

ePAR – Transfer Detail Guide

What is a Transfer ePAR?

- Transfer ePAR is used when an employee is transferring from one UTD department to another
 - Should be entered by the department that the employee is **transferring to**
- Transfer ePAR CANNOT:
 - Job information is changing but department is not – use Job Attribute Change ePAR

Enter A New ePAR

Gemini for Departments > Personnel Info/Action > ePAR Action

The screenshot displays the Gemini HCM Menu interface. On the left, a sidebar lists various menu items, with 'ePAR Actions' highlighted and enclosed in a red rectangular box. The main content area is titled 'ePAR Actions' and features a 'Find an Existing Value' section. This section includes a search criteria dropdown, a 'Recent Searches' section with a 'Choose from recent searches' dropdown, and a 'Saved Searches' section with a 'Choose from saved searches' dropdown. A red rectangular box highlights the 'Add a New Value' button in the top right corner of the main content area. Below the search sections, there are several input fields for search criteria: 'Request ID' (begins with), 'Empl ID' (begins with), 'Name' (begins with), 'Department' (begins with), 'Request Date' (with a date picker), 'Action' (with a dropdown), and 'Status' (with a dropdown).

Select Transfer

Personnel Action Request

ePAR

Action

*Action

Change Funding Sources

End Assignment

Job Attribute Change

Leave of Absence

New Appointment

Retirement

Return From LOA

Supplemental Pay

Termination

Transfer

Status

Request ID

Request Dt 11/07/2023

Explain Action

▼ Submit

Entered

Name

Phone

Email

Secondary Contact

Name

Phone

Add

Enter Employee ID

Transfer

ePAR

Employee Information

Empl ID

Name

Emprcd

0

Job

DeptID

Pos

Action

*Action

Transfer

Status

Request ID

Request Dt 11/07/2023

Explain Action

Attachments

Eff Date 11/07/2023

Current

Position Nbr

Proposed

Position Nbr

If you don't know the employee ID, click the magnifying glass to search by name

Look Up Emp

Empl ID begins with

Last Name begins with

First Name begins with

Search

Clear

Cancel

Basic Lookup

Search Results

View 100

| Empl ID | Display Name | Job Code | Job Title | Department |
|---------|---------------|----------|------------------------------|------------|
| | Charles Brown | C06342 | Senior Public Safety Officer | 506000 |
| | Jessie Brown | S00634 | Research Assistant | 302500 |
| | Brandon Brown | S09997 | Student Assistant | 601090 |

Current Appointment Details

- The Name, Current Appointment Details and Current Funding will auto-populate, after you are entering empl ID
- Select Effective Date for Proposed department change (default as ePAR request date)

ePAR

Transfer

Employee Information

Empl ID

Name Rachel

DeptID 601010

Job C09005 Administrative Services Off II

Pos 00011610

Action

*Action

Status

Request ID

Request Dt 11/07/2023

Explain Action
Transfer to Budget & Finance Division - Budget department. Financial Analyst position with a start date of 11/6/2023.

Attachments

Appointments

| EmpRd | Position | Job Code | Job Title | Dept ID | Dept Title | Job Indc |
|-------|------------|----------|--------------------------------|---------|--------------------|-------------|
| 1 | 1 00011610 | C09005 | Administrative Services Off II | 601010 | Housing Operations | Primary Job |

Eff Date

Current

Position Nbr

Department Housing Operations

Job Code Administrative Services Off II

Reports To Matthew Grief

Location

Proposed

Position Nbr

Department

Job Code

Reports To

Location

Appointment Details

The required fields for this section will vary based on if the employee is budgeted by position or appointment.

Appointment Details – By Position

- Current appointment will be pre-populated, and several fields of Proposed appointment are available to be changed.
- If an employee's position number is changing, this field should be entered first as it drives the information in several other fields.
- Certain fields will be greyed out as they cannot be altered from what is attached to the position number, other fields can be changed as needed. If no changes are needed, please leave the fields filled as is.
- The description and short description of Position should match the information in the Job Code table. If the Job Code is changing, please update this field to match.
- On the compensation fields for monthly employees, you can fill in "Annual Rate @ 100%" or "Monthly Rate @ 100%" with new compensation amount. This will update the other compensation fields once the ePAR is saved.

| Current | Proposed |
|---|--|
| Position Nbr <input type="text" value="00011610"/> | Position Nbr <input type="text" value="00010565"/> |
| Department <input type="text" value="601010"/> Housing Operations | Department <input type="text" value="403100"/> BudgetA |
| Job Code <input type="text" value="C09005"/> Administrative Services Off II | Job Code <input type="text" value="C09120"/> Financial Analyst |
| Reports To <input type="text" value="00013728"/> Matthew Grief | Reports To <input type="text" value="00012470"/> Eva Burnett |
| Location <input type="text" value="SSB4.400"/> | Location <input type="text" value="SP212.502"/> |
| Std Hrs/Wk <input type="text" value="40.00"/> | Std Hrs/Wk <input type="text" value="40.00"/> |
| FTE <input type="text" value="1.000000"/> | FTE <input type="text" value="1.000000"/> |
| Full/Part <input type="text" value="Full-Time"/> | Full/Part <input type="text" value="Full-Time"/> |
| Reg/Temp <input type="text" value="Regular"/> | Reg/Temp <input type="text" value="Regular"/> |
| FLSA Status <input type="text" value="Nonexempt"/> | FLSA Status <input type="text" value="Exempt"/> |
| Salary Basis <input type="text" value="Sal Mnth"/> | Salary Basis <input type="text" value="Sal Mnth"/> |
| Work Period <input type="text" value="W"/> | Work Period <input type="text" value="W"/> |
| Annual Rate @ 100% <input type="text" value="58518.00"/> | Annual Rate @ 100% <input type="text" value="65000"/> |
| Annual Rate @ FTE <input type="text" value="58518.00"/> | Annual Rate @ FTE <input type="text" value=""/> |
| Monthly @100% <input type="text" value="4876.50"/> | Monthly @100% <input type="text" value=""/> |
| Monthly Rate @ FTE <input type="text" value="4876.50"/> | Monthly Rate @ FTE <input type="text" value=""/> |

Appointment Details – By Appointment

- Employees who are hired by appointment will have the following available fields to change
- Required fields: Department, Job Code, Reports To, Location, Standard Hours/Week, FTE, Salary Basis, Pay Rate
- Optional fields: Reg/Temp, Full/Part, FLSA status

| Current | | Proposed | |
|--------------------|--------------------------------|--------------------|---|
| Position Nbr | <input type="text"/> | Position Nbr | <input type="text"/> |
| Department | 305200 Psychology | Department | 201390 <input type="text"/> Texas Schools Project |
| Job Code | S00061 Teaching Assistant | Job Code | S00634 <input type="text"/> Research Assistant |
| Reports To | 00026953 Heidi Kane | Reports To | 00013195 <input type="text"/> Holly Kosiewicz |
| Location | DAL01 | Location | DAL01 <input type="text"/> |
| Std Hrs/Wk | 20.00 | Std Hrs/Wk | 20.00 |
| FTE | 0.500000 | FTE | 0.500000 |
| Full/Part | Part-Time <input type="text"/> | Full/Part | Part-Time <input type="text"/> |
| Reg/Temp | Temporary <input type="text"/> | Reg/Temp | Temporary <input type="text"/> |
| FLSA Status | Exempt <input type="text"/> | FLSA Status | Exempt <input type="text"/> |
| Salary Basis | Sal Mnth <input type="text"/> | Salary Basis | Sal Mnth <input type="text"/> |
| Work Period | W | Work Period | W <input type="text"/> |
| Annual Rate @ 100% | 40716.00 | Annual Rate @ 100% | 57600 |
| Annual Rate @ FTE | 20358.00 | Annual Rate @ FTE | |
| Monthly @100% | 4524.00 | Monthly @100% | |
| Monthly Rate @ FTE | 1696.50 | Monthly Rate @ FTE | |

Proposed Funding

- The Funding Start Date should be consistent with effective date of department change
- Enter new Cost Center (if not known, click magnifying glass to search) and Percent

Appointments

| EmpRd | Position | Job Code | Job Title | Dept ID | Dept Title | Job Indc |
|-------|------------|----------|--------------------------------|---------|--------------------|-------------|
| 1 | 1 00011610 | C09005 | Administrative Services Off II | 601010 | Housing Operations | Primary Job |

Eff Date: 11/06/2023

Current Funding

Start Date: 09/01/2023 End Date: 08/31/2024

Cost Center Info | Project Info | ID

| Earn Code | Cost Center | Cost Center Description | Percent | Monthly Amt | Total Amt | Benefits Estimate | Fund Code | Fund Description | Function | Function Description | Dept ID | Department |
|-----------|-------------|----------------------------|---------|-------------|-----------|-------------------|-----------|----------------------|----------|----------------------|---------|------------|
| 1 REG | 43149001 | Budget Aux Assess Salaries | 100.000 | 4876.50 | 58518.00 | 8102.00 | 4910 | Auxiliary Assessment | 005 | Auxiliary - Enterpri | 403100 | BudgetA |

Proposed Funding

Start Date: 11/06/2023 End Date: 08/31/2024

Cost Center Info | Project Info | ID

| Earn Code | Cost Center | Cost Center Description | Percent | Monthly Amt | Total Amt | Benefits Estimate | Fund Code | Fund Description | Function | Function Description | Dept ID | Department | | |
|-----------|--|----------------------------|---|-------------|-----------|-------------------|-----------|----------------------|----------|----------------------|---------|------------|---|---|
| 1 REG | 43149001 | Budget Aux Assess Salaries | 100.000 | 5416.67 | 53428.03 | 17503.00 | 4910 | Auxiliary Assessment | 005 | Auxiliary - Enterpri | 403100 | BudgetA | + | - |

Multiple Periods

- Add a second date range by clicking “+” sign, and remove the date range by click “-” sign
- If there are already multiple effective dates in the Current Funding section, data must be entered for all the same effective dates in the Proposed Funding section
- Example: Bob is working on 37755008 Project through July 19th, and changes to 37755006 on July 20th

Proposed Funding

Start Date: 05/16/2023 End Date: 07/19/2023 + -

Cost Center Info | Project Info | ID

| Earn Code | Cost Center | Cost Center Description | Percent | Monthly Amt | Total Amt | Benefits Estimate | Fund Code | Fund Description | Function | Function Description | Dept ID | Department | | |
|-----------|--|-------------------------------|---------|-------------|-----------|-------------------|-----------|----------------------|----------|----------------------|---------|--------------------|---|---|
| 1 REG | 37755008 | Zyrex Labs Str II: Atomically | 100.000 | 2150.00 | 4602.69 | 765.00 | 5501 | Federal Passthroughs | 202 | Research - Organized | 307700 | System Engineering | + | - |

Start Date: 07/20/2023 End Date: 08/31/2023 + -

Cost Center Info | Project Info | ID

| Earn Code | Cost Center | Cost Center Description | Percent | Monthly Amt | Total Amt | Benefits Estimate | Fund Code | Fund Description | Function | Function Description | Dept ID | Department | | |
|-----------|--|----------------------------------|---------|-------------|-----------|-------------------|-----------|----------------------|----------|----------------------|---------|--------------------|---|---|
| 1 REG | 37755006 | Zyrex Labs Str II: High-Speed PI | 100.000 | 2150.00 | 2969.05 | 494.00 | 5501 | Federal Passthroughs | 202 | Research - Organized | 307700 | System Engineering | + | - |

Multiple Cost Centers

- Add a new Cost Center and percentage by clicking “+” sign
- Remove a Cost Center and percentage by clicking “-” sign
- The total % for each funding effective date adds up to 100%

Proposed Funding

Start Date: 09/01/2023 End Date: 03/31/2024

Cost Center Info | **Project Info**

| Earn Code | Cost Center | Cost Center Description | Percent | Monthly Amt | Total Amt | Benefits Estimate | Fund Code | Fund Description | Function | Function Description | Dept ID | Department | | |
|-----------|-------------|--------------------------------|---------|-------------|-----------|-------------------|-----------|----------------------------|----------|----------------------|---------|----------------|---|---|
| 1 REG | 37355052 | Nih Scalable Electrode Technol | 40.000 | 2101.20 | 14708.40 | 5910.00 | 5500 | Federal Sponsored Programs | 202 | Research - Organized | 307300 | Bioengineering | + | - |
| 2 REG | 37355098 | Cwru/Nih 10718 Supp. Character | 60.000 | 3151.80 | 22062.60 | 8864.00 | 5501 | Federal Passthroughs | 202 | Research - Organized | 307300 | Bioengineering | + | - |

Start Date: 04/01/2024 End Date: 08/31/2024

Cost Center Info | **Project Info**

| Earn Code | Cost Center | Cost Center Description | Percent | Monthly Amt | Total Amt | Benefits Estimate | Fund Code | Fund Description | Function | Function Description | Dept ID | Department | | |
|-----------|-------------|--------------------------------|---------|-------------|-----------|-------------------|-----------|----------------------------|----------|----------------------|---------|----------------|---|---|
| 1 REG | 37355052 | Nih Scalable Electrode Technol | 100.000 | 5253.00 | 26265.00 | 10567.00 | 5500 | Federal Sponsored Programs | 202 | Research - Organized | 307300 | Bioengineering | + | - |

Save ePAR before Submit

- The Submitter/Contact information will indicate the person who created the ePAR. Click the arrow to expand.
- A secondary contact can be added.
- Click the “Save” button. Further changes can be made after ePAR has been saved.
- The ePAR cannot be submitted without first being saved.

Submitter/Contact Information

Entered By

Name: Xi Chen

Phone:

Email: xxc171830@hcmtest.utdallas.edu

Secondary Contact

Name:

Phone:

Save Submit Approve Deny Call Back Send Back Cancel Copy... History

Request ID and Attachments

- Upon saving the ePAR, a request ID will be assigned, and the Attachments button is available
- Request ID will allow you to leave and come back to the ePAR as needed

Action

*Action: Transfer Status: Saved

Request ID: 00178987

Request Dt: 11/07/2023

Explain Action:

Attachments

Attachments

- Select type from the drop-down menu, click Add to upload
- Click Choose File to browse, and then click Upload
- Click “+” sign to add another document
- Once all documents have been attached, click Done

ePAR Attachments

Request ID 00181996

1-1 of 1

| | Type | File Name | Add | |
|---|---|-----------|-----|---|
| 1 | <div> <div></div> <div> Cell Phone Receipt I9 No Rehire Other Selective Service Social Security Card Visa </div> </div> | | Add | + |

Done

File Attachment X

Choose File Dept List.xlsx

Upload Cancel

Request ID 00181996

1-2 of 2

| | Type | File Name | View | Delete | |
|---|-------|---------------------|------|--------|---|
| 1 | Other | Dept_List.xlsx | View | Delete | + |
| 2 | Other | Payable_Status.docx | View | Delete | + |

Done

Submit ePAR

- Please review the ePAR and make sure all of information is correct before submission
- No changes can be made after an ePAR has been submitted
- Once the ePAR is submitted, the approval workflow will be visible
- You will receive an email that your ePAR has been submitted for approval

> Submitter/Contact Information

Save Submit Approve Deny Call Back

Department Approvals

REQUEST_ID=00181738:Pending View/Hide Comments

Department 1

Self Approved → Approved

Carina Legorreta → Amanda R Moilan

Department Approval 10/03/23 - 2:08 PM → Department Approval 10/03/23 - 4:53 PM

Department 2

Pending → Not Routed

Multiple Approvers → Multiple Approvers

Department Approval → Department Approval

Comments

After Department

REQUEST_ID=00181738:Awaiting Further Approvals

FND, REA

Not Routed → Not Routed

Multiple Approvers → Multiple Approvers

Career Center → Budget Office

Save Submit Approve Deny Call Back Send Back Cancel Copy... History