Requesting a Position Change/Transfer for an Employee

To add or remove a position for an employee or to transfer an employee to a different position, complete and submit the ZXFERCHGLOA - Personnel Change Request in IRIS. This sort of request will often be submitted by a department other than the employee's current primary responsible department.

NOTE: The position change/transfer option will only change the position(s) to which an employee is assigned. It does not make changes to positions themselves. Use the ZPPOSITION000 – Position Create/Change transaction to request changes to positions.


2. Enter the employee’s Personnel Number and the Earliest Effective Date (the date the position change or transfer becomes effective). Click or press Enter to access the employee’s information. Verify the correct person has been selected.

3. Position Change/Transfer is the default selection. Click Create Request.

4. This graphic indicates that completing this form to request a position change for an employee involves several steps: three are required and one is optional.

5. In the Organizational Assignment section:

   5.1 The employee’s current position(s) will be appear on the first line(s). The Remove Position checkbox for each position defaults as not selected. Check the Remove Position checkbox for any position that should be removed from the employee after the effective date.

   5.2 On the first blank line, type in the Position number for the employee’s new position.

   If you don’t know the number for that position:

   (a) Click Search Help.

   (b) On the pop-up window, enter your department’s cost center in the Cost Center field.

   (c) Click (Start Search).

   5.3 Click or press Enter to confirm the correct position has been entered.

   5.4 Then click.

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6.0 In the Pay/Funding section:

6.1 Click (Cost Period) in the bottom right corner of the section.

6.2 On the pop-up window:

(a) Select the appropriate Change Reason:
   (i) 20 – Promotion to Vacant Position
   (ii) 21 – Move to Vacant Pos-LowerPayGra
   (iii) 22 – Promotion in Place
   (iv) 23 – Add a Position
   (v) 24 – Remove a Position
   (vi) 36 – Lateral Transfer to Vacant Pos
   (vii) 42 – Continuation of Position

(b) Enter/adjust the Pos Pct for each position, as needed.

(c) Select which position should be the Primary position.

   **NOTE:** The position with the highest Pos Pct should always be the primary position.

(d) Click  to apply the entries to the employee’s Cost Period data.

6.3 Verify the reason and time period for the requested change and verify the employee’s current pay information.

6.4 Enter the pay/funding information for the new position.

(a) Type in the position number.

(b) Type in the funding source for the new position.

   **NOTE:** Enter only E or I funds in the Cost Center column and only R or N funds in the WBS Element column.

(c) Type in the Wage Type for the new position:
   1HRL for biweekly employees or 1REG for monthly employees.

(d) Type in the pay rate that applies to the new position: hourly rate for biweekly employees or monthly rate for monthly employees.

(e) Change the Cost Percent (for biweekly employees) or Effort Percent (for monthly employees) to include the new position in a 100% total.

(d) To delete a line, highlight the line and then click (Delete Row).

6.5 Then click .
7. In the Pay/Funding section, verify the information for the requested change. Then click again.

8. In the Actions section at the bottom of the screen:
   7.1 Verify that the Action and Reason values reflect the requested change.
   7.2 If needed, you can change the Work Schedule value for the employee.

== optional

8. In the Primary Office Address section, verify/change/complete the primary office address for the employee, as needed. These options include using selections in the Building and Room fields and adding a Mail Stop number to complete the address information, entering a Telephone number and Cell Phone, and choosing a selection for Phone release of this information in the UT Directory.

NOTE: A Mail Stop number is required for all addresses with a 37996 zip code.

11. Click . Enter comments related to the transfer of the friend to a pending employee. These comments will be available to approvers and reviewers during the approval process. The workflow notes will not be stored permanently in IRIS with the personnel record.

12. Click to attach documents to the request to transfer the friend to a pending employee.

13. Click to display the request to transfer the friend to a pending employee in PDF format.

14. Click when you are ready to submit the request to transfer the friend to a pending employee to workflow for approval.

You have completed the Personnel Change Request to transfer a friend to a pending employee.