Manage Transfers: Quick Transfer

1

Select the **My Client Groups** tab

Me   My Team   My Client Groups   Benefits Administration   My Enterprise   Tools   Configuration   >

QUICK ACTIONS   APPS

HCM Experience Design Studio

Hire an Employee

Add a Contingent Worker

Add a Pending Worker

Add a Nonworker

Hiring   Journeys   New Person   Person Management

Absences   Compensation   Goals   Performance
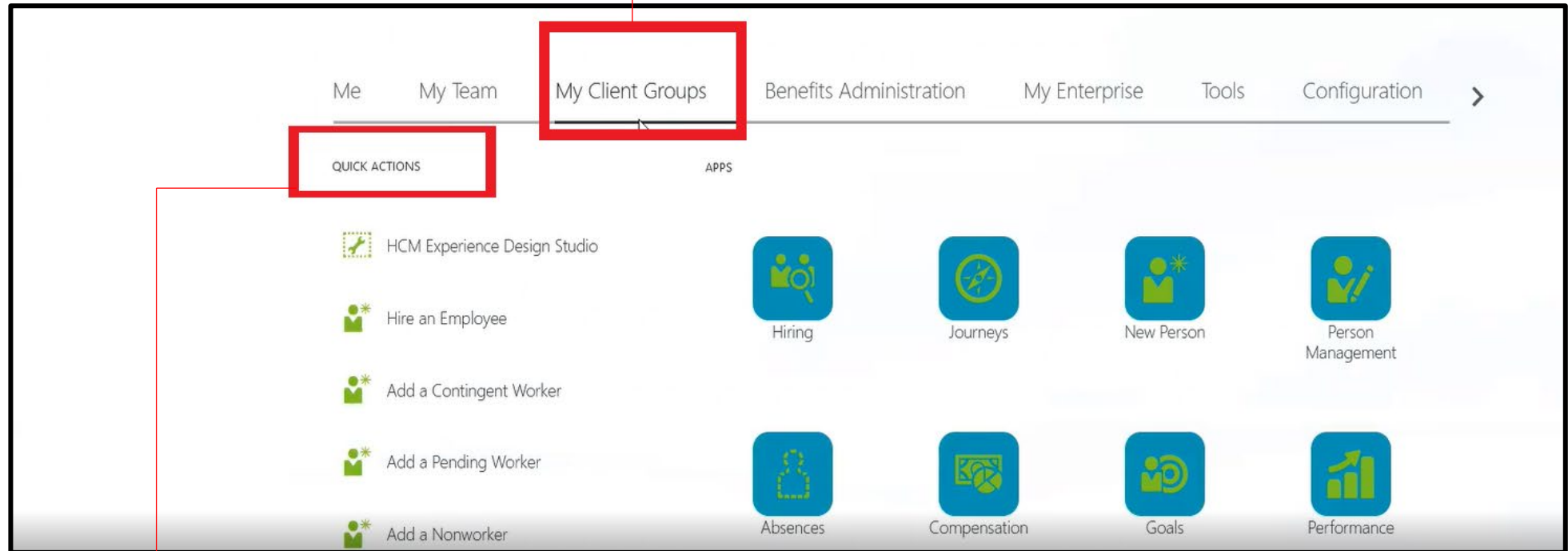
2

Select the **Quick Actions** section and select the **Show More** link from the drop-down list

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New Person

- Add a Contingent Worker
- Pending Workers
- **Employment**
- Add Assignment
- Areas of Responsibility
- Change Legal Employer Dashboard
- Change Working Hours

Change Legal Employer Dashboard	Change Location	Change Manager	Change Photo
Change Working Hours	Checklist Templates	Contact Info	Create Work Relationship
Direct Reports	Document Delivery Preferences	Document Records	Eligible Jobs
Employment Contracts	Employment Info	Family and Emergency Contacts	Identification Info
Local and Global Transfer	Manage Job Offers	Manage User Account	Mass Legal Employer Change
Person	Person Identifiers for External Applications	Personal Details	Promote
Seniority Dates	Share Data Access	Share Personal Info	Termination
Transfer	Vacancies	Work Relationship	Workforce Modeling

Compensation

Act as Proxy Manager	Action Reasons	Active Plans	Administer Compensation
Administer Workers	Balance Definitions	Benefit Balances	Change Salary
Compensation Categories	Compensation Info	Compensation Items	Compensation Types

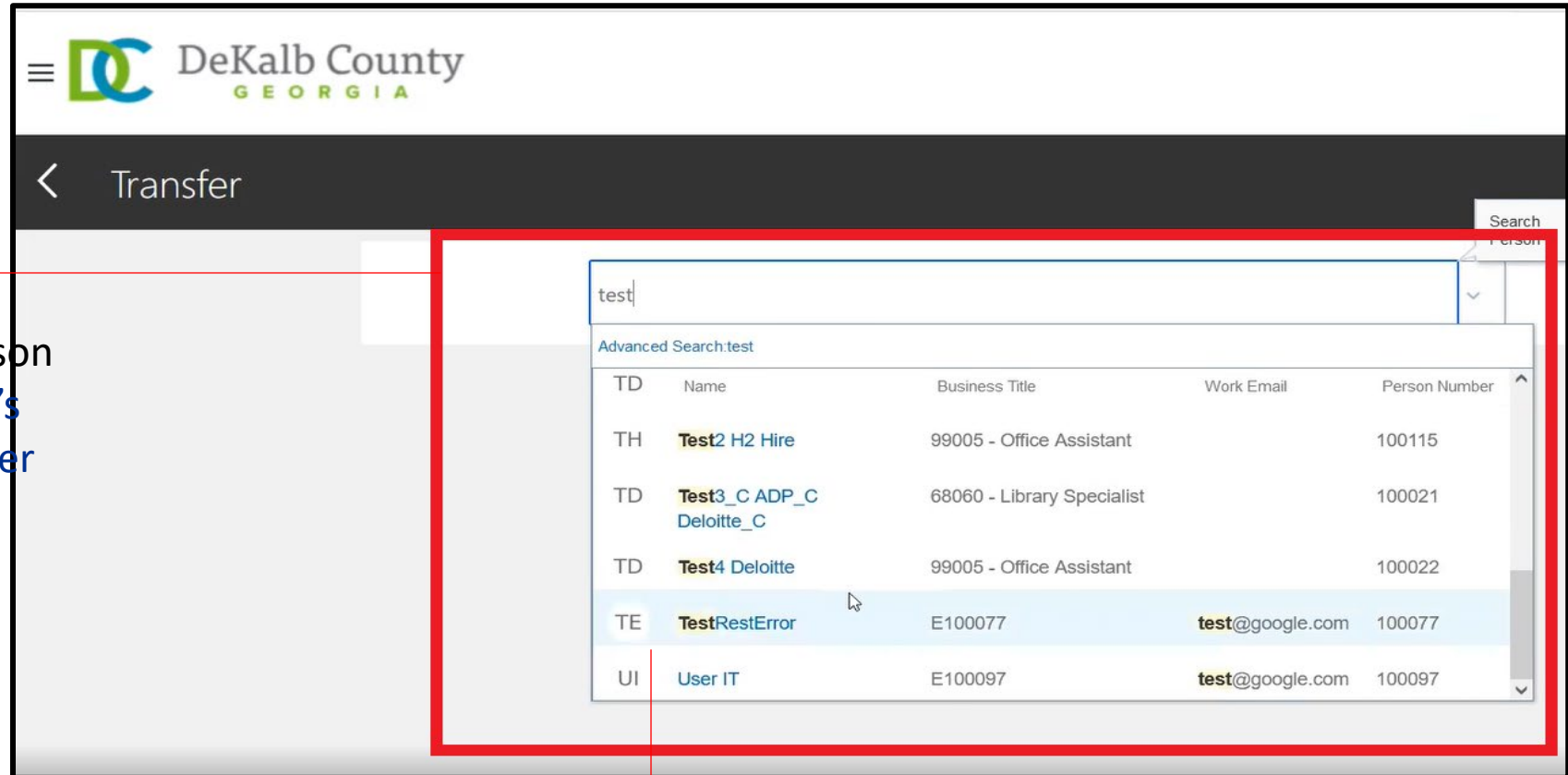**3** Locate the **Employment** section

4 Select **Transfer** under the **Employment** section

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5

From the Search for a Person field, key in the Employee's Name or Employee Number

6 Select the Employee from the returned results within the Recent Items list

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7 Key in the appropriate **Transfer Start Date** in the **When does the transfer start?** field

8 Select **Transfer** in the **What's the way to transfer** dropdown list

1 When and Why

*When does the transfer start?

4/7/22

*What's the way to transfer?

Transfer

*Why are you transferring

Continue

Manage Transfers: Quick Transfer

1 When and Why

*When does the transfer start?

4/7/22

*What's the way to transfer?

Transfer

*Why are you transferring

Intercompany Transfer

Continue

7 Select Intercompany Transfer from the Why are you transferring dropdown list

8 Select the **Continue** button

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Transfer

*Assignment Status
Active - Payroll Eligible

Person Type
Employee

*Business Unit
DC Business Unit

Primary Assignment
Yes

Position
Select a value

Job
08130 - GIS Analyst

Business Title
08130 - GIS Analyst

Grade
DK2_16

Department
06101 - PARKS - ADMINISTRATION

*Reporting Establishment
Select a value

Full Time or Part Time
Full time

Hourly Paid or Salaried
Salaried

Working Hours
40   Weekly

Standard Working Hours
40 Weekly

FTE
1

Headcount
1

Merit Status
Y

*Company
001

Division Code
06700 - STORMWATER

AD Account Required
Yes

Payroll Coordinators will use the Quick Transfer function when they aren't aware which position the employee will be placed in without Salary Adjustment details.

Coordinators will delete the current position details and enter the correct cost center in the Department drop-down list.

Deleting the current position will open additional fields on the transfer page.

The Receiving Generalist will receive notification of the new employee and enter the correct Salary adjustment and position details.

9 Deleted the current position details from the Position drop down list

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9

Enter the correct cost center in the department field

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Key the Additional Assignment Information if applicable.

11 Select Continue
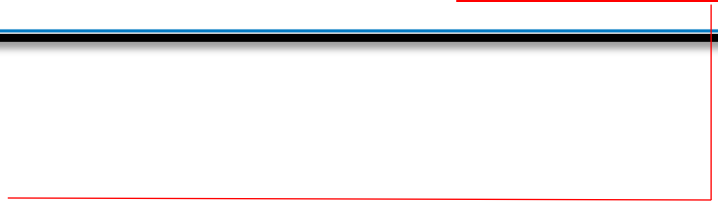
Manage Transfers: Quick Transfer

Document Records (Attachments)

+ Add

There's nothing here so far.
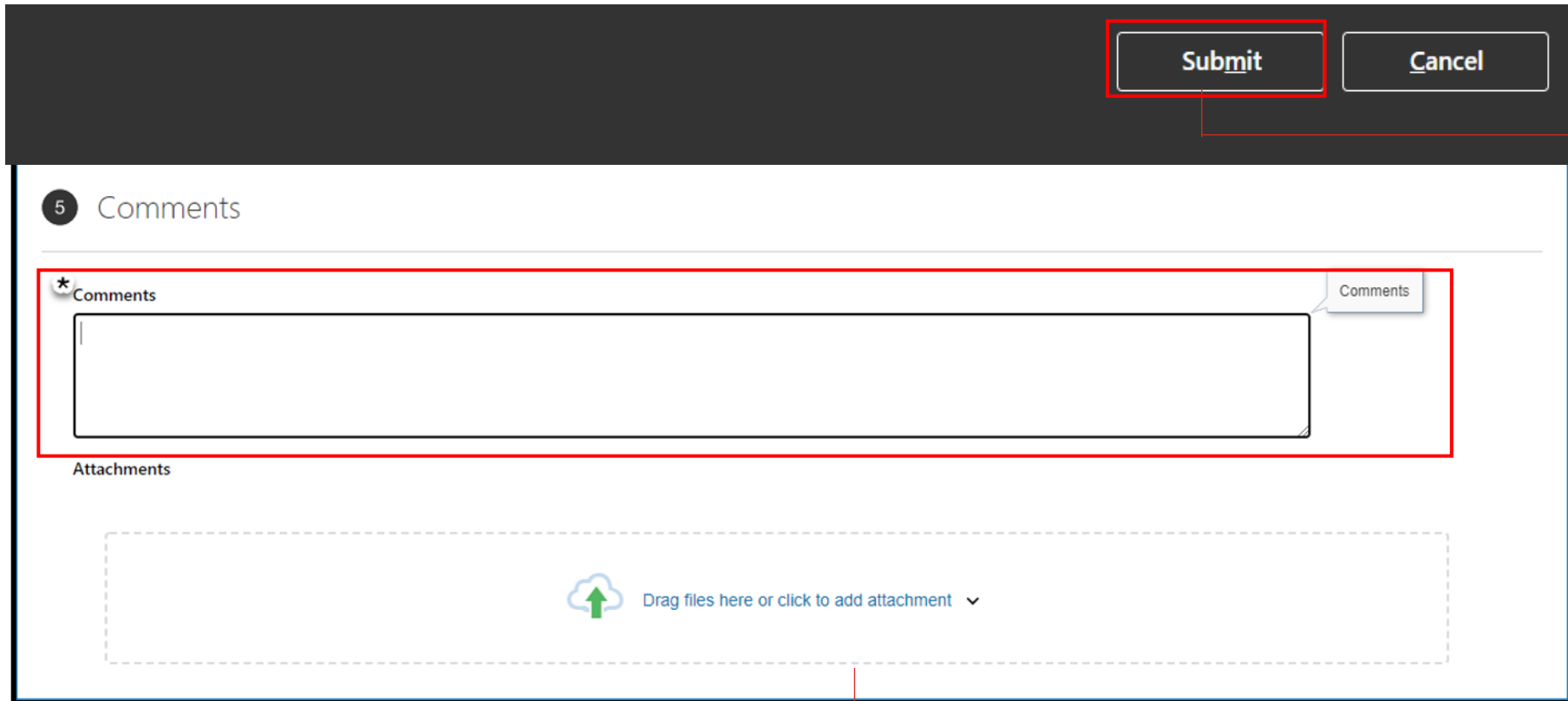
Continue

Comments

13 Add the applicable documents to the transfer

Manage Transfers: Quick Transfer

⑤ Comments

*Comments

Comments

Attachments

☁ Drag files here or click to add attachment ⌄

14 Enter the mandatory comment and attachment associated with the transfer.

15 Select the submit button