Transfer

1.	Before beginning to process a transfer, be sure to make note of the **position number** to which the employee will be assigned.
2.	Click the **Administer Workforce** link. Administer Workforce
3.	Click the **Administer Workforce (USF)** link. Administer Workforce (USF)
4.	Click the **Use** link. Use
5.	Click the **Hire** link. Hire
6.	NOTE: Do not change the **Empl Rcd Nbr**. It must remain "0." Click the **Add** button. Add
7.	In the **Actual Effective Date** field, type the date the appointment is to become effective in the system. Enter the desired information into the **Actual Effective Date** field. Enter a valid value, e.g. "**12/04/2003**".
8.	Click in the ***Reason Code** field.
9.	Enter "XFR" (Transfer) in the **Reason Code** field. Enter the desired information into the ***Reason Code** field. Enter a valid value, e.g. "**XFR**".
10.	Click in the **NOA Code** field.
11.	In the **NOA (Nature of Action) Code** field, enter "130." Enter the desired information into the **NOA Code** field. Enter a valid value, e.g. "**130**".
12.	Click in the **NOA Ext** field.
13.	Enter the desired information into the **NOA Ext** field. Enter a valid value, e.g. "**0**".
14.	Enter the applicable authority in the **Authority (1)** field. Click in the **Authority (1)** field.
15.	Enter the desired information into the **Authority (1)** field. Enter a valid value, e.g. "**ABT**".
16.	In the **PAR Request #** field, enter the applicable PAR Request number. Click in the **PAR Request#** field.

17.	NOTE: This field is not required but can be used for PAR request tracking purposes. Enter the desired information into the **PAR Request#** field. Enter a valid value, e.g. "**0003790024**".
18.	Click the **PAR Remarks** link. PAR Remarks
19.	Enter the applicable Remark CD (Code) and tab out of the field to see the text of the remark. Enter the desired information into the **Remark CD** field. Enter a valid value, e.g. "**A01**".
20.	Press **[Tab]**.
21.	Click the **Ok** button. OK
22.	Click the **Tracking Data** link. Tracking Data
23.	Enter any necessary Comment or review comments made by management. NOTE: There is a 30 character limit in the **Comment** field. Click the **Ok** button. OK
24.	Click the **Personal Data** tab. Personal Data
25.	Click the **Prefix** list.
26.	Select the Prefix to the employee's name from the dropdown menu. MR
27.	Press **[Tab]**.
28.	Enter the desired information into the **First Name** field. Enter a valid value, e.g. "**NATHAN**".
29.	In the **Middle** field enter the employee's middle name or middle initial, as applicable. Click in the **Last Name** field.
30.	Enter the desired information into the **Last Name** field. Enter a valid value, e.g. "**JONES**".
31.	Enter the **Suffix** (i.e. Jr, Sr) for the employee, if applicable. Select the appropriate radio button for **Gender**. Click the **Male** option.
32.	Enter the **Citizenship Status**. Click the **Lookup Citizenship Status** button.
33.	Click the **Lookup** button. Lookup

34.	Select the desired Citizenship Status. NOTE: The default is "1" for US citizen. U.S. Citizen
35.	Click the **Ethnic Group** list.
36.	Select the **Ethnic Group** from the dropdown menu. NOTE: Upon save, this field will diasappear from view. **orgin** White, not of Hispanic origin
37.	Click in the ***Date of Birth** field.
38.	Enter the desired information into the ***Date of Birth** field. Enter a valid value, e.g. "**06/07/1966**".
39.	Scroll as necessary to view the rest of the page. Click the horizontal scrollbar.
40.	Enter the **Disability Code** if applicable. NOTE: This field will default to "05," i.e., "No Handicap." NOTE: Upon save, this field will disappear from view.
41.	Click the **Address Information** link. Address Information
42.	- Confirm the default country of USA or enter another country. - Enter the address in the **Address 1** field. NOTE: The **Address 1** field is restricted to 25 characters. - Enter the **City**. - Enter the **Postal** (Zip) code. - Enter the **State**. To save time, these steps will be completed for you.
43.	Click the **Ok** button. OK
44.	Click the **Veterans Info** link. NOTE: If there is no Veterans information, you may skip this step. The **Veterans Info** defaults to None. Veterans Info
45.	Change the **Veterans Preference** from the None default using the dropdown menu, if applicable. - Select the **Veterans Status** from the dropdown menu. - Select the **Uniformed Service** or **Public Health Service** from the dropdown menu. - Select the **Military Separation Status** from the dropdown menu. - Select the **Military Grade** from the dropdown menu.

46.	- Enter the **Military Service Start Date**. - Enter the Military Service **End Date**. - Select the **Reserve Category** from the dropdown menu. - Enter the **Creditable Military Service** (months/year). - Confirm the status of the **Veterans Preference RIF** checkbox. To save time, these steps will be completed for you.
47.	Click the **Ok** button. OK
48.	Click the **Education Details** link. Education Details
49.	- Enter the Degree the employee earned in the **Degree** field. - In the **Year Earned/Expected** field, enter the year of degree completion . - Enter the employee's **GPA** if applicable. - Confirm the status of the **Graduated** checkbox, if known. - Enter the **Major Code**. **Note:** The Major Codes are the OPM values. To save time, these steps will be completed for you.
50.	Click the **Ok** button. OK
51.	Scroll as necessary to view the rest of the page. Click the horizontal scrollbar.
52.	Confirm the default of "USA" or modify the **Country** field, if applicable. Confirm the default of "PR" or modify the **Type/Description** field. NOTE: The **Type/Description** field indicates the type of National ID. "PR" is used for SSN.
53.	Click in the **National ID** field.
54.	Enter the **National ID**, which is the employee's Social Security Number (SSN). Enter the desired information into the **National ID** field. Enter a valid value, e.g. "**105668735**".
55.	Scroll as necessary to view the rest of the page. Click the horizontal scrollbar.
56.	Click the **Job** tab. Job
57.	Enter the desired information into the **Position** field. Enter a valid value, e.g. "**00000057**".
58.	The **Position Override** checkbox will allow the user to modify the position management data for this employee. This function is to be used on a limited basis for extreme EXCEPTIONS. If the box is checked, the employee's data must be maintained manually, and automatic action functionality will be disabled for this employee record.
59.	Click in the **Transferred From Agency** field.

60.	Enter the desired information into the **Transferred From Agency** field. Enter a valid value, e.g. "**AG**".
61.	Click the **Benefits/FEHB Data** link. Benefits/FEHB Data
62.	Select the appropriate radio button to indicate FEHB Eligibility. If the employee is Not Eligible for FEHB, enter the date on which they will qualify for the benefit in the **FEHB Date** field. Click in the **FEHB Date** field.
63.	Enter the desired information into the **FEHB Date** field. Enter a valid value, e.g. "**12/05/2004**".
64.	Click the **Ok** button. OK
65.	Click the **FEGLI/Retirement/FICA** link. FEGLI/Retirement/FICA
66.	- Confirm the default of "**C0**" ("Basic Only") or modify the **FEGLI Code**. - Confirm the default of "**K**" ("FERS and FICA") or modify the **Retirement Plan**. - Select the **FERS Coverage** from the dropdown menu, if applicable. - Select the **Previous Retirement Coverage** from the dropdown menu, if applicable. - Confirm the default of "**9**" (Not Applicable) or modify the **Annuitant Indicator**. - Enter the **Annuity Commencement Date**, if applicable.
67.	For **CSRS Frozen Service**, enter the appropriate service time, if applicable. Confirm the default of "N" or modify the **FICA Status-Employee** field.
68.	Click the **Ok** button. OK
69.	Click the **Position** tab. Position
70.	Click the **SF-113G Ceiling** checkbox, if applicable. Click the **SF-113G Ceiling** option. SF-113G Ceiling
71.	Click the **Employee Classification** list.
72.	Select the **Employee Classification** from the dropdown menu, if applicable. NOTE: This field is only used for Indian Preference.
73.	Click the **Type Appt** list. Career (Competitive Svc Perm)
74.	Select the **Type Appt** from the dropdown menu. Career-Conditional (Comp Perm)

75.	Click the ***Job Indicator** list. Primary
76.	Select the **Job Indicator** from the dropdown menu. Primary
77.	Click the **Compensation** tab. Compensation
78.	Click the **Pay Rate Determinant** list. Regular Rate
79.	Select the appropriate **Pay Rate Determinant** from the drop-down menu. Retained Grade - Diff Posn
80.	Double-click in the **Step** field. 0
81.	NOTE: For those employees that do not have a step,"0" should be entered in the **Step** field. Enter the desired information into the **Step** field. Enter a valid value, e.g. "**0**".
82.	If the employee is an annuitant, enter the **Annuity Offset Amount**. This amount should be entered based on the employee's compensation frequency. If the employee's compensation frequency is annual, the annuity offset amount should be an annual amount.
83.	Click the **Expected Pay** link. Expected Pay
84.	Scroll as necessary to view the rest of the page. Click the horizontal scrollbar.
85.	Verify the read-only information. Click the **Ok** button. OK
86.	Click the **Accounting Info** link. Accounting Info
87.	Enter the CAN in the **Account Code** field. Click in the **Account Code** field.
88.	Enter the desired information into the **Account Code** field. Enter a valid value, e.g. "**1921024R**".
89.	Click the **Ok** button. OK
90.	Click the **Employment 1** tab. Employment 1
91.	Click the **Filling Position Data** link. Filling Position Data

92.	Click the **Position Filled By** list. Not Applicable
93.	From the dropdown menu, select the correct method by which the position has been filled. Outside Dept, Comp Prom
94.	Click the **Ok** button. OK
95.	Click the **Appt Data** link. Appt Data
96.	Click the **Special Employment Program** list. Not Applicable
97.	From the dropdown menu, select the **Special Employment Program**, if applicable. NOTE: This is where the Special Program ID would be entered. SES Candidate Development
98.	NOTE: **Welfare to Work** should not be captured here. Click the **Ok** button. OK
99.	In the **Service Computation Dates** section, - Modify the **Leave** date, if applicable. - Modify the **RIF (Reduction in Force)** date, if applicable. - Enter the **LEO (Law Enforcement Officer)** date, if applicable. - Modify the **Retire** date, if applicable. - Modify the **TSP (Thrift Savings Plan)** date, if applicable. - Modify the **Sev (Severance) Pay** date, if applicable.
100.	- Enter the **Conv (Conversion) Begin Date**, if applicable. - Enter the **Career Conv Date**, if applicable. - Enter the **Career-Cond Conv Date**, if applicable.
101.	The **WGI Status** will default to "Waiting." NOTE: The **WGI Due Date** will populate automatically. THIS IS WGI DUE DATE NOT WGI START DATE. Modify the **LEI Date**, if applicable.
102.	Click the **Employment 2** tab. Employment 2
103.	Enter the employee's **Union Code**, if applicable. NOTE: The following fields default based on the position selected: - **Bargaining Unit** - **Reports to Position**
104.	Confirm or enter the appropriate **Reports To Position** for the employee. Click in the **Reports To Position** field.
105.	Enter the desired information into the **Reports To Position** field. Enter a valid value, e.g. "**00000028**".

106.	Click the **Tenure** list.
107.	In the **Tenure** field, select the appropriate type of tenure. Permanent
108.	Enter the employee's compensation area and level in the **Comp Level** field as applicable. NOTE: Users should no longer enter any data related to the Comp Area Field. The entire Comp Level code should be entered into the **Comp Level** field only.
109.	In the **Probation Date** field, enter the completion date for the employee's probation. NOTE: If this employee is a SES or Supervisor/Manager enter the probation completion date in the appropriate field.
110.	As applicable, enter the employee security information in the **Security Info** hyperlink.
111.	Return to the **Data Control** tab and change the **PAR Status** according to your role. Click the **Data Control** tab. Data Control
112.	NOTE: Document the employee identification number (EMPLID) to facilitate processing benefits and pay documents. Click the **Save** button. Save
113.	After the Transfer is completed, you must ensure that the address information is transmitted to Payroll. In order to do this, process a Data Change action to capture the address information you entered during the Hire process. **End of Procedure.**