RIAS PHASE III –
Human Capital Management
HCM/Payroll

Hiring (Online Templates) and
Employee Transactions (Manager Self Service)

Preparer Role
Contents

The New Hire and Additional Assignments Workflow ......................................................... 4
New Terminology .................................................................................................................. 6
Navigation Icons .................................................................................................................. 8
Template-Based Hire ............................................................................................................ 9
Teaching Responsibilities .................................................................................................... 10
The Transactional Workflow for Employee Transactions (Manager Self Service) ............ 11
Employee Transactions (Manager Self Service) ................................................................ 12
Request Reporting Change (used for both Staff and Academic Employees) .................. 13
  Step 1 – Enter an Effective Date .................................................................................... 13
  Step 2 – Select the Employee(s) .................................................................................. 13
  Step 3 – Enter the Supervisor Name ............................................................................. 14
  Step 4 – View Reporting Request ................................................................................. 14
Request Change Status .................................................................................................... 15
Location Change (used for both Staff and Academic Employees) ..................................... 16
  Step 1 – Enter an Effective Date .................................................................................... 16
  Step 2 – Select the Employee(s) .................................................................................. 16
  Step 3 – Enter the Location ............................................................................................ 17
  Step 4 – View the Location Change ............................................................................... 17
Retire Employee (used for both Staff and Academic Employees) ..................................... 18
  Step 1 – Enter an Effective Date .................................................................................... 18
  Step 2 – Select the Employee(s) .................................................................................. 18
  Step 3 – Enter the Reason for Retirement ................................................................... 19
  Step 4 – View Retirement Change ................................................................................ 19
Terminate Employee (used for both Staff and Academic Employees) .............................. 20
  Step 1 – Enter an Effective Date .................................................................................... 20
  Step 2 – Select the Employee(s) .................................................................................. 20
  Step 3 – Enter the Reason for Termination .................................................................. 21
  Step 4 – View Termination ............................................................................................ 21
Change Full / Part Time Status (used for both Staff and Academic Employees whose workweek will change from/to Part-time/Fulltime) ............................................................................ 22
  Step 1 – Enter an Effective Date .................................................................................... 22
  Step 2 – Select the Employee(s) .................................................................................. 22
  Step 3 – Enter the Supervisor Name ............................................................................. 23
  Step 4 – View Full/Part Time Status Change ................................................................ 23
Leave Request (used for both Staff and Academic Employees) ........................................ 24
  Step 1 – Enter an Effective Date .................................................................................... 24
  Step 2 – Select the Employee(s) .................................................................................. 24
  Step 3 – Enter the Type of Leave and Reason ................................................................. 25
  Step 3A – Paid Leave of Absence ............................................................................... 26
  Step 4 – View Leave Details ......................................................................................... 27
Leave Status ....................................................................................................................... 28
Return From Leave Request .............................................................................................. 29
  Step 1 – Enter an Effective Date .................................................................................... 29
  Step 2 – Select the Employee(s) .................................................................................. 29
  Step 3 – Enter the Type of Leave and Reason ................................................................. 30
  Step 4 – View Leave Details ......................................................................................... 31
Return From Leave Status ............................................................................................... 32
Request Reappointment
Step 1 – Enter an Effective Date

Promote Employee (for Academic Reappointments with promotion only)
Step 1 – Enter an Effective Date
Step 2 – Select the Employee
Step 3 – Enter the Reason for the Promotion
Step 4 – View Promotion Details

Ad Hoc Salary Change (Academic Employees only)
Step 1 – Select the Employee
Step 2 – Enter the New Salary and Action Reason
Step 3 – View Ad Hoc Salary Request
Ad Hoc Salary Change Status

Transfer Employee (used for both Staff Academic Employees only)
Step 1 – Enter an Effective Date
Step 2 – Select the Employee
Step 3 – Enter the Reason for the Transfer and the Transfer Information
Step 4 – View Transfer Details
The New Hire and Additional Assignments Workflow

New hire and additional assignment data is entered into the RIAS HCM and Payroll application by department HR Preparers through a process called Template-Based Hire. Below is the Workflow for New Hires and Additional Assignments using Template-Based Hire.

1. **Period Pay New Hire and additional job assignments: Employee Classes 6-Teaching & Graduate Assistants, 7-Part Time Lecturers, 8-Coadjutants, and 9-PostDoc Fellows**
   - Online template is completed and offer letter/supporting documentation is attached by the Preparer. Upon “Save and Submit” an employee ID is generated for new hires and University Human Resources matches employees when additional job assignments need to be created for existing employees.
   - Email notification will be sent to a designated Approver in the department who will be responsible for reviewing job details, providing approval, attaching a PeopleSoft contract and confirming or changing charging instructions (account distribution). Note: a PeopleSoft contract must be added by the Approver for the employee to get paid.

2. **Hourly New Hire: Employee Classes 2-trades people, 4-hourly casual and 5-student hourly**
   - Online template is completed and any offer letter/supporting documentation is attached by the Preparer. Upon “Save and Submit” employee ID is generated for new hires
   - Email notification will be sent to a designated Approver in the department who will be responsible for reviewing job details, providing approval, and confirming or changing charging instructions (account distribution).

3. **Faculty New Hire: Employee Class 1 in union 003-AAUP, 013-Other faculty (AAUP Ineligible, 014-Visiting Faculty, or 023-PostDoc Associates**
   - New Hire information will be entered by department with offer letter attached
   - Information entered will be reviewed by Academic Affairs before it is loaded into the application
• Email notification will be sent to a designated Approver in the department who will be responsible for reviewing job details, providing approval, and confirming or changing charging instructions.
• Any corrections to job data or if a person was hired in error, Approver will contact HR to correct the error.

4. **Staff New Hire: Employee Class 1-Regular Salaried or 3-Temporary**
   • New Hire information will be entered by department with offer letter attached.
   • Information entered will be **reviewed by Human Resources before it is loaded into the application**.
   • Email notification will be sent to a designated Approver in the department who will be responsible for reviewing job details, providing approval, and confirming or changing charging instructions.
   • Any corrections to job data or if a person was hired in error, Approver will contact HR to correct the error.
## New Terminology

<table>
<thead>
<tr>
<th>Terms</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Action</strong></td>
<td>The code given for a personnel action such a new hire or promotion or any updates to an employee's record.</td>
</tr>
<tr>
<td><strong>Action Reason</strong></td>
<td>The reason an employee's job or employment information is updated, such as a salary change or leave of absence.</td>
</tr>
<tr>
<td><strong>Compensation</strong></td>
<td>Regular annual salary regardless of part-time percent or 10-month status.</td>
</tr>
<tr>
<td><strong>Compensation Rate</strong></td>
<td>Regular annual salary for Salary employees and hourly rate for Hourly employees.</td>
</tr>
<tr>
<td><strong>Department Code/ID</strong></td>
<td>Refers to the department at the university in which the employee works. Same as the Organization Code (ID) in the General Ledger and Internet Procurement.</td>
</tr>
<tr>
<td><strong>Effective Date</strong></td>
<td>Date on which information takes effect. The Effective Date defaults to the system's current date unless overridden by user. The information is in effect until a new entry is made with a more current effective date.</td>
</tr>
<tr>
<td><strong>Effective Sequence</strong></td>
<td>The order in which multiple actions to an employee's record with the same effective date are processed.</td>
</tr>
<tr>
<td><strong>Employee Class</strong></td>
<td>A code to indicate the general category of the appointment which the employee holds.</td>
</tr>
<tr>
<td>(formerly Employee Type)</td>
<td>1 – Regular Faculty, Staff, and PostDoc Associates</td>
</tr>
<tr>
<td></td>
<td>2 – Trades People</td>
</tr>
<tr>
<td></td>
<td>3 – Short-term Temporary</td>
</tr>
<tr>
<td></td>
<td>4 – Casual/Seasonal</td>
</tr>
<tr>
<td></td>
<td>5 – Student Hourlies</td>
</tr>
<tr>
<td></td>
<td>6 – Teaching/Graduate Assistants &amp; Residence Counselors</td>
</tr>
<tr>
<td></td>
<td>7 – Part Time Lecturers</td>
</tr>
<tr>
<td></td>
<td>8 – Coadjutants (incl. Faculty Summer Research)</td>
</tr>
<tr>
<td></td>
<td>9 – Fellows (stipend pay)</td>
</tr>
<tr>
<td><strong>Employee ID</strong></td>
<td>The 8-digit number assigned to every Rutgers University employee. It is used in place of the social security number to identify each employee and is used to search for information and records for the individual.</td>
</tr>
<tr>
<td>(EmplID)</td>
<td></td>
</tr>
<tr>
<td><strong>Employee Record</strong></td>
<td>Indicates the number of assignments an employee has.</td>
</tr>
<tr>
<td>(Empl Record)</td>
<td>Empl Record 0 indicates the employee’s primary assignment.</td>
</tr>
<tr>
<td></td>
<td>Empl Record 1 indicates the secondary assignment.</td>
</tr>
<tr>
<td><strong>Employee Transactions</strong></td>
<td>The online forms accessed via Manager Self Service menu item are used to process transactions to existing employees (academic reappointments, supervisor changes, location changes, change in terms of appointment, and leaves). These online forms replace the Personnel Data Record (PDR).</td>
</tr>
<tr>
<td>(Manager Self Service)</td>
<td></td>
</tr>
<tr>
<td><strong>FTE</strong></td>
<td>Fulltime equivalent, calculation based on the standard hours entered for a job code or based on the number of credits taught for Part Time Lectures.</td>
</tr>
<tr>
<td>Terms</td>
<td>Definition</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Full/Part</td>
<td>Classifies an employee as full time or part time. This field does not change the standard hours.</td>
</tr>
<tr>
<td>Grade</td>
<td>The grade/range of the job code.</td>
</tr>
<tr>
<td>Job Code (Job Class Code)</td>
<td>The number indicating the type of position held by an employee.</td>
</tr>
<tr>
<td>Job Record (formerly Assignment Number)</td>
<td>A Job Record is identified by an Employment Record Number within the Job Data page group. Searching for an Employee by their Empl ID will return their unique Job Record(s).</td>
</tr>
<tr>
<td>On Line Templates</td>
<td>On Line Template-Based Hires, replaces the Payroll Authorization Form (PAF).</td>
</tr>
<tr>
<td>Pay Group (replaces Pay Code)</td>
<td>Indicates the method of payment for payroll purposes.</td>
</tr>
<tr>
<td></td>
<td>• S00 – Empl Class 1 Faculty Paid AY salary over 12 months (Academic year appointment)</td>
</tr>
<tr>
<td></td>
<td>• S01 - Empl Class 1 &amp; 3 Staff &amp; Faculty Paid CY salary over 12 months (Calendar year appointment)</td>
</tr>
<tr>
<td></td>
<td>• S03 - Empl Class 1 &amp; 3 Staff Paid 10-month salary over 10 months</td>
</tr>
<tr>
<td></td>
<td>• HLY – Hourly, Empl Classes 4, &amp; 5</td>
</tr>
<tr>
<td></td>
<td>• TRD - Trades People, Empl Class 2</td>
</tr>
<tr>
<td></td>
<td>• P00 - Period Pay (employee classes 6, 7, 8)</td>
</tr>
<tr>
<td></td>
<td>• P09 – Stipend Pay (employee class 9 – PostDoc Fellows)</td>
</tr>
<tr>
<td></td>
<td>• P11 – Stipend Pay to Non-resident Aliens (employee class 9 – PostDoc Fellows)</td>
</tr>
<tr>
<td>Period Pay</td>
<td>Used is to calculate pay for Classes 6 Teaching/Graduate Assistants &amp; Residence Counselors, 7 Part Time Lecturers, 8 Coadjutants (incl. Faculty Summer Research) and 9 Post Doc Fellows (stipend pay). The employee will be paid over the number of days in the semester (similar to the legacy T code).</td>
</tr>
<tr>
<td>Salary Admin Plan</td>
<td>Represents the salary schedule that is the basis for grade/step employees annual salary; it must be selected on the online template-based hire in order for the salary to default upon “save and submit”.</td>
</tr>
<tr>
<td>Short Work Break</td>
<td>Replaces expired status for ten month staff and other employees with appointment end dates. Note, 10-month staff (Pay Group S03) no longer require an appointment end date. SWB allows employees to remain active without pay during the summer months, or shortly following the end of their assignment.</td>
</tr>
<tr>
<td>Standard Hours</td>
<td>Employee’s actual work week which is equal to the job’s standard hours if full-time, or is reduced proportionate to an employee’s part time percent if part-time. Please note, you will include a different measure for those employee groups without a true standard workweek. Credit Hours will be used in place of Standard Hours for Empl Class 7-PTL’s, and a default of 1.0 will be used for Empl Classes 8 – Coadjutants and 9 – PostDoc Fellows.</td>
</tr>
<tr>
<td>Supervisor ID</td>
<td>This field contains the Empl ID (employee id) of the individual Supervisor ID for an employee.</td>
</tr>
<tr>
<td>Union Code (same as Unit Code)</td>
<td>Designates the employee group to which a job is assigned, for union employees it represents their bargaining unit.</td>
</tr>
</tbody>
</table>
## Navigation Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asterisk (*)</td>
<td>Any field that has an asterisk is a required field.</td>
</tr>
<tr>
<td>Error</td>
<td>If a required field is not populated with information or if information entered is incorrect, the field will become red and an error message will display.</td>
</tr>
<tr>
<td>Drop Down Menu</td>
<td>Used to populate a field from a listing of menu options.</td>
</tr>
<tr>
<td>Calendar Icon</td>
<td>Can enter a date directly in a field or use the calendar.</td>
</tr>
<tr>
<td>Search Icon</td>
<td>Used to do a search.</td>
</tr>
</tbody>
</table>
Template-Based Hire

Template-Based Hires are replacing Payroll Authorization Forms (PAFs). Each employee class has its own template. To navigate to Template-Based Hires select \textbf{Workforce Administration}>\textbf{Temple-Based Hire}>\textbf{Temple-Based Hire} from the main menu.

\begin{center}
\includegraphics[width=\textwidth]{template-based-hire-screenshot.png}
\end{center}

\textbf{Note:} This section of the guide is being revised to incorporate recent changes to system functionality. In the meantime, please refer to the “Instructional Materials for HCM System Users” section of the HCM System Users Blog for detailed Template-Based Hire instructions.

\url{http://hcmblog.rutgers.edu}
Teaching Responsibilities

Any time you hire an Employee Class 7 – Part Time Lecturer, teaching responsibilities must be entered to track course load and the associated salary for each course.

Navigate from the Main Menu>Workforce Development>Faculty Events>Track Events>Teaching Responsibilities.

Search for the Part Time Lecturer by EMPL ID or Last Name.

Enter the following information:

- **Course ID** – first 2 digits are the school code, next three digits are the subject number and the last 5 digits are the course number
- **Title** – Enter the Title of the course followed about the salary for teaching that course
- **Term:**
  - 0 = Winter Session
  - 1 = Spring Semester
  - 7 = Summer Session
  - 9 = Fall Semester
- **Year** – class will be taught

If the Part Time Lecturer is teaching more than one course, select the plus sign and enter the information above for the next class.
The Transactional Workflow for Employee Transactions (Manager Self Service)

Employee job data changes are submitted by a Preparer in Manager Self Service and will follow various pre-approved workflow paths. While certain events such as Supervisor Changes require no workflow and will be immediately updated in the application, other events such as reappointments would be routed to HR for review and require an approval from an Approver. Note that reappointments for employee class 6-TA/GA & Residence Counselors, class 7-PTL’s, class 8-Coadjutants, and class 9-PostDoc Fellows require the HR Approver to attach a new contract once the action is approved.

All workflows are routed automatically after the transaction has been submitted by a Preparer. When approval is needed, notifications are sent to an Approver as a reminder that specific transactions must be approved. In addition for those transactions routed to Human Resources for confirmation, an email will be sent as well as a notification to the Approver.

Below is the Workflow for the Manager Self Service transactions.

1. Faculty Events - PTL Teaching Responsibilities and Tenure Data
   - Information will be entered by Academic Affairs and loaded directly into the application

2. Employee Work Location and Supervisor Changes
   - Changes will be entered by the department and loaded directly into the application

3. Ad Hoc Salary Changes, Promotions, Leaves Terminations, Retirements, Reappointments, FT/PT Changes and Transfers
   - Changes will be entered by the department
   - Information entered will be reviewed by Human Resources before it is loaded into the application
   - Email notification will be sent to a designated Approver in the department who will be responsible for reviewing job details, providing approval, and confirming or changing charging instructions. **HR Approver must attach a new contract to reappointments in employee classes 6, 7, 8, or 9.**
   - Any corrections to job data, an Approver will contact HR to correct the error
Employee Transactions (Manager Self Service)

Manager Self Service will be used to make all changes to an employee’s job record. To navigate to Manager Self Service Manager Self Service>Job and Personal Information from the main menu.
Request Reporting Change (used for both Staff and Academic Employees)

To assign an employee to a new supervisor, select Manager Self Service>Job and Personal Information>Request Reporting Change.

Step 1 – Enter an Effective Date

Enter an **Effective date**. The date can be today’s date or a future date. Click the **Continue** button.

### Reporting Change

Initiate a reporting change for one or more of your employees.

<table>
<thead>
<tr>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Follow this 3-step process to assign one or more employees to a new supervisor:</td>
</tr>
<tr>
<td>1. Enter the date this reporting change will take effect. You will be able to process only those employees that report to you as of this date.</td>
</tr>
<tr>
<td>2. Select the employees to be assigned to the new supervisor.</td>
</tr>
<tr>
<td>3. Enter the name of the new supervisor and submit the change.</td>
</tr>
</tbody>
</table>

**Enter the as of date**

Enter the date this change is effective.  

[Continue]

09/25/2010

Step 2 – Select the Employee(s)

Select the employee(s) that require the change and click the **Continue** button.

### Select Employees

<table>
<thead>
<tr>
<th>Reports To:</th>
<th>Jane Deal</th>
</tr>
</thead>
<tbody>
<tr>
<td>As Of:</td>
<td>09/25/2010</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Select</th>
<th>Name</th>
<th>Empl ID</th>
<th>Job</th>
<th>Pay Status</th>
<th>HR Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>J</td>
<td>James Crown</td>
<td>00014107</td>
<td>0</td>
<td>Active</td>
<td>Active</td>
</tr>
<tr>
<td>L</td>
<td>Pam Brown</td>
<td>00016267</td>
<td>0</td>
<td>Active</td>
<td>Active</td>
</tr>
<tr>
<td>V</td>
<td>Rosie Avocado</td>
<td>00010413</td>
<td>0</td>
<td>Active</td>
<td>Active</td>
</tr>
</tbody>
</table>

[Continue]
Step 3 - Enter the Supervisor Name

Type the **Supervisor's Name** or use the search icon and click the **Submit** button.

A confirmation message appears, Click the **OK** button.

---

**Reporting Change**

Below is a list of the employees you selected for the reporting change. Select Submit once you have entered the reporting change information.

<table>
<thead>
<tr>
<th>Selected Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Email ID</strong></td>
</tr>
<tr>
<td>00010413</td>
</tr>
</tbody>
</table>

**Reporting Change Details**

**Reporting Change Date:** 09/25/2010

* *Supervisor:* Jane Smith

* Required Field

---

Step 4 - View Reporting Request

The Reporting Change page will display showing your request. This change will be loaded directly into the application. Click the **Return to Select Employees** link to process another transaction.

**Reporting Change**

_The following information has been submitted._

<table>
<thead>
<tr>
<th>Selected Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Email ID</strong></td>
</tr>
<tr>
<td>00010413</td>
</tr>
</tbody>
</table>

**Reporting Change Details**

**Reporting Change Date:** 09/25/2010

**Supervisor:** Jane Smith

---
Request Change Status

To view the status of a Reporting Change, select Manager Self Service>Job and Personal Information>View Reporting Change Status.

Reporting Change Status

Select a Reporting Change Request

The list below contains reporting change requests requiring your approval. Select a transaction number to view details.

<table>
<thead>
<tr>
<th>Transaction Number</th>
<th>Reporting Change Date</th>
<th>Workflow Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>09/25/2010</td>
<td>Administrator is Processing</td>
</tr>
<tr>
<td>4</td>
<td>09/25/2010</td>
<td>Administrator is Processing</td>
</tr>
</tbody>
</table>

Select a transaction number to view details of your request. You can select Return to Select a Reporting Change Request link to view other reporting changes.

Reporting Change Status

Reporting Change Details

<table>
<thead>
<tr>
<th>Selected Employees</th>
<th>Empl ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>00010413</td>
<td>Avocado</td>
<td>Rosie</td>
<td>CUSTODIAN</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reporting Change Details</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Reporting Change Date</td>
<td>09/25/2010</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervisor:</td>
<td>Jane Smith</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transaction Number:</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requester:</td>
<td>Antoinette Pensa</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Return to Select a Reporting Change Request
Location Change (used for both Staff and Academic Employees)

To change an employee’s job location, select Manager Self Service>Job and Personal Information>Location Change.

Step 1 – Enter an Effective Date

Enter an **Effective date**. The date can be today’s date or a future date. Click the **Continue** button.

**Location Change**
Initiate a request to change the location for one or more employees.

**Instructions**
Follow this 3-step process to assign one or more employees to a new location:
1. Enter the date this location change will take effect. You will be able to process only those employees that report to you as of this date.
2. Select the employees to be moved to the new location.
3. Enter the new location and submit the change.

**Enter the as of date**
Enter the date this change is effective. 

Step 2 – Select the Employee(s)

Select the employee(s) that requires the change and click the **Continue** button.
Step 3 - Enter the Location

Change the Location. You can search for the location or enter it directly. Click the Submit button.

A confirmation message appears, Click the OK button.

Change Location
Below is the list of employees you selected for a location change. Select Submit once you have entered the location change information.

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Title</th>
<th>Empl ID</th>
<th>Current Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diane Cws1</td>
<td>STUDENT CWS</td>
<td>00001056</td>
<td>Admin Svcs Bldg Annex I</td>
</tr>
</tbody>
</table>

New Location

Date Change Will Take Effect: 10/28/2010
*Location: Queens Building

Step 4 - View the Location Change

The Location will display showing the information you submitted. This change will be loaded directly into the application. Click the Return to Select Employees link to process another transaction.

Change Location

The following information has been saved.

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Title</th>
<th>Empl ID</th>
<th>Current Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diane Cws1</td>
<td>STUDENT CWS</td>
<td>00001056</td>
<td>Admin Svcs Bldg Annex I</td>
</tr>
</tbody>
</table>

New Location

Date Change Will Take Effect: 10/28/2010
*Location: Queens Building

Return to Select Employees
Retire Employee (used for both Staff and Academic Employees)

To retire an employee, select Manager Self Service>Job and Personal Information>Retire Employee.

Step 1 – Enter an Effective Date

Enter an **Effective date**. Click the **Continue** button. Please note the effective date is the day after the last day worked. For someone whose last day worked is January 31, you should input February 1 as effective date of termination.

Retire Employee

Initiate a request to retire an employee.

**Instructions**

Follow this 3-step process to retire an employee:

1. Enter the date the retirement will take effect. You will be able to process only those employees that report to you as of this date.
2. Select the employee to be retired.
3. Select the retirement reason and submit the retirement.

**Enter the as of date**

Enter the effective date for this retirement. 10/08/2010

Continue button

Step 2 – Select the Employee(s)

Select the employee(s) that require the change and click the **Continue** button.

Select Employees

<table>
<thead>
<tr>
<th>Reports To: Jane Smith</th>
<th>As Of: 10/08/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Empl ID</td>
</tr>
<tr>
<td>James Carpenter</td>
<td>00025222</td>
</tr>
<tr>
<td>James Water</td>
<td>00025380</td>
</tr>
<tr>
<td>James Watermelon</td>
<td>00025379</td>
</tr>
</tbody>
</table>
Step 3 - Enter the Reason for Retirement

Select the **Reason for Retirement** from the drop down list. Click the **Submit** button.

A confirmation message appears, Click the **OK** button.

---

**Retire Employee**

**James Watermelon**

The Retirement Date is the first day the employee is no longer employed at the company. Select Submit once you have entered the retirement information.

- **Empl ID:** 00025379
- **Job Title:** CUSTOMIAN
- **Retirement Date:** 10/08/2010

*Reason for Retirement:* Normal Retirement

[Submit]

* Required Field

[Return to Select Employees]

---

Step 4 – View Retirement Change

The Retirement Change will display showing the information you submitted. This request has been sent to the Approver for review and approval. Click the [Return to Select Employees] link to process another transaction.

**Retire Employee**

**James Watermelon**

*The following information has been submitted.*

- **Empl ID:** 00025379
- **Job Title:** CUSTOMIAN
- **Retirement Date:** 10/08/2010
- **Reason for Retirement:** Normal Retirement

[Return to Select Employees]
Terminate Employee (used for both Staff and Academic Employees)

To terminate an employee, select Manager Self Service>Job and Personal Information>Terminate Employee.

Step 1 – Enter an Effective Date

Enter an Effective date. Click the Continue button. Please note the effective date is the day after the last day worked. For someone whose last day worked is January 31, you should input February 1 as effective date of termination.

**Terminate Employee**

Initiate a request to retire an employee.

---

**Instructions**

Follow this 3-step process to retire an employee:

1. Enter the date the retirement will take effect. You will be able to process only those employees that report to you as of this date.
2. Select the employee to be retired.
3. Select the retirement reason and submit the retirement.

**Enter the as of date**

Enter the effective date for this retirement.

[Continue]

---

Step 2 – Select the Employee(s)

Select the employee(s) that require the termination and click the Continue button.

---

Select Employees

Reports To: Jane Smith

As Of: 10/08/2010

<table>
<thead>
<tr>
<th>Select Employee</th>
<th>Empl ID</th>
<th>Empl Record</th>
<th>Pay Status</th>
<th>HR Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>James Carpenter</td>
<td>00025222</td>
<td>0</td>
<td>Active</td>
<td>Active</td>
</tr>
<tr>
<td>James Water</td>
<td>00025380</td>
<td>0</td>
<td>Active</td>
<td>Active</td>
</tr>
<tr>
<td>James Watermelon</td>
<td>00025379</td>
<td>0</td>
<td>Active</td>
<td>Active</td>
</tr>
</tbody>
</table>
Step 3 – Enter the Reason for Termination

Select the Reason for Termination from the drop down list. Click the Submit button.

A confirmation message appears, Click the OK button.

Step 4 – View Termination

The Termination details will display showing the information you submitted. This request has been sent to the Approver for review and approval. Click the Return to Select Employees link to process another transaction.
Change Full / Part Time Status (used for both Staff and Academic Employees whose workweek will change from/to Part-time/Fulltime)

To change an employee’s full or part time status of any employee, select Manager Self Service>Job and Personal Information>Change Full/Part Time Status.

Step 1 – Enter an Effective Date

Enter an Effective date. The date can be today’s date or a future date. Click the Continue button.

Change Full/Part Time Status
Initiate a request to change an employee's full time or part time status.

Instructions
Follow this 3-step process to change an employees full time or part time status:
1. Enter the date the full time or part time status change will take effect. You will be able to process only the employees that report to you as of this date.
2. Select the employee to be changed.
3. Select the new status and submit the change.

Step 2 – Select the Employee(s)

Select the employee(s) that require the change and click the Continue button.

<table>
<thead>
<tr>
<th>Reports To:</th>
<th>Jane Deal</th>
<th>As Of:</th>
<th>09/25/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Select</th>
<th>Name</th>
<th>Empl ID</th>
<th>Job</th>
<th>Pay Status</th>
<th>HR Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>James Crown</td>
<td>00014107</td>
<td>0</td>
<td>Active</td>
<td>Active</td>
</tr>
<tr>
<td></td>
<td>Pam Brown</td>
<td>00016267</td>
<td>0</td>
<td>Active</td>
<td>Active</td>
</tr>
<tr>
<td>✅</td>
<td>Rosie Avocado</td>
<td>00010413</td>
<td>0</td>
<td>Active</td>
<td>Active</td>
</tr>
</tbody>
</table>

Select All  Deselect All

Continue
Step 3 – Enter the Supervisor Name

Change the Status and enter the new Standard Hours. Click the Submit button.

A confirmation message appears, Click the OK button.

Full/Part Time Status Change
Rosa Avocado

Select Submit once you have entered the new status change information.

Current Status
Contact the Human Resources Department if any of this information is incorrect.

- Emp ID: 00009701
- Annual Salary: 47,791.00
- Status: Full-Time
- Hourly Salary: 22.888410
- Standard Hours/Week: 40.00
- Currency: US Dollar

New Status
* Date Change Will Take Effect: 10/06/2010
* Status:
  - Part-Time
* New Standard Hours/Week
  - 20

Submit

* Required Field

Return to Select Employees

Step 4 – View Full/Part Time Status Change

The Full/Part Time Status Change will display showing the information you submitted. This change will be loaded directly into the application. Click the Return to Select Employees link to process another transaction.

Full/Part Time Status Change
Rosa Avocado

The following information has been submitted.

Current Status
Contact the Human Resources Department if any of this information is incorrect.

- Emp ID: 00009701
- Annual Salary: 47,791.00
- Status: Full-Time
- Hourly Salary: 22.888410
- Standard Hours/Week: 40.00
- Currency: US Dollar

New Status
* Date Change Will Take Effect: 10/06/2010
* Status: Part-Time
* New Standard Hours/Week
  - 20.00

Return to Select Employees
Leave Request (used for both Staff and Academic Employees)

To request a leave for an employee, select Manager Self Service>Job and Personal Information>Leave Request.

**Step 1 – Enter an Effective Date**

Enter an **Effective date**. The date can be today’s date or a future date. Click the **Continue** button.

**Leave Request**
Initiate a leave request for an employee.

---

**Step 2 – Select the Employee(s)**

Select the employee(s) that require the change and click the **Continue** button.
Step 3 - Enter the Type of Leave and Reason

Enter the Type of Leave and the Reason for the Leave from the drop down list. Click the Submit button.

A confirmation message appears, Click the OK button.

If this is a partial paid leave, indicate the percentage to be paid.

If this is a partial paid leave (i.e, Sabbatical 80%) please record the percentage to pay below

Regular Salary: 100.00

Comment:
Step 3A – Paid Leave of Absence

If you had entered a Paid Leave of Absence, you need to record the percentage of pay. The example below shows a faculty member who is going on an 80% paid sabbatical. Click the Submit button.

A confirmation message appears, Click the OK button.

<table>
<thead>
<tr>
<th>Leave Request</th>
<th>Leave Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Leave Details</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Aaron Water</strong></td>
<td></td>
</tr>
<tr>
<td>Enter Leave details for</td>
<td></td>
</tr>
<tr>
<td>the employee below</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Leave Details</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Leave Date:</strong></td>
<td>10/28/2010</td>
</tr>
<tr>
<td><strong>Type of Leave:</strong></td>
<td>Paid Leave of Absence</td>
</tr>
<tr>
<td><strong>Reason for Leave:</strong></td>
<td>Sabbatical @ 80%</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Current Info</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Business Unit:</strong></td>
<td>Rutgers</td>
</tr>
<tr>
<td><strong>Department:</strong></td>
<td>Demonstration Department 1</td>
</tr>
<tr>
<td><strong>Location:</strong></td>
<td>Admin Svcs Bldg Annex I</td>
</tr>
<tr>
<td><strong>Job Title:</strong></td>
<td>ASSOC PROFESSOR ACD YR</td>
</tr>
<tr>
<td>Full/Part Time:</td>
<td>Full-Time</td>
</tr>
<tr>
<td>Standard Hours:</td>
<td>37.50</td>
</tr>
<tr>
<td>Supervisor:</td>
<td>Chris Sales</td>
</tr>
<tr>
<td></td>
<td>00001001</td>
</tr>
</tbody>
</table>

If this is a partial paid leave (i.e, Sabbatical 80%) please record the percentage to pay below

**Regular Salary:** 80

**Comment:**
Step 4 – View Leave Details

The Leave Details will display showing the information you submitted. This request has been sent to the Approver for review and approval. Click the Return to Select Employees link to process another transaction.
Leave Status

To view an employee’s leave status, select **Manager Self Service>Job and Personal Information>Leave Status**.

Leave Status gives a list of employees in your department that requested a leave. To view details about the leave request, select the employee’s name.

<table>
<thead>
<tr>
<th>Employee Leave Requests</th>
<th>Leave Date</th>
<th>Effective Sequence</th>
<th>Workflow Status</th>
<th>Reason for Leave</th>
</tr>
</thead>
<tbody>
<tr>
<td>Claire Boy</td>
<td>09/09/2010</td>
<td>1</td>
<td>Administrator is Processing</td>
<td>Personal</td>
</tr>
<tr>
<td>Lev Faloy</td>
<td>07/02/2010</td>
<td>1</td>
<td>Administrator is Processing</td>
<td>Federal FMLA</td>
</tr>
<tr>
<td>Felicia Durr</td>
<td>09/09/2010</td>
<td>1</td>
<td>Administrator is Processing</td>
<td>Personal</td>
</tr>
<tr>
<td>Robert Jox</td>
<td>05/13/2010</td>
<td>1</td>
<td>Administrator is Processing</td>
<td>Federal FMLA</td>
</tr>
<tr>
<td>James Watermelon</td>
<td>10/09/2010</td>
<td>1</td>
<td>Administrator is Processing</td>
<td>Personal</td>
</tr>
</tbody>
</table>
Return From Leave Request

To return an employee from a leave, select Manager Self Service>Job and Personal Information>Return From Leave Request.

Step 1 – Enter an Effective Date

Enter an Effective date. The date can be today’s date or a future date. Click the Continue button.

Return from Leave Request

Initiate a Return from leave request for an employee.

Step 2 – Select the Employee(s)

Select the employee(s) that returned from leave. Click the Continue button.
Step 3 - Enter the Type of Leave and Reason

Enter the details for the return in the comments field. Click the **Submit** button.

![Return From Leave Request form](image)

**Return From Leave Details**

Enter Return From Leave details for the employee below

Return from Leave Information

- **Return Date:** 10/06/2010
- **Type of Leave:** Return from Leave
- **Reason:** Return From Leave

**Current Info**

- **Business Unit:** Rutgers
- **Department:** Facilities Maintenance Service
- **Location:** Svc Bldg Fac Maint&Oper
- **Job Title:** CUSTODIAN
- **Full/Part Time:** Full-Time
- **Standard Hours:** 40.00

**Comment:** Enter details

---

A confirmation message appears, Click the **OK** button.
Step 4 - View Leave Details

The Return From Leave Details will display showing the information you submitted. This request has been sent to the Approver for review and approval. Click Return to Select Employees link to process another transaction.

Return From Leave Request

Return From Leave Details

James Watermelon

The following information has been submitted.

Return from Leave Information

<table>
<thead>
<tr>
<th>Return Date:</th>
<th>10/08/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of Leave:</td>
<td>Return from Leave</td>
</tr>
<tr>
<td>Reason:</td>
<td>Return From Leave</td>
</tr>
</tbody>
</table>

*Business Unit: Rutgers UNIV
*Department: Facilities Maintenance Service 10460
*Location: Svc Bldg Fac Maint&Oper 8328
*Job Title: CUSTODIAN 10812
Full/Part Time: Full-Time
Standard Hours: 40.00

Comment: Enter details

Return to Select Employees
Return From Leave Status

To view the status of employees in your department that have returned from leaves, select Manager Self Service>Job and Personal Information>Return From Leave Status.

Return From Leave Status gives a list of employees in your department that have returned from a leave. To view details, select the employee’s name.

Return From Leave Status
Select a Transaction

The list below contains Return From Leave requests. Select an employee to view details.

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Return Date</th>
<th>Effective Sequence</th>
<th>Workflow Status</th>
<th>Reason for Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>Janice Waterton</td>
<td>10/08/2010</td>
<td>1</td>
<td>Administrator is Processing</td>
<td>Return From Leave</td>
</tr>
</tbody>
</table>
Request Reappointment

To request a reappointment, select Manager Self Service>Job and Personal Information>Request Reappointment.

Step 1 – Enter an Effective Date

Enter an Effective date. This is usually the date the reappointment takes effect. It is normally a future date, unless the request is being submitted late. Click the Continue button.

Reappoint Employee

Initiate a request to reappoint an employee.

Instructions

Follow this 3-step process to reappoint an employee:

1. Enter the date this reappointment will take effect. You will be able to process only those employees that report to you as of this date.
2. Select the employee to be reappointed.
3. Enter the reappointment details and submit the change.

Enter the as of date

Enter the date this reappointment takes effect. 09/01/2010

Note: This section of the guide is being revised. In the meantime, please refer to the “Instructional Materials for HCM System Users” section of the HCM System Users Blog for detailed Reappointment instructions.

http://hcmblog.rutgers.edu
Promote Employee (for Academic Reappointments with promotion only)

Promote employee through Manager Self Service will normally follow a transaction of reappointment, and will include a transaction of ad hoc salary change. Staff promotions will continue to be handled by Human Resources.

To promote an employee, select Manager Self Service>Job and Personal Information>Promote Employee.

Step 1 – Enter an Effective Date

Enter an Effective date. The date can be today’s date or a future date. Click the Continue button.

Step 2 – Select the Employee

Select the employee that requires the promotion and click the Continue button.
Step 3 - Enter the Reason for the Promotion

Select the *Reason for the Promotion* and the *Promotion Method* from the drop down list of values:

After you select the Promotion Method, new information must be entered for the employee – Department, Location, and Job Title. You can type the information in directly or use the search icon . When all information is completed select the Submit button.

A confirmation message appears, Click the OK button.
Step 4 - View Promotion Details

The Promotion Details page will display, showing details of the promotion you submitted. Your request has been sent to the Approver for review and approval.

Next, you need to submit an Ad Hoc Salary request. You can select the Request Ad Hoc Salary Change link at the bottom of the page. For detailed instructions on processing an Ad Hoc Salary Request, view the Ad Hoc Salary change section in this guide.

Promote Employee
Promotion Details
Gary James
The following information has been submitted.

<table>
<thead>
<tr>
<th>Promotion Details</th>
<th>Current Info</th>
<th>New Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promotion Date:</td>
<td>09/01/2010</td>
<td></td>
</tr>
<tr>
<td>Reason for Promotion:</td>
<td>Other</td>
<td></td>
</tr>
<tr>
<td>*Promotion Method:</td>
<td>By Department and/or Job Title</td>
<td></td>
</tr>
<tr>
<td>*Business Unit:</td>
<td>Rutgers</td>
<td>Rutgers</td>
</tr>
<tr>
<td>*Department:</td>
<td>Demonstration Department 1</td>
<td>Demonstration Department 1</td>
</tr>
<tr>
<td>*Location:</td>
<td>Admin Svcs E1dga Annex I</td>
<td>Admin Svcs E1dga Annex I</td>
</tr>
<tr>
<td>*Job Title:</td>
<td>ASST PROF AY NON TENURE TRACK 86002</td>
<td>ASSOC PROFESSOR ACD YR</td>
</tr>
<tr>
<td>Full/Part Time:</td>
<td>Full-Time</td>
<td></td>
</tr>
<tr>
<td>Standard Hours:</td>
<td>37.50</td>
<td>37.50</td>
</tr>
<tr>
<td>Supervisor:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Return to Select Employees

Go To: Request Ad Hoc Salary Change
Ad Hoc Salary Change (Academic Employees only)

To request an Ad Hoc Salary Change, select Manager Self Service>Compensation and Stock>Request Ad Hoc Salary Change or click on the link Request Ad Hoc Salary Change if it is displayed on the screen you are using. For example, after you complete a request for transfer, the Ad Hoc Salary Change link becomes available.

Step 1 – Select the Employee

Select the employee for the Ad Hoc Salary Change and change the effective date to the date the new salary becomes effective. Click the Continue button.

Ad Hoc Salary Change

Select Employees

Select the employee(s) from the list below. If the employee of interest is not displayed, initiate a search using the Search for an Employee pushbutton.

Transaction Effective Date:  09/01/2010

<table>
<thead>
<tr>
<th>Direct Reports For Brenda Zucich</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
</tr>
<tr>
<td>--------</td>
</tr>
<tr>
<td>✓</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

[Select All]  [Search for an employee]  [Continue]
Step 2 - Enter the New Salary and Action Reason

Enter the new Salary and the Action Reason.

Select **Calculate New Total** to view the new Annual Rate. You have the option to add comments in the Comment field. Click the **Submit** button.

### Ad Hoc Salary Change

The employees you selected are displayed below. Enter the desired salary change information and select Calculate New Total for each person. Select Submit once all salary changes have been entered.

**Salary Change Date:** 09/01/2010

<table>
<thead>
<tr>
<th>Gary James</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee ID:</strong> 00001137</td>
</tr>
</tbody>
</table>

**Job Information**

**Data**

<table>
<thead>
<tr>
<th>Component</th>
<th>Current Amount</th>
<th>Change Percent (ex. 10.350%)</th>
<th>Change Amount</th>
<th>New Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default NA Annual</td>
<td>48000.000000</td>
<td>4.000</td>
<td>1,920.000000</td>
<td>49920.000000 USD</td>
</tr>
</tbody>
</table>

**Compensation Frequency:** Rutgers Biweekly

**Action Reason:** Promotion

**Previous Salary:** $1,839.080460 USD  **New Total:** $1,912.643678 USD

**Previous Annual Rate:** $480,000,000 USD  **New Annual Rate:** $49,920,000 USD

**Comment:**

A confirmation message appears, Click the **OK** button.
**Step 3 - View Ad Hoc Salary Request**

The Ad Hoc Salary page displays showing your request. This request has been sent to the Approver for review and approval. Click the Return to Select Employees to process another transaction.

## Ad Hoc Salary Change

The salary change information below has been submitted.

**Salary Change Date:** 09/01/2010

**Gary James**

<table>
<thead>
<tr>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee ID:</strong></td>
</tr>
</tbody>
</table>

### Data

**Enter Salary Change Amounts**

<table>
<thead>
<tr>
<th>Component</th>
<th>Current Amount</th>
<th>Change Percent (ex. 10.850%)</th>
<th>Change Amount</th>
<th>New Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default NA Annual</td>
<td>43000.000000</td>
<td>4.00</td>
<td>1,920.000000</td>
<td>49920.000000 USD</td>
</tr>
</tbody>
</table>

**Compensation Frequency:** Rutgers Biweekly  
**Action Reason:** Promotion

**Previous Salary:** $1,839,080.460 USD  
**New Total:** $1,912,643.678 USD

**Previous Annual Rate:** $48,000.000 USD  
**New Annual Rate:** $49,920.000 USD

### Process Detail

<table>
<thead>
<tr>
<th>Name</th>
<th>Role Name</th>
<th>Process Action</th>
<th>Process Action Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brenda Zucish</td>
<td>Originator</td>
<td>Submit</td>
<td>10/30/2010</td>
</tr>
<tr>
<td></td>
<td>Compensation Administrator</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Compensation Administrator</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Comments**
Ad Hoc Salary Change Status

To view the status of an Ad Hoc Salary Change, select Manager Self Service>Compensation and Stock>View Ad Hoc Salary Change Status.

View Ad Hoc Salary Change Status

The hyperlinks below indicate groups for which you are a participant in the approval process. Select a hyperlink to see details about the status of each transaction contained in the group.

Ad Hoc Salary Change 2
Submitted By: Brenda Zucish  Submitted Date: 10/30/2010

<table>
<thead>
<tr>
<th>Data</th>
<th>Customize</th>
<th>Find</th>
<th>1 of 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Empl ID</td>
<td>Name</td>
<td>Job Title</td>
<td>Last Processed By</td>
</tr>
<tr>
<td>00001137</td>
<td>Gary James</td>
<td>ASST PROF</td>
<td>Brenda Zucish</td>
</tr>
</tbody>
</table>

Select the Ad Hoc Salary Change link Ad Hoc Salary Change 2 to view details of your request. Click Return to Approval/Status List to view other Ad Hoc Salary requests.
Transfer Employee (used for both Staff Academic Employees only)

Use transfer employee to change job title (includes Academic Year (AY)/Calendar Year (CY) changes), or to transfer an employee from one department (org id) to another or for lateral moves in your Department. To process a transfer, select Manager Self Service > Job and Personal Information > Transfer Employee.

Step 1 – Enter an Effective Date

Enter an Effective date. The date can be today’s date or a future date. Click the Continue button.

**Transfer Employee**
Initiate a request to transfer an employee.

<table>
<thead>
<tr>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Follow this 3-step process to transfer an employee:</td>
</tr>
<tr>
<td>1. Enter the date this transfer will take effect. You will be able to process only those employees that report to you as of this date.</td>
</tr>
<tr>
<td>2. Select the employee to be transferred.</td>
</tr>
<tr>
<td>3. Enter the transfer details and submit the change.</td>
</tr>
</tbody>
</table>

**Enter the as of date**
Enter the date this transfer takes effect.  
09/01/2010  
[Continue]

Step 2 – Select the Employee

Select the employee that requires the transfer and click the Continue button.

**Transfer Employee**
Select the employee to be transferred.

<table>
<thead>
<tr>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select the employee to be transferred. You will be able to process only those employees that report to you as of the date entered on the first page.</td>
</tr>
<tr>
<td>Once you have finished select Continue to enter the transfer details.</td>
</tr>
</tbody>
</table>

**Select Employees**
Reports To: Brenda Zucish  
As Of: 09/01/2010

<table>
<thead>
<tr>
<th>Select Employee</th>
<th>Customize</th>
<th>Find</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Empl ID</td>
<td>Empl Record</td>
<td>Pay Status</td>
<td>HR Status</td>
</tr>
<tr>
<td>Greg Werner</td>
<td>00001136</td>
<td>0</td>
<td>Active</td>
<td>Active</td>
</tr>
</tbody>
</table>

[Continue]
Step 3 – Enter the Reason for the Transfer and the Transfer Information

Select the **Reason for the Transfer** from the drop down list of values:
- Internal Recruitment – normally reserved for central HR use only upon internal staff hire
- Promotion – used by central HR for an employee who received a promotion and is being reassigned to another department
- Reorganization – the department has been reorganized and the employee has been moved to another department
- Change Terms of Appointment – the employee’s title has changed include Academic Year(AY)/Calendar Year (CY) changes

Select the **Transfer Method** from the drop down list of values:
- By Department and/or Job Title

After you select the Transfer Method, new transfer information must be entered for the employee – **Department, Location, Job Title**. You can type the information in directly or use the search icon ✗. When all information is completed select the **Submit** button. A confirmation message appears, Click the **OK** button.

---

### Transfer Employee Details

#### Transfer Details

**Greg Warner**

Enter the transfer details below for the chosen employee. You will have an opportunity to change this employee’s salary after you submit the transaction. Select **Submit** once you have entered the transfer information.

**Transfer Information**

- **Transfer Date:** 09/01/2010
- **Reason for Transfer:** Change in Terms of Appointment
- **Transfer Method:** By Department and/or Job Title

<table>
<thead>
<tr>
<th>Current Info</th>
<th>New Info</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Business Unit:</em> Rutgers</td>
<td>Rutgers</td>
</tr>
<tr>
<td><em>Department:</em> Demonstration Department 1</td>
<td>Demonstration Department 1</td>
</tr>
<tr>
<td><em>Location:</em> Admin Svcs Bldg Annex I</td>
<td>Admin Svcs Bldg Annex I</td>
</tr>
<tr>
<td><em>Job Title:</em> ASST PROFESSOR AY</td>
<td>ASST PROFESSOR CY</td>
</tr>
<tr>
<td>Full/Part Time: Full-Time</td>
<td>Full-Time</td>
</tr>
<tr>
<td>Standard Hours: 37.50</td>
<td>37.50</td>
</tr>
</tbody>
</table>

Supervisor: [Search]

(Example: Firstname Lastname)

[Submit]

* Required Field

[Return to Select Employees]
Step 4 – View Transfer Details

The Transfer Details page will display, showing details of the transfer you submitted. Your request has been sent to your Approver for review and approval.

In the example above, an ad hoc salary request would be processed adjusting the faculty member’s salary for the change in terms of his appointment. Select the Request Ad Hoc Salary Change link at the bottom of the page. For detailed instructions on processing an Ad Hoc Salary Request, view the Ad Hoc Salary change section in this guide.