# Tufts Support Services

## Job Aid for Transfer to Job

Description

- This job aid is intended to guide you through the online process for a Transfer to Job transaction to move a Tufts employee to a different position and update pay rate/allocation. This will be initiated by a Tufts approved submitter.
- Note if you are moving a person from an hourly job to a salaried job or vice-versa, contact TSS
- Use ePAF if you want to add a job to a person

Key Steps/Activities to be performed

1. The Approved Submitter Logs into PeopleSoft and clicks on the submit request tile from their landing page.
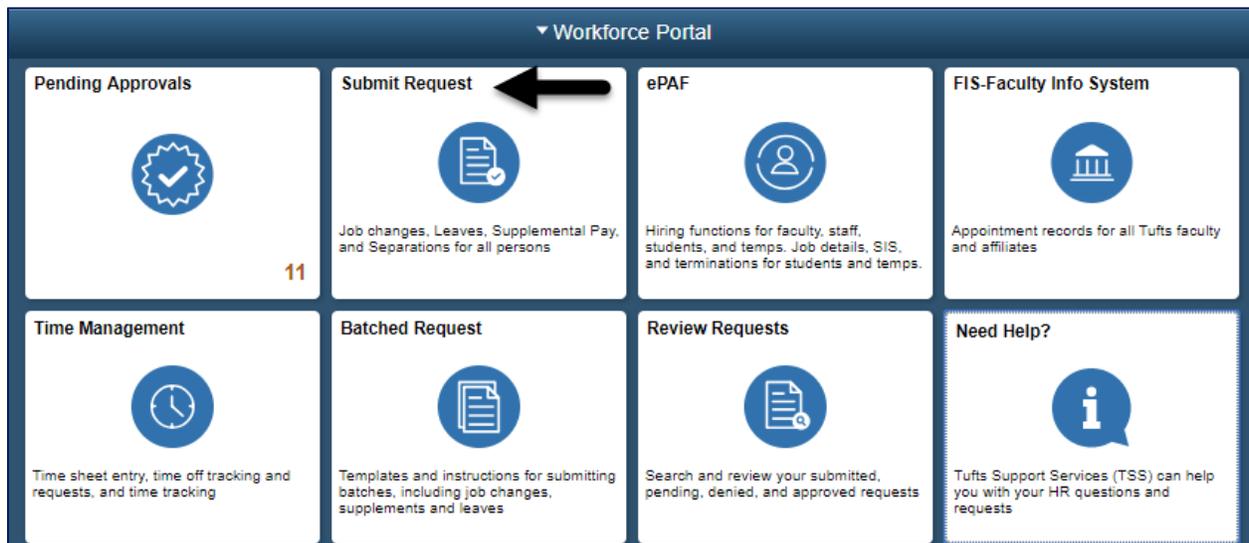
2. The submitter selects the Transfer to Job from the left-hand side navigation, which will begin the transaction and opens a window to allow the submitter to search for an employee.
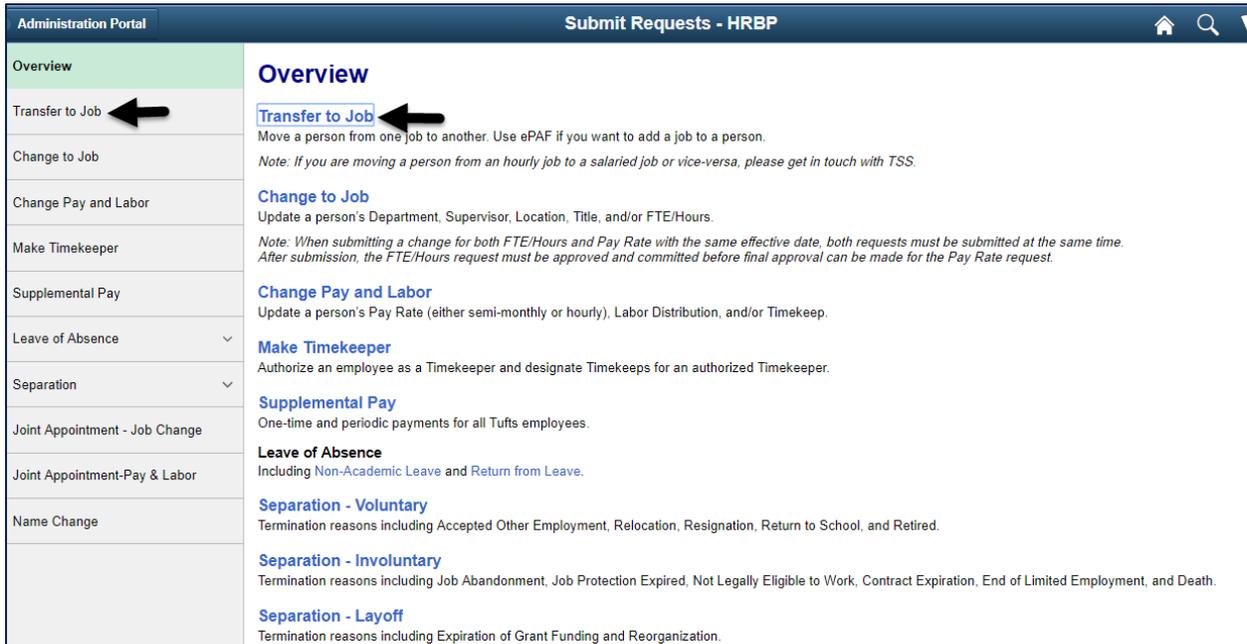
3. You can search for the employee by name, employee id, position number or department.
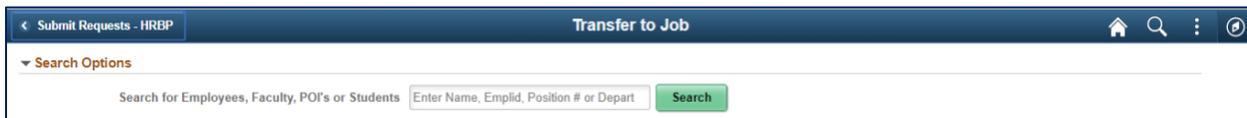
4. Based on the search criteria, a list of employees will appear that the submitter has security access to. In the example below, the search was for "Simpson".

5. After selecting the Employee from the list, the submitter will answer 2 questions about the changes they would like to make in addition to Transferring this employee to a new job. If the question is answered "YES", the submitter will be allowed to change the fields. The questions are
   a. Are you changing the person's pay rate?
   b. Are you changing the person's labor distribution?

   If any part of the transaction is retroactive, please contact TSS before proceeding.
6. After selecting " Homer Simpson" and answering the questions, the submitter will fill in the information below.
   a. Reason – Transfer to Another Position
   b. Position Title – The position title or number the employee is transferring to. Note you will need to contact TSS to obtain new position numbers
   c. In our example, we have changed the employee position number from 00007964 to 00001040. Based on the setup in position management, this will also change the fields highlighted with the orange circles.

   When completed the user will click on the NEXT button.

7. Since the submitter selected "Yes" to the pay rate question, the Compensation Detail page will be the next step to complete.
    a. The submitter can either enter the Change Percent, Change Amount, or New Amount. Based on the value entered in one field, the other two fields will be calculated.
    b. In our example, we have changed the percent to a 1% increase. This will also change the fields highlighted by the green circle.
    c. Note: The Change Percent, Change Amount, and New Amount are based on the employee's pay frequency.

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8. The submitter also selected "Yes" to the Labor Distribution question, which is the next step to complete.
    a. The submitter will enter the new department the payroll cost will be distributed to.
    b. If the payroll is funded by a project or grant, the Project/Grant field will be entered.
    c. The percentage of payroll expense that should be distributed. Note: multiple rows can be added but must equal 100%.

9. The submitter will have a chance to review the changes that were made and add comments that they can reference in the future and will be included in the workflow transaction.   After reviewing the transaction, the submitter will click on the submit button.

10. After the transaction is submitted, the submitter will receive a message that the transaction was submitted for approval. They can also view the approval workflow chain with a pending status.

All required approvals will appear in the Approval Chain. Upon completion of the Approval Chain, certain roles will be notified. The required approvals and the notified roles will vary based on the type of employee as shown below.

Employee Type	Faculty	Staff
Approvers	OFA LRA (if involves Grant Funding) OVPR Post-Award (if involves Retroactive Grant Funding) Budget Center (if Pay Change >= $2,500) TSS Tier 2	Dept Manager HRBP LRA (if involves Grant Funding) OVPR Post-Award (if involves Retroactive Grant Funding) Budget Center (if Pay Change >= $2,500) TSS Tier 2
Notified	HRBP (if involves change from Hard Money to Grant Money) Budget Center (if involves Pay Change < $2,500)	HRBP (if involves change from Hard Money to Grant Money) Compensation (if involves Pay Change) Budget Center (if involves Pay Change < $2,500)

11. The approver will receive an email that a transaction is waiting to be approved and they will also see the transaction in the pending approvals tile.
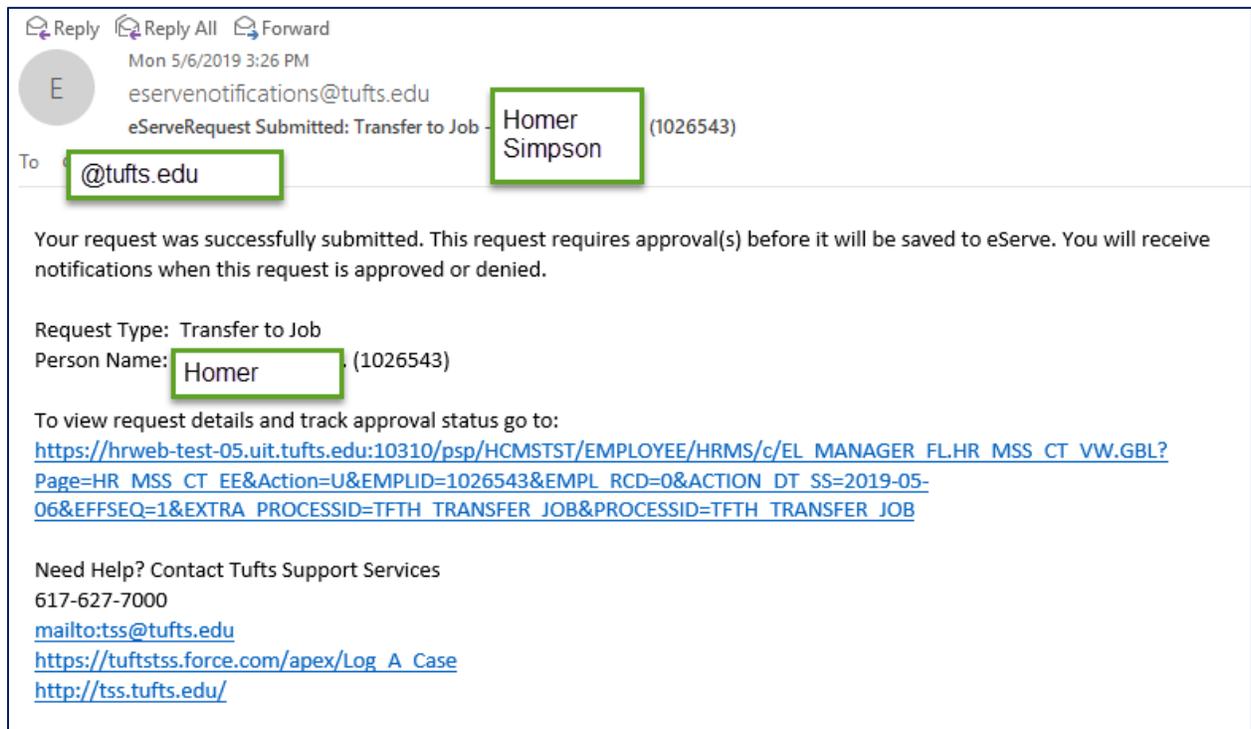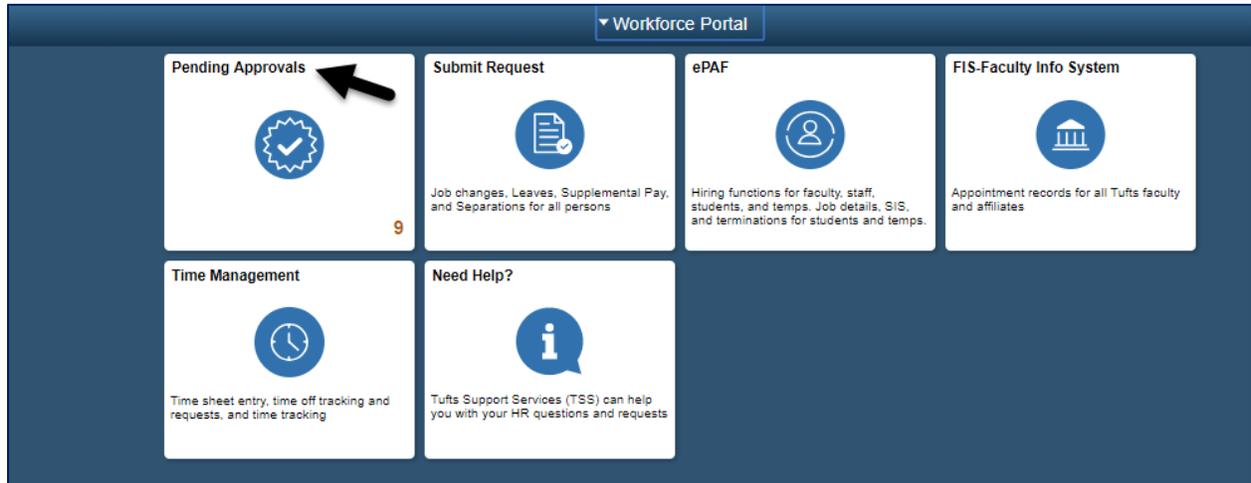
12. The approver should then select the transaction from the list. They can review the changes and comments before denying or approving the transaction. Once the final approver has approved the transaction, the employee's job data information will reflect the changes.

Pending Approvals

View By	Type ▾		
🌐 All	19		
▥ Change to Job	1		
▥ Joint Appointment-Salary	1		
▥ LOA - Academic	1		
▥ LOA - Non-Academic	1		
▥ LOA - Summer	1		
▥ Labor Distribution	2		
▥ Make Timekeeper	2		
▥ MaritalStatusChange	3		
▥ Salary Change	4		
▥ Separation - Voluntary	1		
▥ Transfer to Job	2		

Transfer to Job   2 rows

Transfer to Job		Reason - Transfer to Another Position	Routed
1000387	04/24/19		04/10/2019 >
Transfer to Job		Reason - Transfer to Another Position	Routed
Homer Simpson	04/15/19		04/15/2019 >
1041605			

‹ Pending Approvals   Transfer to Job

Approve   Deny

Summary

Empl ID   1041605   Transaction Date   04/15/19

EmplName   Homer Simpson

Proposed Changes

Description	After Approval	Before Approval
Position Number	Staff Asst - 00001012	Library Coord Doc Delivery - 00002325
Department	Academic Support-Fletcher - F200001	Tisch Library - A780001
Location Code	Cabot Building-160 Packard Ave - M151	Tisch Library-35 Professors - M024
Job Code	Staff Asst - 4010	Library Coord Doc Delivery - 4850
Reports To	Facilities Coordinator - 00001014	Head of Access Services - 00002322
Manager Name	Marge Simpson	John Doe
Annual Rate	54,138.63 USD	51,560.60 USD

▾ **Labor Distribution**

New Labor Dist	Current Labor Dist
A000001 - PV4262 - 100%	A780210 - NONE - 100%

8:42 AM

Reply ⌂ Reply All ⌂ Forward

Tue 5/7/2019 8:49 AM

P

pshr_testing@tufts.edu

Informational - Transfer to Job -   - Approved by James Rollins

To   david.cuddihy@tufts.edu

Your request was approved by the approver below.

Approver Name:
Transaction Name: Transfer to Job
Employee Name:
Employee Id: 1308662

To view the status of this request, go to:

https://hrweb-test-05.uit.tufts.edu:10310/psp/HCMSTST/EMPLOYEE/HRMS/c/EL_MANAGER_FL.HR_MSS_CT_APPR.GBL?
Page=HR_MSS_CT_APPR&Action=U&EMPLID=1308662&EMPL_RCD=0&ACTION_DT_SS=2019-03-
21&EFFSEQ=1&EXTRA_PROCESSID=TFTH_TRANSFER_JOB&PROCESSID=TFTH_TRANSFER_JOB

This communication was sent via Oracle Workflow Technology. Please do not reply to this email.

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