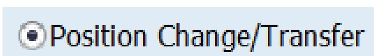
Requesting a Position Change/Transfer for an Employee

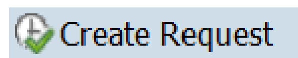
To add or remove a position for an employee or to transfer an employee to a different position, complete and submit the ***ZXFERCHGLOA - Personnel Change Request*** in IRIS. This sort of request will often be submitted by a department other than the employee's current primary responsible department.

NOTE: The position change/transfer option will only change the position(s) to which an employee is assigned. It does not make changes to positions themselves. Use the ***ZPPOSITION000 – Position Create/Change*** transaction to request changes to positions.

1. Access transaction **ZXFERCHGLOA – Personnel Change Request**.

2. Enter the employee's *Personnel Number* and the *Earliest Effective Date* (the date the position change or transfer becomes effective). Click or press **Enter** to access the employee's information. Verify the correct person has been selected.

3. 

is the default selection. Click 

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4. 

This graphic indicates that completing this form to request a position change for an employee involves several steps: three are required and one is optional.

5. In the *Organizational Assignment* section:

   5.1 The employee's current position(s) will be appear on the first line(s). The **Remove Position** checkbox for each position defaults as not selected. Check the **Remove Position** checkbox for any position that should be removed from the employee after the effective date.

   5.2 On the first blank line, type in the **Position** number for the employee's new position.

   If you don't know the number for that position:
   (a) Click **Search Help**.
   (b) On the pop-up window, enter your department's cost center in the *Cost Center* field.
   (c) Click  **(Start Search)**.

   5.3 Click or press **Enter** to confirm the correct position has been entered.

   5.4 Then click 

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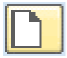
6.0 In the *Pay/Funding* section:

6.1 Click  **(Cost Period)** in the bottom right corner of the section.

6.2 On the pop-up window:

(a) Select the appropriate **Change Reason**:

(i) **20 – Promotion to Vacant Position**
(ii) **21 – Move to Vacant Pos-LowerPayGra**
(iii) **22 – Promotion in Place**
(iv) **23 – Add a Position**
(v) **24 – Remove a Position**
(vi) **36 – Lateral Transfer to Vacant Pos**
(vii) **42 – Continuation of Position**

(b) Enter/adjust the **Pos Pct** for each position, as needed.

(c) Select which position should be the **Primary** position.

NOTE: The position with the highest **Pos Pct** should always be the primary position.

(d) Click  to apply the entries to the employee's *Cost Period* data.

6.3 Verify the reason and time period for the requested change and verify the employee's current pay information.

6.4 Enter the pay/funding information for the new position.

(a) Type in the position number.

(b) Type in the funding source for the new position.

NOTE: Enter <u>only E or I funds</u> in the *Cost Center* column and <u>only R or N funds</u> in the *WBS Element* column.

(c) Type in the **Wage Type** for the new position:
1HRL for biweekly employees or **1REG** for monthly employees.

(d) Type in the pay rate that applies to the new position: **hourly rate** for biweekly employees or **monthly rate** for monthly employees.

(e) Change the **Cost Percent** (for biweekly employees) or **Effort Percent** (for monthly employees) to include the new position in a <u>100% total</u>.

(d) To delete a line, highlight the line and then click  **(Delete Row)**.

6.5 Then click .

STEP3*

7. In the *Pay/Funding* section, verify the information for the requested change. Then click STEP3* again.

STEP3*

8. In the *Actions* section at the bottom of the screen:

   7.1 Verify that the **Action** and **Reason** values reflect the requested change.

   7.2 If needed, you can change the **Work Schedule** value for the employee.

STEP4 **== optional**

8. In the *Primary Office Address* section, verify/change/complete the primary office address for the employee, as needed. These options include using selections in the **Building** and **Room** fields and adding a **Mail Stop** number to complete the address information, entering a **Telephone number** and **Cell Phone**, and choosing a selection for **Phone release** of this information in the UT Directory.

   NOTE: A **Mail Stop** number is required for all addresses with a 37996 zip code.

11. Click Workflow Notes. Enter comments related to the transfer of the friend to a pending employee. These comments will be available to approvers and reviewers during the approval process. **The workflow notes will not be stored permanently in IRIS with the personnel record.**

12. Click Attach Documents to attach documents to the request to transfer the friend to a pending employee.

13. Click Display actions/changes in PDF format to display the request to transfer the friend to a pending employee in PDF format.

14. Click Submit for Approval when you are ready to submit the request to transfer the friend to a pending employee to workflow for approval.

You have completed the *Personnel Change Request* to transfer a friend to a pending employee.