



Requesting a Transfer on an Expired Position

Quick Reference Guide

Purpose: This document informs HRP's who hire students when to request a Transfer of an expired position in another organization to your organization for modification or when to *Add an Additional Job*.

- The use of Transfer enables the HRP to use an expired position on the student's Workday record and make it an active record.
- The use of 'Add Job' creates another position on the student's Workday record and an expired position, if applicable, remains on the student's Workday record.
- The benefit of requesting a Transfer is that it keeps the student's record clean from showing expired positions.
- HRPs are not always presented with the option to use 'Transfer'. If the student has a position in an organization that the HRP supports, and an expired job is available for use, the HRP will not be given the option to 'Request Transfer' on an expired position. The HRP would need to select 'Add Job'.
- If the student does not have an active position in the HRP's organization, the HRP can request a Transfer of an expired position in another organization to their organization for modification.**

Keep in mind

- You can only request a Transfer when the student **DOES NOT** have an active position within your organization.
- The Add Additional Job business process should be used if the HRP does not have the option to Transfer.

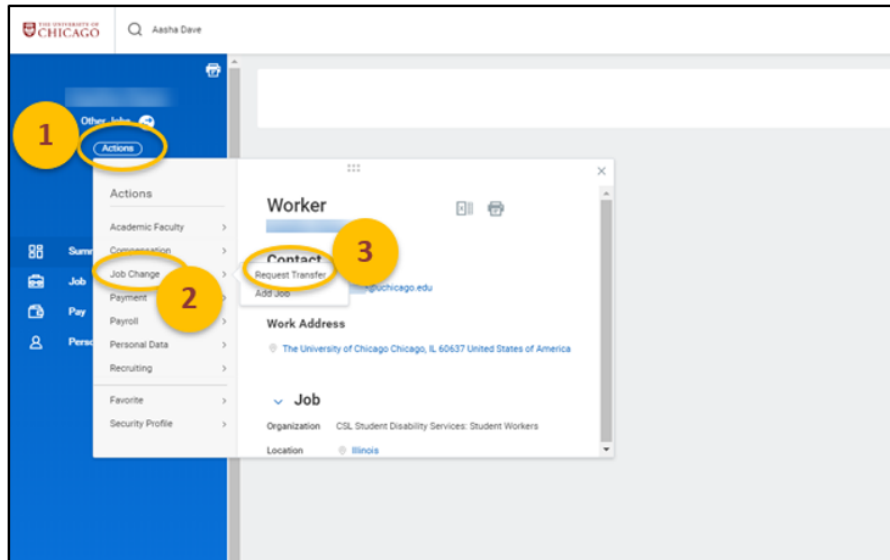
1 – Locate and Review the Student's Record for Expired Positions

Job Details										
All Jobs										
Additional Data										
UC Time - Time Approvers										
Job History										
Worker History										
3 items										
All Positions / Jobs										
Position ID	Start Date/Hire Date	Position Start Date	End Date	Position	Position Worker Type	Job Profile	Organization	Pay Rate Type	FTE	Weekly Hours
P9072476	10/01/2019	10/01/2019		P9072476 Note Taker - [REDACTED]	Student (Fixed Term)	Note Taker - 374000	CSL Student Disability Services Student Workers	Hourly	8.00%	3
P99113102	09/13/2019	09/13/2019	12/14/2019	P99113102 Student Phys Ed Assistant - 294200 - [REDACTED] (*)	Student (Fixed Term)	Student Phys Ed Assistant - 294200	CSL ATH Game Support	Hourly	10.00%	4
P99120813	03/30/2020	03/30/2020		P99120813 Instructional Grader - [REDACTED] (*)	Student (Fixed Term)	Instructional Grader - 794201	SDD: Economics - Student Employees	Salary	13.33%	5
									Total:	31.33%
										12

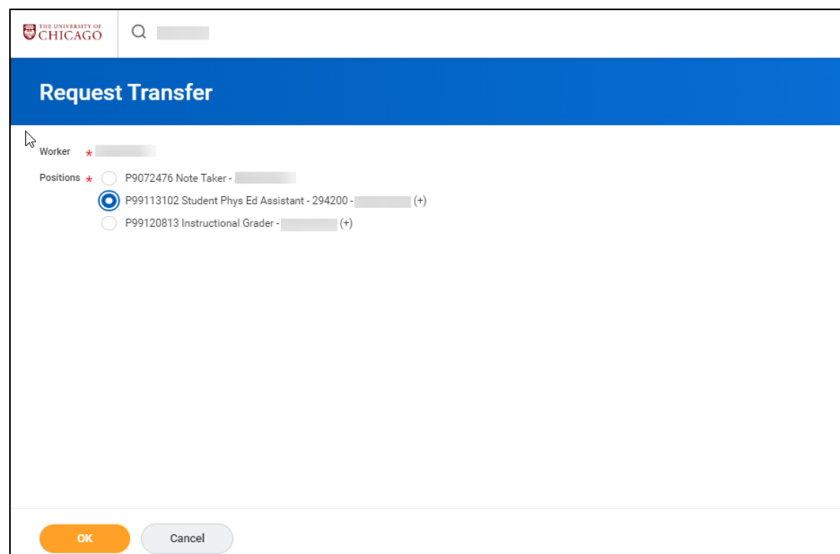


2 – Start the Request Transfer Process

- 2a. Click on the Related Actions button.
- 2b. Click on Job Change
- 2c. Click on **Request Transfer**.



- 2d. Select the expired job that you want to Transfer.
- 2e. Click OK.





3– Add Details

- 3a. Click the prompt on the top right to begin
- 3b. When do you want this change to take effect: Enter Date.
- 3c. Why are you making this change: Click the prompt and select Data Change; Change End Employment Date

Start

Data Change >

Demote >

Lateral Move >

Promote >

Search

× Transfer to Academic Position

← Data Change

☒ Data Change: Change End Employment Date

☐ Data Change: Change in Weekly Hours

☐ Data Change: Change Work Location

☐ Data Change: Job Profile Update

☐ Data Change: Post Doc

☐ L743 Reclassification

Search

× Data Change: Change End Employment Date

- 3d. Who will be the manager after this Change:
 - i. Select the prompt
 - ii. Select All Managers
 - iii. Search the manager's name or add when you know the student's team assignment
- 3e. Which team will the person be on after the change:
 - i. Select "Active Supervisory Organizations by Hierarchy"
 - ii. Search or select the organization name where the student will be employed



Star

Start Details

When do you want this change to take effect? *

06 / 14 / 2020

Why are you making this change? *

× Data Change: Change End Employment Date

Who will be the manager after this change?

Which team will this person be on after this change?

× Lab School Summer Lab

Where will this person be located after this change? *

Search

× Hyde Park Campus

Select the team that the worker will be on after this job change.

3f. Where will the person be located after the change: Select the appropriate location.

Start

Start Details

When do you want this change to take effect? *

06 / 14 / 2020

Why are you making this change? *

× Data Change: Change End Employment Date

Who will be the manager after this change?

Which team will this person be on after this change?

× Lab School Summer Lab

Where will this person be located after this change? *

Search

× Hyde Park Campus

3g. Select Submit.

Submit Save for Later Cancel



3h. Select Done

The screenshot shows a confirmation page with a blue header bar containing the text "Success! Event submitted" and "Data Change:" followed by a button labeled "Actions". Below the header, the page is divided into two columns. The left column, titled "Up Next", lists "HR Partner", "Review: Current Manager", and "Due Date: 06/06/2020", with a link for "Details and Process". The right column, titled "Do Another", contains links for "Change Job" and "Request Transfer". At the bottom left, there is an orange "Done" button.

4 – Approve the Transfer

- 4a. The Data Change routes to the HRP for the organization of the expired position for approval.
- 4b. The Data Change routes to the receiving HRP for approval.
- 4b. The receiving HRP now has a task in their inbox indicating that the Transfer is approved.

The screenshot displays the "Inbox" interface. On the left, a list of tasks is shown, including "Data Change:" (2 minutes ago), "Update Academic Appointment:" (2 days ago), "Time Entry:" (2 days ago), and "Period Activity Pay:". On the right, a confirmation message reads "Success! Event approved" with "Data Change:" and "2 minute(s) ago". Below this, the "Up Next" section shows "Propose Compensation Change" with a due date and "Open" and "Skip" buttons. A "Details and Process" link is also present. An orange "Done" button is at the bottom right.