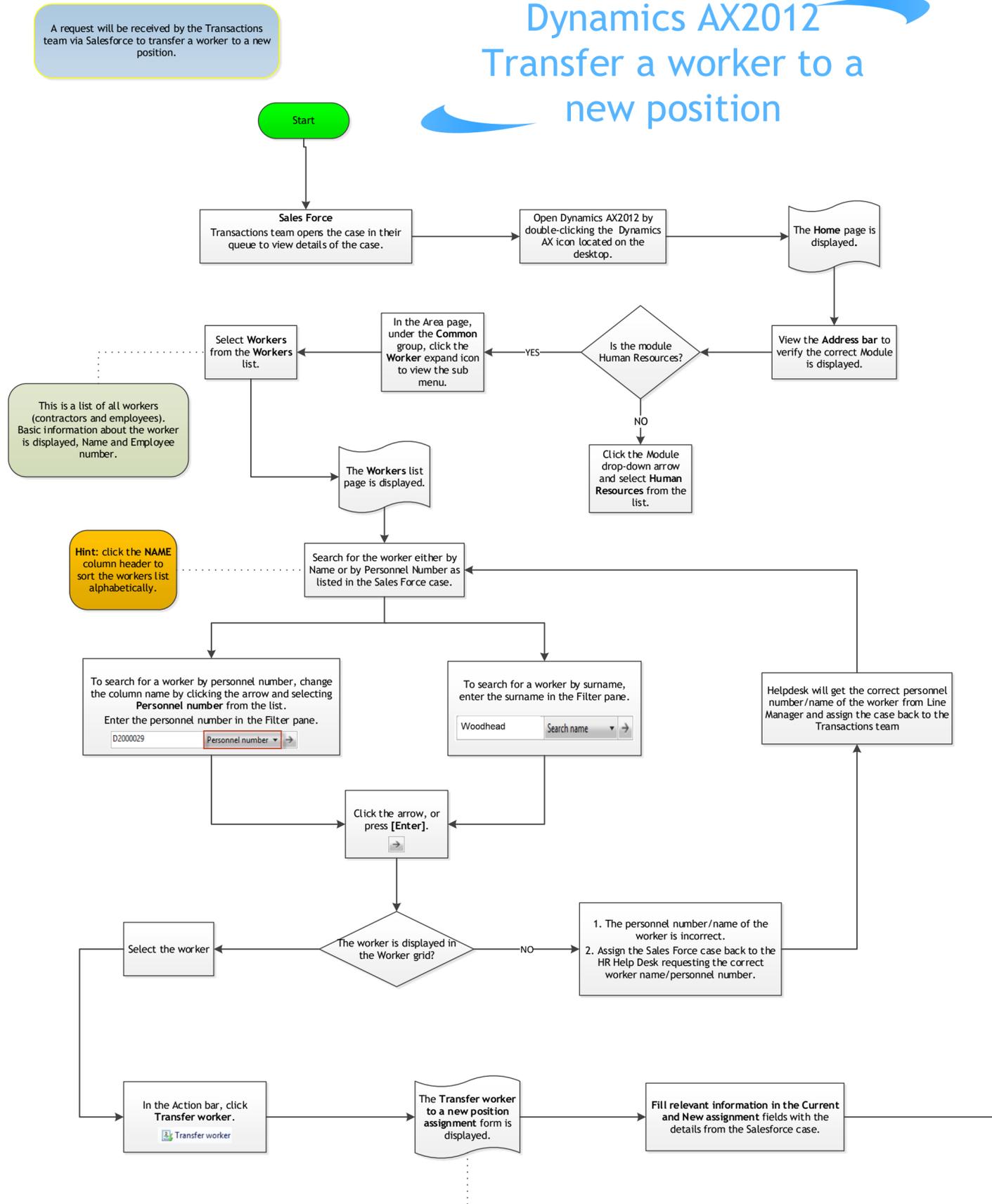


# Dynamics AX2012

## Transfer a worker to a new position

A request will be received by the Transactions team via Salesforce to transfer a worker to a new position.



The Transfer worker to a new position assignment form displays two sections. Current assignment details and New assignment details.

Transfer worker to a new position assignment

Worker: Paul Evans

Current assignment		New assignment	
Job:	Cleaning Assistant		
Position:	P034		
Primary:	<input checked="" type="checkbox"/>		<input type="checkbox"/>
Full-time equivalent:	0.1		0.00
Assignment start date/time:	15/10/2014 01:00:00		01/01/2015 00:00:00
Assignment end date/time:	01/01/2015 23:59:59		Never
Transfer reason:			

### Current Assignment Fields

**Assignment end date/time field**  
Fill the date when the current assignment of the worker is due to end. Please note it will default to previous day's date.

In the Current Assignment section, this is the only information that needs to be filled in.

To ensure that there is no gap or overlapping period in the employment of the worker when being transferred from one position to another, End date of the current assignment and Start date of the New Assignment should be consecutive dates.

### New Assignment Fields

**Position field**  
Click the Position drop-down arrow to view Open Positions. Select the required Position from the list.

**Job field**  
When the Position was selected, the details of the Job on which the Position was created are displayed in the Job field.

**Primary check box**  
Select the Primary check box if this is the only Position to which the worker is assigned, or will be the Primary Position where the worker has more than one Position.

**Full-time equivalent field**  
Do not enter data into this field, it is a field which will be calculated based on the Standard and Contract Hours recorded against the new position worker will be getting transferred to.

**Transfer reason field (New assignment)**  
Click the New assignment Transfer reason drop-down arrow and select the reason for transfer from the list.

**Transfer reason field (Current assignment)**  
Click the Current assignment Transfer reason drop-down arrow and select the reason for transfer from the list.

**Assignment end date/time field**  
If the end date is known, enter the date the Position will end in this field, or use the calendar.

**Assignment start date/time field**  
Enter the Assignment start date, or select from the calendar. Please note it will default to today's date.

The Assignment end date/time field defaults to Never. When you click Never, the date 31/12/2154 is displayed. This is the system end date. Date format should be dd/mm/yyyy.

This date field defaults to today's date. Date format should be dd/mm/yyyy.

### New Compensation Fields

**Action field**  
Click the New assignment Action drop-down arrow and select the Action type from the list.

**Plan field**  
Click the New compensation Plan drop-down arrow and select the hourly or salaried plan from the list.

**Pay rate field**  
Enter the annual pay rate in the Pay rate field.

**Effective date field**  
In the Effective date field, enter the date the compensation becomes effective if different to the Assignment start date.

**Expiration date field**  
Do not alter this date field unless the compensation has an expiry date.

The Compensation section of the Transfer worker to a new position assignment form also displays two columns. Column one displays the Current compensation. The fields in column two, New compensation, are blank, ready for the worker's new compensation details to be entered.

This field requires the annual pay rate, not a weekly or hourly pay rate.

This field defaults to the Assignment start date.

**Retire position field**  
If the current position is to be retired following the worker's transfer, select the Retire position check box and enter the position retirement date in the Retirement date field.

Retire position

Retirement: 31/12/2016

Click Transfer worker.

Transfer worker

Close worker record