

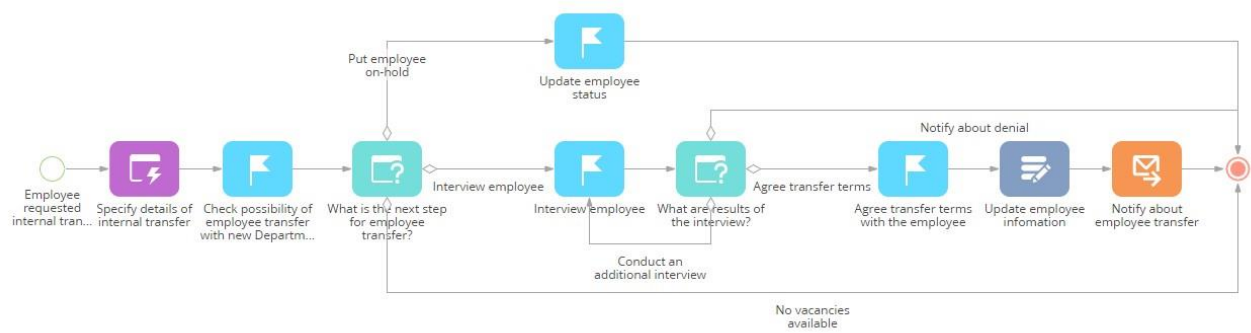
Employee internal transfer

Characteristic	Description
Purpose	Employee internal transfer groundwork Planning and conducting a cycle of interviews with employees Agreeing transfer terms with employees and their managers
Area	HR
Creatio compatibility	All base products on Creatio platform 7.10+
Required system objects	Base sections: <ul style="list-style-type: none">• Contacts• Employees• Activities System sections:• Users

List of process participants' roles

Role	Responsibilities
HR Specialist	Internal paperwork transfer and conducting interviews Preparing evaluation report based on the interview results Approving transfer terms with employees and their line managers
New Department head	Conducting interviews with internal candidates for positions within their department

Process description



Process step	Role	Step description
Employee requested internal transfer	HR Specialist	Based on employee's request, HR Specialist selects new employee record in the [Employees] section and perform the [Start employee transfer] action to run the process.
Specify details of internal transfer	HR Specialist	HR Specialist specifies new department and job title for the requested transfer.
Check possibility of employee transfer with new Department head	HR Specialist	HR Specialist checks if required position is available in the required department.
What is the next step for employee transfer?	HR Specialist	Upon agreement with current and new department heads, HR Specialist plans next activities for employee transfer: <ul style="list-style-type: none"> • Interview employee • Put employee on hold • No vacancies available
Interview employee	HR Specialist / New Department head	HR Specialist conducts an interview and checks the candidate's compliance with the position requirements. If additional interviews are required, HR Specialist arranges the head of the new department as a task owner.
What are results of the interview?	HR Specialist	HR Specialist analyzes the interview results and plans the next process steps: <ul style="list-style-type: none"> • Agree transfer terms • Conduct an additional interview • Notify about denial
Agree transfer terms with the employee	HR Specialist	HR Specialist prepares the transfer terms and agrees them with the employee if the employee successfully passes the interview.
Update employee information	HR Specialist	In case of the employee's positive decision, HR Specialist updates the employee information in Creatio.
Notify about employee transfer	HR Specialist	HR Specialist notifies all parties involved in the transfer process by email on internal transfer of the employee.
Update employee status	HR Specialist	If the employee does not pass the interview but their profile matches most of the position requirements, HR Specialist puts the employee on hold.

Implementation guidelines

1. Install package the [Installed applications] functionality in [System designer].
2. Add HR personnel in Creatio.
3. Configure HR personnel mailboxes synchronization with Creatio to send emails as a part of the business process workflow.
4. Before starting processing internal transfers in Creatio:
 - a. add all current employees in the [Employees] section,
 - b. in the lookup [Organization structure items] add all departments (for each department specify it's lead manager), and
 - c. update all current employees with their organization unit and line manager.
5. If there is an assigned employee responsible for internal transfers at your company, add their details to the "HR Specialist (internal transfers)" system setting.
6. If there is a specified list of email recipients to inform about internal transfers at your company, update the value of the system setting "Email notifications about employee's transfers".
7. To start the process, select a new employee record in the [Employees] section and perform the [Start employee transfer] action.