



Employee/Organizational Transfer

Employee/Organizational Transfer MANAGER

Use this job aid when changing an active employee's classification, status, job title and/or department. For example, the change may be from full time (FT) to part time (PT) or changing to seasonal or casual.

Reminder(s):

- Managers can only backdate organizational changes/transfers by a maximum of 60 days through HR Central.
- Store managers must continue to follow current POS protocol for some organizational transfers.
- The employee must acknowledge that they are "waiving" their FT benefits coverage before a transfer can occur.
- If the transfer requires a change in pay, refer to the **Modifying an Employee Pay Rate/Salary** job aid.

1 Access Current Employee Detail

Log in to HR Central using your Luxottica employee ID and password.

From the **Self Service** menu, select **My Team**.

Select the employee's name.

(You are able to search for an employee by the Employee Name or Lux ID fields. Just click on the field title and perform the search.)

At the employee's data information screen, select **Organizational Transfer**.

The screenshot shows the 'Employee Name' field with a red box around it. Below the field, there are three buttons: 'Back to Team View', 'Change of Basic Pay', and 'Organizational Transfer'. The 'Organizational Transfer' button is highlighted with a red box. Below the buttons, there is a section titled 'Personal Data' with fields for 'Full Name' and 'Nickname'.

2 Choose Effective Date and Reason for Action

In the **Effective Date** field, select the calendar icon and choose the valid date for the organizational transfer (should be first date of a pay period).

Note: HR Central can only backdate changes for 60 days.

1. Use the drop-down menu for the **Reason for Action** to select the reason for the organizational transfer.

The screenshot shows the 'Validity' section with a calendar for February 2016. The date 02/04/2016 is selected. Below the calendar, there is a dropdown menu for 'Reason for Action'. The 'Organizational Assignment' section is also visible, showing fields for 'Position ID', 'Personnel Area', 'Employee Group', and 'Employee Subgroup'. The 'Reason for Action' dropdown menu is highlighted with a red box.



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2. Use the search icon in the **Position ID** textbox to select the new position.
 - a. The **Organizational Transfer for Employee** menu appears. Enter an **Org. Unit**, which is a **6-digit** number
 - Cost Center,
 - Department Number
 - Store Number with leading zeros
 - b. Click the **Search** button.
 - c. The Search: Org.Unit menu appears.
 - d. The Available Positions will populate. Select the desired position.

*If you don't know the Org. Unit number:

1. Click the **search icon** in the Org. Unit textbox.
 2. The **Search: Org.Unit** menu appears. Enter part of a **Cost Center** number in the Org Unit Short field or part of a **Department Name** in the Org. Unit field.
 3. Click **Search**.
 4. Select the desired **Org.Unit**. It will populate the Org.Unit textbox in the Organizational Transfer for Employee menu.
 5. Click **Search**.
 6. Select the desired position.
3. Use the drop-down menu for the **Employee Group** to select the status change, if changing.
 4. Once the **Reason for Action**, **Position ID** and **Employee Group** are selected, click **Next**.

Note the information at the top left of the screen. The current record will be effective until the day before the effective date, when this employee will become part-time. If the change requires a pay change, click **Next** again. If not, review your entries then select **Check**.

Note: If performing a Status Change from Full-Time, the employee must acknowledge online in HR Central that they are "waiving" benefits coverage before a transfer can occur.

Organizational Assignment
Position ID: 50157622 3005ULN1
Personnel Area: UL20 LensCrafters
Employee Group: Casual Casual
Employee Subgroup: UH Hourly

Organizational Transfer for Employee: Employee name X
*Org.Unit: 111315
Position:
Search

Organizational Transfer for Employee: Employee name X
*Org.Unit: 111315
Position:
Search
Available Positions

Org. Unit	Position ID	Position	Supervisor
111315	50158068	Sr Business Systems Analyst	Klosterman, Maureen
111315	50163522	Manager- IT	Klosterman, Maureen
111315	50164110	Technical Analyst	Klosterman, Maureen
111315	50164857	Sr Manager- eCommerce	Klosterman, Maureen
111315	50165844	Sr Technical Manager	Klosterman, Maureen

Search: Org.Unit X
Search Criteria
Organization Unit ID
Org Unit. Short
Org.Unit 1113
Search Clear Entries

3 Review Any Warnings and / or Errors and Send

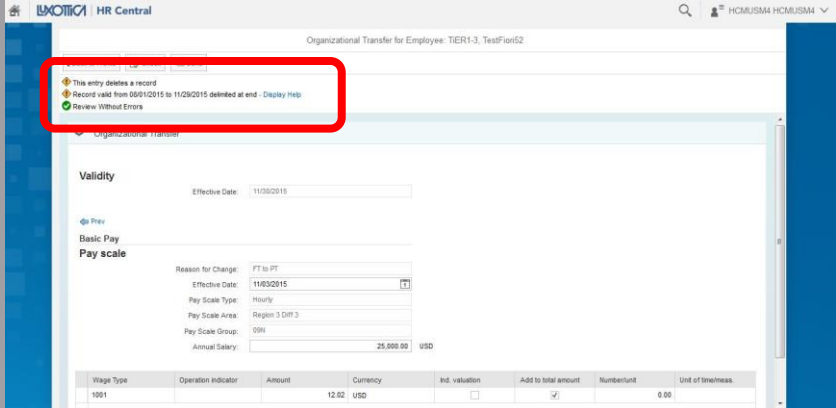
Review all warnings and/or errors.

The first warning states that a record will be deleted. This references the previous status of the employee. The second warning is letting you know that the original record will no longer apply as of the day prior to the effective date you entered. This is expected and a good opportunity to double-check the entry date.

Once you have reviewed any warnings and corrected any errors, select **Send** to complete the Action.

You will see a “Data sent” message and a link to return to **My Team Data**.

The next-level manager will receive a notice in My Data Approvals that this Action needs approval only if it includes a pay change.



Organizational Transfer for Employee: TIER1-3, TestFiori02

Warnings:

- This entry deletes a record
- Record valid from 06/01/2015 to 11/09/2015 deleted at end - Display Help
- Review Without Errors

Organizational Transfer

Validity

Effective Date: 11/09/2015

Basic Pay

Pay scale

Reason for Change: FT to PT

Effective Date: 11/09/2015

Pay Scale Type: Hourly

Pay Scale Area: Region 3 DFT 3

Pay Scale Group: 000

Annual Salary: 25,000.00 USD

Wage Type	Operation Indicator	Amount	Currency	Ind. valuation	Add to total amount	Number/Unit	Unit of time/meas.
1001		12.02	USD	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0.00

Step Completed

Transfer Request was Completed.

[Back to "My Team Data"](#)



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4 Waiver Confirmation by Manager

Once the employee submits the waiver (Employment Status Request), the manager can access the **My Data Approvals** and view the Employment Status Request.

Click on “OK” in the lower right corner to confirm that you have received the request.

A “Submit Decision” box will appear in the middle of the screen to confirm your selection and allow you to add any necessary notes.

Click “Submit” and wait for the “Task Successfully Processed” message to appear.

Employment Status Request for Tobias, TestFiori23

Created on 11/25/2015

Ready Medium

Associate Tobias, TestFiori23 with Lux ID C08652 has submitted an Employment Classification Request for Part Time, effective 11/25/2015. You can perform the Organizational Transfer Action for this associate from the "My Team" icon.

Submit Decision

You have selected "OK".

Add note (optional):

Submit Cancel

Task successfully processed