Transfer to Existing Position
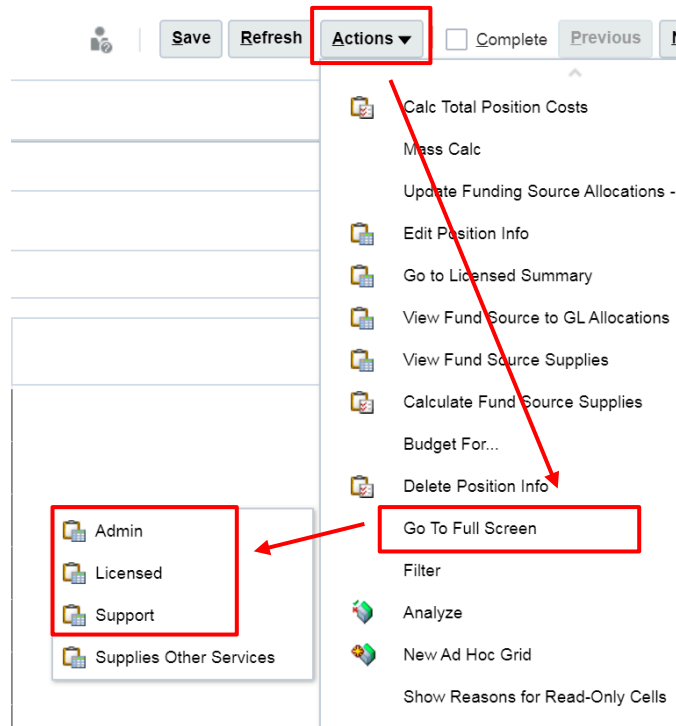
1. From the School Budget Form > click **Actions** > **Go To Full Screen** > select the desired tab (Admin/ **Licensed**):

2. Review the licensed page to identify the employee you want to transfer as well as identify the existing position to transfer that employee to:

3. Highlight the employee row > Right Click > Select **Transfer Position**:

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario	Version	Years	Entity
Budget	Working_SB	FY21	0340 Frias, Charles & PhyllisES

	Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage		
(context menu)		Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3
KDG 1 AM/1 PM1 - C1000 — P_10012220_1 KDG 1 AM/1 PM — Employee 1	Transfer Position		8/7/19		1.00	100.00		
Employee 2	Calc Total Position Costs		8/7/19		1.00	100.00		
Employee 3	Mass Calc ▶		8/7/19		1.00	100.00		
Employee 4	Update Funding Source Allocations ▶		8/7/19		1.00	100.00		
New Position 3 — Vacant	Edit Position Info				0.00	100.00		
GRADE 1 - C1010 — P_10012221_1 GRADE 1 — Employee 1	Go to Licensed Summary		8/7/19		1.00	100.00		
Employee 2	View Fund Source to GL Allocations		8/7/19		1.00	100.00		
P_10012222_1 GRADE 1 — Employee 1	View Fund Source Supplies		8/7/19		1.00	7.72	92.28	
Employee 2	Calculate Fund Source Supplies		8/7/19		1.00		100.00	
GRADE 2 - C1020 — P_10012223_1 GRADE 2 — Employee 1	Budget For... ▶		8/7/19		1.00	100.00		
Employee 2	Delete Position Info		8/7/19		1.00	100.00		
Employee 3	Go To Full Screen ▶		8/7/19		1.00	100.00		
Employee 4	Edit Position Detail		8/7/19		1.00	100.00		
P_10012224_1 GRADE 2 — Employee 1	Edit ▶		8/7/19		1.00		100.00	
Employee 2	Adjust ▶		8/7/19		1.00		100.00	
GRADE 3 - C1030 — P_10012225_1 GRADE 3 — Employee 1	Supporting Detail		8/7/19		1.00	100.00		
Employee 2	⌄		8/7/19		1.00	100.00		

4. A confirmation message appears to remind the User to make a note of the target **job/position/employee**. Click **OK** when ready to proceed.

Launch Confirmation Message ✕

Please confirm you have Job, Position and Employee# to make the transfer To and From. In the To Employee# field type the next number in line i.e. the position you are transferring to has employee 1 and 2, enter employee 3. TIP: Use Snipping Tool if needed

[OK] [Cancel]

5. Edit the Transfer Position prompts as needed. The *FROM* position information is on the left and pre-filled with the employee row you selected to transfer (from where the User originates the right-click action). The *TO* position information is on the right and needs to be updated with the identified **job/position/employee** in the step 3, then click Launch to complete the transfer process:

Transfer Position

[Launch] [Cancel]

* Select FROM Employee	"Employee 1"
* Select FROM Job Code	"C1020"
* Select FROM Position	"P_10012223_1"

* Select TO Employee	"Employee 3"
* Select TO Position	"P_10012224_1"
* Select TO JOB	"C1020"

Tip: Update the **TO** Employee with the next Employee # from the target row (i.e. if the target row has *Vacant* or *Employee 1,* then update the ***TO Employee*** field with "Employee 2".

6. When the process is done, the budget form will highlight the updated position rows in yellow. Note that the FROM position FTE is zero, the TO position created a row with the next Employee number in line (Employee 3):

Note: the <u>Assigned Position Number</u> fields will display the source position # for both the source and <u>target</u> rows. The target position will have the same funding of the <u>target Job/Position</u> with Employee 1.

7. Calculate each row: **right-click** the highlighted row > **select Calc Total Position Costs** (or to mass calculate: **Actions** > **Mass Calc** > **Calc Licensed Positions**):

8. When done the updated rows will no longer display in yellow highlight. Review the resulting *calculated* cost to ensure the process calculated the desired results: