

# Bulk Organizational Transfers

**Please Note:** The organizational change template should only be used if there are more than 10 employees who need their current job in Banner to move from one department to another. This process is only designated for faculty, staff and single non-student wage positions.

**Pooled Positions** - If the position number is marked as “pooled” (ex. student, work study, GA, P14) the departmental enterer will need to enter a job end PAF for the current job and enter a job appointment PAF using the correct position number and timeclock job code associated with the new department.

When an organizational change occurs there are multiple components that may or may not need to change. They include:

- **Position Number** - This pertains to the position number alone, not the job record associated with an employee. Each position number has it’s own organization and default fund number.
- **Employee’s Job Organization** - Department identified on the job record on PWIEMPV.



Position Num	P81010 00
Role Title	Information Tech Spec I
Job Status	A Active
Job Title	IT Specialist
Job Class Desc	Univ Staff FT CY Reg
Job Orgn	099000
Orgn Desc	Dino Organization
Beg/End Date	03/07/2011

- **Employee’s Home Organization** - Department identified as the primary for the employee on PWIEMPV. A person can have multiple jobs in different departments but can only have one home org assigned.



Employee Verification		Labor Distribution	
EMPLOYEE INFORMATION			
Employee Status	Active		
Employee Class	UA Univ Staff FT CY Reg		
Home Orgn	099000		
Orgn Desc	Dino Organization		
Current Hire Date/	03/07/2011		
Tech Hire Date			

- **Funding** - Fund number and department associated with the employee’s job record.



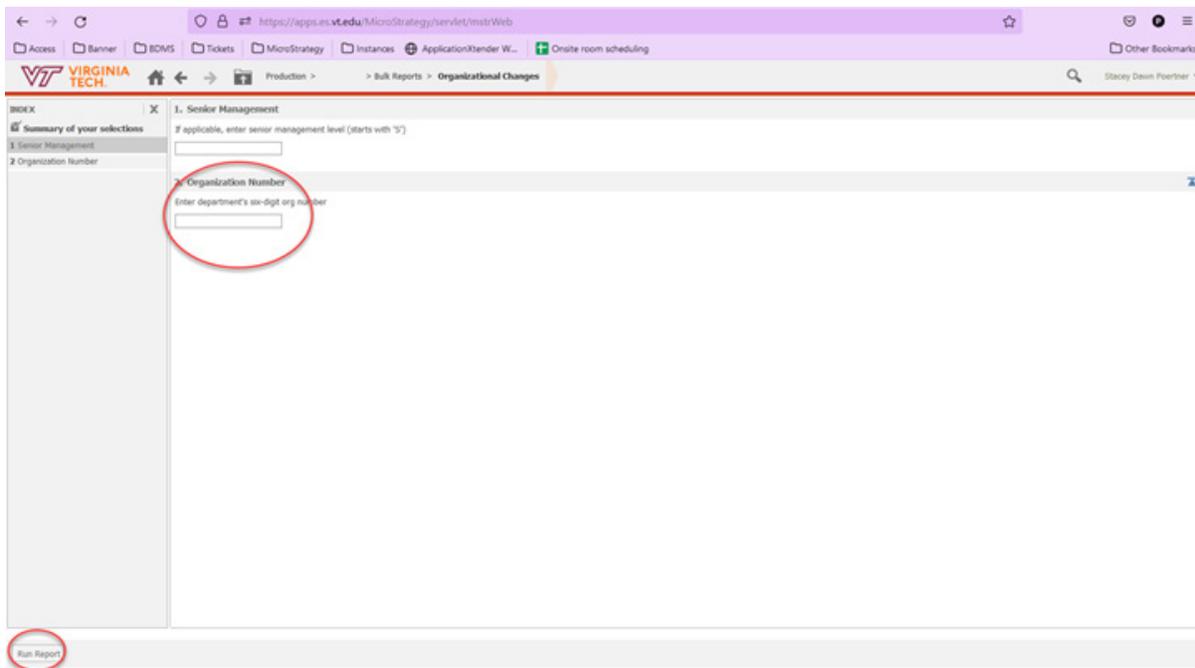
Employee Verification		Labor Distribution	
LABOR DISTRIBUTION			
ID	99999910	Virginia Ann O'Hara	
Effective Date	Index	Description	Project End Date
03/07/2011	990201	Dino Salary	
			Orgn Code
			099000

1. For Faculty/Staff/Non-Student Wage, the position description in PageUp will need to be updated to reflect the new organization and funding associated with the position number.
2. Navigate to the [Hiring and Employee Transactions Guide](#) on the Human Resources website to access the report template and link to submit files for processing.
3. Select the Employee Transactions link.

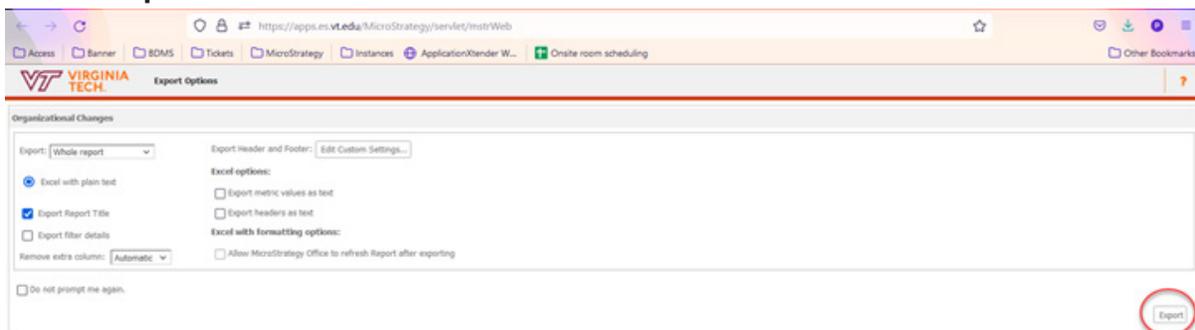
4. Select the Organizational Transfer Template option under the Faculty/Staff section.
5. Under the org transfer directions, select the MicroStrategy HR link then select the Organizational Transfer Template report. This report will be generated in MicroStrategy.



6. To run the report, enter either the departmental job organization or senior management based upon the user's access.



7. Select **Run Report** button.



8. The option to export the report to “Excel with plain text” should be available. Select the **Export** button.
9. Select to open or save the results into an Excel file.
10. The following columns will have values. **Please do not delete any rows or columns, if an employee’s information is not changing leave the new values blank.**

- Job Employee Classification
- Employee ID Number
- Employee Last Name
- Job Position Number
- Job Position Suffix
- Job Title
- Home Organization
- Job Organization
- Fund Number
- Job Funding Organization

11. The following columns are provided for entry.

- New Home Organization
- New Job Organization
- New Fund Number

12. Use the blank columns to indicate the appropriate .

Job	Employee Class	Employee ID Number	Employee Name	Job Position Number	Job Position Suffix	Job Title	Home Organization	Job Organization	Job Funding Organization	Organizational	New Home Organization	New Job Organization	New Fund Number
1	3A	Fac FT C					025800	VP Human	025800	VP Human	025800	VP Human	
2	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
3	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
4	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
5	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
6	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
7	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
8	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
9	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
10	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
11	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
12	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
13	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
14	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
15	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
16	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
17	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
18	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
19	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
20	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
21	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
22	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
23	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
24	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
25	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
26	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
27	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
28	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
29	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
30	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
31	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
32	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
33	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
34	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
35	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
36	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
37	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
38	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
39	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	
40	3A	Fac FT CY					025800	VP Human	025800	VP Human	025800	VP Human	

If both employee's home and job organization is changing please reflect the information in both columns.

Job	Employee Class	Employee ID Number	Employee Name	Job Position Number	Job Position Suffix	Job Title	Home Organization	Job Organization	Job Funding	Organizational New Home Organization	New Job Organization	New Fund Number
1A	Class FT C						25800 VP Human	025800 VP Hum	025800 VP Human	045600	045600	
3A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human	045600	045600	
4A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human	045600	045600	
5A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human	050200	050200	
6A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
7A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
8A	Fac FT CY						25800 VP Human	025800 VP Hum	034000 CALS Adm			
9A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
10A	Fac FT CY						25800 VP Human	025800 VP Hum	034000 CALS Adm			
11A	Fac FT CY						25800 VP Human	025800 VP Hum	046700 Research			
12A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
13A	Fac FT CY						25800 VP Human	025800 VP Hum	046700 Research			
14A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
15A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
16A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
17A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
18A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
19A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
20A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
21A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
22A	Fac FT CY						25800 VP Human	025800 VP Hum	042500 Hoke Well			
23A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
24A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
25A	Fac FT CY						25800 VP Human	025800 VP Hum	034700 Dean - Arc			
26A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
27A	Fac FT CY						25800 VP Human	025800 VP Hum	015000 Architectur			
28A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
29A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
30A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
31A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
32A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
33A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
34A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
35A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
36A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
37A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
38A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
39A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			
40A	Fac FT CY						25800 VP Human	025800 VP Hum	025800 VP Human			

If the funding associated with the job is also changing please enter the fund number in the New Fund Number column.

13. Save the excel file as “Organizational Transfers - PP (pay period number). **Please Note: It is required that the ticket with is submitted no later than 1 pay period prior to the effective date.**

14. From the HR Forms Library download the P3A form.

15. Write name of spreadsheet on P3A form, department, indicate effective date field and make a note on form. Please reference if there are funding and/or if transfer includes moving employees to different org numbers. Also check mark organization transfer box on P3A.

16. Obtain the proper signatures on the P3A form.

17. Select the link under the Organizational Transfer section in the Hiring and Employee Transactions guide to submit a ticket to route for processing.

**Procedures after the ticket has been submitted**

- The information will be routed to the appropriate group in Human Resources to review and enter proper Banner access exemption.
- If the information on the file does not meet the criteria for bulk processing the file will be sent back to the department for correction.
- Once the file is given approval to process, the information will be submitted to the HRIS technical team to upload the information in the Banner system.
- During processing any errors will be sent to the appropriate group for correction or manual entry.
- The files will be stored in a secured HR location for future reference or auditing purposes.