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. <u>This</u> 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.



• **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.



• Funding - Fund number and department associated with the employee's job record.

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- 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 <u>Hiring and Employee Transactions Guide</u> 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.

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

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7. Select Run Report button.

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- 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 .

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

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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 Transactuions 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.