

Tufts Support Services

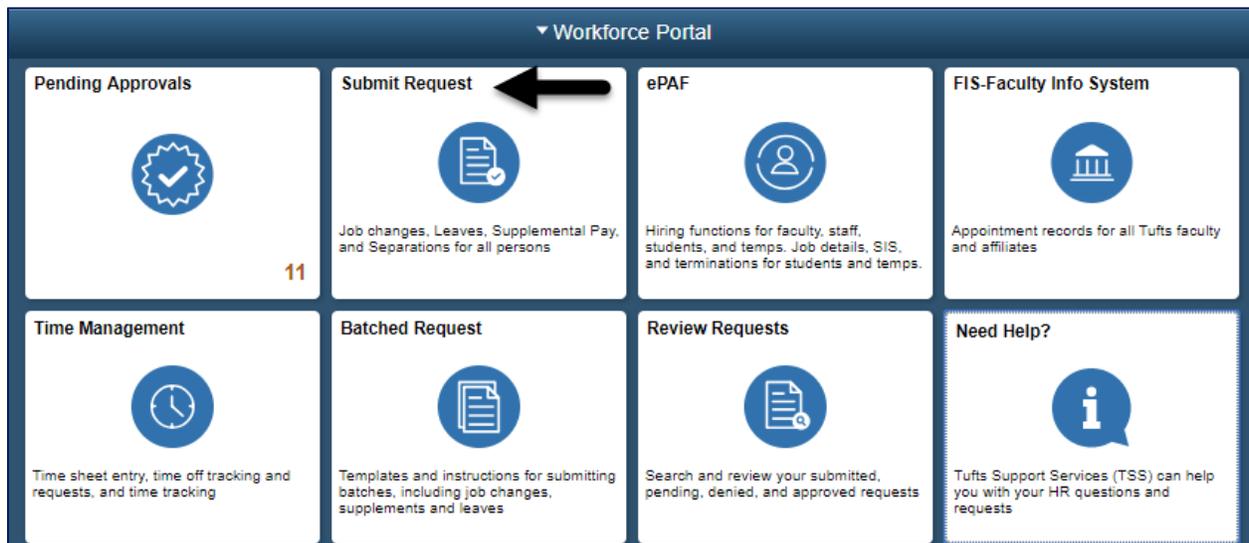
Job Aid for Transfer to Job

Description

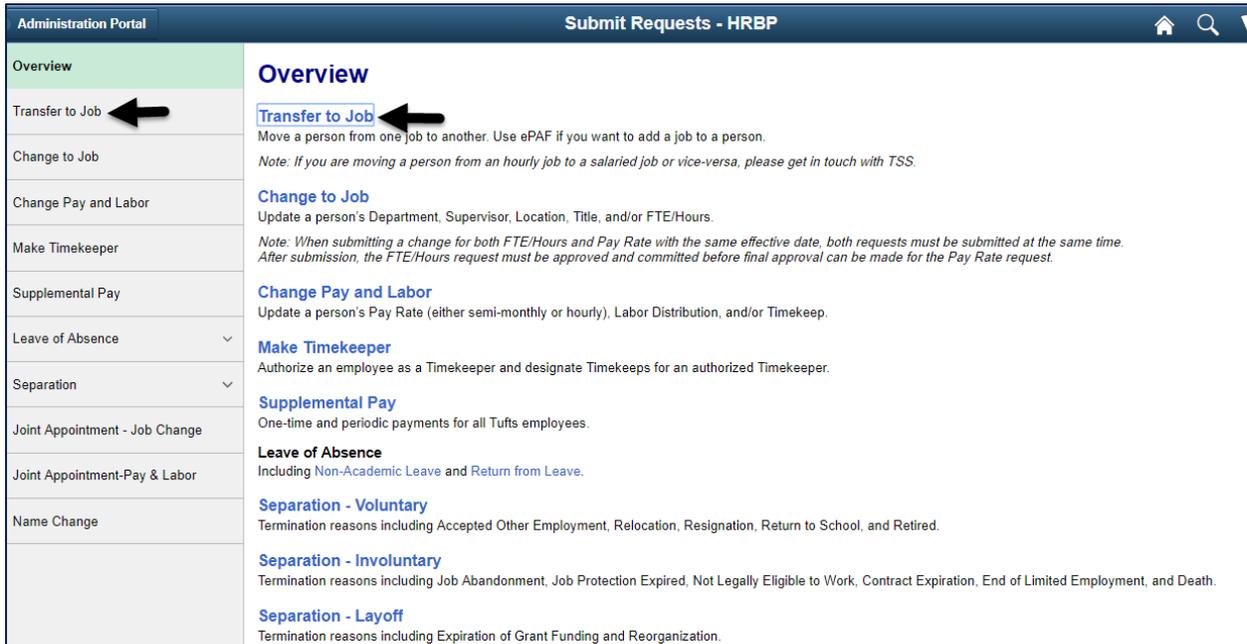
- This job aid is intended to guide you through the online process for a Transfer to Job transaction to move a Tufts employee to a different position and update pay rate/allocation. This will be initiated by a Tufts approved submitter.
- Note if you are moving a person from an hourly job to a salaried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

Key Steps/Activities to be performed

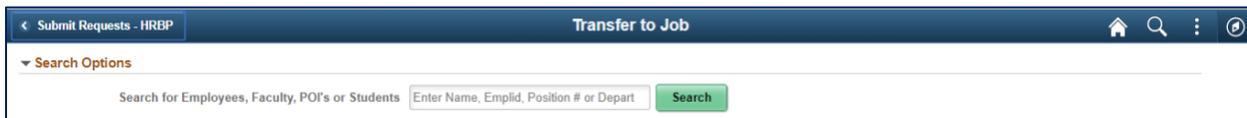
1. The Approved Submitter Logs into PeopleSoft and clicks on the submit request tile from their landing page.



- 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.



- You can search for the employee by name, employee id, position number or department.



- 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".

Submit Requests - HRBP Transfer to Job

Search Options

Search for Employees, Faculty, POI's or Students

May Devers

Select Employee 4 rows

Name / Title / ID - Record	Status / Type
Simpson Program Administrator 1265551 - 0	Active Employee
Simpson Lecturer 1000006 - 0	Active Employee
Simpson Assoc Dir Research Admin 1201463 - 0	Active Employee
Simpson Sr Lecturer 1021643 - 0	Active Employee

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.

Transfer to Job

Homer Simpson
Professor

1 Job Detail 2 Compensation Detail

Work and Job Information

*Transaction Date 05/06/2019

*Reason Transfer to Another Position

New Information

*Position Title Dir PhD and MA Program 00001040

Department Student Services-Fletcher F300001

Location Cabot Building-160 Packard Ave M151

Job Title Dir PhD and MA Program 3431

Standard Hours 35.00

FTE 1.000000

Full/Part Time Full-Time

Reports To Executive Associate Dean 00001004

Manager Name Marge Smith

Current Information

Professor 00007964

Eileen Kennedy Research N312001

75 Kneeland St B923

Professor 2023

35.00

1.000000

Full-Time

Dean Friedman School 00008392

Joe Doe

Changes Made
Required Field

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.

Transfer to Job

Homer Simpson

1 Job Detail 2 Compensation Detail 3 Labor Distribution

Compensation Details

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
Default NA Annual	1.000	75.149500	7,590.099500	7,514.950000	USD	Fiat Amount	Semimonthly

New Information

Semimonthly Salary 7,590.099500 USD

Annual Rate 182,162.388 USD

Current Information

7,514.950000 USD

180,358.800 USD

Changes Made
Required Field

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%.

*Department	Description	Project/Grant	Description	%
A140001	Chemistry - A&S	FSU049	ACWD-integrated Mesoscale Archi	100

*Department	Description	Project/Grant	Description	%
N210301	NUTR 0203 Fundamentals of Publ			15.00
N210502	NUTB 0206 Global Food and Nutr			12.50
N312001	Eileen Kennedy Research	SU2422	Growth Through Nutrition	57.50
N325101	Cost Share - Africa			15.00

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.

Transaction Date: 05/08/2019
Reason: Transfer to Another Position

New Information		Current Information	
Position Title	Dir PhD and MA Program 00001040	Professor	00007964
Department	Student Services-Fletcher F300001	Eileen Kennedy Research	N312001
Location	Cabot Building-160 Packard Ave M151	75 Kneeland St	B923
Job Title	Dir PhD and MA Program 3431	Professor	2023
Standard Hours	35.00	35.00	
FTE	1.000000	1.000000	
Full/Part Time	Full-Time	Full-Time	
Reports To	Executive Associate Dean 00001004	Dean Friedman School	00008392
Manager Name	Marge Simpson	John Doe	
Semimonthly Salary	7,590.099500 USD	7,514.950000 USD	
Annual Rate	182,182.388 USD	180,358.800 USD	

Department	Description	Project/Grant	Description	Fund Code	%
A140001	Chemistry - A&S	FSU049	ACWD-integrated Mesoscale Archi		100.00
N210301	NUTR 0203 Fundamentals of Publ				15.00
N210502	NUTB 0206 Global Food and Nutr				12.50
N312001	Eileen Kennedy Research	SU2422	Growth Through Nutrition		57.50
N325101	Cost Share - Africa				15.00

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.

Job Change Transfer to Job

✔ Your transaction request for **Homer Simpson** has been successfully submitted for approval.

Homer Simpson

Transfer to Job

: Pending View/Hide Comments

Transfer to Job - Faculty

Skipped

No approvers found
OFA

Skipped

Jane Smith
05/08/19 - 3:28 PM

Pending

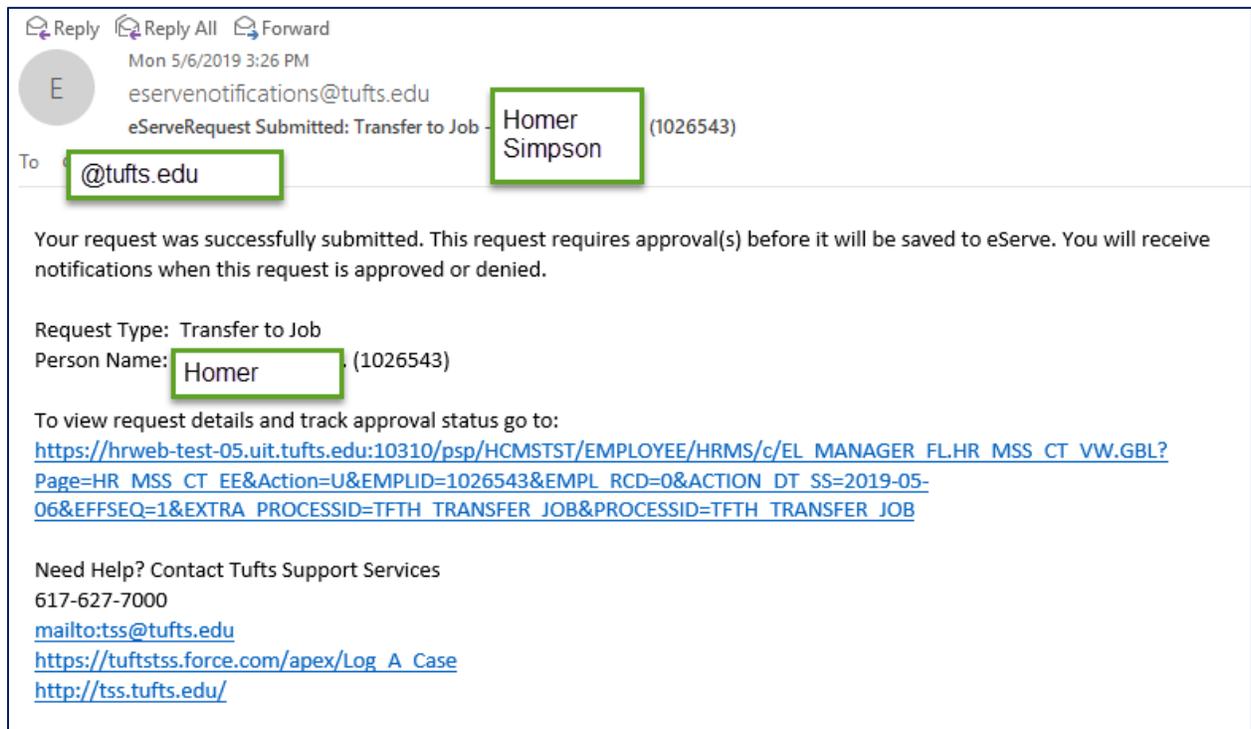
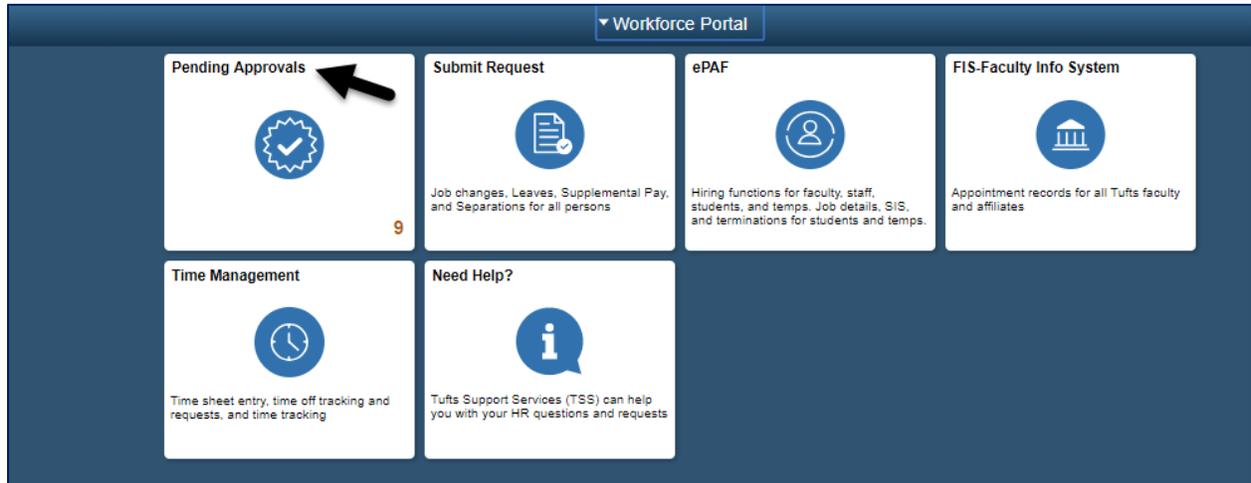
Multiple Approvers
Local Research Admin

▶ Comments

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)

- 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.



- 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	Transfer to Job		2 rows
Change to Job	1	Transfer to Job	04/24/19	Reason - Transfer to Another Position Routed 04/10/2019 >
Joint Appointment-Salary	1	1000387		
LOA - Academic	1	Transfer to Job	04/15/19	Reason - Transfer to Another Position Routed 04/15/2019 >
LOA - Non-Academic	1	Homer Simpson 1041605		
LOA - Summer	1			
Labor Distribution	2			
Make Timekeeper	2			
MaritalStatusChange	3			
Salary Change	4			
Separation - Voluntary	1			
Transfer to Job	2			

Pending Approvals		Transfer to Job	
		<input type="button" value="Approve"/> <input type="button" value="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%		

 Reply  Reply All  Forward



Tue 5/7/2019 8:49 AM

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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