

# 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.

The screenshot shows the 'ViewChange' interface. At the top, there are fields for Department (6987 Imagination), Location (110 Imagination K-8), and Employee (010767 Griffith,loan). To the right, there are buttons for 'SMT Help' and 'Actions Glossary', and a 'Notes' icon. Below this, there are balance fields: 'General Fund Balance' (0.450), 'Title I Balance' (0.090), and 'Title IC Balance' (0.000). The main area is a table with columns: Effective Date, Seq, Action, Name, Empl ID, Rcd #, Position #, and Assignment Title. The table contains three rows. The first row is 'Baseline' for Griffith,loan. The second row is 'Modify Position' for Griffith,loan. The third row is 'Transfer Within' for Griffith,loan. The 'Effective Date' for the third row is 07/01/2013. A dropdown menu is open for the 'Transfer Within' action, showing options: End Employment, Leave of Absence, Location Change, Modify Position, Transfer Out, Transfer Within, and Unassignment. The 'Transfer Within' option is highlighted. Below the table are buttons for 'OK', 'Cancel', and 'Apply'.

**Step 2: Select Transfer Within from the Action list.**

**Step 3: Read the note about vacancy creation and Click OK to continue the Transfer Within action.**

The screenshot shows a 'Message' dialog box. The text inside reads: 'This action will create a vacancy. Click OK to continue or Cancel to re-enter a new action. (20000,36)'. At the bottom right, there are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red circle.

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.

ViewChange

Department 6987 Imagination      Notes      Fiscal Year 2014      SMT Help  
 Location 110 Imagination K-8      General Fund Balance **-0.450**      Actions Glossary  
 Employee 010767 Griffith,Joan      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,Joan	010767	0	00007672	Teacher-K8 Gr 3-4
2	07/01/2013	2	Modify Position	Griffith,Joan	010767	0	00007672	Teacher-K8 Gr 1
3	07/01/2013	3	Transfer Within	Griffith,Joan	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		Furu,Namisu	Teacher-K8 Gr 3-4			00000214		00000990	019733	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,Joan	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	Teach Gr 7-8 Math/Sci 7-8 Tech			06/30/2014	00005736	Lindbergh,Charles	017648	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.

ViewChange

Department 6987 Imagination      Notes      Fiscal Year 2014      SMT Help  
 Location 110 Imagination K-8      General Fund Balance 0.456      Actions Glossary  
 Employee      Title I Balance 0.090  
    Title IC Balance 0.000

Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assignment Title	Vacancy Status
07/01/2013	1	Baseline			0	00002453	Teacher-K8 Gr 5	Recruit
07/01/2013		Fill Vacancy	Gruffudd,Ioan	010767				

Fill Vacancy  
 Inactivate Position  
 Location Change  
 Modify Position

OK    Cancel    Apply

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.

View / Change	Assignment Title	Vacancy Status	Total FTE	Effective Date	Position #	Name	Empl ID	Rcd #	Empl Status	Notes
▲	Teacher-K8 Gr 4 Spanish Imm	Recruit	0.500	07/01/2013	0000382			0		
▲	Teacher-K8 Gr 5	Fill	1.000	07/01/2013	00002453	Gruffudd,Ioan	010767	0	Active	
▲	Principal-K8	Recruit	1.000	07/01/2013	00003668			0		
▲	Teacher-K8 LAV/Reading	Recruit	0.200	10/01/2013	00004914			0		
▲	Tchr- Gr 7-8 Math/sci 3-8 tech			08/30/2014	00005736	Lindbergh,Charles	017548	0		
▲	Tchr- Gr 7-8 Math/sci 3-8 tech	Inactive		06/30/2014	00005736			0		
▲	Teacher-K8 Gr 1 Spanish Imm	Fill	1.000	07/01/2013	00006998	Mouse,Mickey	029999	0	Active	
▲	Teacher-K8 Gr 4	Recruit	1.000	07/01/2013	00006999			0		
▲	School Secretary-K8	Recruit	1.000	07/01/2013	00007022			0		
▲	Teacher-K8 Gr 1	Recruit	1.000	07/01/2013	00007672			0		
▲	Assistant Principal-K8	Inactive		07/01/2013	00011010			0		
▲	Media Specialist-K8	Inactive		07/01/2013	00014302			0		
▲	Teacher-K8 Gr 6 Spanish Imm	Fill	1.000	08/28/2013	00015604	Parks,Rosa	016085	0	Active	
▲	Student Management Specialist	Fill	0.500	07/01/2013	00019999	Mouse,Mickey	029999	0	Active	
▲	Teacher-K8 Gr 6-8 /Reading	Fill	1.000	08/30/2014	NEW00590	Bullock,Sandra	016873	0	Active	

The action is complete!

You have now transferred an employee to a different position within your department and location.