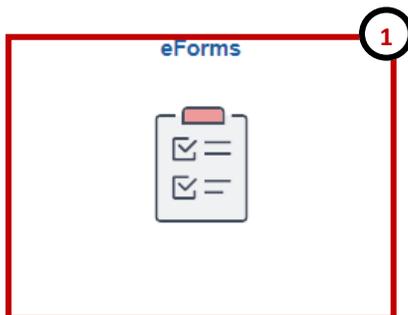


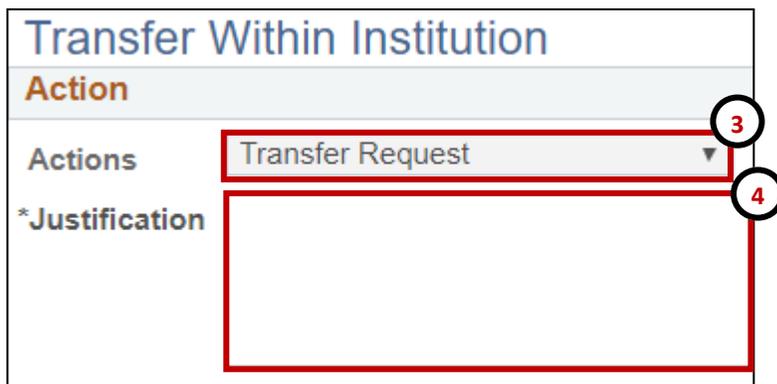
Transfer Request

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

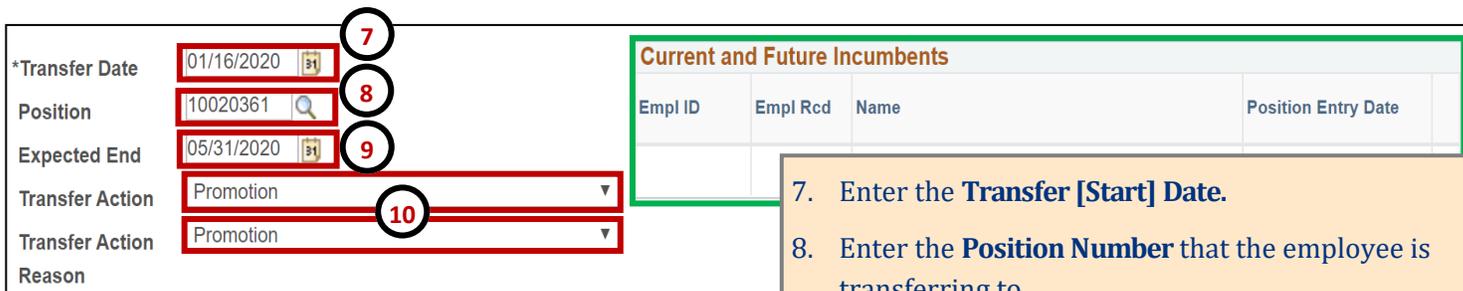
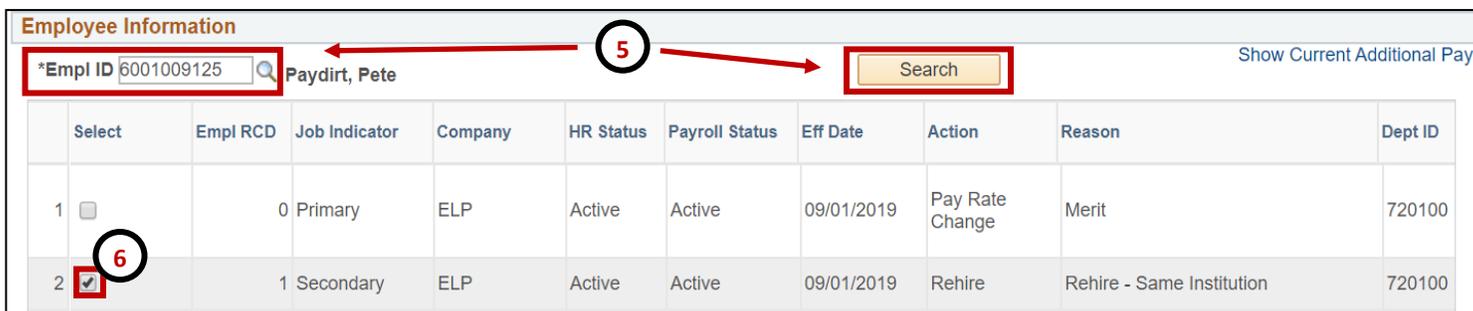
1. After logging into PeopleSoft, click the **eForms** tile on the Employee Self Service home page.
2. From the “eForms Portal Pagelet” select the **Create New Request** link.



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.



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.



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 Profile ID
 Company

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

Proposed Job Information

Empl Class
 FTE
 *9 Month Academic Rate @100%
 9 Month Academic Rate @FTE
 Monthly Allocation

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

Current Funding

Start Date 09/01/2019

Em Cd	Cost Center	Cost Center Descr	Project
	14021600	PEOPLESOFT VPBA	100.000

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

Em Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
	<input type="text" value="14021600"/>	<input type="text" value="PEOPLESOFT VPBA"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="100.000"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text" value="226000000A"/>	<input type="text"/>	<input type="text" value="08/31/2020"/>	<input type="text"/>	<input type="text"/>

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 shows the bottom portion of a web form. At the top is the 'Attachments' section with a table containing one row with columns for Type, Note, Attached File, Attach Date/Time, and By. Below the table is an 'Add/Delete' button. The 'Comments' section below it has a large text area and an 'Add/Edit' button. Below the comments is the 'Form Procedures' section, which is collapsed. Underneath is the 'Contact Information' section, which contains a row of buttons: 'Save', 'Submit', 'Approve', 'Deny', 'CallBack', 'Sendback', 'Cancel', 'Copy...', and 'Check Funds'. Red boxes and circles highlight the 'Add/Delete' button (labeled 15), the 'Save' and 'Submit' buttons (labeled 14 and 16), and the 'Add/Edit' button.

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.

The screenshot shows three approval sections. The first is 'Department Approvals' for 'REQUEST_ID=00107861:Pending', showing a 'Pending' status with a clock icon and the name 'John Smith' for 'New Position Reports To'. The second is 'Funding Approvals' for 'REQUEST_ID=00107861:Awaiting Further Approvals', showing a 'Not Routed' status with a printer icon and 'Multiple Approvers' for 'FMS Cost Center Approver'. The third is 'Business Office Approvals' for 'REQUEST_ID=00107861:Awaiting Further Approvals', showing a 'Not Routed' status with a printer icon and 'Multiple Approvers' for 'EDM'. A red box and circle highlight the top right corner of the entire approval section (labeled 17).