

Manage Transfers

Quick Transfer

Lesson Objective:

Upon completion of the Manage Employment: Transfer an Employee lesson, you will be able to:

Objective

- Understand how to review and update key details required to complete an employee transfer



Managers and HR specialists identify the employee, confirm the transfer start date, and select the transfer method and transfer reason as part of the employment update.

The employee's new position is chosen, and assignment attributes are reviewed. Position synchronization controls whether assignment fields update automatically or can be changed manually.

Focus



- This lesson focuses on helping users understand how to process an employee transfer accurately within the system. It explains the key fields and decisions that influence the transfer such as selecting the correct transfer type, choosing the appropriate action reason, and identifying the right position for the employee.
- A part of the lesson also highlights how Position Synchronization affects assignment attributes, guiding users on when values can be updated manually versus when they are automatically controlled by position settings.
- Overall, the lesson prepares users to make correct selections, manage attribute behavior, and ensure that the transfer is completed without errors or unexpected field restrictions.

Navigation

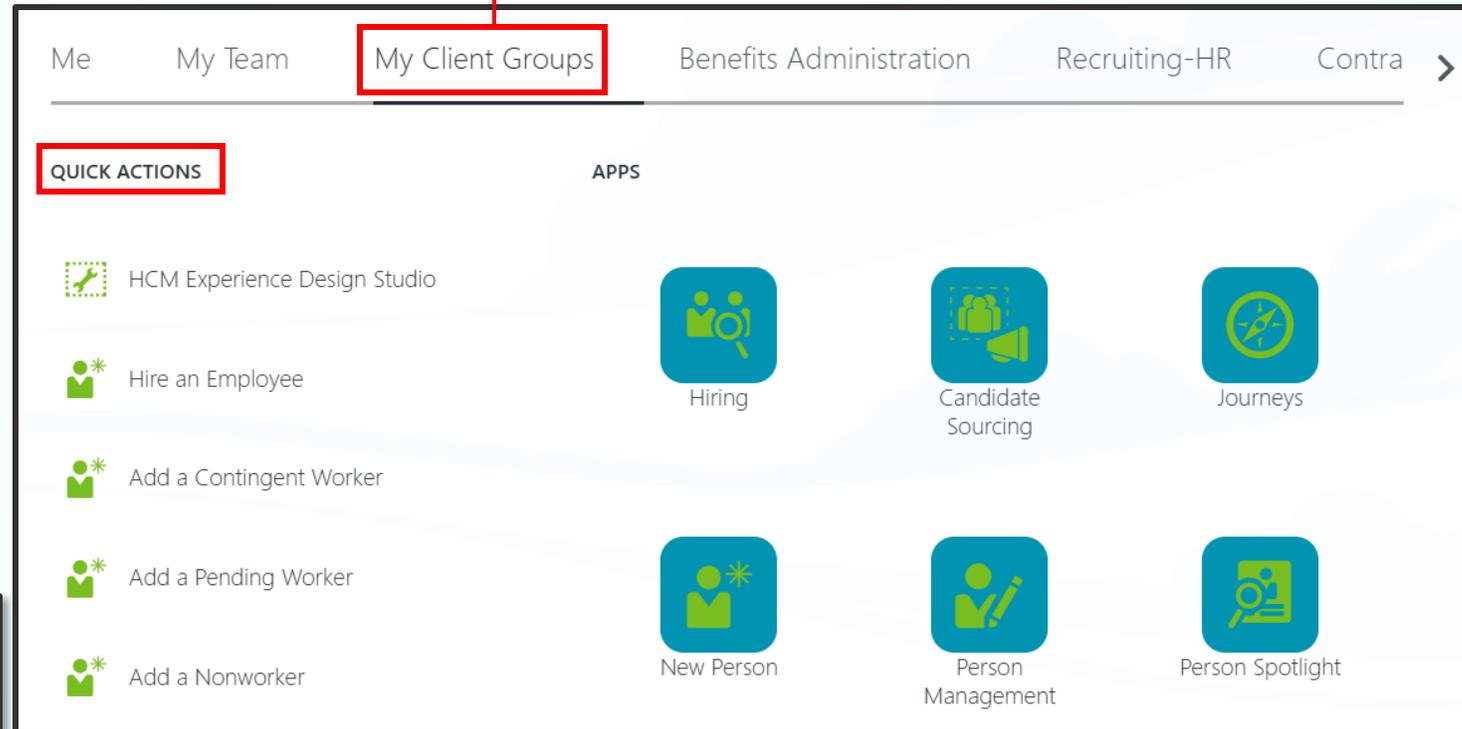


My Client Groups →
Quick Actions →
Show More →
Employment →
Transfer

Manage Transfers: Quick Transfer

1

Select the My Client Groups tab



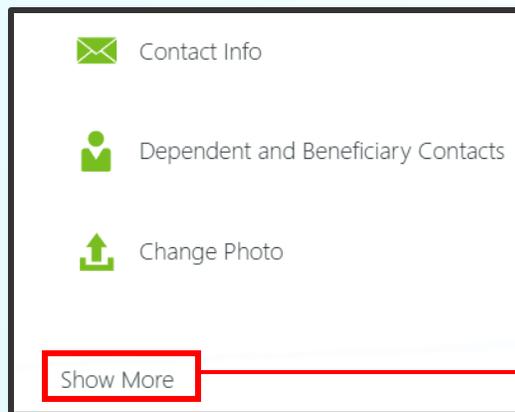
Me My Team **My Client Groups** Benefits Administration Recruiting-HR Contra >

QUICK ACTIONS

- HCM Experience Design Studio
- Hire an Employee
- Add a Contingent Worker
- Add a Pending Worker
- Add a Nonworker

APPS

- Hiring
- Candidate Sourcing
- Journeys
- New Person
- Person Management
- Person Spotlight



- Contact Info
- Dependent and Beneficiary Contacts
- Change Photo

Show More

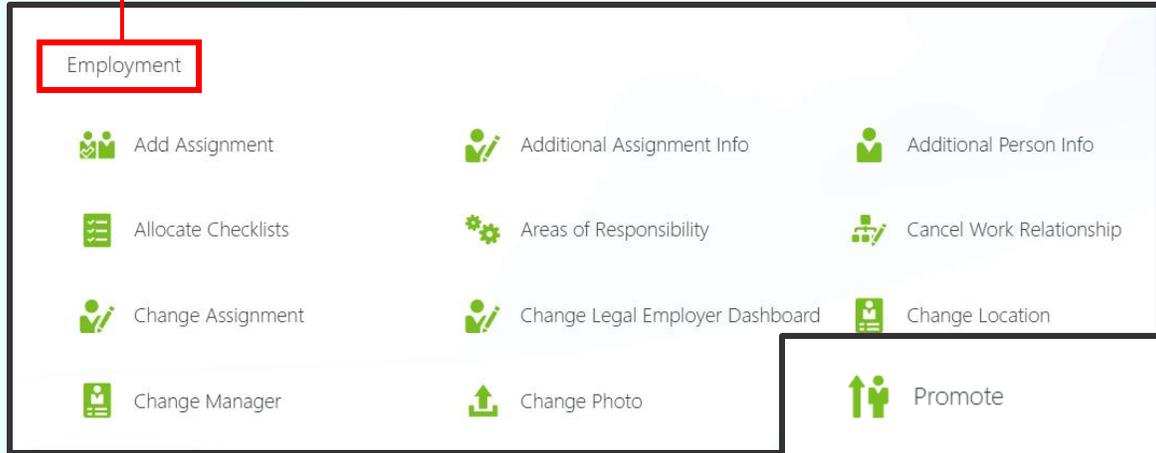
2

From the Quick Actions section, select the Show More link from the drop-down list

Manage Transfers: Quick Transfer

3

Locate the Employment section



Employment

- Add Assignment
- Additional Assignment Info
- Additional Person Info
- Allocate Checklists
- Areas of Responsibility
- Cancel Work Relationship
- Change Assignment
- Change Legal Employer Dashboard
- Change Location
- Change Manager
- Change Photo



- Promote
- Promote and Change Position
- Seniority Dates
- Share Data Access
- Terminate Employment
- Transfer
- Work Relationship
- Workforce Modeling

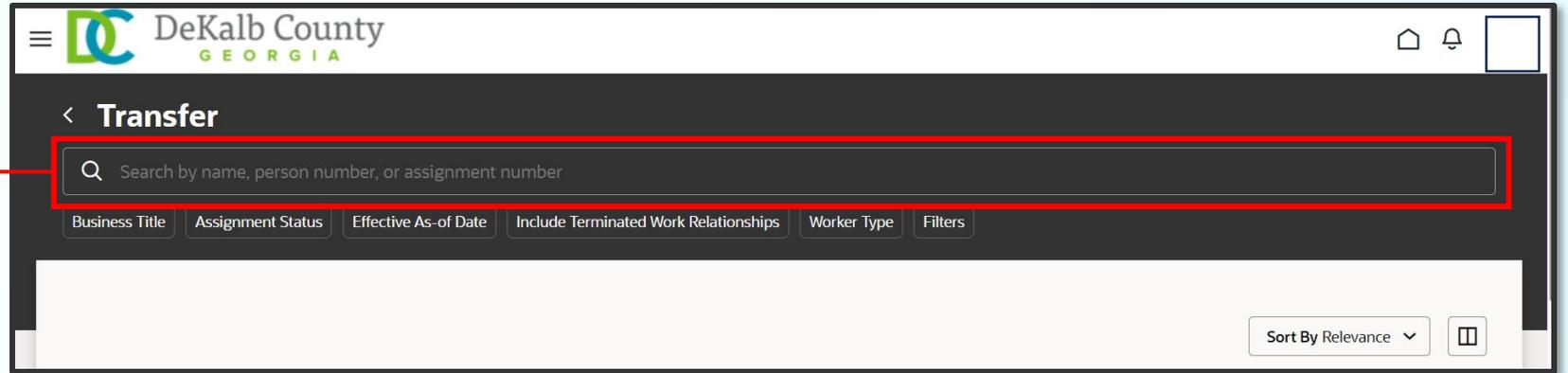
4

Select Transfer under the Employment section

Manage Transfers: Quick Transfer

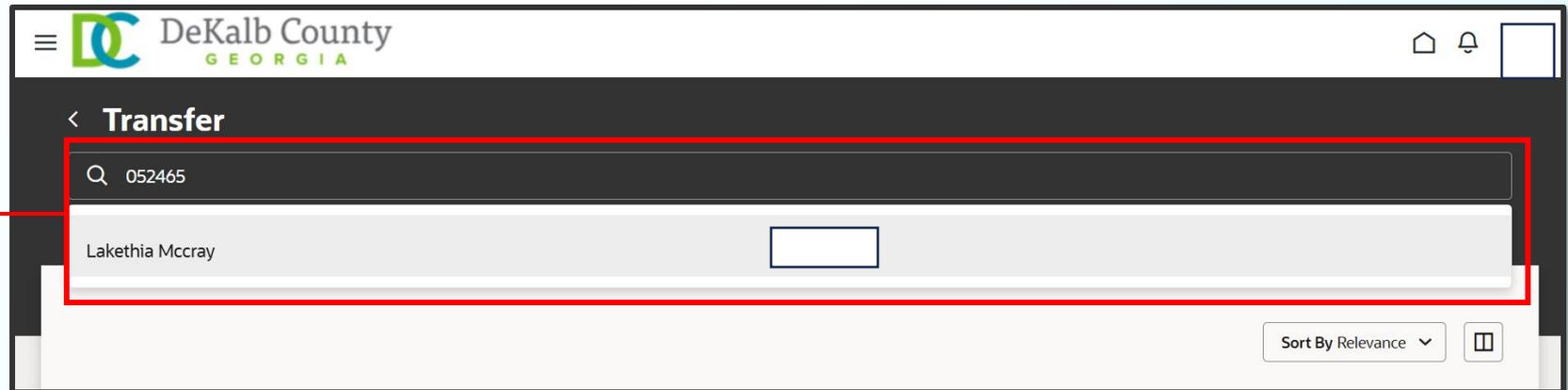
5

In the Search field, key in the employee's name, person number, or assignment number.



6

Select the Employee from the search result



Troubleshooting

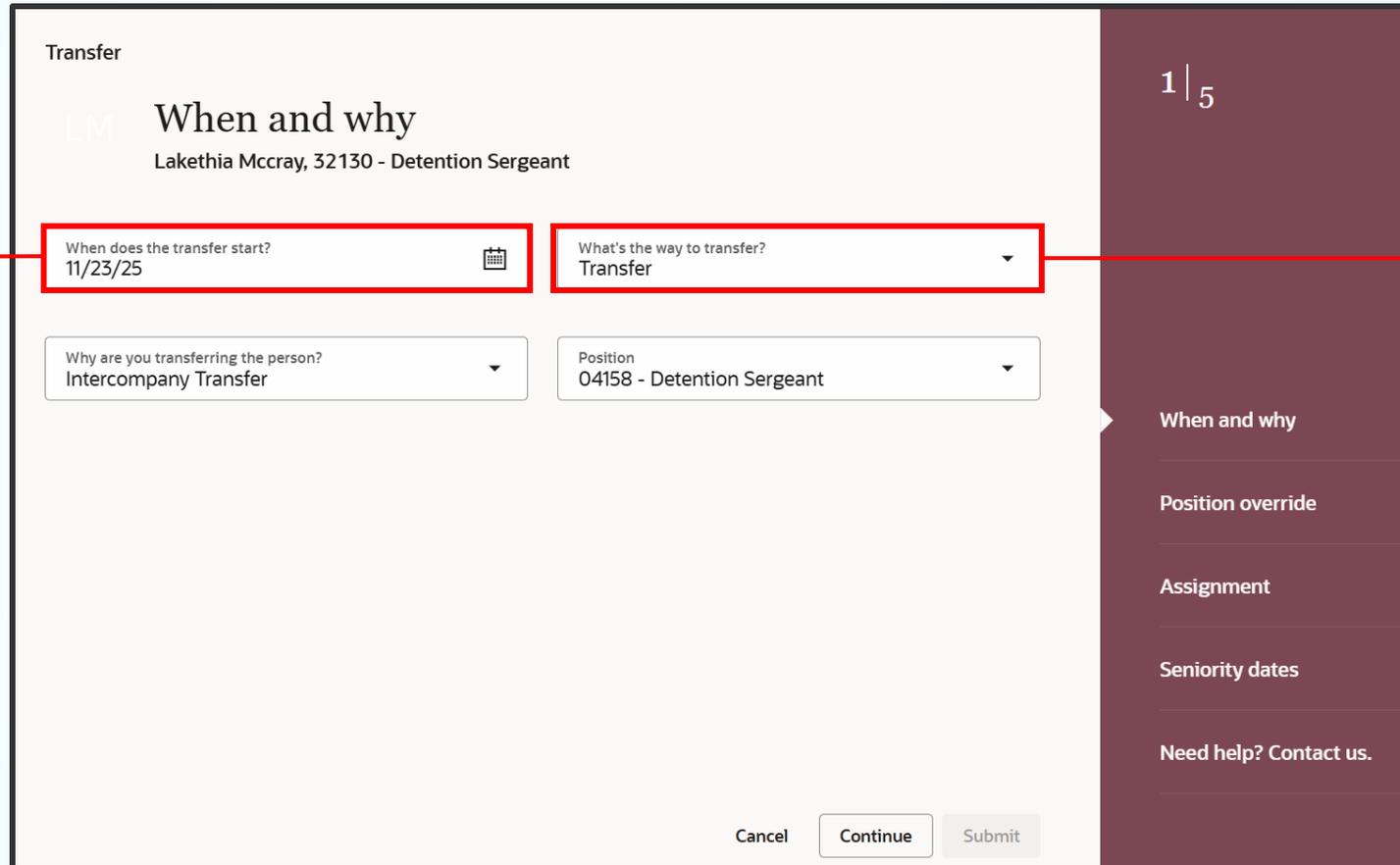


If the expected employee does not display in the search list, double-check the spelling of the name, or confirm that the correct person number or assignment number is being used. The system will only return exact or close matches based on these identifiers.

Manage Transfers: Quick Transfer

7

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



Transfer

LM When and why
Lakethia Mccray, 32130 - Detention Sergeant

When does the transfer start?
11/23/25

What's the way to transfer?
Transfer

Why are you transferring the person?
Intercompany Transfer

Position
04158 - Detention Sergeant

1 | 5

When and why

Position override

Assignment

Seniority dates

Need help? Contact us.

Cancel Continue Submit

8

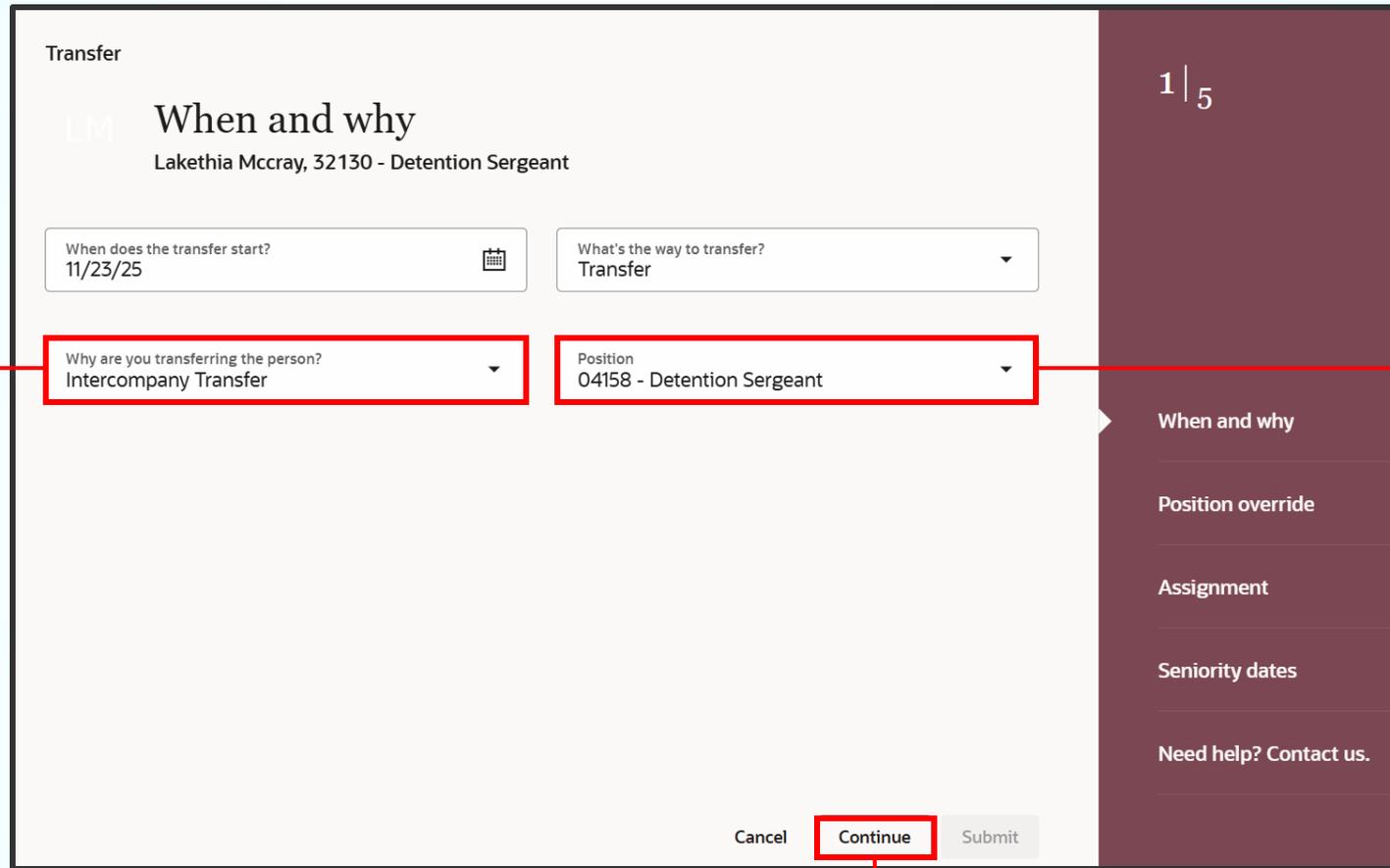
Select Transfer in the What's the way to transfer dropdown list

You may also select the calendar icon and choose the date from the calendar

Manage Transfers: Quick Transfer

9

Select the action reason in the **Why are you transferring the person?** field, for example, select **Intercompany Transfer** from the drop-down list.



Transfer

LM When and why
Lakethia Mccray, 32130 - Detention Sergeant

When does the transfer start?
11/23/25

What's the way to transfer?
Transfer

Why are you transferring the person?
Intercompany Transfer

Position
04158 - Detention Sergeant

1 | 5

When and why

Position override

Assignment

Seniority dates

Need help? Contact us.

Cancel Continue Submit

10

Select the position in the **Position** Field

11

Click on **Continue** to move to the next section

Manage Transfers: Quick Transfer

Transfer

2 | 5

Position override

Lakethia Mccray, 32130 - Detention Sergeant

Information

The attribute switch is disabled when position synchronization is enabled. Set it to off to retain the assignment value, or on to synchronize from the position.

Attributes	Position	Assignment
<input checked="" type="checkbox"/> Synchronize from Position	-	-
<input type="checkbox"/> Job	32130 - Detention Sergeant	32130 - Detention Sergeant

Cancel Continue Submit

When and why
Position override
Assignment
Seniority dates

Transfer

2 | 5

Position override

Lakethia Mccray, 32130 - Detention Sergeant

Information

The attribute switch is disabled when position synchronization is enabled. Set it to off to retain the assignment value, or on to synchronize from the position.

Attributes	Position	Assignment
<input type="checkbox"/> Synchronize from Position	-	-
<input checked="" type="checkbox"/> Job	32130 - Detention Sergeant	32130 - Detention Sergeant
<input checked="" type="checkbox"/> Grade	ENF2_E16	ENF2_E16
<input checked="" type="checkbox"/> Department	03220 - SHERIFF'S OFFICE - JAIL	03220 - SHERIFF'S OFFICE - JAIL

Need help? Contact us.

When and why
Position override
Assignment
Seniority dates

When position synchronization is **enabled** for an attribute, the switch is **disabled**.

- If position synchronization is **disabled** and you want to keep the assignment's current value, set the switch to **off**.
- If position synchronization is **disabled** and you want the assignment's value to match the value on the position, set the switch to **on**.

Manage Transfers: Quick Transfer

Transfer

2 | 5

LM Position override
Lakethia Mccray, 32130 - Detention Sergeant

i Information
The attribute switch is disabled when position synchronization is enabled. Set it to off to retain the assignment value, or on to synchronize from the position.

	Attributes	Position	Assignment
<input checked="" type="checkbox"/>	Synchronize from Position	-	-
<input type="checkbox"/>	Job	32130 - Detention Sergeant	32130 - Detention Sergeant

When and why

Position override

Assignment

Seniority dates

Cancel **Continue** Submit



Click **Continue** to move to the next section



The attribute switch is disabled when position synchronization is enabled. Set it to Off to retain the assignment value, or On to synchronize from the position.



When Synchronize from Position is set to Off, make sure the Location attribute is set to On to change the location on the Assignment page.

Manage Transfers: Quick Transfer

Transfer

Assignment

Lakethia Mccray, 32130 - Detention Sergeant

2 | 4

Person Type Employee	Business Unit DeKalb County
Position 04158 - Detention Sergeant	Job
Business Title 32130 - Detention Sergeant	Grade ENF2_E16
Department	Reporting Establishment DeKalb County GA
Location	Assignment Category Full-time regular
Regular or Temporary Regular	Full Time or Part Time Full time

When and why

Assignment

Seniority dates

Need help? Contact us.

Transfer

Assignment

Lakethia Mccray, 32130 - Detention Sergeant

2 | 4

Person Type Employee	Business Unit DeKalb County
Position 04158 - Detention Sergeant	Job
Business Title 32130 - Detention Sergeant	Grade ENF2_E16
Department	Reporting Establishment DeKalb County GA
Location	Assignment Category Full-time regular

When and why

Assignment

Seniority dates

Need help? Contact us.

Cancel Continue Submit



When Synchronize from Position is set to On, the fields are auto-populated and cannot be changed.

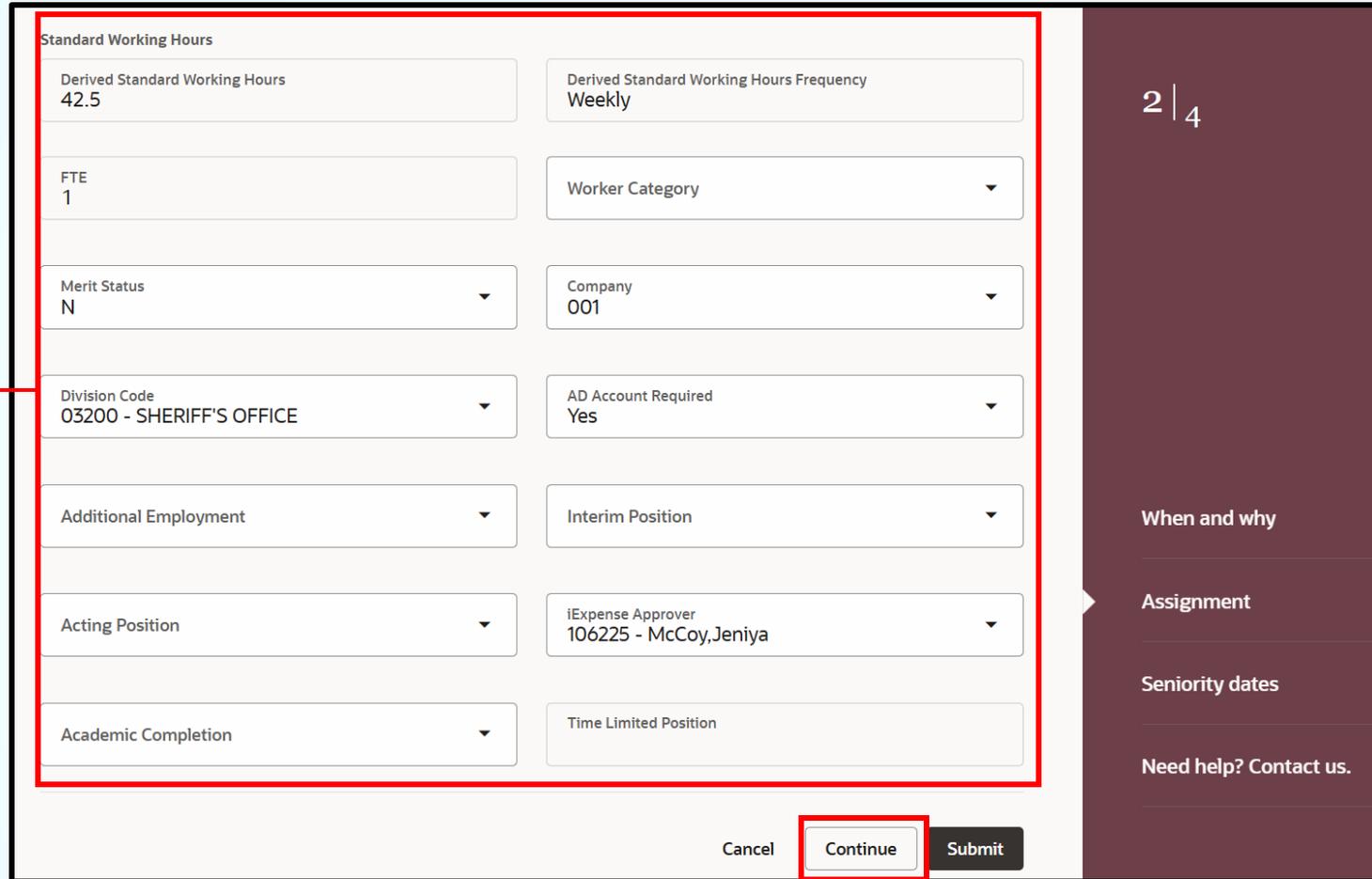


When Synchronize from Position is set to Off, attributes which are set to On can be changed on the Assignment page; otherwise, the fields are auto-populated and cannot be changed.

Manage Transfers: Quick Transfer

13

Update the other fields if required



Standard Working Hours	
Derived Standard Working Hours 42.5	Derived Standard Working Hours Frequency Weekly
FTE 1	Worker Category
Merit Status N	Company 001
Division Code 03200 - SHERIFF'S OFFICE	AD Account Required Yes
Additional Employment	Interim Position
Acting Position	iExpense Approver 106225 - McCoy, Jeniya
Academic Completion	Time Limited Position

Cancel Continue Submit

14

Click Continue to move to the next section

Manage Transfers: Quick Transfer

Transfer

LM Seniority dates
Lakethia Mccray, 32130 - Detention Sergeant

Length of service is the difference between seniority date and the current application date

DeKalb County GA Legal Employer	Seniority Date 5/26/15	Length of Service 10 Years 5 Months and 28 Days
DeKalb County GA Legal Employer	Seniority Date 5/26/15	Length of Service 10 Years 5 Months and 28 Days

Cancel Skip Continue **Submit**

3 | 4

When and why

Assignment

Seniority dates

Need help? Contact us.

15

Click **Submit** to complete the transaction

Conclusion



- We gained a clear understanding of the essential inputs required to initiate a transfer, including selecting the appropriate transfer type, action reason, and position.
- We learned how the system handles assignment attributes through position synchronization, including when fields remain editable and when they become auto-populated.
- We also understood how to handle situations where specific attributes, such as Location, require the correct switch settings to allow updates.
- By reviewing these points, the learner is now better prepared to complete a transfer accurately while avoiding common issues related to synchronization and field behavior.