

OM-51 Transfer Position (Action 113)

Purpose

The purpose of this Business Process Procedure is to explain how to transfer an existing position from one Organizational Unit to another Organizational Unit within an Agency in the Integrated HR-Payroll System.

Trigger

There is a need to move an existing position from one Organizational Unit to another Organizational Unit within an Agency.

Business Process Procedure Overview

This action will move a position from one Organizational Unit to another Organizational Unit. The move may involve a change in the Cost Distribution, Organizational Unit, or the County. The position number does not change.

Agency to Agency transfers must be completed by BEST Shared Services OM team.

Tips and Tricks

See the OM Tips and Tricks Job Aid for a full listing of Best Practices and Tips & Tricks. The job aid is located on the [Training HELP website](#).

- **Copy** is to be used most of the time. This will delimit the existing record and create a new record with the start date given. Copying keeps a history of the old record.
- **Change** is to be used only if you make a spelling or other simple error and want to change the record. There is no history tracked on what the record used to be if you use the change functionality.

Access Transaction

Via Menu Path: This transaction code is not on the menu path. Enter the transaction code in the Command Field (white field in the upper left-hand corner of the screen. If the Command field is not visible, click the gray triangle in this area to display it). Click Enter once the transaction code has been entered.

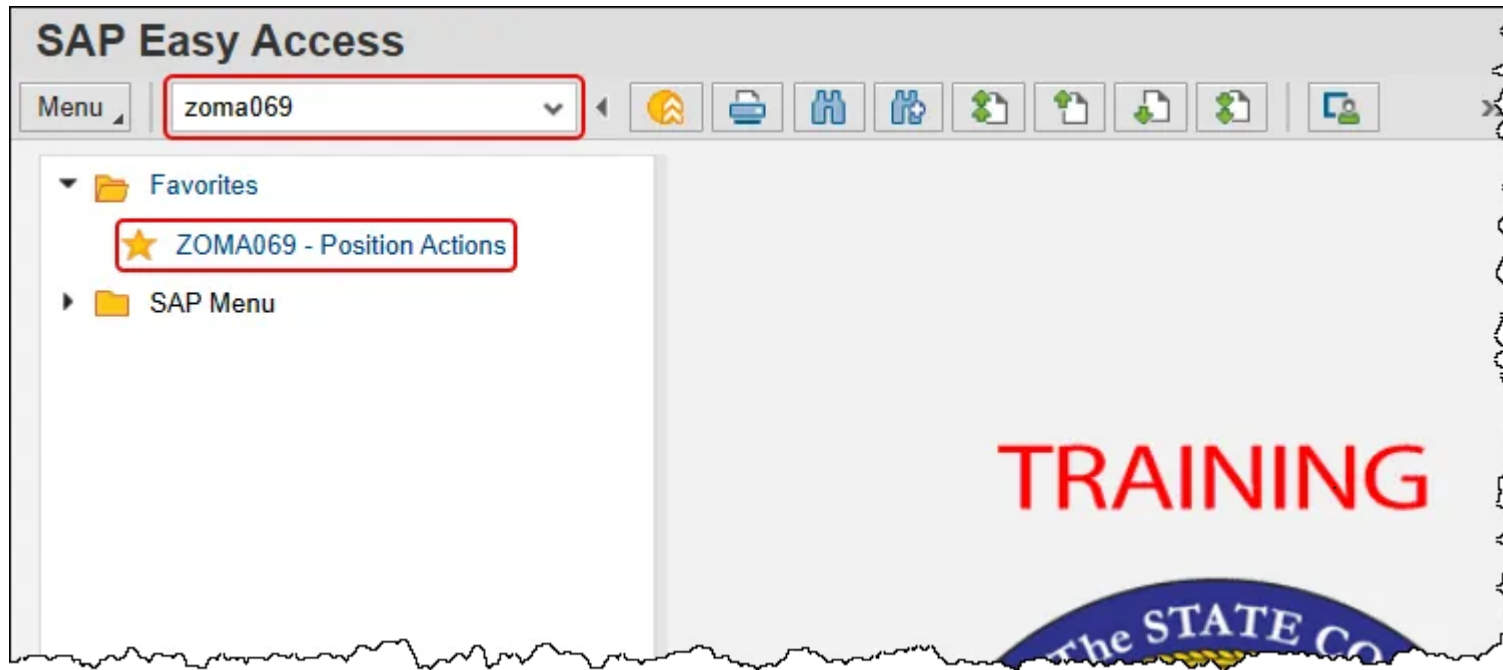
Via Transaction Code: ZOMA069

Procedure

There are 19 steps to complete this process.

Step 1. Enter **zoma069** in the command field and press enter, or double click it from your [favorites folder](#) if you've previously saved it there.

Image



Step 2. Input **113 for Position Transfer**, into the action field. You may type it in directly or you can click in the empty field, then click on the matchcode button to its right and then choose it from the pop-up.

Image

Position Action

Menu

Position

Action

113

Type of Action (1)

Restrictions

Act.	Action text
100	Create New Position
102	Re-Establish Position
103	Reallocate Position Up
104	Reallocate Position Down
105	Reallocate Position Horizontal
106	Position Adjustment from Auth
107	Reallocate Position Differential
108	Remove Position Differential
113	Position Transfer
115	Position Hours Change
116	Position Employee Group/ Subgroup Change
118	Position Competency Level Change
122	Position County Change
124	Change Supervisor of Position

14 Entries found

Note: The action number to transfer a position is 113. Use the matchcode search function for additional OM action options available from this transaction as appropriate.

Clicking Enter will validate the action you have requested and display the date fields for entry.

Step 3. Input the appropriate data in the following new fields:

- **Position** - ID number of position being transferred. (This document will use 60087152.)
- **Valid From** - Date on which the transfer becomes active (This document will use 01/19/26.)

Image

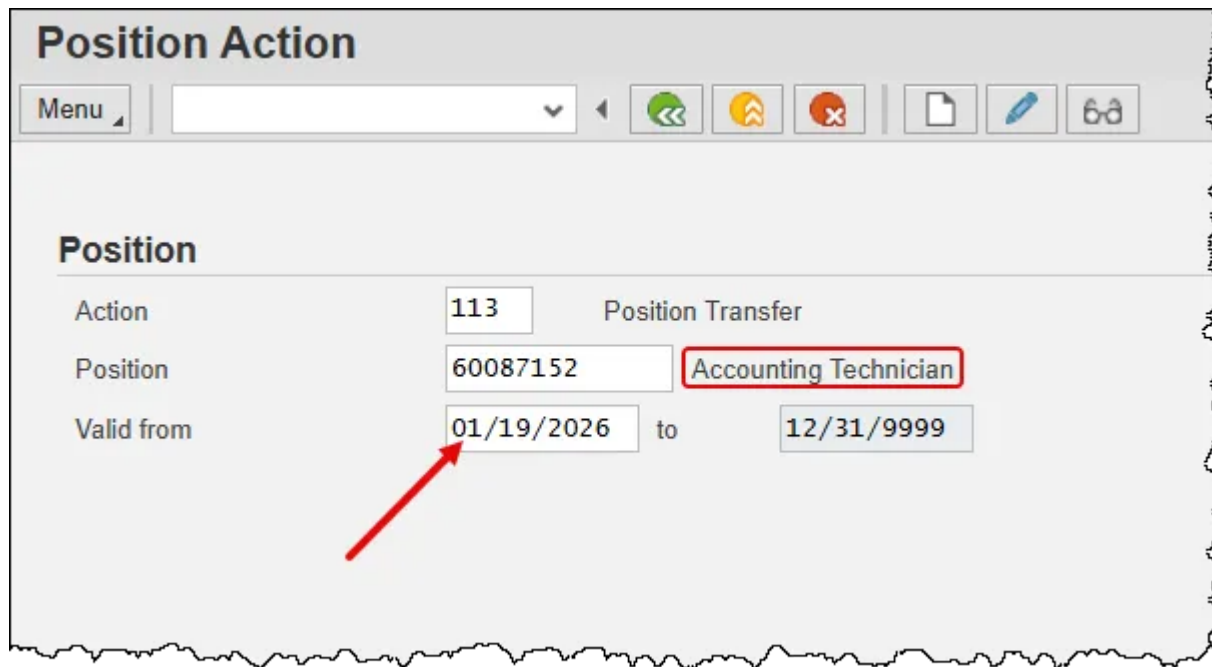


The image shows a screenshot of a web application interface titled "Position Action". At the top, there is a "Menu" dropdown and a search bar. Below this, there are several icons: a green double arrow, a yellow arrow pointing up, a red 'X', a document icon, a pencil icon, and a magnifying glass icon. The main section is titled "Position" and contains three rows of input fields. The first row is labeled "Action" and has a text box containing "113". The second row is labeled "Position" and has a text box containing "60087152". The third row is labeled "Valid from" and has a text box containing "1/19/26", followed by the word "to" and another text box containing "12/31/9999". The "Position" and "Valid from" text boxes are highlighted with red rectangles.

Position	
Action	113
Position	60087152
Valid from	1/19/26 to 12/31/9999

Step 4. Click the **Enter** button to validate that this is the position with which you need to work. This step will also ensure that the date is in the format mm/dd/yyyy.

Image



The screenshot shows a web form titled "Position Action". At the top, there is a "Menu" button, a dropdown menu, and several icons (back, forward, delete, print, edit, and a magnifying glass). Below the header, the form is divided into sections. The "Position" section contains three rows of data: "Action" with the value "113" and the label "Position Transfer"; "Position" with the value "60087152" and the label "Accounting Technician" (which is highlighted with a red border); and "Valid from" with the value "01/19/2026" and the label "to" followed by the value "12/31/9999". A red arrow points to the "01/19/2026" date field.

Position	
Action	113 Position Transfer
Position	60087152 Accounting Technician
Valid from	01/19/2026 to 12/31/9999

Step 5. Click the **Create** button.

Note: Once you click create, the position number and effective date are locked in. If a mistake is discovered with one of these data points, the action must be deleted and a new one created with the correct information.

Image

Position Action

Menu | [Search Bar] | [Icons: Green Double Arrow, Yellow Double Arrow, Red X, Document (highlighted), Blue Pencil, Magnifying Glass] | [Create (F5)]

Position

Action	113	Position Transfer
Position	60087152	Accounting Technician
Valid from	01/19/2026	to 12/31/9999

Step 6. Note that there are two columns showing in the body of the screen. The left column is labeled 'Current Values' and data exist in each field. The right column is designated for 'New Values.' All fields require input as denoted by an asterisk. If the exact value for a field is not known you can click within the empty space to generate a matchcode button to its right. Clicking on the button will provide multiple ways to search for the applicable data.

Update the following fields:

- **Org Unit** – The 8-digit number representing the organizational unit the position is transferring to. You must change the org unit value for the transfer action, or you will receive a hard stop error. This document will use '20010640'.
- **Reports to** – The 8-digit number representing the position the one being transferred will report to upon completion of the action. This document will use '60087123'.

- **Personnel Area** – The 4-digit code representing the agency to which the position belongs. This document will use '1401'.
- **Personnel Subarea** – The code that defines various working schedules so that Time Management can define groups of specific time entry rules. This document will use 'NC01'.
- **EE Group** - An organizational entity which is governed by specific personnel regulations. An employee group is divided into several employee subgroups. This document will use 'A'.
- **EE Subgroup** - Code on position identifying the FLSA status and full-time equivalency. This document will use 'B1'.
- **County** – The 3-digit code identifying the county in which the position resides. This document will use '092'.

Note: The data used in this example is provided for sample purposes only. The data will change depending on the Agency and specific position being transferred.

Best Business Practice: The best practice is to enter any data as appropriate, review all data, and click Enter to allow the system to validate the data.

Image

Position Transfer - CREATE

Menu ▾
⏪ ⏩ ⏴ ⏵ ⏶ ⏷ ⏸
Initiate Work Flow

Position Header

Position	60087152	Accounting Technician	Org Unit	20010643	OSC STWD ACCT Central Compliance
PCR Number			Reports To	60087148	Cash Management Manager
Valid from	01/19/2026	to 12/31/9999	Supervisor		
Holder			WF Status		
Personnel area	1401	State Controller			

Org Unit

Reports to

Personnel Area

Personnel Subarea

EE Group

EE Subgroup

County

Current Values	New Values
Org Unit: 20010643 OSC STWD ACCT Central Complia...	20010640
Reports to: 60087148 Cash Management Manager	60087123
Personnel Area: 1401 State Controller	1401
Personnel Subarea: NC01 7day Norm	nc01
EE Group: A SHRA Employees	A SPA Employees ▾
EE Subgroup: B1 FT S-FLSAOT Perm	b1
County: 092 Wake	092

Address
Time

Step 7. Click the **Enter** button to validate your data and check its validity. The text for the values will appear to the right of the fields and provides an opportunity to ensure accuracy. Corrections can be made until the data is saved.

Image

Position Transfer - CREATE

Menu

Initiate Work Flow

Position Header

Position	60087152	Accounting Technician	Org Unit	20010643	OSC STWD ACCT Central Compliance
PCR Number			Reports To	60087148	Cash Management Manager
Valid from	01/19/2026	to 12/31/9999	Supervisor		
Holder			WF Status		
Personnel area	1401	State Controller			

	Current Values	New Values
Org Unit	20010643 OSC STWD ACCT Central Complia...	20010640 OSC FIN SYSTEMS Tech Applicati...
Reports to	60087148 Cash Management Manager	60087123 Technical Applications Manager
Personnel Area	1401 State Controller	1401 State Controller
Personnel Subarea	NC01 7day Norm	NC01 7day Norm
EE Group	A SHRA Employees	A SPA Employees SHRA Employees
EE Subgroup	B1 FT S-FLSAOT Perm	B1 FT S-FLSAOT Perm
County	092 Wake	092 Wake

Address

Time

Step 8. A Position Transfer action allows us to update its address. Ensure the **Address** tab is selected by clicking on it. Select the type of address (Main, Mailing, or Courier) being updated by clicking on the drop-down list in the **Subtype** field.

Finally, click the **Get Address** button to display the current data for that subtype. This document will update the Main Address.

Image

County 092 Wake 092 Wake

Address Time

Subtype 9002 Mailing Addr. 1 Active

Address suppl. 9003 Courier 9002 Mailing Address 9001 Main Address

Street/House 1410 Mail Service Center House number

PCode/City 27699 Raleigh

Country US USA

Region NC North Carolina

Telephone no. 919-981-5499

Fax number 919-981-5560

Get Address

Step 9. Enter the new or updated address in the following fields.

Note: Data should only be added to the fields below. The State of North Carolina does not use the other fields.

- **Street/House** – The street name and number, up to a maximum of 30 characters. This document will use '310 N Blount St.'
- **PCode/City** – The postal (zip) code for the address. This document will use '27601/Raleigh'.
- **Country** – The country in which the position resides. This field defaults to 'US' and should only be changed as required.
- **Region** – Represents the state in which the position resides. This field defaults to 'NC' and should only be changed as required.
- **Telephone no.** – Phone number to be associated with the position.
- **Fax number** – Fax number to be associated with the position.

Image

The screenshot shows a web form with two tabs: 'Address' (selected) and 'Time'. Below the tabs, there is a 'Subtype' dropdown menu set to '9001 Main Addr...', a 'Get Address' button, and a status indicator '1 Active'. The main form area contains several input fields, some of which are highlighted with red boxes:

- Address suppl.**: A text input field.
- Street/House**: A text input field containing '310 N Blount St'.
- House number**: A text input field.
- PCode/City**: Two text input fields, the first containing '27601' and the second containing 'Raleigh'.
- Country**: A dropdown menu set to 'US' with 'USA' displayed next to it.
- Region**: A dropdown menu set to 'NC' with 'North Carolina' displayed next to it.
- Telephone no.**: A text input field containing '919-555-7632'.
- Fax number**: A text input field containing '919-555-4027'.

Step 10. Click the **Enter** button to validate the address entries. No new data is shown, however any potential errors with entered values will be shared at this step.

Step 11. A Position Transfer action allows us to update any time setting(s) associated with the position. Click the Time tab.

The Time tab contains the fields required for time entry and payroll calculation rules. Premium rates are determined from the data saved on the Position in the HR-Payroll system, not what a person enters on their time sheet. The person who holds this position will automatically receive the premiums which are designated on this position.

There are 10 potential fields that can be changed and not all will be viewable at one time. Note that the Time Tab will have its own vertical scroll bar which is used to see all the settings.

Each field is associated with a specific position infotype and displays current values. Changes are applied via the values entered in the **New Value** column. If no data is entered, the current setting remains in place.

Update the following fields as applicable:

- **Overtime Compensation (IT9005)** - Stores settings related to overtime compensation.
 - If time worked beyond the overtime limit (40 hours, etc.) is to be paid or accumulated as compensatory time, the position must have a valid IT9005 record (which is this area).
 - If overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-subject only) at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.).
 - If it is to be paid out immediately, the Immediate Payout checkbox should be checked. The default is 365 days. An IT9005 record is not required if the position is not eligible for overtime pay or compensation.
- **Holiday Payout Period (IT9006)** - Indicates if overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-Subject only) at a point earlier than 12 months from when it was earned. The Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). The default is 365 days. If no record exists, the default value of 365 applies. If it is to be paid out immediately, the Immediate Payout checkbox should be checked.

- **Night Shift Prem Rate (IT9007)** - Pay rate increase for Night Shift premium. If OSHR has approved a rate other than the default of 10%, the rate as a percentage must be entered in the rate field.
- **Evening Shift Premium (IT9008)** - Stores settings for positions that are eligible for evening shift premium. OSHR approved rates other than the default of 10% must be entered in the rate field.
- **Weekend Shift Premium (IT9009)** - Stores settings for positions that are eligible for weekend shift premium. The OSHR approved rate other than the default of 10% must be entered in the rate field.
- **Holiday Premium Rate (IT9010)** - Pay rate increase for Holiday Pay. The OSHR approved rate other than the default of 50% must be entered in the rate field.
- **On-call (IT9011)** - Stores settings for positions that are eligible for On-Call compensation. The accrued box should be checked if the time is to be collected as On-Call comp time. The rate field must be populated with the OSHR approved on-call rate.
- **Callback (IT9012)** - Stores settings for positions that are eligible for Callback compensation. The decision to pay or award comp time is determined by the “Immediate Payout” checkbox.
- **Extended Duty (IT9016)** - Stores settings for positions that are eligible for extended duty
- **GAP Hours (IT9017)** - Positions eligible for Gap Hours Comp must have a valid IT9017 record. The decision to pay versus comp time is determined by the existence of the 9017 infotype. Gap Hours are additional hours for Subject-FLSA employees. The “Additional hours” are those hours caught in the gap between the minimum hours of work required and the overtime threshold. These hours are currently being paid at an hour-for-hour rate for Subject-FLSA employees.

Note: The values shown in the screenshot are sample data only and are provided for illustration purposes.

Image

Address

Time

Overtime Compensation(9005)

CURRENT VALUE

NEW VALUE

Immediate Payout

OR

Comp Aging Limit

Delimit 9005

365 Days

365 Days

Holiday Premium Rate(9010)

CURRENT VALUE

NEW VALUE

Holiday Premium Rate

Delimit 9010

50 %

Holiday Payout Period(9006)

CURRENT VALUE

NEW VALUE

Immediate Payout

OR

Comp Aging Limit

Delimit 9006

365 Days

Night Shift Premium(9007)

CURRENT VALUE

NEW VALUE

Night Shift Prem Rate

Delimit 9007

0 %

10 %

On-Call(9011)

CURRENT VALUE

NEW VALUE

On-Call Comp Accrued

On-Call Rate

Delimit 9011

\$ 0.00

Callback(9012)

CURRENT VALUE

NEW VALUE

Immediate Payout

OR

Comp Aging Limit

Delimit 9012

0 Days

SAP

E1T (805)

oschr-t1map01

Step 12. Click the **Enter** button to validate the time setting(s) entries. No new data is shown, however any potential errors with entered values will be shared at this step.

Best Business Practice: The best practice is to enter any data as appropriate, review all data, and click Enter to allow the system to validate the data.

Step 13. Take a moment to verify all data that has been entered. When the **Save** button is pressed, all values are locked in and can only be changed by leaving the action and coming back to it with the Change button in transaction zoma069.

Step 14. Click the **Save** button.

Image

Position Transfer - CREATE

Menu
Save (Ctrl+S)
Initiate Work Flow

Personnel Subarea	NC01	7	NC01	7day Normal
EE Group	A	SHRA Employees	A	SPA Employees
EE Subgroup	B1	FT S-FLSAOT Perm	B1	FT S-FLSAOT

Step 15. Observe that new data has been added and a new functional button has appeared.

The system has assigned a **Position Request Number (PCR)** and a **WF Status** of 'D' (Created) in the Position Header section. This PCR number does not mean the form has been submitted to workflow. You still must initiate workflow to begin the process. If you have not yet initiated the workflow, you can use the PCR number to make changes and save the latest form.

Although it is not required, BEST Shared Services recommends that you keep a log of your created and submitted actions. Doing so will help them in assisting you should you need their help. Information that may be helpful includes the position number, the action type, the effective date and the PCR number.

Additionally, the **Services for Object** button has appeared on the top right of the screen.

Image

Position Transfer - CREATE

Menu **Services for Object**

Position Header

Position	60087152	Accounting Technician	Org Unit	20010640	OSC FIN SYSTEMS Tech Applications
PCR Number	5000002369		Reports To	60087123	Technical Applications Manager
Valid from	01/19/2026	to 12/31/9999	Supervisor		
Holder			WF Status	D	Created
Personnel area	1401	State Controller			

Step 16. Per Office of State Human Resources (OSHR) policy, all PCRs must include an attached note at the time of submission.

Click the **Services for Objects** button, hover over **Create...**, then click **Create Note**.

Image

Position Transfer - CREATE

Menu | [Dropdown] | [Icons] | Initiate Work Flow

Position Header

Position	60087152	Accounting Technician	Org Unit	
PCR Number	5000002369		Reports To	
Valid from	01/19/2026	to 12/31/9999	Supervisor	
Holder			WF Status	D Created
Personnel area	1401	State Controller		

[Create Attachment] [Create note] [Create external document (URL)] [Store business document] [Enter Bar Code]

[Create...] [Attachment list] [Private Note] [Send] [Relationships] [Workflow] [My Objects] [Help for object services]

Step 17. The content and format of this note must follow the appropriate template provided in the [OM Action Notes Template](#).

- In the referenced action notes template, click into the **Templates** tab and then locate the template for **Position Transfer**. Copy the template into your clipboard.

Image

AutoSave ☐ Off    OM_Comments_Template (6) -... L... • Saved to this PC

File Home Insert Draw Page Layout Formulas Data Review View Automate Help

G62 :   

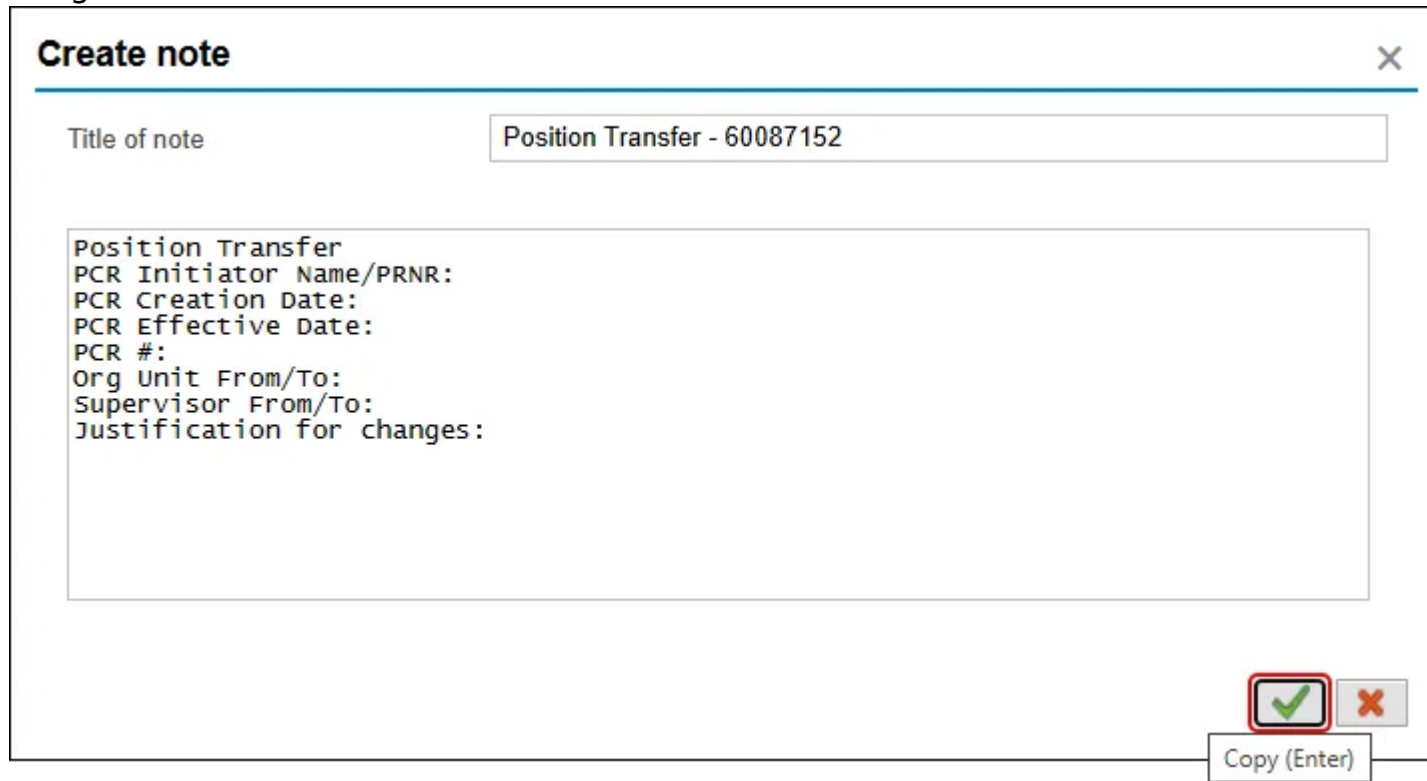
	A	B	C
43	PCR Effective Date:		
44	PCR #:		
45	Justification for use per General Assembly:		
46			
47	<u>Position Transfer</u>		
48	PCR Initiator Name/PRNR:		
49	PCR Creation Date:		
50	PCR Effective Date:		
51	PCR #:		
52	Org Unit From/To:		
53	Supervisor From/To:		
54	Justification for changes:		
55			
56	<u>Position Hours Change</u>		
57	PCR Initiator Name/PRNR:		
58	PCR Creation Date:		
59	PCR Effective Date:		
60	PCR #:		
61	Hours From/To:		
62			
63	<u>Position Employee Group/Subgroup Change</u>		

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Ready  Display Settings  

- Return to the Integrated HR-Payroll System and provide a note in the Title of note field. Then, paste the template into the body of the Create Note pop-up and fill it in with the appropriate information. Finally, press the Copy button to save the note.

Image



Create note [X]

Title of note: Position Transfer - 60087152

Position Transfer
PCR Initiator Name/PRNR:
PCR Creation Date:
PCR Effective Date:
PCR #:
Org Unit From/To:
Supervisor From/To:
Justification for changes:

[Green Checkmark] [Red X]

Copy (Enter)

Step 18. Click the **Initiate Work Flow** button.

Doing so begins the electronic approval process known as Workflow. No changes can be made after the PCR has been submitted for approval, unless it is rejected at any stage and sent back to you (the initiator/requestor).

This position data in the HR-Payroll System is held in the Planned status until the workflow has gone through the entire approval process. Once position data has been saved, it is in Planned status on the position. If the workflow is approved, the data on the various infotypes will be moved into the Active status on the position. If the workflow is cancelled, the data will be moved into the Rejected status on the position.

Note the confirmation on the bottom left of the screen.

Image



Step 19. Click the back button to return to the SAP Easy Access Screen.

The system task is complete.

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