


Processing a Transfer Action in JAR

What you need before proceeding with action: An approved action code (AC) from [Classification and Compensation](#) (C&C) associated with the waiver of recruitment.

NOTE: Before initiating a Job Action Request (JAR) transaction review and confirm the position data is up to date (i.e.: title, reports to, FTE/STD Hours, salary plan) to ensure the JAR transaction is accurately updated.

The employee ID associated with the transfer should be provided in the approval notification. If not contact your college/division Classification and Compensation consultant.

The receiving college/division will initiate the JAR transfer transaction using the following navigation instructions to begin. **Contact your designated HRIM Specialist regarding questions about this process.**

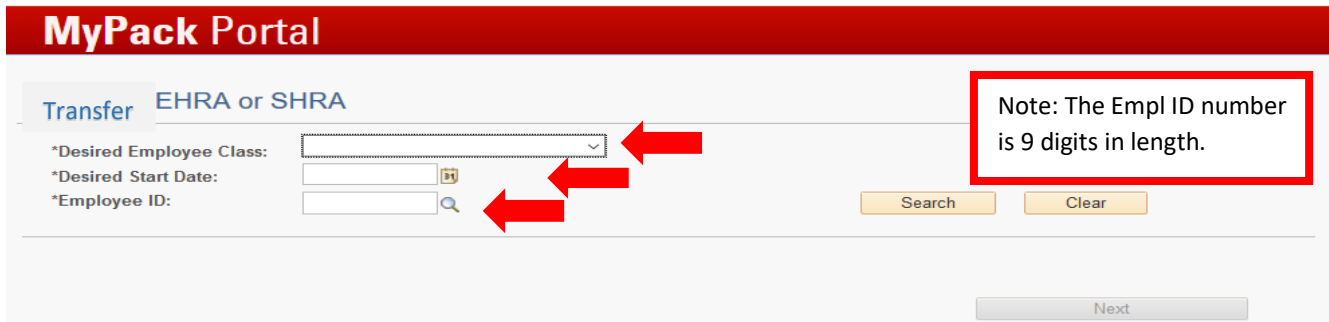
Click on the NavBar  in the top right hand corner of the MyPack Home screen.

Click on the Menu icon  .

Then follow this navigation through the menu options.

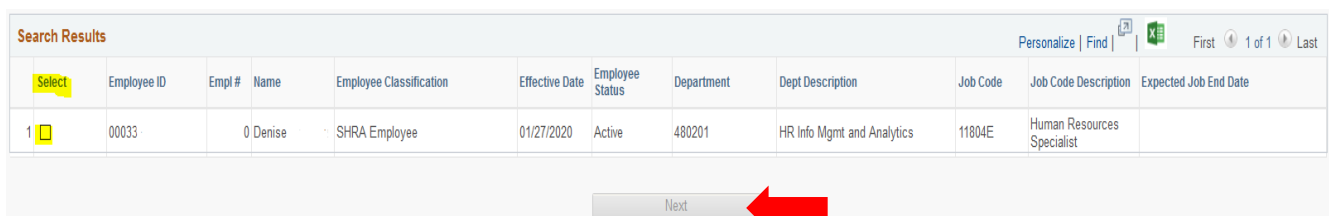
Human Resources Systems > Job Action Requests (JAR) > JAR (SHRA, EHRA, Post Docs) > Transfer

Once the **Transfer** panel appears then use the drop down option to select the appropriate **Desired** (EHRA) **Employment Class** (i.e.: Faculty, Non Faculty, SAAO Tier 1 or 2). Enter the **Desired Start Date**. Enter the **Employee ID**.



The screenshot shows the 'MyPack Portal' header in red. Below it, the 'Transfer' panel is titled 'EHRA or SHRA'. It contains three input fields: '*Desired Employee Class:' with a dropdown arrow, '*Desired Start Date:' with a calendar icon, and '*Employee ID:' with a magnifying glass icon. Red arrows point to each of these fields. To the right, a red-bordered box contains the text: 'Note: The Empl ID number is 9 digits in length.' Below the input fields are 'Search' and 'Clear' buttons. At the bottom right of the panel is a 'Next' button.

Once the transfer panel fields have been entered, click **Search** to locate the latest employment data. If the ID provided is valid the system should locate the latest employment job data record. If the search results produce the correct employee then check the highlighted "Select" box and the "Next" button will become active. Just click the Next button to continue the transfer process.



The screenshot shows a 'Search Results' table with 12 columns. The first column, 'Select', has a yellow box around the first row's checkbox. The table contains one data row for an employee with ID 00033. Below the table is a 'Next' button with a red arrow pointing to it.

Select	Employee ID	Empl #	Name	Employee Classification	Effective Date	Employee Status	Department	Dept Description	Job Code	Job Code Description	Expected Job End Date
<input checked="" type="checkbox"/>	00033	0	Denise	SHRA Employee	01/27/2020	Active	480201	HR Info Mgmt and Analytics	11804E	Human Resources Specialist	

Transfer SHRA or EHRA

Activity Guide

Legend

Task Progress

0 6

● Initiate Job Request

● Monitor Background Check

● Confirm Job Request

● Review Job Data

● Approve - Central Office

● Populate Education Data

Transfer SHRA Employee for AG00236912

Initiate Job Request

Transaction ID: AG00236912 Empl ID: Rcd #: 0 Name:

Legal Name

Name Prefix: ?

Legal First Name: ?

Legal Middle Name: ?

Legal Last Name: ?

Name Suffix: ?

Employee's Work Location / Address

*On Campus: On Campus

*Building #: 121 Administrative Services II

*Room Number: 0000NA

*Campus Box: 7210 HUMAN RESOURCES

NCSU Data

*Candidate Email: nobody@ncsu.edu

*HR Hiring Proposal: HP999999SP

Time Keeping Location: (FLSA Non-Exempt)

Job

Action: Transfer

*Action Reason: ?

*Effective Date: ?

*Position Number: ?

FLSA Status: ?

Expected Job End Date: ?

*Base Compensation: ?

(Full Annualized salary at 1.0 FTE = \$66000.00)

*Tax Location Code: NC North Carolina

☐ Probationary ?

☐ Encumbrance Override

☐ Encumber to Appt End

☐ Time Limited

*Job Code: 11805E Human Resources Consultant

*Department: ?

*Location: 205

*Reports To Position: 00062628

*Standard Hours: 40.00 Hrs/Week FTE: 1.000 Total FTE: 1.000

*Recurring Contract: 12 Month Assignment

*Salary Admin Plan: HR *Level: 02 Step: 2

Add Supplement(s)

Rate Code	Amount	Total Compensation:
1 Base Pay	\$66,000.000000	\$66,000.00

Note: Use the magnifying glass icon next to each field to search for information.

Step 1

Step 2

Step 3

Note: A Time Keeping location is not required if the employee is "Exempt".

Step 1: The Legal Name Section will be updated automatically based on the employee ID provided.

- Identify the Employee's Work Location/Address Section based on the work location of the transfer.
- If the work location/address is off campus, be sure that the address entered is complete and accurate.

Step 2: Complete the NCSU Data Section

- Candidate's Email** must be correct in order for them to receive the background check.
- Time Keeping Location** is not required for FLSA exempt employees.
- HR Hiring Proposal** is required and will be provided by C&C. Please be sure to enter the hiring proposal "HP" code in its entirety including letters and numbers. If not entered correctly, the supporting documents will not upload and the transaction will not progress forward.

Step 3: Complete Job Section

- Action Reason** select the appropriate transfer option from the drop down
- Effective Date** feeds in the "Desired Start Date" from the initial JAR transaction panel
- Position Number** enter or select the position number associated with the waived recruitment then tab out of the field. Verify all the information uploaded from position data is correct. If the uploaded data does not match the approved waiver action, please save the JAR action (bottom) for later and go update the Position Data before returning to complete the JAR transaction. Do not check the "Override Position Data" box unless approved by C&C.

The following **Appointment Info** and **Academic Rank** sections are exclusively for EHRA Transfers.

Skip to step 6 if the transfer is for an SHRA employee.

Appointment Info

Appt Begin Date: 01/27/2020 [calendar icon]
 Appt End Date: [calendar icon]
 *Anticipated Appt Length: At Will [dropdown]
 Appt Comments: [text area]

Academic Rank

Academic Rank: [search icon]
 *Tenure Status: EPA Non-Faculty [dropdown]
 Tenure Type: [dropdown]
 Academic Home Dept: [search icon]
 Named/Distinguished Professorship: [text area]

Original Tenure Track Date: [calendar icon]
 Mandatory Review Date: [calendar icon]
 Tenure Granted Date: [calendar icon]
 Date of Current Rank: 01/27/2020 [calendar icon]

Step 4: Complete the Appointment Info Section

- **Appt. Begin & End Dates** enter the contract appointment dates listed in the offer letter
- **Anticipated Appt. Length** select the contract appointment length option listed in the offer letter

Step 5: Complete the Academic Rank Section

- **Tenure Status** is a required field, select the option from the drop down describing the person's status.
 - The example (EPA Non-Faculty) reflects a person who does not have tenure with the university

If the person has tenure or IS currently on Tenure/Tenure-Track (T/TT) with the university the academic rank/home fields, tenure type and dates will need to be update.

- Academic Rank use the magnifying icon to search for the rank
- Tenure Type only utilized if the person is on a T/TT plan with the university
- Academic Home Dept. use the magnifying icon to search for the academic home
- Original Tenure Track Date, Mandatory Review Date and Tenure Granted Date associated with tenured EHRA personnel at the university
- Date of Current Rank is required for all EHRA hire transactions

Distribution Data

Fiscal Year: 2020 [checkbox] Work Against Position Nbr:

Project ID	Account	Override	Percent	Amount		
1 201558 [search icon]	51119 [search icon]	<input checked="" type="checkbox"/>	25.000	48,997.000	[+]	[-]
2 201558 [search icon]	51319 [search icon]	<input type="checkbox"/>	75.000	146,991.000	[+]	[-]
Totals:			100.000	195,988.00		

Step 6: Complete Distribution Data Section

- If you have questions regarding distributions please contact the Budget Office:
<https://budget.ncsu.edu/budgetoffice/>.

Background Check Step 7

Background check package will be automatically selected based on the following questions: Help

☒ I want to request a background check on this person

☐ This person could / will be driving a NCSU vehicle

☐ This person will be handling money

☐ This person will be living in University Housing for more than 3 days

☐ This person could / will be working with minors (people under the age of 18 years old)

☐ This person will be sponsored on an H-1 Visa

☐ A Commercial Drivers Licesnse (CDL) may be used in this job

☐ This person is a recurring Faculty Member.

☐ This person is an Emeritus Faculty Member.

*Department:

*Contact Email:

*Contact Name:

*Contact Phone:




Step 8

[Show Comments](#) [Attachments](#) [Create Offer Letter](#)

Step 7: Complete the Background Check (BGC) Section by checking the boxes of the background check packages to be performed on the candidate. Note that departments will be charged for any working with minors checks, as well as any credit (handling money) or driving (including CDL) check performed in conjunction with a working with minors package selection.

- If you have questions please contact Background Checks: <https://backgroundchecks.hr.ncsu.edu/>
- The “This person is a recurring Faculty Member” option will only be available for selection on EHRA Faculty transactions and should NOT be selected for new hires who have not worked at NC State University before and do not already have an employee ID. Utilize the help link to learn more about recurring faculty appointments.

Step 8: Click Attachments to upload and/or review supporting documents

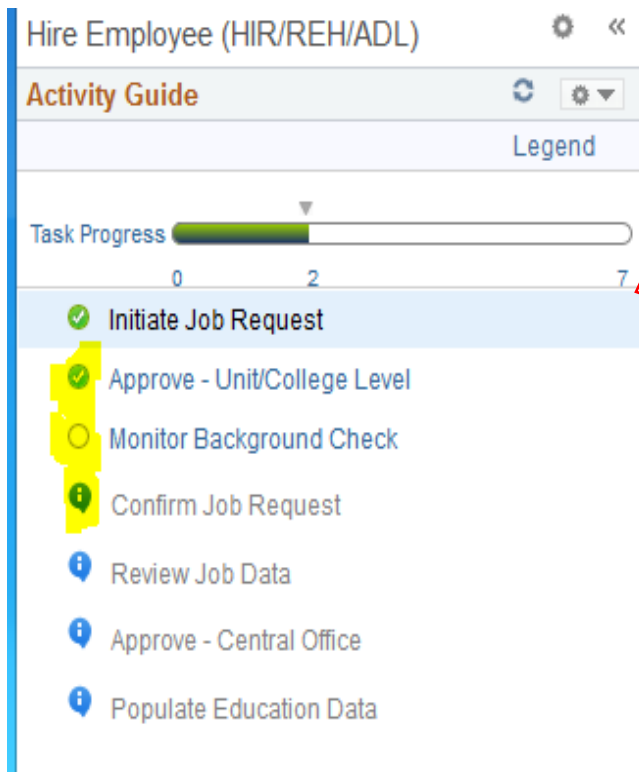
Onbase Document Type	Upload Document		Required	Received
1 HR Employment References	Upload Document		<input type="checkbox"/>	<input type="checkbox"/>
2 HR Hiring Proposal			<input checked="" type="checkbox"/>	<input type="checkbox"/>
3 HR Offer Letter	Upload Document		<input checked="" type="checkbox"/>	<input type="checkbox"/>
4 HR Patent Agreement	Upload Document		<input type="checkbox"/>	<input type="checkbox"/>

Step 9[Back](#)

- **Attach employment reference checks**
- **Verify the AC hiring proposal has been uploaded by C&C, if not contact C&C with any questions**
- **Upload the signed offer letter**
- **Review/Upload any supporting documents that apply**
- **Click Back to go back to the hire action**

Step 9: After the attachments have been uploaded and/or reviewed, click Back to return to the transaction page. Click [Submit for Approval](#). If you are not ready to submit the action for approval, click [Save for Later](#). This will allow you to come back and make changes before submitting.

The Activity Guide below is located on the left hand side of the JAR transaction page. When a JAR transaction is open the panel indicates the task progression and which stage of approval of approval it currently resides. A description of the Activity Guide icons (below) explain what is happening at each stage of approval.



Note: When the JAR transaction is open the Activity Guide/Task Progress appears on the left hand side indicating the current progression status.

After the “Monitor Background Check” is complete the transaction will eventually land on **Review Job Data** for a final review by the initiating college.

The college level reviewer needs to verify all the information and required attachments associated with the transaction are accurate before submitting for Central Office approval.

If the transaction is missing an attachment the system will display an error message and will not progress forward until the document is uploaded.

When the transaction reaches “Approve-Central Office” the UHR-HRIM Specialist will review the transaction and supporting attachments then approve once the items are verified.

Activity Guide Icons



The blank circle - means the task is in progress or currently being reviewed



The green circle/with a check mark - means the task has been completed



The blue circle - means the task is dependent on the previous task approval (top to bottom)

If you have questions regarding a JAR transaction contact your [HRIM Specialist](#) for assistance.