

Contents

Overview 1

Workday Instructions for Transfer 1

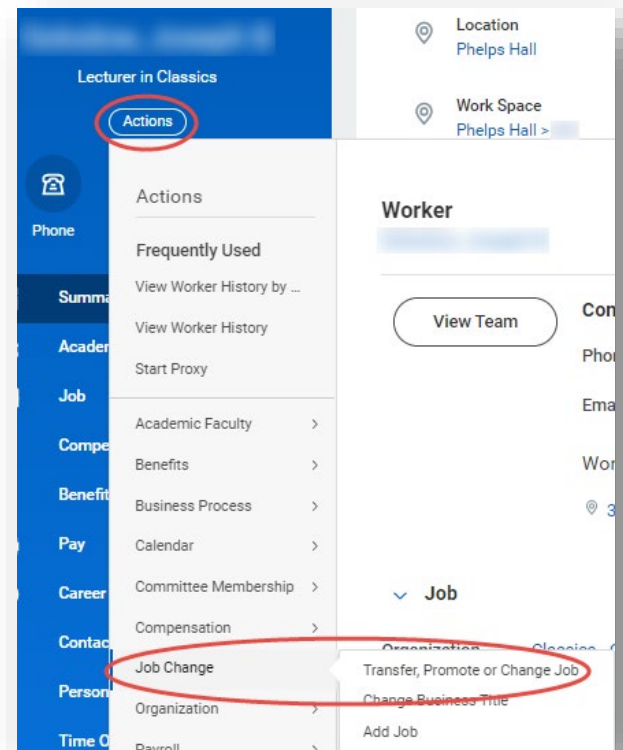
Overview

Faculty who are currently active but are not being rehired in the following year need to be transferred to Summer Session. The home department will need to initiate the transfer using the instructions below.

Note: A similar transfer will need to happen at the end of the summer if by some chance the faculty member is rehired.

Workday Instructions for Transfer

1. Search for the faculty member in Workday.
2. Pull up the faculty member’s record and click on the Actions button, hover over Job Change, then select **Transfer, Promote, or Change Job**.



3. In the *Start* window, enter the information as displayed in the example to the right.
 - a. When do you want this change to take effect? – Enter the effective date of the transfer.
 - b. Why are you making this change? = Transfer – Change Manager
 - c. Who will be the manager after this change? = Spear, Sarah E.
 - d. Which team will this person be on after this change? = Yale College – Summer Session (Spear, Sarah E.)
 - e. Where will this person be located after this change? = Whitney Ave, 55
4. Click **Start**.

Start

Start Details

When do you want this change to take effect? *

07/01/2023

Why are you making this change? *

× Transfer - Change Manager

Who will be the manager after this change?

× Spear, Sara E. ...

Which team will this person be on after this change?

× Yale College - Summer Session (Spear, Sara E.) ...

Where will this person be located after this change? *

× Whitney Ave, 55 ...

Do you want to use the next pay period?

5. Under **What do you want to do with the opening left on your team?**, select **Close this headcount**.
6. Click **Next**.
7. In the comment field in the final review window enter the following statement, “Transferring to teach in Summer Session per request from ...” and enter the name of the Summer Session contact.
8. Click **Submit**.

Move ▾

Opening

What do you want to do with the opening left on your team? *

Close this headcount ▾

Is this position available for overlap?