Transfer Within

If you have an Employee who will fill a vacancy to perform a different assignment in the same department and location SMT combination, you will use the SMT **Transfer Within** action.

You will also Fill a Vacancy as part of this action.

Step 1: **Enter the Effective Date for the Transfer Within.**
 	
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 Transfer Within from the Action list.**
	View/Change
	
	Department 6987 Imagination Notes Fiscal Year 2014 SMT Help
	Location 110 Imagination K-8 General Fund Balance -0.450 Actions Glossary
	Employee 010767 Griffith,Ioan Title I Balance 0.090
	Title IC Balance 0.000
	
	Personalize
		Find	First 1-3 of 3 Last
			
			Effective Date / Seq / Action / Name / Empl ID / Rcd # / Position # / Assignment Title
			1 07/01/2013 1 Baseline Griffith,Ioan 010767 0 00007672 Teacher-K8 Gr 3-4
			2 07/01/2013 2 Modify Position Griffith,Ioan 010767 0 00007672 Teacher-K8 Gr 1
			3 07/01/2013 Transfer Within 0
			   End Employment
			   Leave of Absence
			   Location Change
			   Modify Position
			   Transfer Out
			   Transfer Within
			   Unassignment
			
			OK Cancel Apply

Step 3: Read the note about vacancy creation and **Click OK** to continue the Transfer Within action.	**Message** This action will create a vacancy. Click OK to continue or Cancel to re-enter a new action. (20000,36) OK Cancel

Step 4: **Note the spelling of the employee's Name and Empl ID.** You will need to enter this information in Step 10 for Filling the Vacancy.

Step 5: **Click OK to save the changes and return to the Staffing Summary page.**

NOTE: If you click Cancel at this point, the Transfer Within Row will not be saved; however, the vacancy will have already been created and you will need to delete the vacancy.

View/Change							
Department	6987	Imagination		Notes	Fiscal Year	2014	SMT Help
Location	110	Imagination K-8			General Fund Balance	-0.450	Actions Glossary
Employee	010767	Griffith,Ioan			Title I Balance	0.090	
					Title IC Balance	0.000	

Personalize | Find | | First 1-3 of 3 Last

			Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assignment Title
1	+	-	07/01/2013	1	Baseline	Griffith,Ioan	010767	0	00007672	Teacher-K8 Gr 3-4
2	+	-	07/01/2013	2	Modify Position	Griffith,Ioan	010767	0	00007672	Teacher-K8 Gr 1
3	+	-	07/01/2013	3	Transfer Within	Griffith,Ioan	010767	0	00007672	Teacher-K8 Gr 1

OK   Cancel   Apply

Step 6: **Note that the △ next to the row has changed to a ▲, indicating a change.**

The changed employee row will have a blank FTE.

Step 7: **Click on the △ for the vacant position that you want the employee to fill.**

NOTE: You can only transfer an employee within your department and location to a vacant position.

12	▲	Ford,Harrison	Teacher-K8 Gr K-5 Alt			06/30/2014		00000990	019753	0
13	▲	Garland,Judy	Counselor-K8	1.000	Active	07/01/2013		00014865	004095	0
14	▲	Goodall,Jane	Teacher-K8 PE	0.500	Active	07/01/2013		00007537	001347	0
15	▲	Griffith,Ioan	Teacher-K8 Gr 1			07/01/2013		00007672	010767	0

▼ Vacant Positions   Personalize | Find | View All | | First 1-15 of 17 Last

	View / Change	Assignment Title	Vacancy Status	Total FTE	Effective Date	Position #	Name	Empl ID	Rcd #	Empl Status	Notes
1	▲	Teacher-K8 Gr 4 Spanish Imm	Recruit	0.500	07/01/2013	00000382			0		
2	△	Teacher-K8 Gr 5	Recruit	1.000	07/01/2013	00002453			0		
3	▲	Principal-K8	Recruit	1.000	07/01/2013	00003668			0		
4	▲	Teacher-K8 LA/Reading	Recruit	0.200	10/01/2013	00004914			0		
5	▲	Tchr- Gr 7-8 Math/sci 3-8 tech			06/30/2014	00005736	Lindbergh,Charles	017548	0		

Step 8: **Enter the Effective Date for the transferring employee to fill this position.** Step 9: **Select the Fill Vacancy action.** Step 10: **Enter the Employee Name and Empl ID.** Step 11: **Click OK to save the changes and return the Staffing Summary page.**	

Step 12: **Note that the ⬜ next to the row has changed to a ▲, indicating a change.** Step 13: **Note the new vacancy that has been created.** It is identical to the position that was filled by the employee who Transferred Within. Also, the employee's information is now listed in the new position's row. **NOTE**: A note attached to the vacancy will automatically be created and indicate the reason for the vacancy. For example, "Vacancy due to the Transfer Within of Mouse,Mickey." The note will be added under the name of the person who performed the action.	

The action is complete!	You have now transferred an employee to a different position within your department and location.