

Payroll Coordinators

Manage Transfers

- **Section 1: Promotion**

Lesson Objective:

Upon the completion of the Manage Transfers: Promotions Lesson you will be able to:

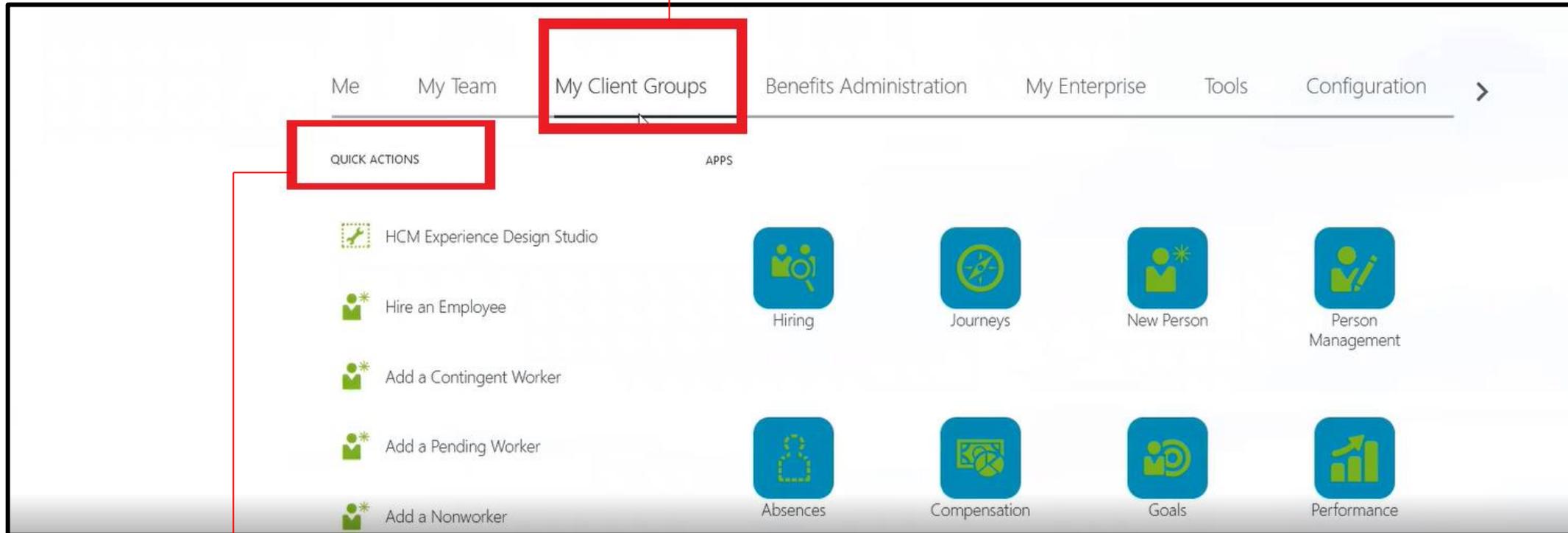
Objectives

- Promote an Employee

Manage Transfers: Promotion

1

Select the My Client Groups tab



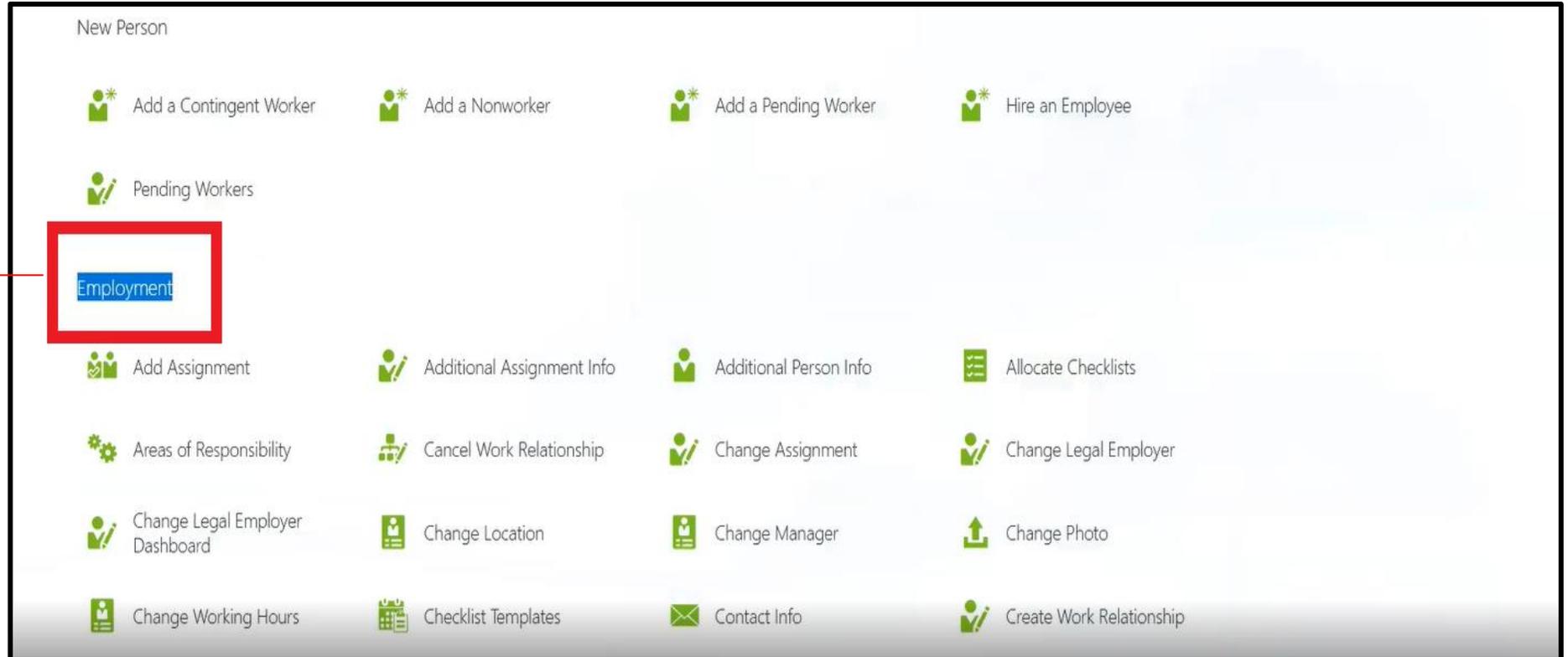
2

Select the Quick Actions section and select the Show More link from the drop-down list

Manage Transfers: Promotion

3

Locate the
Employment section



New Person

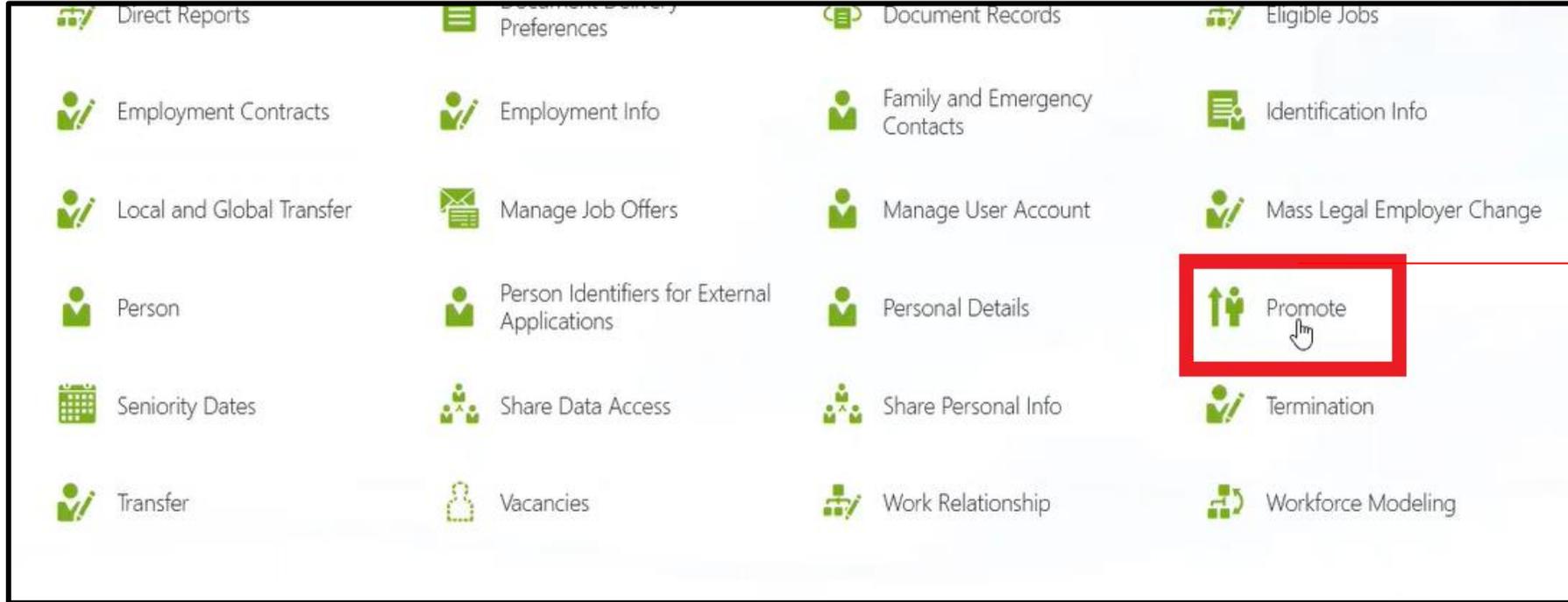
- Add a Contingent Worker
- Add a Nonworker
- Add a Pending Worker
- Hire an Employee

Pending Workers

Employment

- Add Assignment
- Additional Assignment Info
- Additional Person Info
- Allocate Checklists
- Areas of Responsibility
- Cancel Work Relationship
- Change Assignment
- Change Legal Employer
- Change Legal Employer Dashboard
- Change Location
- Change Manager
- Change Photo
- Change Working Hours
- Checklist Templates
- Contact Info
- Create Work Relationship

Manage Transfers: Promotion



4

Select **Promote** under the **Employment** section

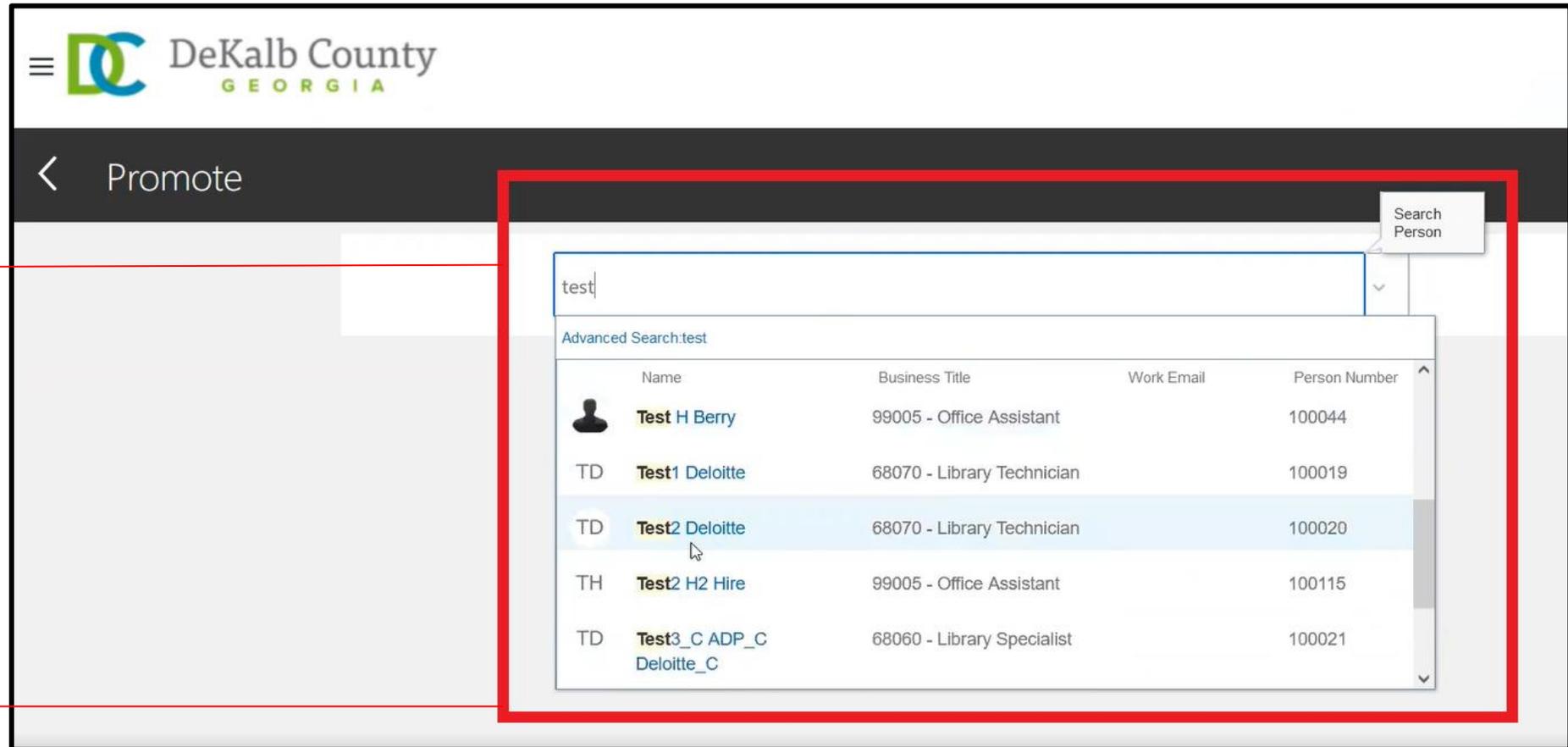
Manage Transfers: Promotion

5

Key in the appropriate information for an **Employee name** in the search bar on the Promote page

6

Select the correct **Employee Name** from the drop-down list



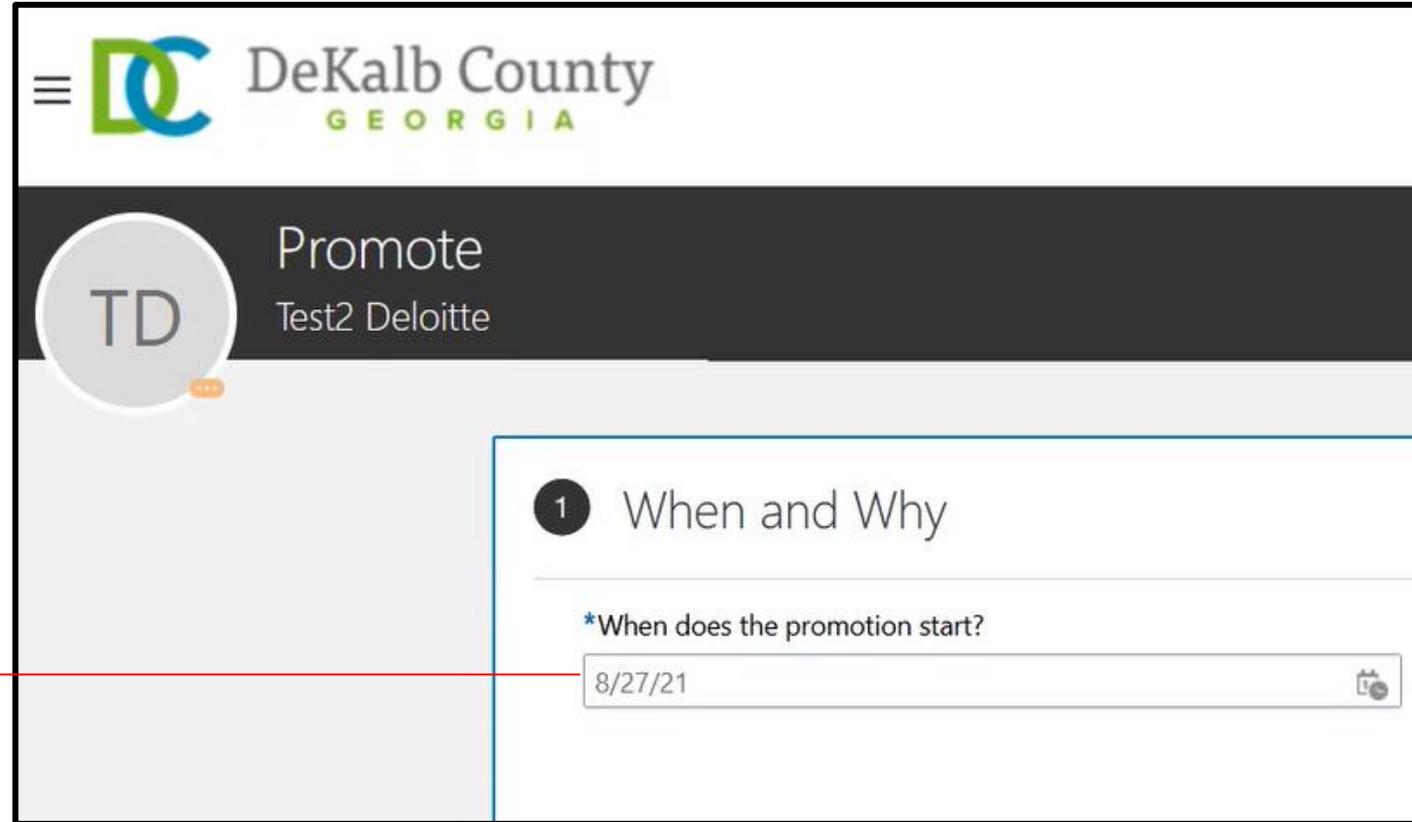
The screenshot shows the DeKalb County Georgia 'Promote' page. A search bar contains the text 'test'. A dropdown menu is open, displaying a table of search results. The table has columns for Name, Business Title, Work Email, and Person Number. The row for 'Test2 Deloitte' is highlighted in blue, indicating it is the selected option.

	Name	Business Title	Work Email	Person Number
	 Test H Berry	99005 - Office Assistant		100044
TD	Test1 Deloitte	68070 - Library Technician		100019
TD	Test2 Deloitte	68070 - Library Technician		100020
TH	Test2 H2 Hire	99005 - Office Assistant		100115
TD	Test3_C ADP_C Deloitte_C	68060 - Library Specialist		100021

Manage Transfers: Promotion

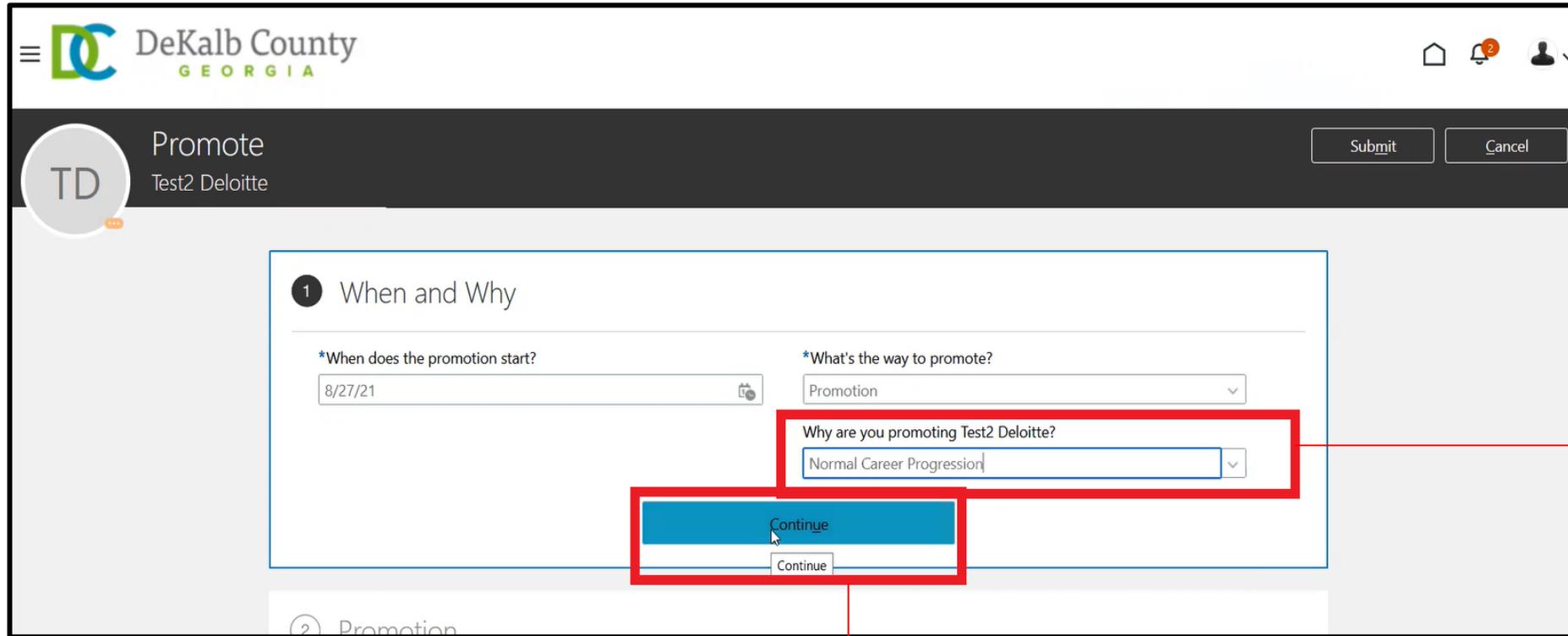
7

Select the appropriate Promotion **Start Date**



The screenshot shows the 'Promote' interface for 'Test2 Deloitte' in the DeKalb County system. The header includes the DeKalb County logo and name. Below the header, the user 'TD' is identified. The main content area is titled '1 When and Why' and contains a required field: '*When does the promotion start?'. The date '8/27/21' is entered in the field, and a calendar icon is visible to the right of the input box.

Manage Transfers: Promotion



DeKalb County
GEORGIA

Promote
Test2 Deloitte

Submit Cancel

1 When and Why

*When does the promotion start?
8/27/21

*What's the way to promote?
Promotion

Why are you promoting Test2 Deloitte?
Normal Career Progression

Continue
Continue

2 Promotion

8

Select the appropriate Reason for the promotion from the Why are you promoting Employee name? drop-down list

9

Select the Continue button

Manage Transfers: Promotion

10

Select the appropriate **Position** name from the drop-down list

2 Promotion

*Assignment Status: Active - Payroll Eligible

Person Type: Employee

Primary Assignment: Yes

Projected End Date: m/d/yy

Regular or Temporary: Regular

Full Time or Part Time: Full time

Hourly Paid or Salaried: Hourly

Standard Working Hours: 40 Weekly

FTE

Position: 00005

Name	Code	Job Name	Department Name
00005 - Office Assistant	00005	99005 - Office Assistant	01525 - HUMAN RESOURCES & MERIT SYSTEM - TRAINING & DEVELOPMENT

Headcount: Select a value

Job: 68070 - Library Technician

Business Title: 68070 - Library Technician

Grade: 06

Probation End Date: m/d/yy

Notice Period: Select a value

Merit Status

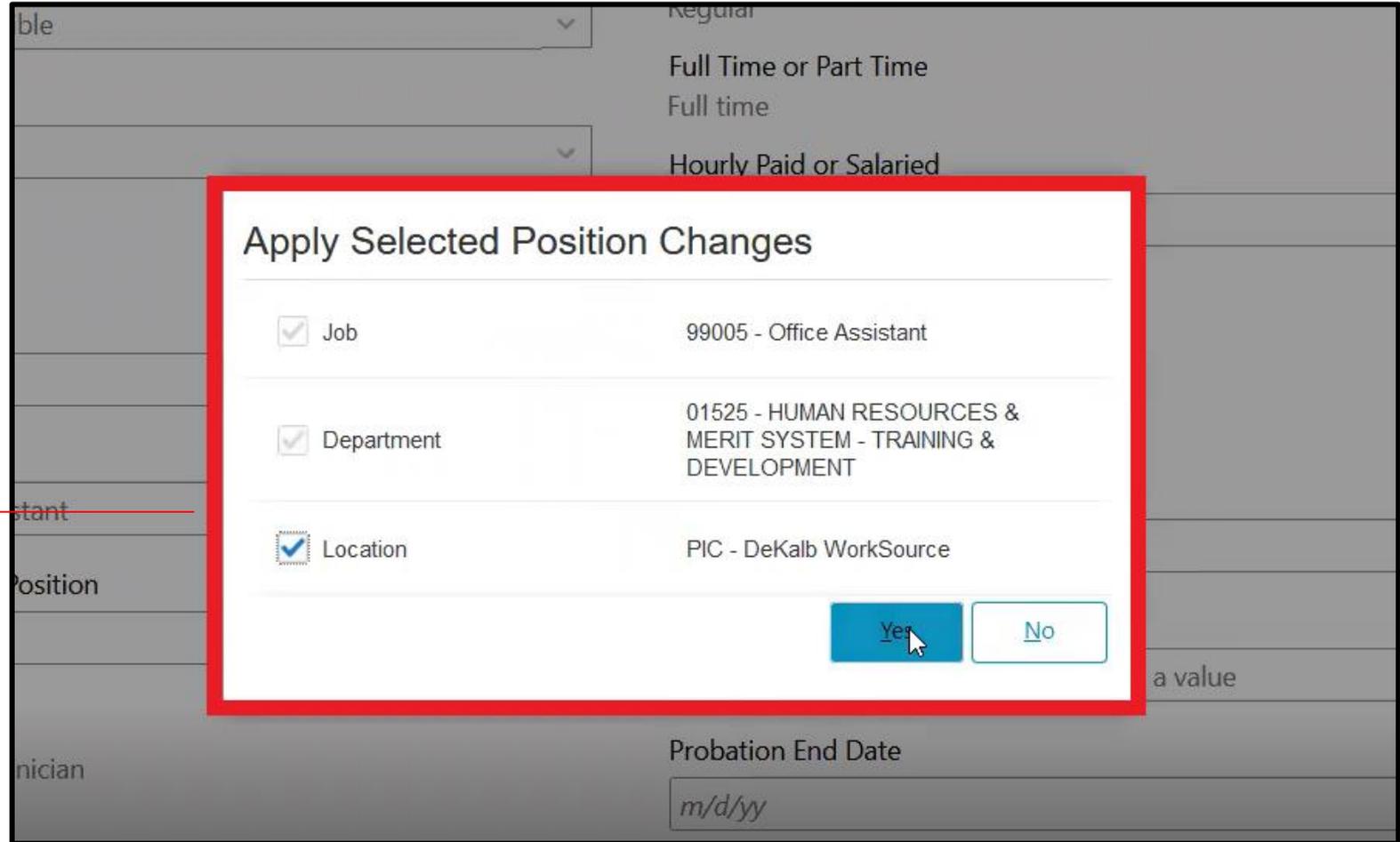


From the Position field, key in the Position name. All Position names start with a code and then the description. When entering the code, the system will intuitively provide a list of Positions that match the data that has been entered. Select the correct Position from the drop-down list

Manage Transfers: Promotion

11

Select the **Yes** button on the **Apply Selected Position** pop-up window



Item	Value
<input checked="" type="checkbox"/> Job	99005 - Office Assistant
<input checked="" type="checkbox"/> Department	01525 - HUMAN RESOURCES & MERIT SYSTEM - TRAINING & DEVELOPMENT
<input checked="" type="checkbox"/> Location	PIC - DeKalb WorkSource

Buttons: **Yes** (highlighted), **No**

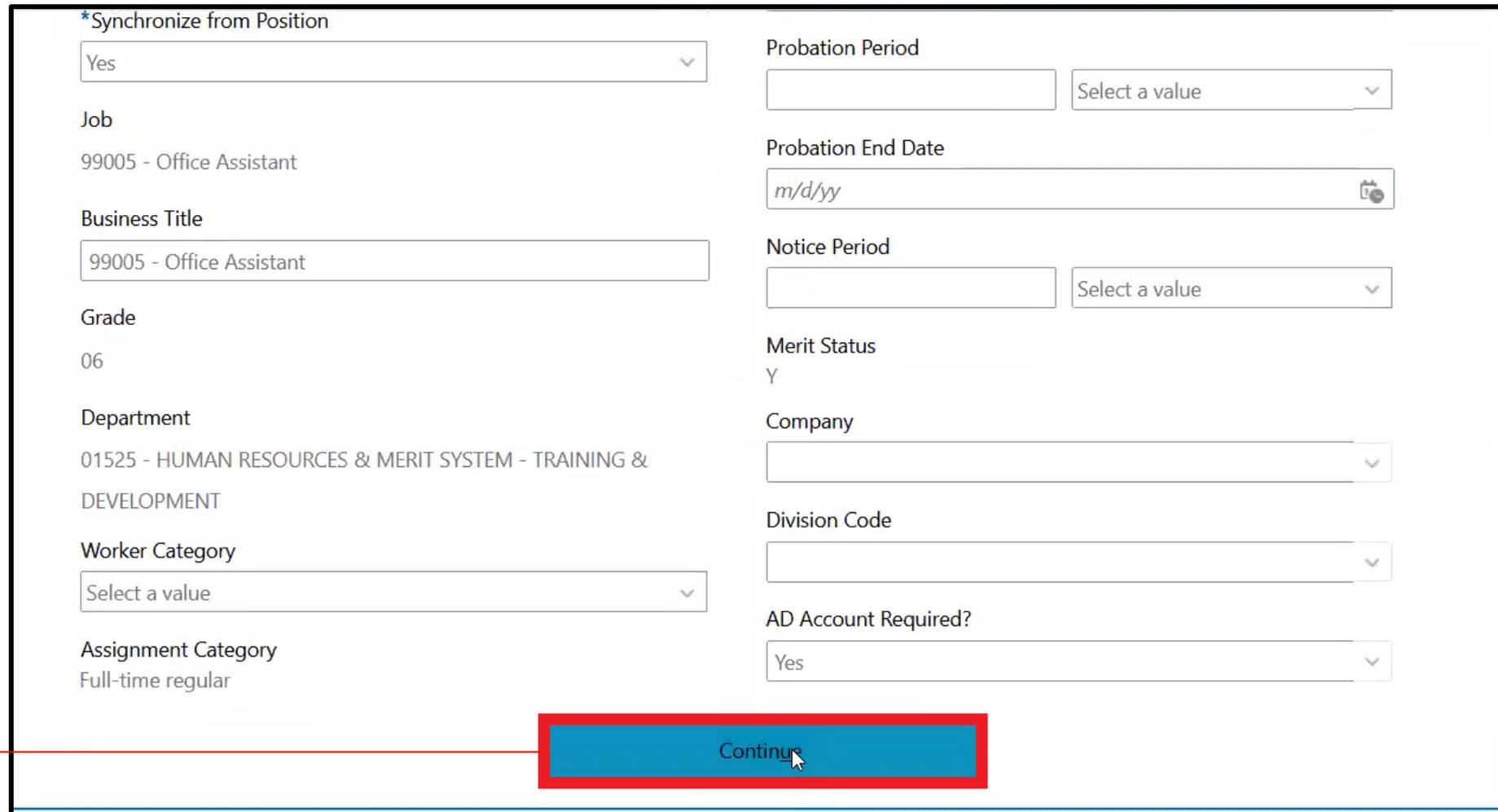


Position synchronization is being used when selecting the Position. You will be prompted with a message to confirm the data elements that have been selected for synchronization. Select **Yes** on the pop-up window

Manage Transfers: Promotion

12

Once all the necessary information has been completed under the Promotion section, select the **Continue** button



*Synchronize from Position
Yes

Job
99005 - Office Assistant

Business Title
99005 - Office Assistant

Grade
06

Department
01525 - HUMAN RESOURCES & MERIT SYSTEM - TRAINING & DEVELOPMENT

Worker Category
Select a value

Assignment Category
Full-time regular

Probation Period
[] Select a value

Probation End Date
m/d/yy

Notice Period
[] Select a value

Merit Status
Y

Company
[]

Division Code
[]

AD Account Required?
Yes

Continue

Manage Transfers: Promotion

13

Key in the appropriate **Base Salary** and **Hazardous Duty** amount on the **Salary** section

*Salary Basis
40 Hourly Salary Basis

Select Components

Component Name	Prior Amount	Adjustment Amount	Adjustment Percentage	Percentage	Amount	Annual Amount
Base salary	20.0000	5.0000	25.0000		25.0000	52,000.0000
Longevity (Base salary)	0.0000	0.0000		0.0000	0.0000	0.0000
Hazardous Duty	0.0000	2.0000			2.0000	4,160.0000
Paramedic (Base salary)	0.0000	0.0000		0.0000	0.0000	0.0000
Supplemental	0.0000	0.0000			0.0000	0.0000
Shift Differential	0.0000	0.0000			0.0000	0.0000
Overall salary	20.0000	7.0000	35.0000		27.0000	56,160.0000

Action
Transfer
Action Reason
Comparable Transfer
***Salary Amount**
27.0000 USD Hourly
Adjustment Amount
7.0000 USD

Salary Range
26.0755 - 40.4178 USD Hourly
Salary Range Midpoint
33.2466 USD
Range Position
6.45
Compa-Ratio
81.21



If the Promotion comes with a Salary change, edit the amount in the **Salary Amount** field or key in an adjustment amount in the **Adjustment Amount** field. Based on which field is entered (Salary Amount or Adjustment Amount), the other field will be updated to reflect what was entered. If the Salary Amount was entered, then the Adjustment Amount will be updated with the different between the Current Amount and the newly proposed amount

Manage Transfers: Promotion

Annual Salary 56,160.0000 USD (FTE 1)	1
Annualized Full-Time Salary 56,160.0000 USD	Quintile 1
Grade Name 20	Next Salary Review Date m/d/yy
Current Salary 20.0000 USD Hourly 26.0755 40.4178	Proposed Salary 27.0000 USD Hourly +7.0000 (+35.0000%) 26.0755 40.4178
Show Current Salary Details	
Continue	
④ Compensation	
⑤ Comments and Attachments	

14

The revised salary will be reflected on the Salary page. Select the **Continue** button to save the changes and proceed to the next step

Manage Transfers: Promotion

① When and Why Edit

② Promotion Edit

③ Salary Edit

④ Compensation

Add

 There's nothing here so far.

Show Prior Compensation

Continue

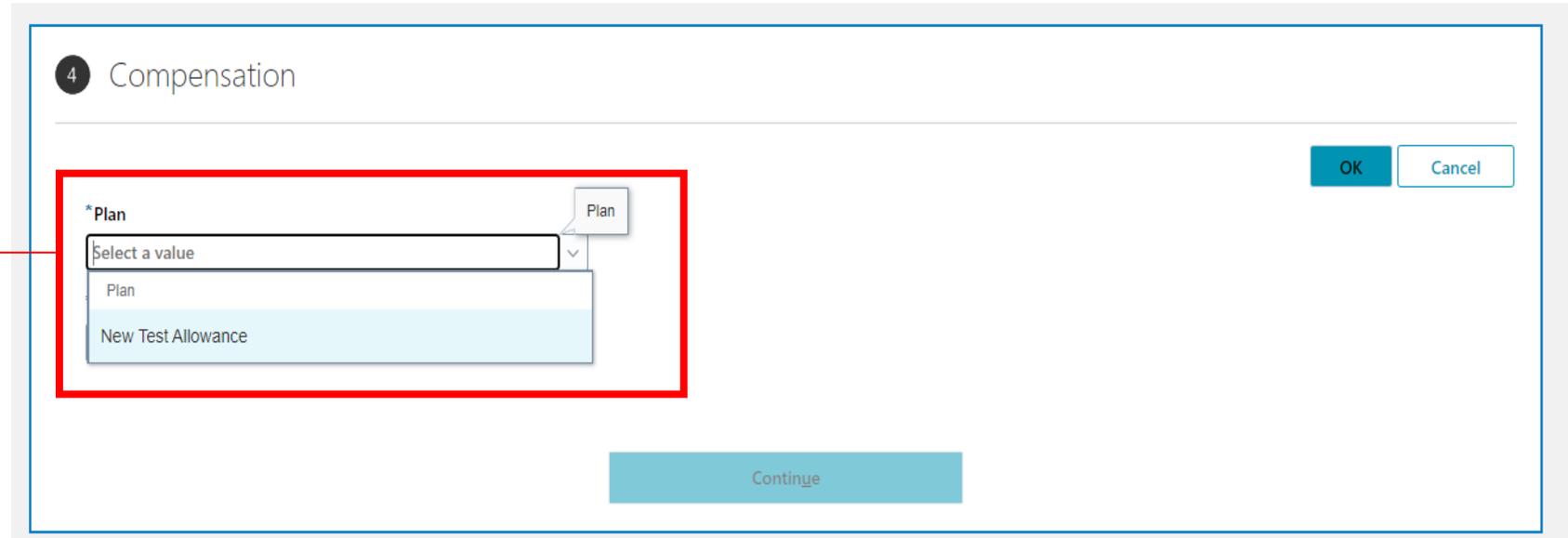
15

Select the **Add** button

Manage Transfers: Promotion

16

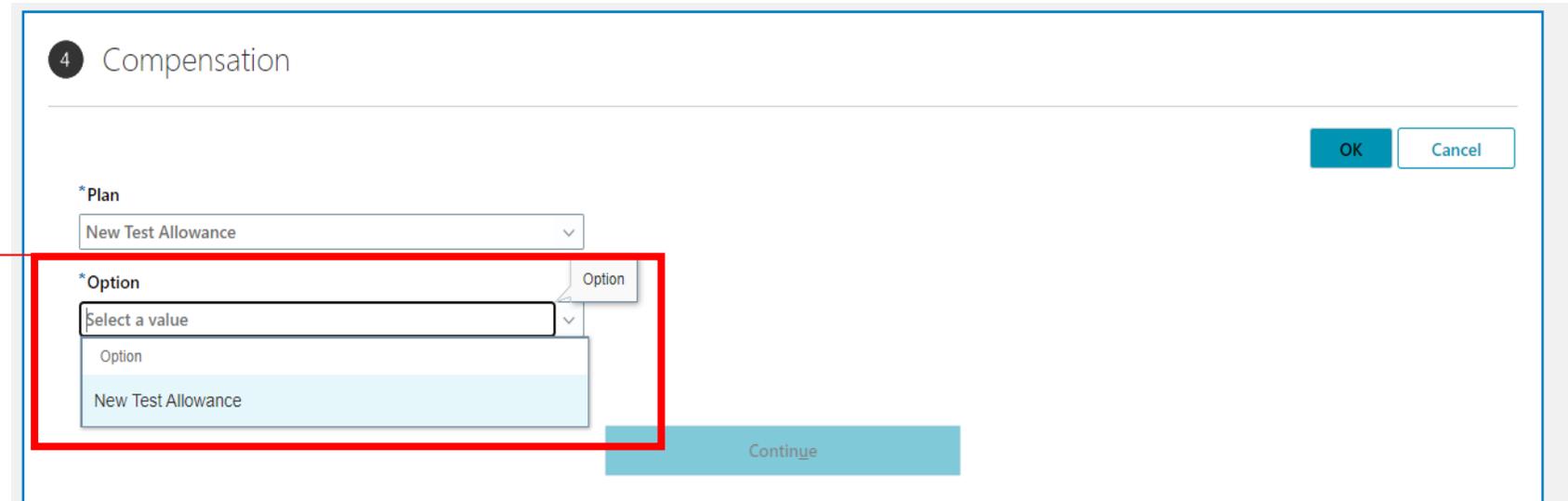
Select the appropriate **Plan** from the drop-down list



The screenshot shows a form titled "4 Compensation". It has "OK" and "Cancel" buttons in the top right corner. A red box highlights the "*Plan" dropdown menu, which is open to show a list of options: "Plan" and "New Test Allowance". The "New Test Allowance" option is highlighted in light blue. A "Continue" button is located at the bottom center of the form.

17

Select the appropriate **Option** from the drop-down list

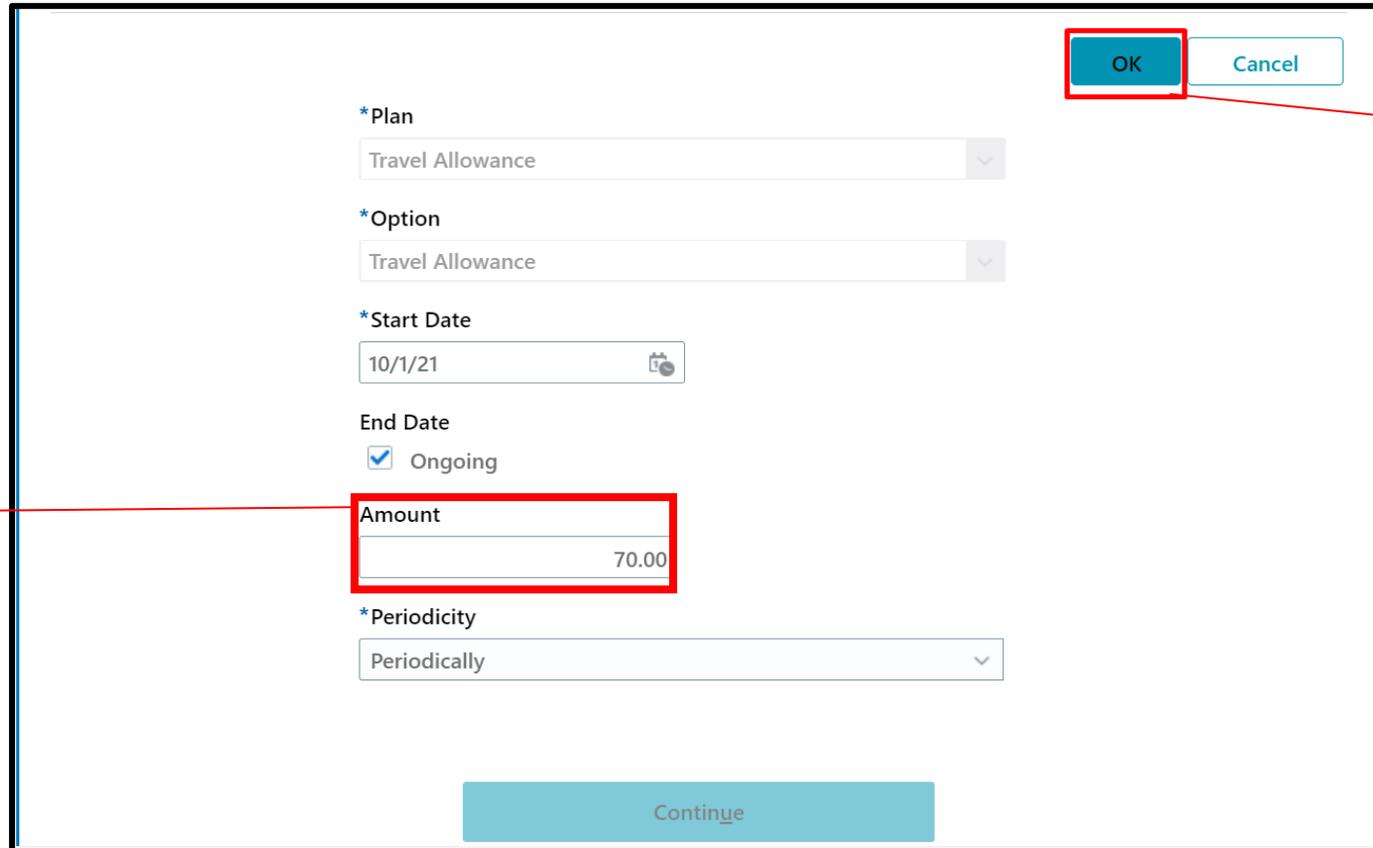


The screenshot shows the same "4 Compensation" form. The "*Plan" dropdown is now closed and shows "New Test Allowance" as the selected value. A red box highlights the "*Option" dropdown menu, which is open to show a list of options: "Option" and "New Test Allowance". The "New Test Allowance" option is highlighted in light blue. The "Continue" button is visible at the bottom center.

Manage Transfers: Promotion

18

Key in the appropriate Amount



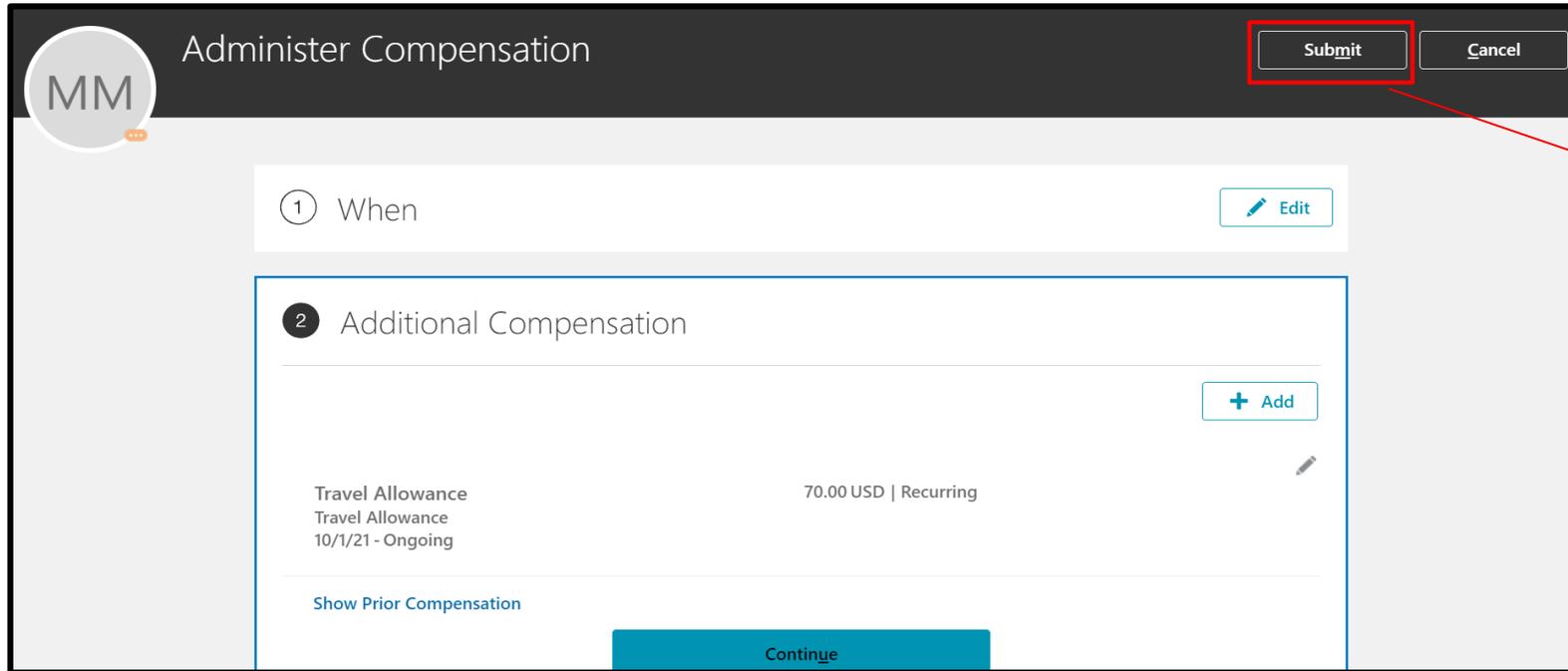
The screenshot shows a form for managing transfers. The form includes the following fields and controls:

- *Plan**: A dropdown menu with "Travel Allowance" selected.
- *Option**: A dropdown menu with "Travel Allowance" selected.
- *Start Date**: A date input field with "10/1/21" and a calendar icon.
- End Date**: A checkbox labeled "Ongoing" which is checked.
- Amount**: A text input field containing "70.00". This field is highlighted with a red box.
- *Periodicity**: A dropdown menu with "Periodically" selected.
- Buttons**: "OK" and "Cancel" buttons are located at the top right. The "OK" button is highlighted with a red box. A "Continue" button is located at the bottom center.

19

Select the OK button

Manage Transfers: Promotion



MM Administer Compensation

Submit Cancel

1 When Edit

2 Additional Compensation Add

Travel Allowance	70.00 USD Recurring
Travel Allowance	
10/1/21 - Ongoing	

Show Prior Compensation

Continue

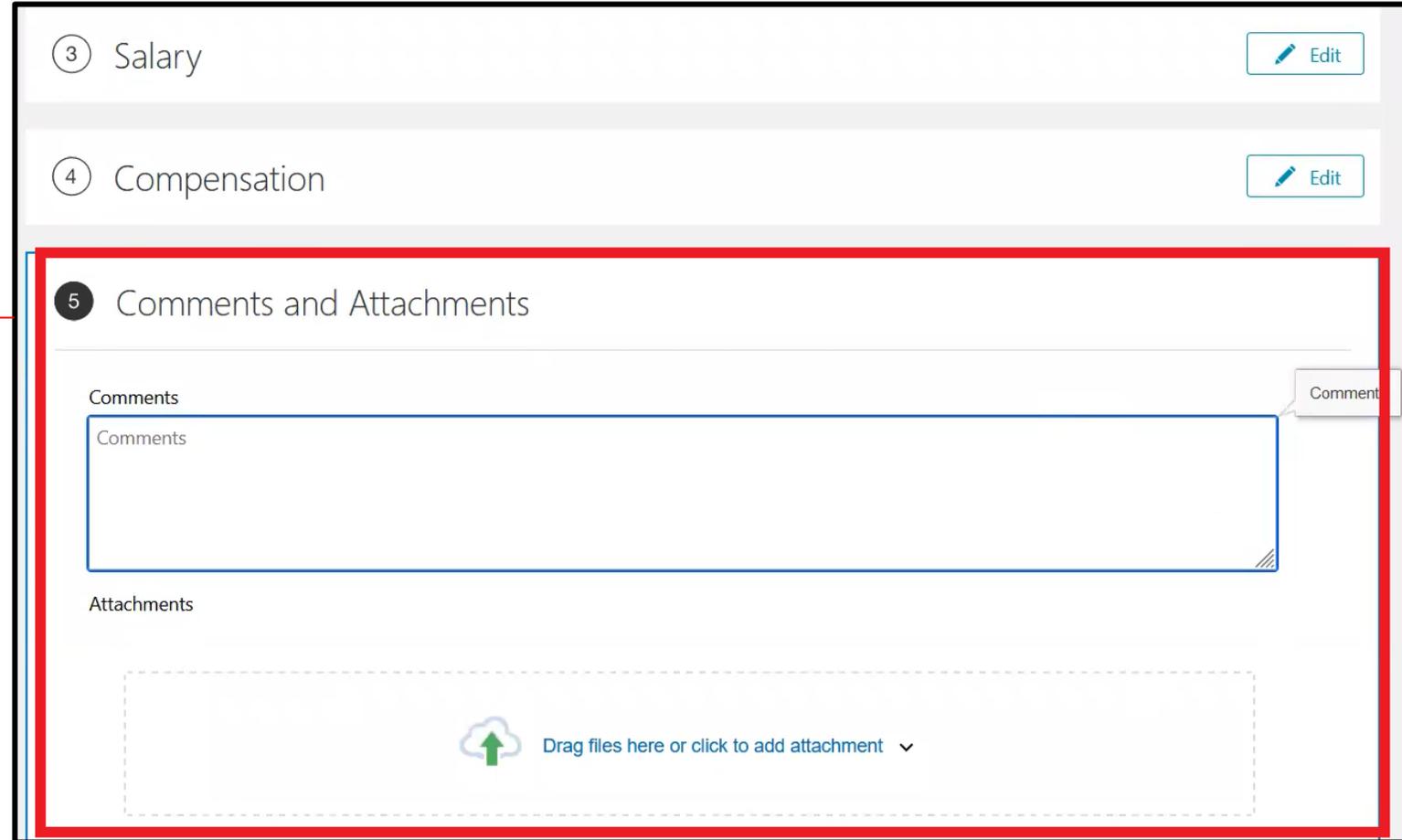
20

Select the **Submit** button

Manage Transfers: Promotion

21

Key in the appropriate details in the **Comments** section and add the required **Attachments** for the **Approver** as needed



The screenshot displays a web interface for managing transfers. It features three main sections: 'Salary', 'Compensation', and 'Comments and Attachments'. Each section has an 'Edit' button. The 'Comments and Attachments' section is highlighted with a red border. It contains a 'Comments' text area and an 'Attachments' section with a dashed border and a green upload icon. The text 'Drag files here or click to add attachment' is visible below the attachment area.

Attachments may be selected from the file, or they can be dragged and dropped into the **Attachments** section

Manage Transfers: Promotion

TD Promote
Test2 Deloitte

Submit **Cancel**

① When and Why	Edit
② Promotion	Edit
③ Salary	Edit
④ Compensation	Edit
⑤ Comments and Attachments	

22

Select the Submit button

Manage Work Relationship Lifecycle

Lesson 3: Manage Transfers

- **Section 2: Demotion**



Lesson Objective:

Upon the completion of the Manage Transfers: Demotions Lesson you will be able to:

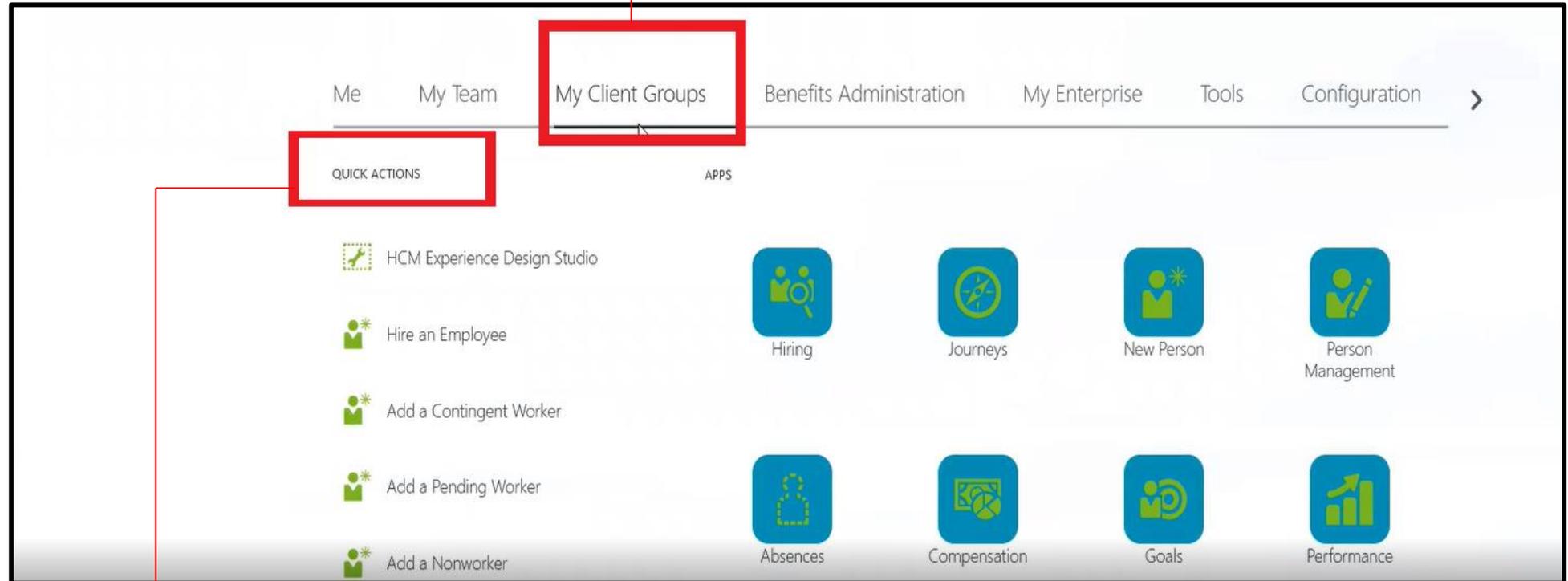
Objective

- Demote an Employee

Manage Transfers: Demotion

1

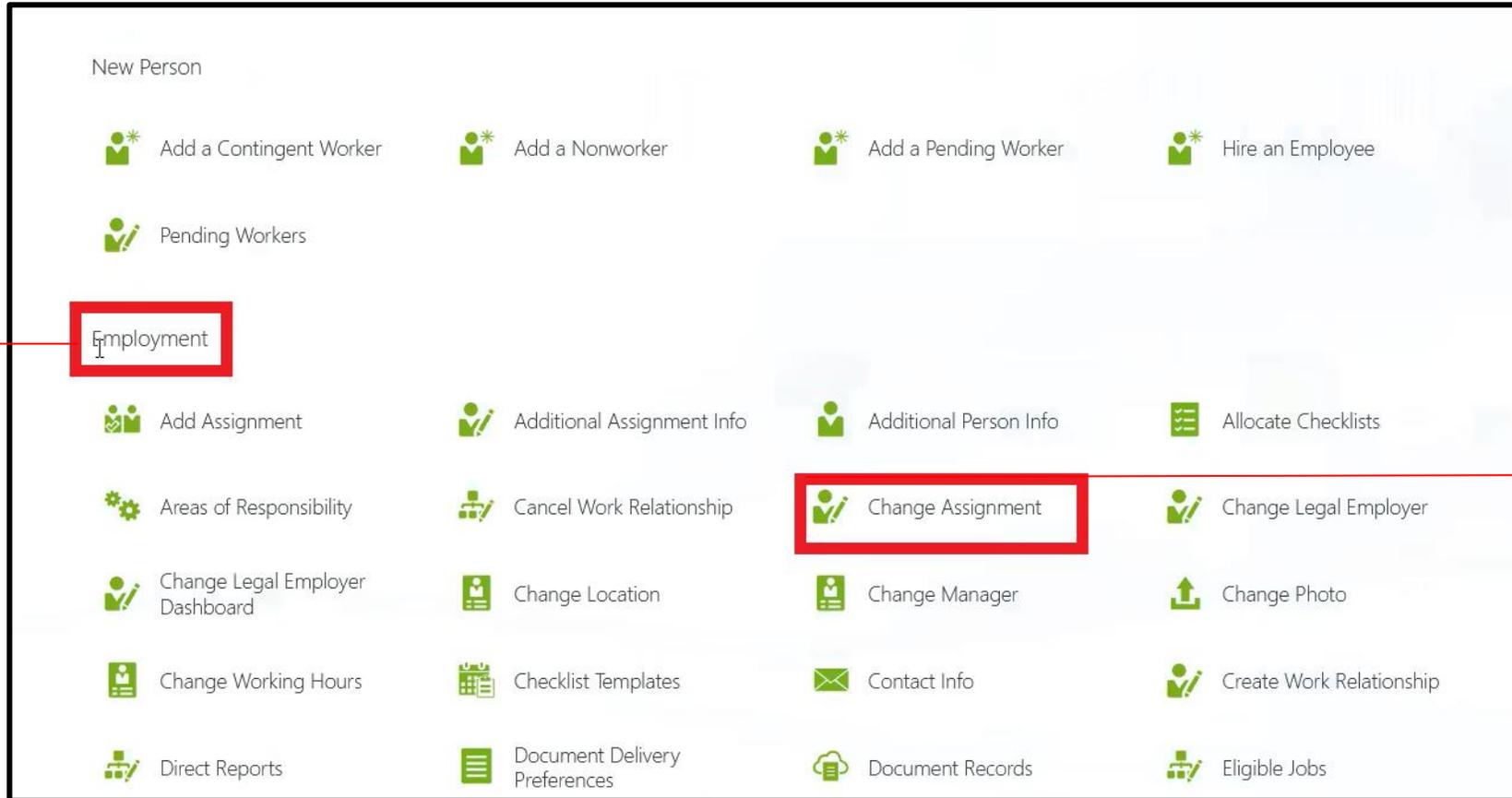
Select the My Client Groups tab



2

Select the Quick Actions section and select the Show More link from the drop-down list

Manage Transfers: Demotion



3

Locate the **Employment** section

4

Select **Change Assignment** under the **Employment** section

Manage Transfers: Demotion

<Change Assignment

Search Person

test

Advanced Search:test

TD	Name	Business Title	Work Email	Person Number
TH	Test2 H2 Hire	99005 - Office Assistant		100115
TD	Test3_C ADP_C Deloitte_C	68060 - Library Specialist		100021
TD	Test4 Deloitte	99005 - Office Assistant		100022
TE	TestRestError	E100077	test@google.com	100077
UI	User IT	E100097	test@google.com	100097

5

From the Search for a Person field, Key in the **Employee's Name** or **Employee Number**

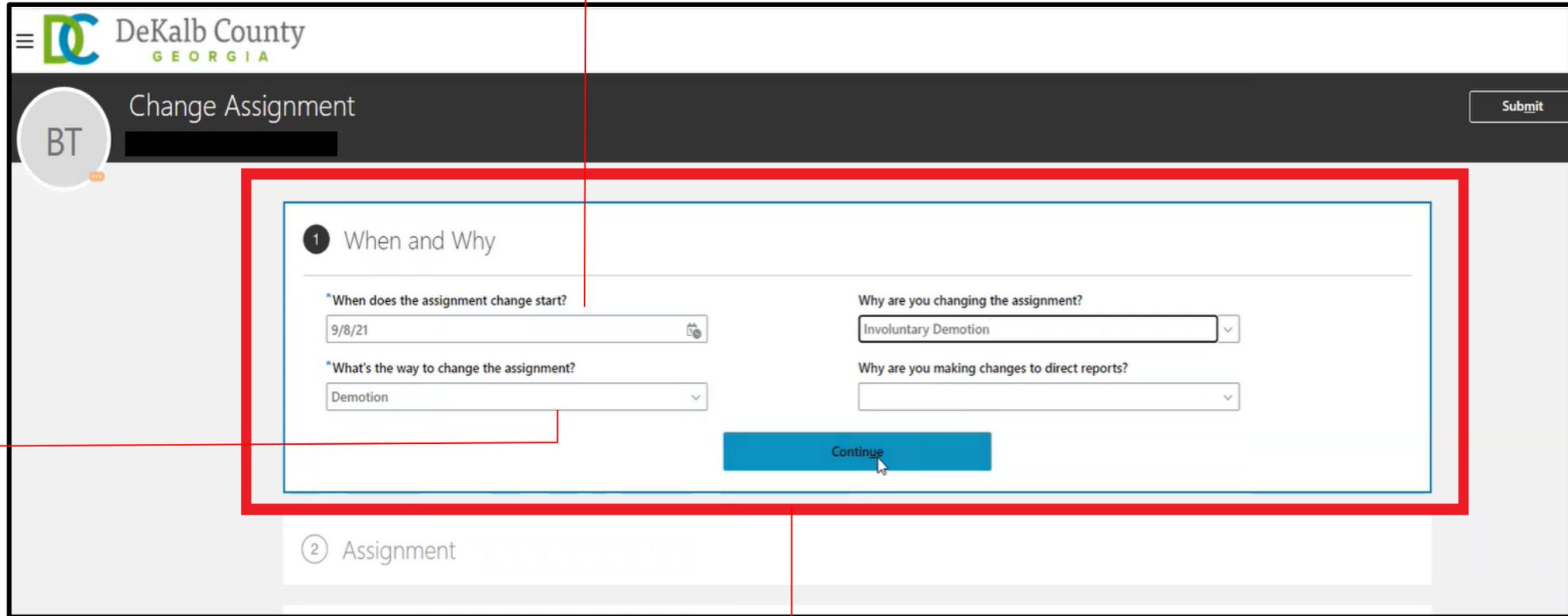
6

Select the **Employee** from the returned results within the Recent Items list

Manage Transfers: Demotion

7

Key in the appropriate **Assignment Change Start Date** in the When does the assignment change start? field



8

Select **Demotion** from the **What's the way to change the assignment?** drop-down list

9

Select the **Continue** button

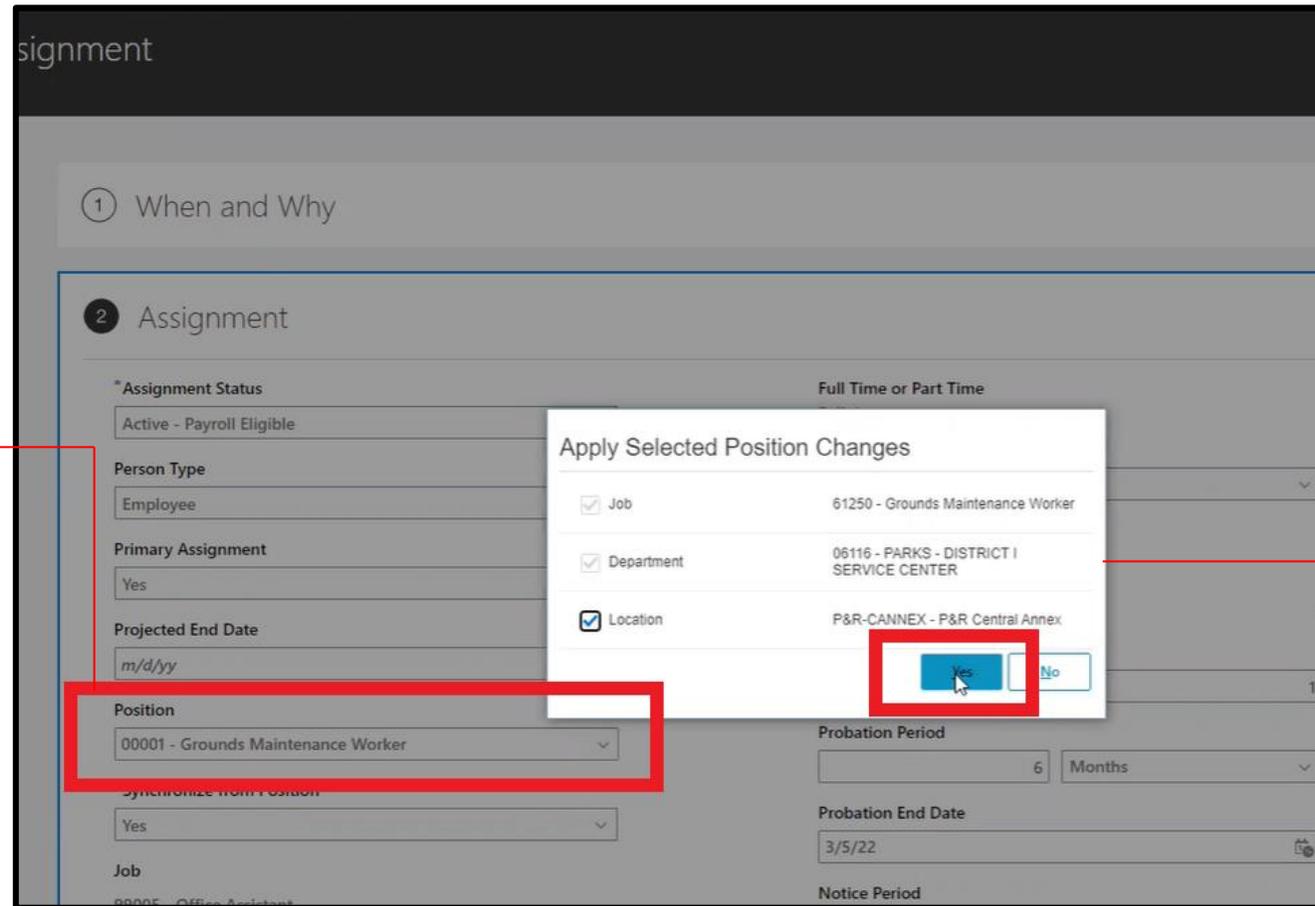


Select either **Voluntary Demotion** or **Involuntary Demotion** from the **Why are you changing the assignment?** drop-down list

Manage Transfers: Demotion

8

Select the **Position** name from the drop-down list



9

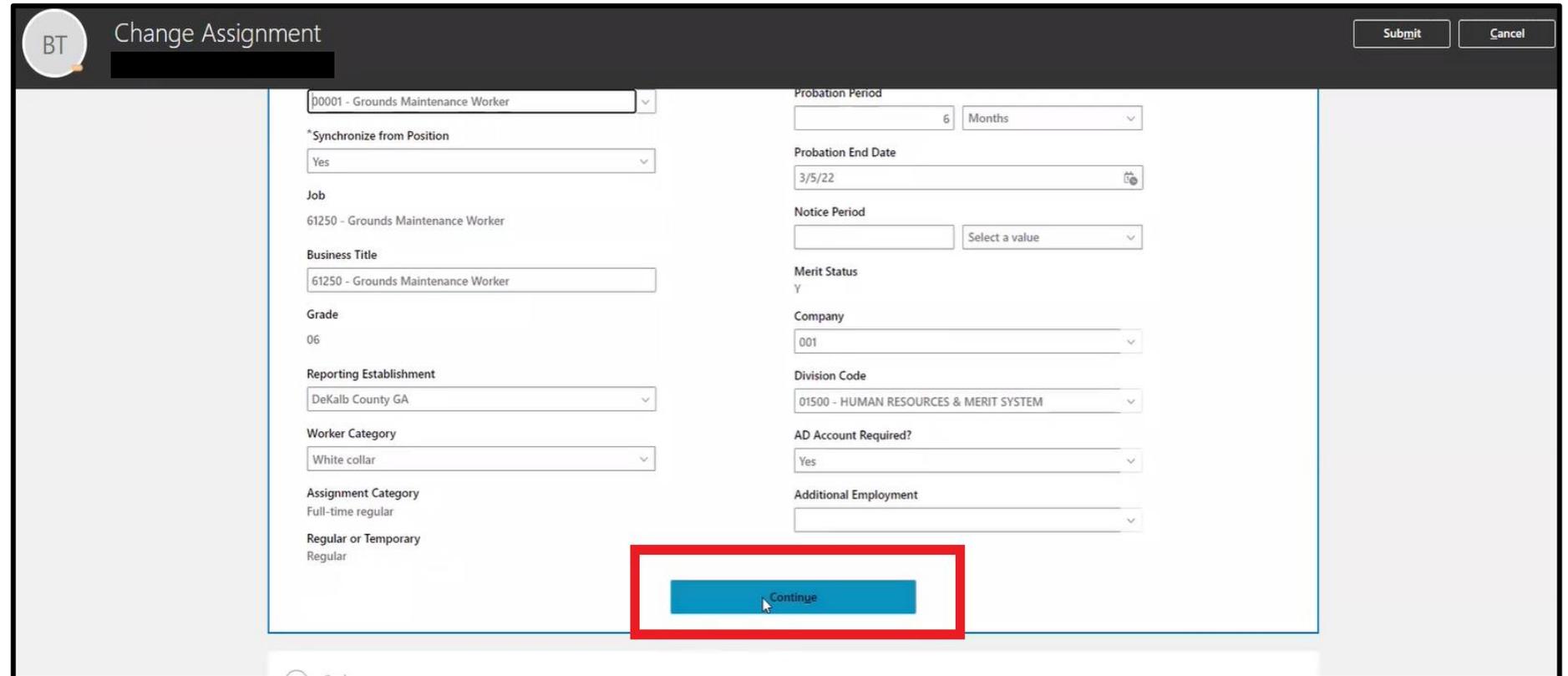
Select the **Yes** button

From the Position field, key in the Position name. All Position names start with a code and then the description. When entering the code, the system will intuitively provide a list of Positions that match the data that has been entered. Select the correct Position from the drop-down list

Manage Transfers: Demotion

10

Once all the necessary information has been completed under the Change Assignment section, select the Continue button



The screenshot shows a 'Change Assignment' form with the following fields and values:

- Job: 00001 - Grounds Maintenance Worker
- *Synchronize from Position: Yes
- Job: 61250 - Grounds Maintenance Worker
- Business Title: 61250 - Grounds Maintenance Worker
- Grade: 06
- Reporting Establishment: DeKalb County GA
- Worker Category: White collar
- Assignment Category: Full-time regular
- Regular or Temporary: Regular
- Probation Period: 6 Months
- Probation End Date: 3/5/22
- Notice Period: Select a value
- Merit Status: Y
- Company: 001
- Division Code: 01500 - HUMAN RESOURCES & MERIT SYSTEM
- AD Account Required?: Yes
- Additional Employment: (empty)

The 'Continue' button is highlighted with a red box.

Manage Transfers: Demotion

11

Make the appropriate adjustments to the **Basic Salary** and **Hazard Pay** fields and select the **Continue** button

BT Change Assignment Submit Cancel

2 Assignment Edit

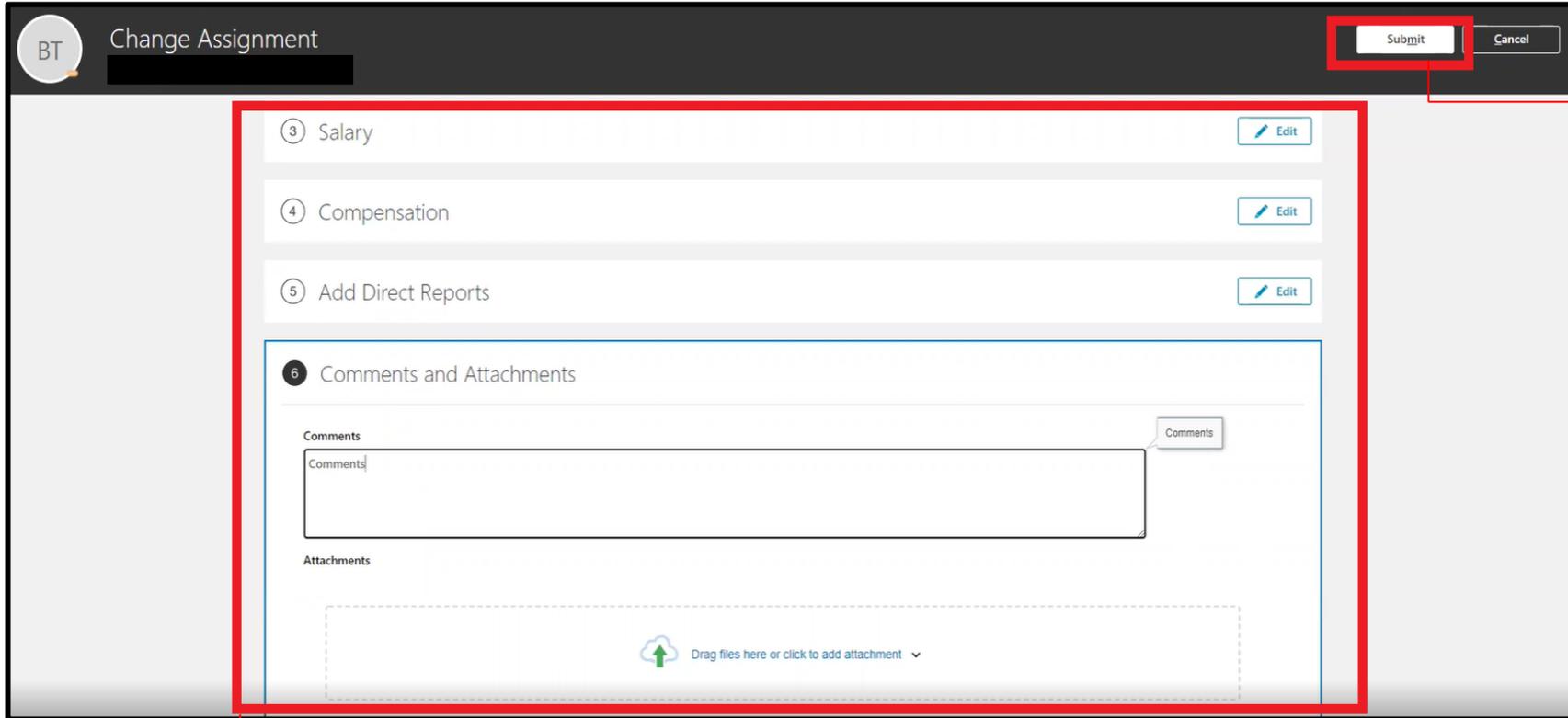
3 Salary

*Salary Basis
DC 40 Hourly Salary Basis

Component Name	Prior Amount	Adjustment Amount	Adjustment Percentage	Percentage	Amount	Annual Amount
Basic salary	25.00	-5.00	-20.00		20.00	41,600.00
Longevity	0.00	0.00			0.00	0.00
Paramedic (Basic salary)	2.00	-0.40	-20.00	8.00	1.60	3,328.00
Hazard Pay	10.00	-3.00	-30.00		7.00	14,560.00
Education	0.00	0.00			0.00	0.00
Shift Differential	0.00	0.00			0.00	0.00
Overall salary	37.00	-8.40	-22.70		28.60	59,488.00

Action Demotion Annual Salary 59,488.00 USD (FTE 1)
Action Reason Grade Name

Manage Transfers: Demotion



13

Select the
Submit button

12

Key in the appropriate details in the **Comments** section and add the required **Attachments** for the Approver, if necessary

Manage Work Relationship Lifecycle

Lesson 3: Manage Transfers

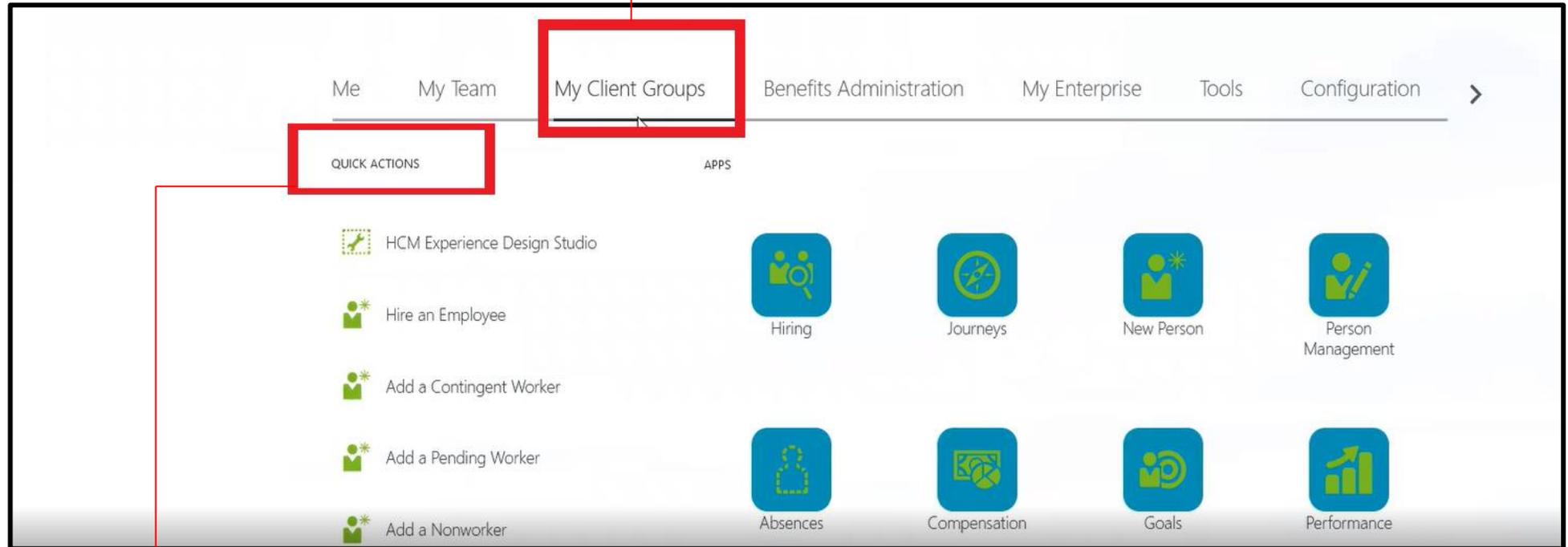
- **Section 3: Transfers**



Manage Transfers: Transfer

1

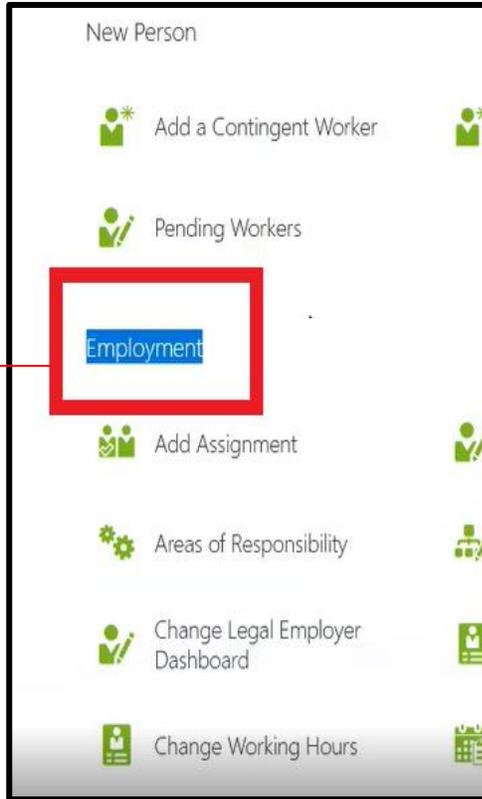
Select the My Client Groups tab



2

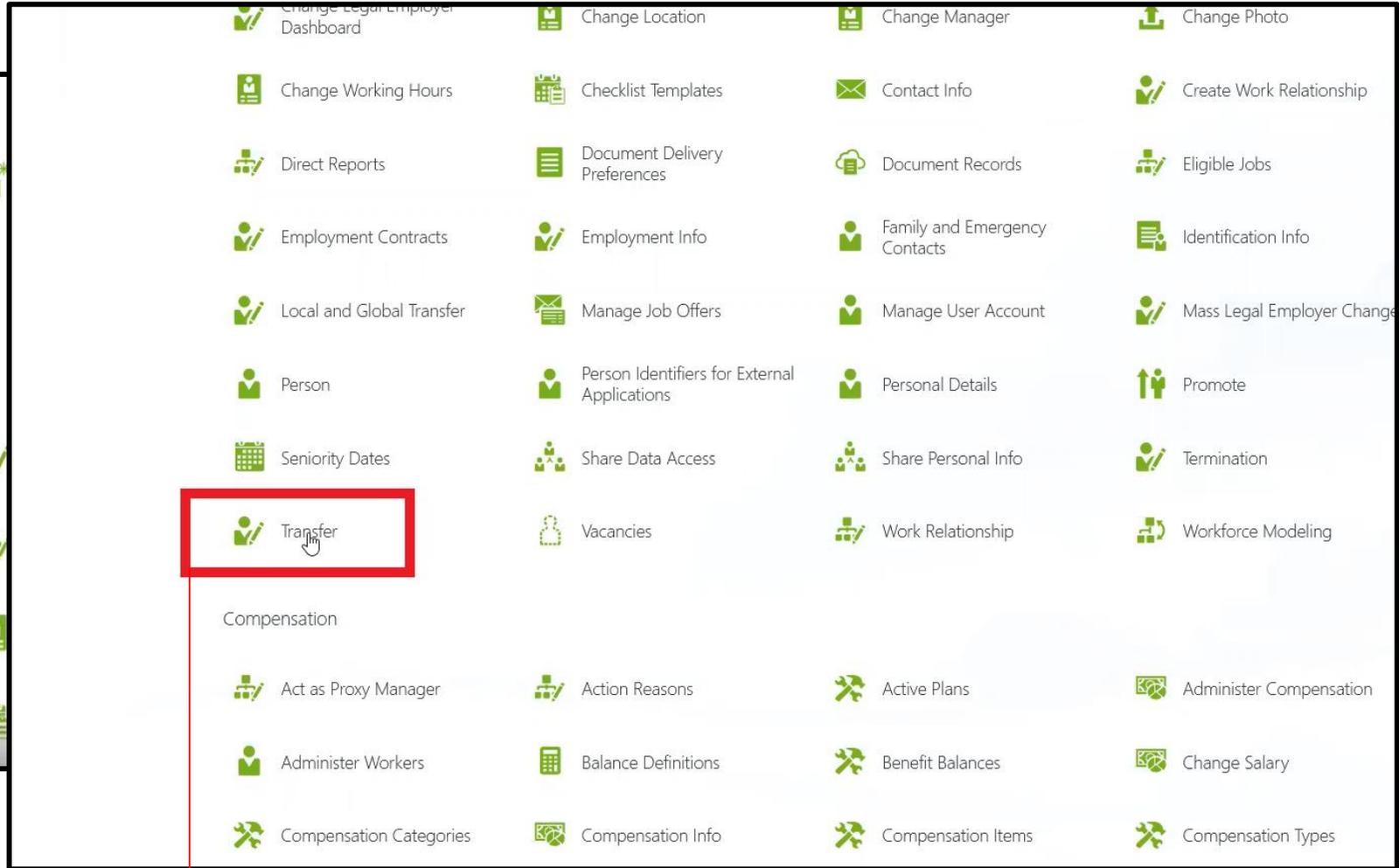
Select the Quick Actions section and select the Show More link from the drop-down list

Manage Transfers: Transfer



3

Locate the Employment section



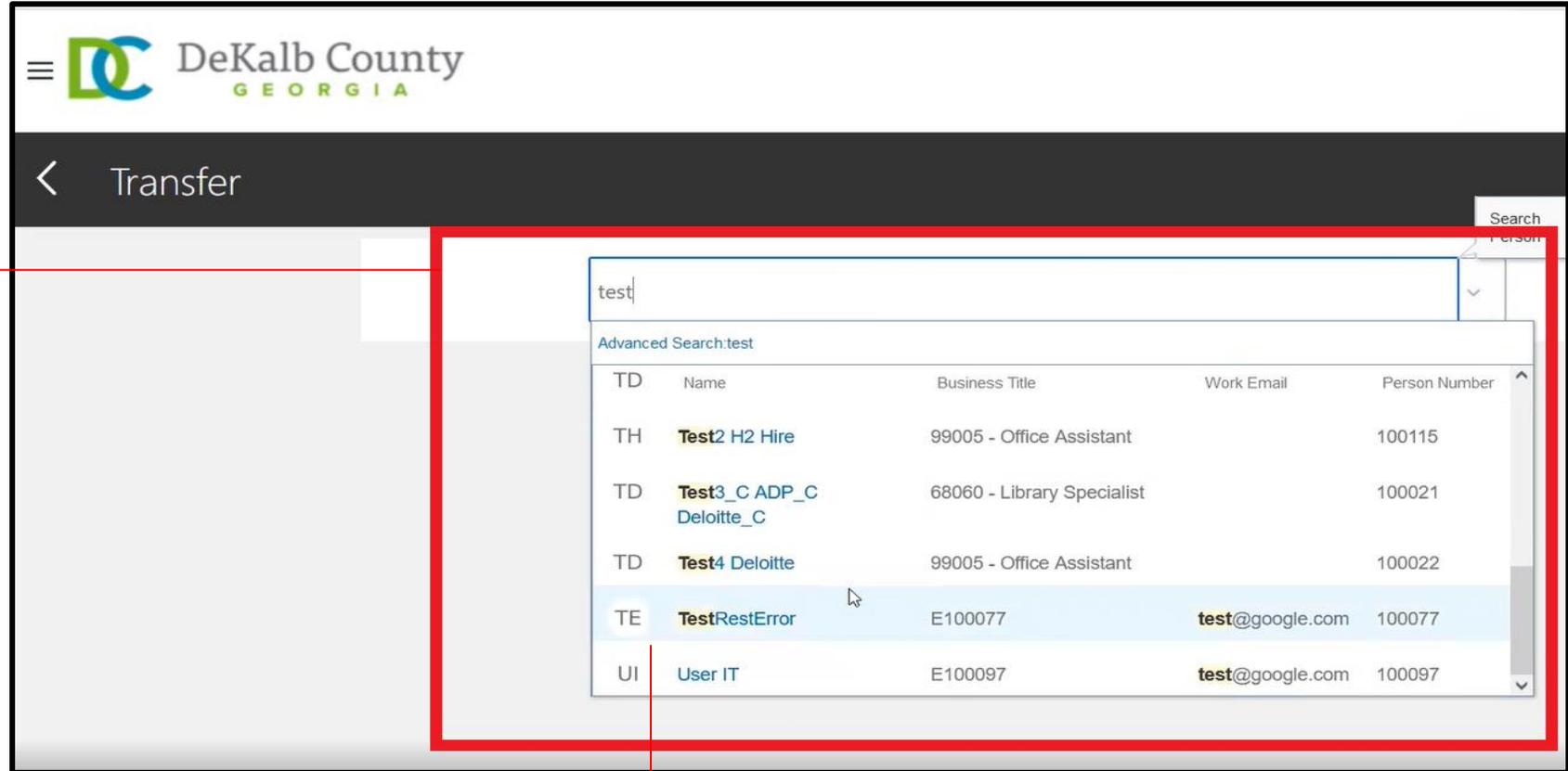
4

Select Transfer under the Employment section

Manage Transfers: Transfer

5

From the Search for a Person field, key in the Employee's Name or Employee Number



DeKalb County
GEORGIA

< Transfer

Search Person

test

Advanced Search: test

TD	Name	Business Title	Work Email	Person Number
TH	Test2 H2 Hire	99005 - Office Assistant		100115
TD	Test3_C ADP_C Deloitte_C	68060 - Library Specialist		100021
TD	Test4 Deloitte	99005 - Office Assistant		100022
TE	TestRestError	E100077	test@google.com	100077
UI	User IT	E100097	test@google.com	100097

6

Select the Employee from the returned results within the Recent Items list

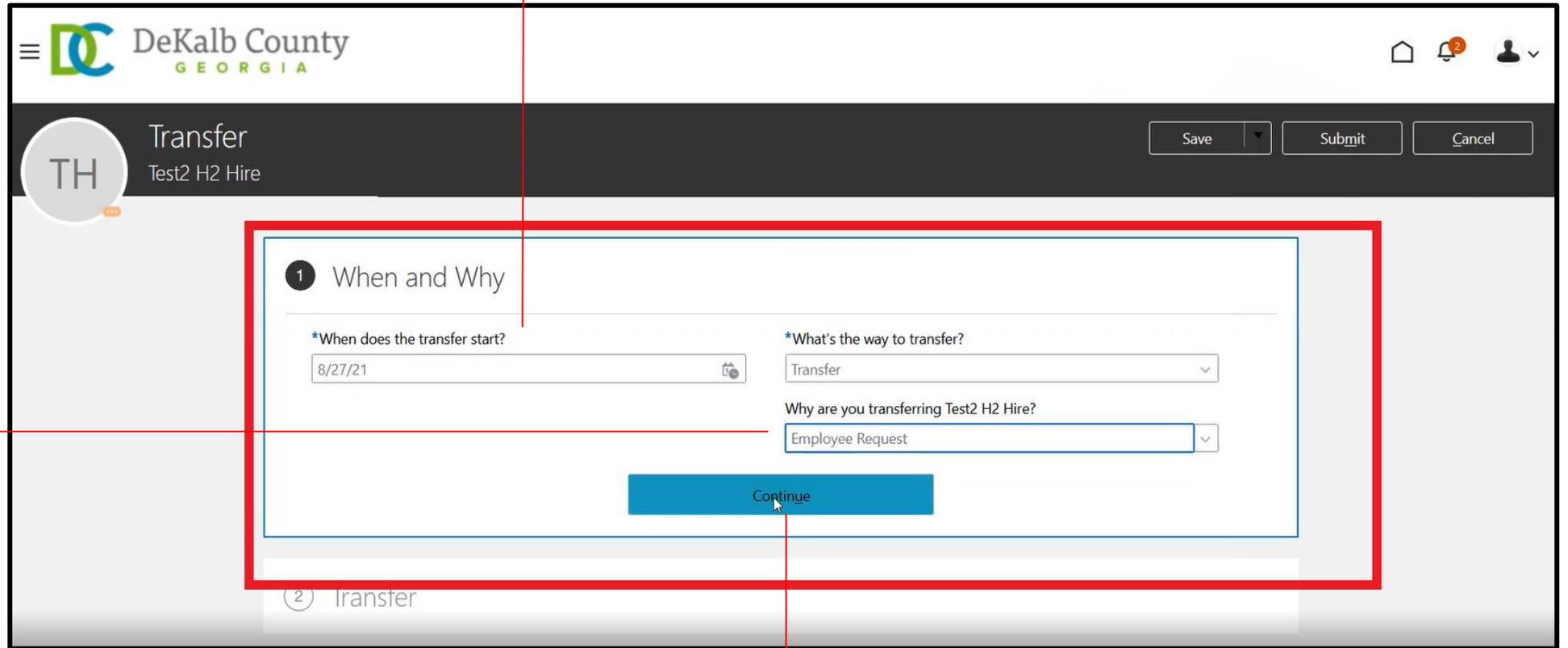
Manage Transfers: Transfer

7

Key in the appropriate **Transfer Start Date** in the **When does the transfer start?** field

8

Select the appropriate **Reason** for the **Transfer** from the **Why are you transferring?** drop-down list



7

Select the **Continue** button

Manage Transfers: Transfer

9

Select the **Position** name from the drop-down list

2 Transfer

*Assignment Status: Active - Payroll Eligible

Assignment Category: Full-time regular

Person Type: Employee

Regular or Temporary: Regular

*Business Unit: DC Business Unit

Full Time or Part Time: Full time

Primary Assignment: Yes

Hourly Paid or Salaried: Salaried

Projected End Date: m/d/yy

Standard Working Hours: 40 Weekly

FTE: 1

Position: 00006

Headcount: 1

Name	Code	Job Name	Department Name
00006 - Administrative Specialist	00006	99015 - Administrative Specialist	06901 - EXTENSION SERVICE - ADMINISTRATION

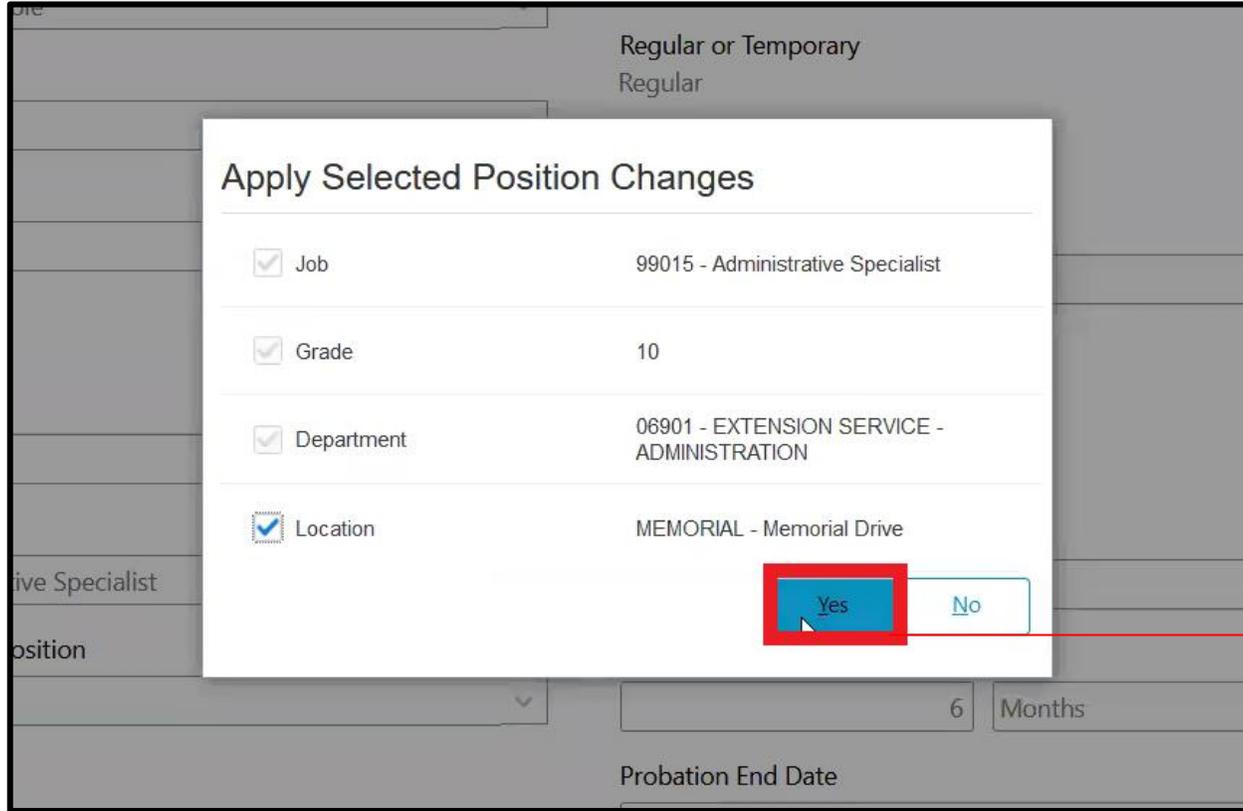
99005 - Office Assistant

Probation End Date: 2/22/22



From the Position field, key in the Position name. All Position names start with a code and then the description. When entering the code, the system will intuitively provide a list of Positions that match the data that has been entered. Select the correct Position from the drop-down list

Manage Transfers: Transfer



Regular or Temporary
Regular

Apply Selected Position Changes

<input checked="" type="checkbox"/> Job	99015 - Administrative Specialist
<input checked="" type="checkbox"/> Grade	10
<input checked="" type="checkbox"/> Department	06901 - EXTENSION SERVICE - ADMINISTRATION
<input checked="" type="checkbox"/> Location	MEMORIAL - Memorial Drive

Probation End Date

10

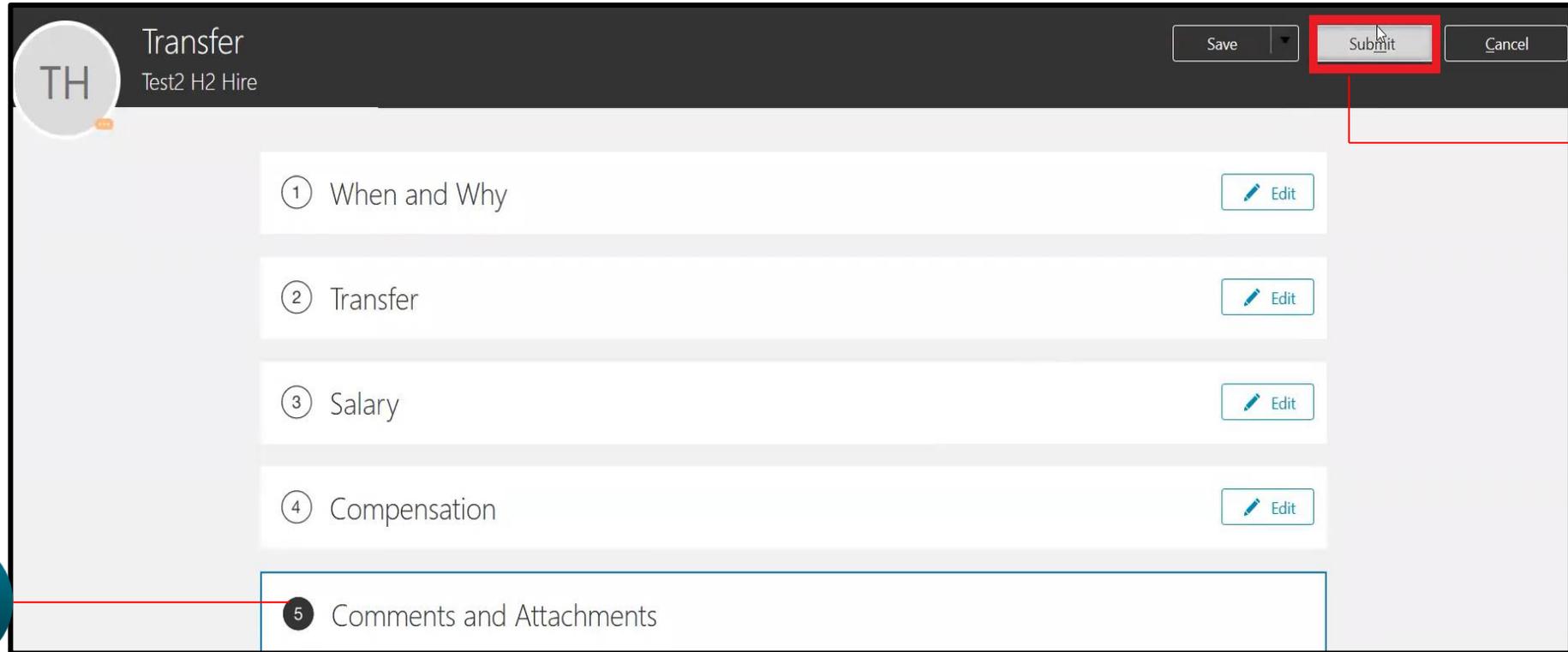
Select the **Yes** button in the pop-up window to apply the transfer changes

! Position synchronization is being used when selecting the Position. You will be prompted with a message to confirm the data elements that have been selected for synchronization. Select **Yes** on the pop-up window

Manage Transfers: Transfer

Key in the appropriate details in the **Comments** section and add the required **Attachments** for the **Approver**, if necessary

11



12

Select the **Submit** button



If there is a **Salary Change** based on the **Transfer**, edit Section 3 and 4 for Salary and Compensation. If no Salary Change is needed, these sections can be skipped

Manage Transfers Knowledge Check

The process in which an Employee is moved from one existing Position to a higher Position is known as:

A. Promotion

B. Job Change

C. Department Change

D. Location Change



Manage Transfers Knowledge Check

The process in which an Employee is moved from one existing Position to a higher Position is known as:

A. Promotion

B. Job Change

C. Department Change

D. Location Change



The correct answer is A. The process in which an Employee is moved from their current assigned Position to a higher Position is known as a Promotion

Manage Transfers Knowledge Check

Which of the following details must be updated in CV360 when promoting an Employee?

A. Salary

B. Promotion

C. Compensation

D. All of the above



Manage Transfers Knowledge Check

Which of the following details must be updated in CV360 when promoting an Employee?

A. Salary

B. Promotion

C. Compensation

D. All of the above



The correct answer is D. Salary, Promotion, and Compensation must be updated in CV360 when promoting an Employee

Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

- Demote and Transfer an Employee