Employee Changes: Transfer an Employee

TRANSFER AN EMPLOYEE ON YOUR TEAM

A manager may transfer an employee on his or her team to report to another manager.

1. In the Search field at the top of any page, type the name of the employee for whom you would like to initiate a promotion. This will open the employee’s profile.

2. Underneath the employee’s name, select the Actions button, hover over the Job Change menu item, and click Transfer, Promote or Change Job.

3. The Change Job page will automatically open. Enter the date for which the transfer should take effect, the reason why you are making the change (choose “Transfer”), the employee’s manager after the change occurs, the worker’s new team, and his/her new work location. If the promotion should occur beginning with the next pay period, select the checkbox accordingly. Once you have verified that this information is
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correct, click the orange **Next** button at the bottom of the page.

4. Next, the “Move” screen will be shown. Here, you will be prompted to include what you plan to do about the opening on your team. If the position is available for overlap, click the pencil icon and check the box accordingly. Once you have added this information, click **Next** at the bottom of the page. Add any additional documents pertinent to the transfer (optional), then proceed by clicking **Next**.

5. A summary page will appear where you can verify the accuracy of the information. If you wish, you may add comments at the bottom of the page. Once you are ready to proceed, click the orange **Submit** button at the bottom of the page. Otherwise, choose **Save for Later** if you wish to revisit the process at another time. Once submitted, the request will be forwarded to human resources, the compensation finance partner, and the appropriate managers for approval.