



File Name	Transfer.doc
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Transfer

Concept

Description: The Transfer action is used when you want to assign an employee a new business unit, department, and/or location. Transferring an employee's record is a 2 step process:

- 1) The unit the employee is transferring FROM completes the Transfer process.
 - a) Employee is ACTIVE, use the action code 'Transfer' and appropriate reason code.
 - b) Employee is TERMINATED, use the action/reason codes 'Rehire/Transfer.'

NOTE: The fields needed to complete Step 1 of the transfer are:

- **Effective Date** (date the employee starts in the new location)
- **Position Number** (Position Number at the employees new location)

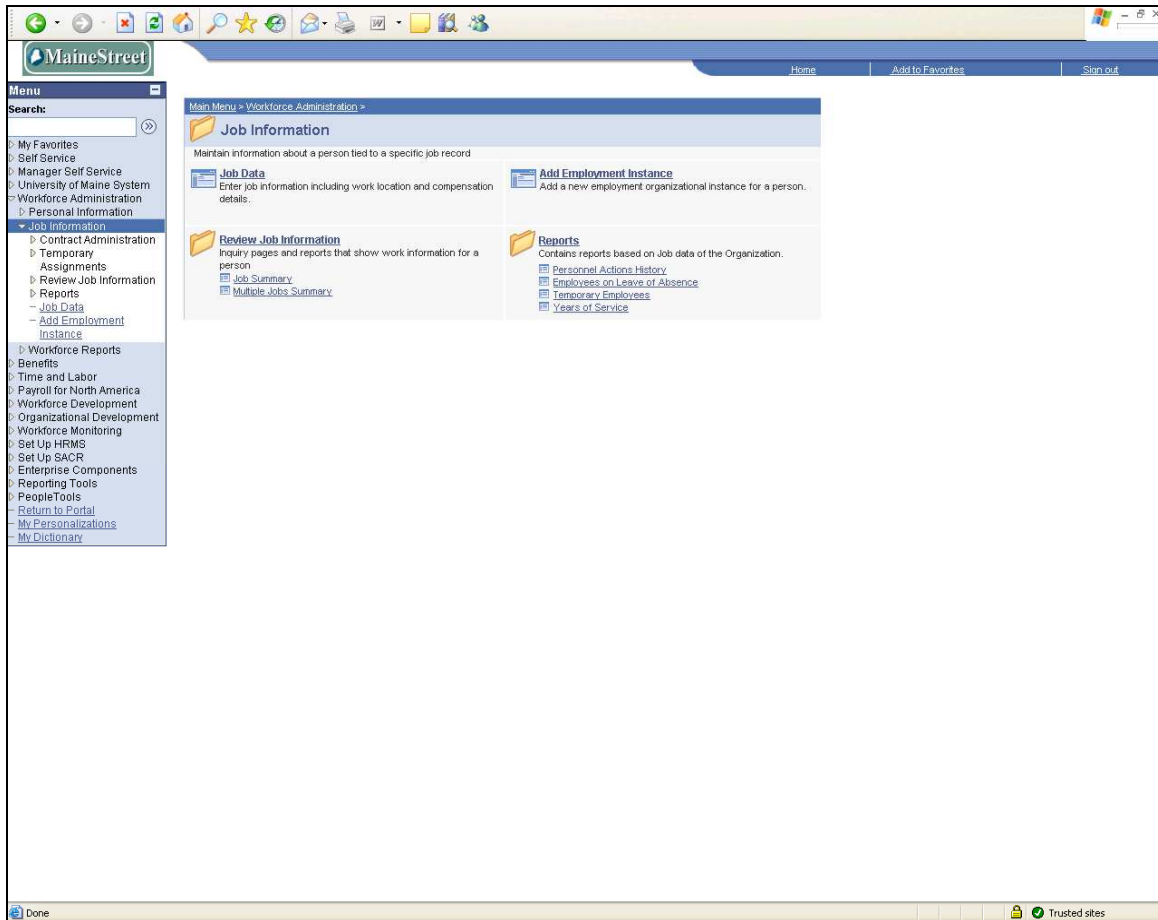
2) The unit the employee is transferring TO should refer to the Data Change process to update the employee information.

Additional Information:

If an employee transfers from one department or campus to another department or campus without a break in service, that does not permit a payout of that employee's vacation balance. Accrued vacation hours should only be paid out when an employee terminates employment from the University of Maine System OR is no longer eligible to accrue vacation as a UMS employee. The Board of Trustees Policy Section 405 applies to a department's financial responsibility, however at this time all vacation payouts are charged to a System Benefits account and there is no financial responsibility for the department or campus from which an employee is transferring from or to. This policy, as well as others, is currently being reviewed and updated. Also, we have found that using the vacation payout earnings code further exacerbates issues related to employees' leave balances that are displayed in various places in MaineStreet (which is not an issue if the employee is no longer employed).

Contact the System Office of Human Resources with any questions you might have.

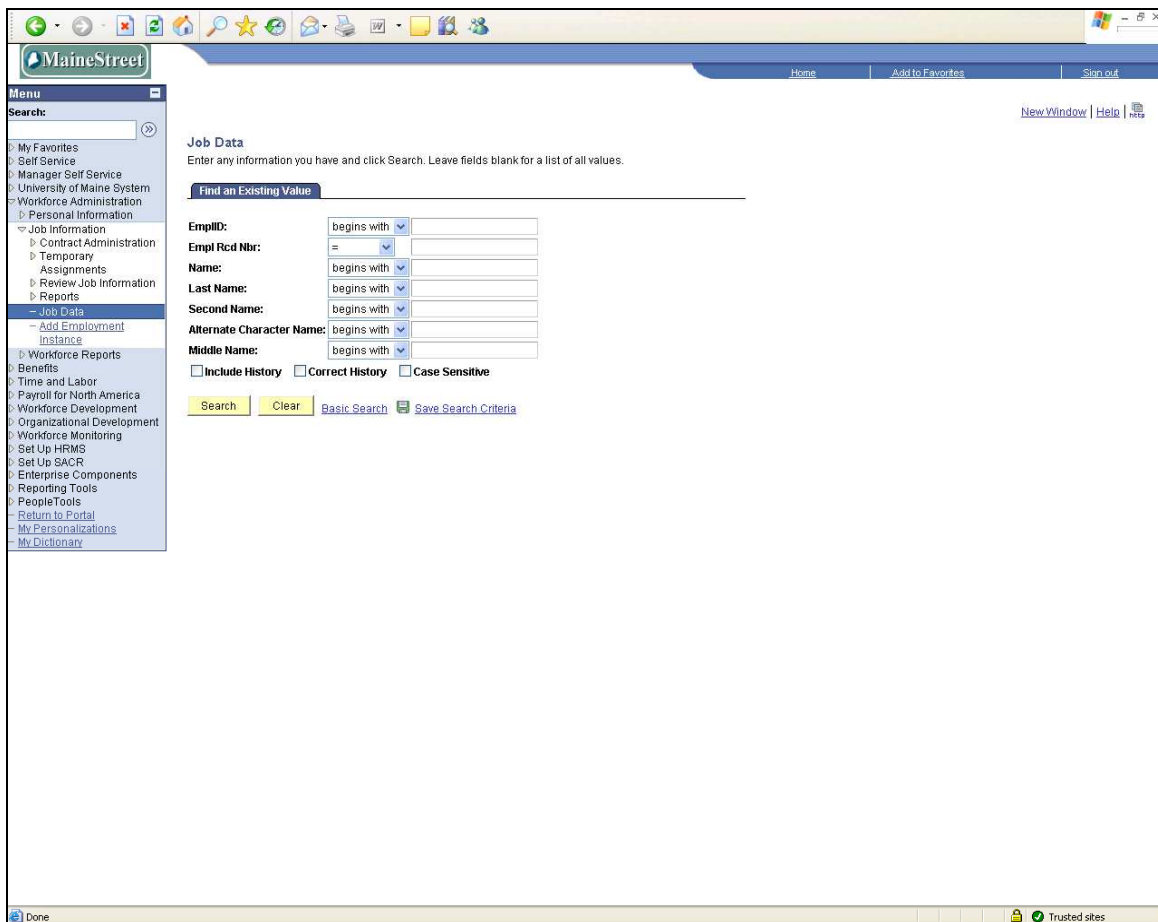
Navigation:



Step	Action
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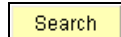
- | | |
|----|---|
| 1. | Click the Workforce Administration link. |
| 2. | Click the Job Information link. |
| 3. | Click the Job Data link. |

Procedure:



Step	Action
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- | | |
|----|---|
| 4. | To Search for an existing employee record, enter EmplID, Name or Last Name. Drop-down menus can be used to select 'begins with', 'contains', etc. to assist in locating an employee. The more information that is entered, the narrower the search and the shorter the search results list. |
| 5. | Click the Search button. |



If multiple employee records are listed, click on the appropriate employee record to continue.

Process Document

HRMS: Transfer



Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Patricia Transfer EMP ID: 0099999 Empl Rcd #: 0

Work Location Find First 1 of 2 Last

HR Status: Active Payroll Status: Active

Effective Date: 12/01/2008 Sequence: 0 Job Indicator: Primary Job

Action / Reason: Transfer Internal Recruitment

Last Start Date: 08/20/2001 Termination Date: Future

Expected Job End Date

Position Number: 00010481 Scientific Technician I Position Entry Date: 10/27/2004

Override Position Data Position Management Record

Regulatory Region: USA United States

Company: UMS University of Maine System

Business Unit: UMS05 University of Maine

Department: OFARM UM Farms Department Entry Date: 08/20/2001

Location: 003410 Highmoor Farm

Establishment ID: UMS05 University of Maine

Job Data Employment Data Earnings Distribution Benefits Program Participation

Save Return to Search Notify Previous tab Next tab Refresh Update Display Include History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Step Action

6. Click the **Plus (+)** key to add a new job row.
7. Enter the **Effective date** of the Transfer.
8. The **Sequence** field defaults to '0'. If the added job row has the same effective date as the prior row, the sequence must be changed to the next higher number. Otherwise, do not change.
9. Click the **Drop-down Arrow** to select from the **Action** list.
10. If employee is **active**, select **Transfer**.
If employee is **terminated**, select **Rehire**.
11. Click the **Drop-down Arrow** to select from the **Action/Reason** list.
12. Click the appropriate value from the list.
13. Enter **Position Number** (blank out field, tab out of field, then enter new number) of the new position into the **Position Number** field.
14. Click the **Save** button.

