

Location Change

If you have an Employee who will perform the same assignment in a different location from where s/he currently works and the Department number for which they work is not changing, you will use the SMT **Location Change** action.

Use this action only if your Department has multiple Locations where employees could be assigned (Special Education, ESL, some schools and some Central Office Departments).

You may also move existing Vacant positions from one location to another.

Step 1: Enter the Effective Date for the Location Change.

NOTE: You must enter the Effective Date **before** you select any action. The Effective Date will become display-only after the action is selected.

Step 2: Select Location Change from the Action list.

The screenshot shows the 'ViewChange' interface. At the top, there are fields for Department (6987 Imagination), Location (110 Imagination K-8), Employee (001347 Goodall,Jane), Fiscal Year (2014), and balances (General Fund Balance 1.500, Title I Balance 0.090, Title IC Balance 0.000). Below this is a table with columns: Effective Date, Seq, Action, Name, Empl ID, Rcd #, Position #, and Assignment Title. Row 1 shows a Baseline action for Goodall,Jane on 07/01/2013. Row 2 shows a Location Change action for Goodall,Jane on 07/01/2013. A dropdown menu is open for the Location Change action, listing options like End Employment, Leave of Absence, Location Change, etc. The 'Location Change' option is selected. Buttons for OK, Cancel, and Apply are at the bottom.

Step 3: Enter the new Location ID for the Employee.

Step 4: Click OK to save the changes and return to the Staffing Summary page.

NOTE: When you click Apply or OK, you will receive a message that tells you the change you requested took effect. Ex: "Location change has occurred. FTE at this location is now 0.000."

The screenshot shows the 'ViewChange' interface after the location change. The 'Location' field is now 6987. The table below shows two rows: Row 1 is the Baseline action, and Row 2 is the Location Change action. The 'Location' column for the Location Change row is now 6987. The 'OK' button is circled in red. Buttons for Cancel and Apply are also visible.

Step 5: Note the new FTE balances at the top of the page. The FTE allocation, if one existed, moves with the position to its new location.

Note that the  next to the row has changed to a , indicating a change.

The changed row will have a blank FTE for the original location.

Step 6: Click on the  in the changed row to see the system-generated notes about the Location Change.

Staffing Summary | Limited Term Staffing Summary | Funding Summary | Allocations & Balances

Department 6987 Imagination Fiscal Year 2014
 Location 110 Imagination K-8 General Fund Balance 1.500
 Status Open Title I Balance 0.090
 Title IC Balance 0.000

Approve & Submit SMT Help
 Open Edit Employee Lookup
 Run SMT Roster

View / Change	Name	Assignment Title	Total FTE	Empl Status	Effective Date	Notes	Position #	Empl ID	Rcd #
▲	Angelou, Maya	Teacher-K8 Gr 5	1.000	Active	06/30/2014		00001269	003249	0
▲	Baez, Joan	Teacher-K8 Gr 4	1.000	Active	07/01/2013		00006999	021138	0
▲	Banderas, Antonio	Teacher-K8 Gr 4 Spanish Imm	0.500	Active	07/01/2013		00000382	016830	0
▲	Banderas, Antonio	Teacher-K8 Gr 4 Spanish Imm	0.500	Leave	07/01/2013		00000382	016830	1
▲	Charles, Ray	Teacher-K8 Gr 1 Spanish Imm			08/01/2013		00006998	017595	0
▲	Christie, Agatha	Teacher-K8 Gr 2	1.000	Active	06/30/2014		00007000	005439	0
▲	Curie, Marie	Principal-K8			07/01/2013		00003668	011362	0
△	Dali, Salvador	Teacher-K8 Gr 3 Spanish Imm	1.000	Active	07/01/2013		00010948	021101	0
▲	Earheart, Amelia	Assistant Principal-K8			07/01/2013		00011010	015845	0
▲	Einstein, Alfred	Teacher-K8 Gr 3-8 Science/Tech	1.000	Active	06/30/2014		00014011	017548	0
△	Fernandez, Rudy	Teacher-K8 Gr 2 Spanish Imm	1.000	Active	07/01/2013		00001169	003610	0
▲	Ford, Harrison	Teacher-K8 Gr K-5 Art			06/30/2014		00006996	019753	0
▲	Garland, Judy	Counselor-K8	1.000	Active	07/01/2013		00014855	004095	0
▲	Goodall, Jane	Teacher-K8 PE		Active	07/01/2013		00007537	001347	0
▲	Griffith, Joan	Teacher-K8 Gr 1	1.000	Active	06/30/2014		00007672	010767	0

Step 7: View the note about the Location Change. Add a new note if desired.

Step 8: Click OK to save the changes and return to the Staffing Summary page.

NOTE: To verify the location change, go to the new Department / Location combination.

SMT Notes

Department 6987 Imagination Fiscal Year 2014 Section: F
 Location 110 Imagination K-8
 Employee 001347 Goodall, Jane

SMT Notes Find | View All First 1 of 1 Last

DateTime: 07/16/2013 11:34:55.000000AM Note Text: Dept 6987 Location change from 110-Imagination K-8 to 100-BESC
 User ID:
 Name:

Add a New Note

OK Cancel Apply

The action is complete!

You have now moved an employee or vacant position to a different location within the same department.