

# Project Passion

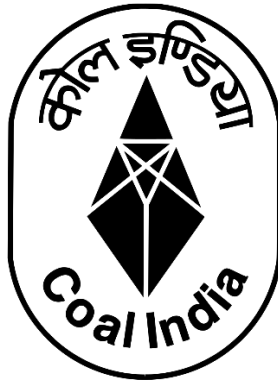
## End User Manual – Transfer Process



### End User Manual

#### Executive Transfer Process – Inter-subsidiary

Prepared for



# Project Passion

## End User Manual – Transfer Process



### DOCUMENT MANAGEMENT

#### Revision History

Version	Date	Author	Revision Description
V1.2	09.11.2024	Swati Solanki	Changes in process by concerned dept, CIL
V1.3	22.03.2026	Swati Solanki	Transfer policy amendments



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## End User Manual – Transfer Process



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### 1. Introduction

The purpose of this document is to provide the procedure to perform Transfer process for Executives in ESS. For Executives, Request & Mutual transfer will be applied through ESS. On submission, it will go to **HoD -> AGM -> GM (EE) Parent subsidiary -> GM (EE) intended subsidiary -> GM (EE), CIL**. Applicant can view the status in ESS.

Note – Maintenance of HoD in ERP (by concerned personnel dept) is mandatory for this process.

### 2. Transfer types

There are 2 types of transfers: -

- **Mutual transfer** - The applications is merged as one application instead of two individual applications. Applicant will apply - a pop to agree the transfer application will appear in Mutual ESS screen, upon accepting the workflow will trigger.
- **Request transfer** - Employee will apply for transfer. Approval will be as per above mentioned flow.

For each type, transfer is applicable for following location types: -

- Inter- Subsidiary
- Inter- Area
- Inter- Unit

At present, Inter-subsidiary transfer will be active.

A mail will be triggered automatically to the applicant when application is submitted. Mail Id needs to be maintained in IT 0105 in ERP for this purpose.

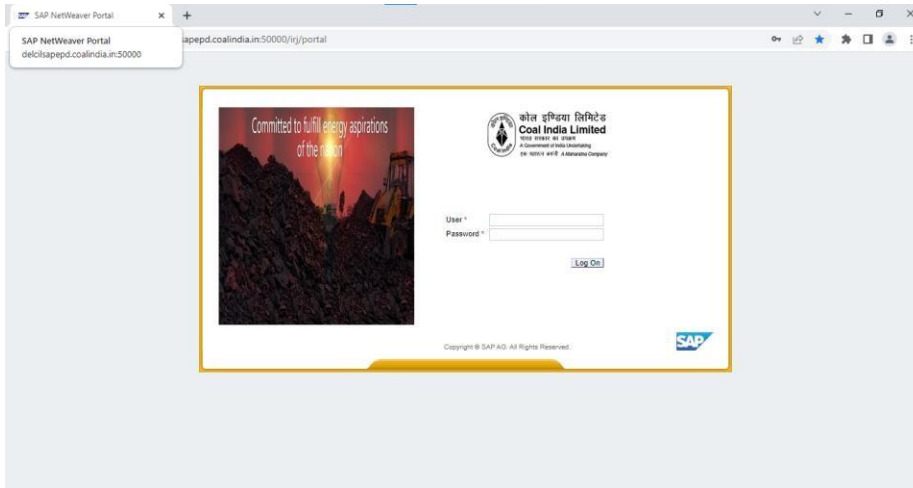




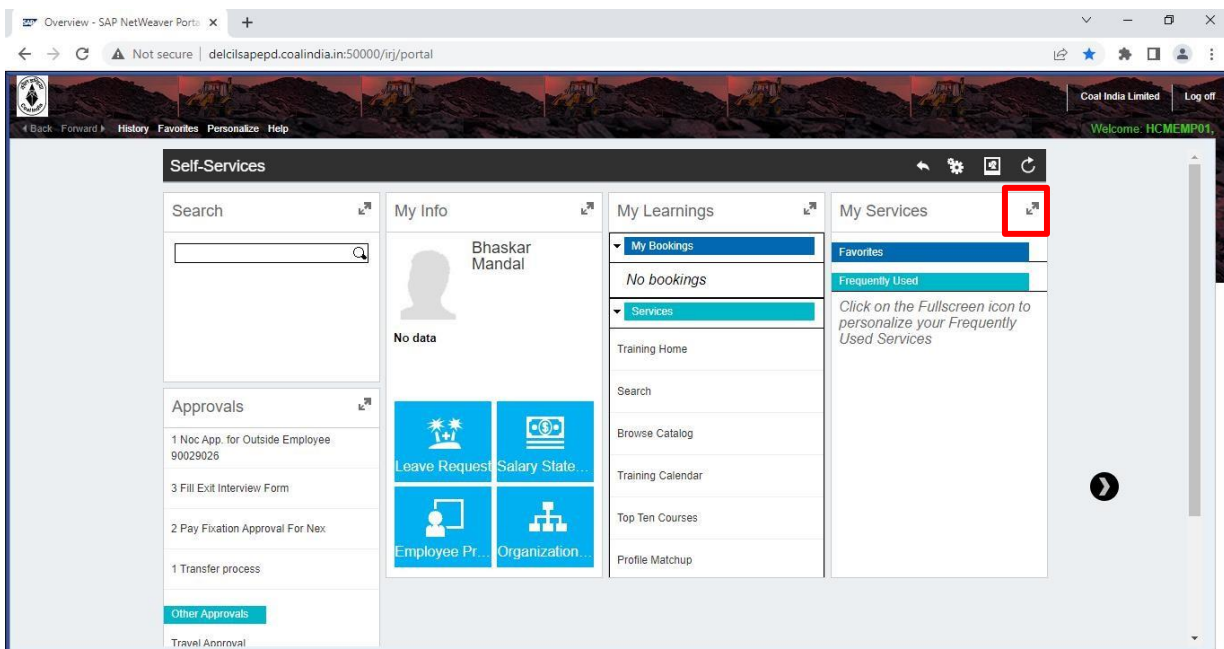
### 3.0 TRANSFER APPLICATION PROCESS THROUGH ESS /./m,

#### 3.1 cwsz Process

- i. Open ESS/ MSS through CIL website. Enter **Username & password**
- ii. Click on **Log On** option.



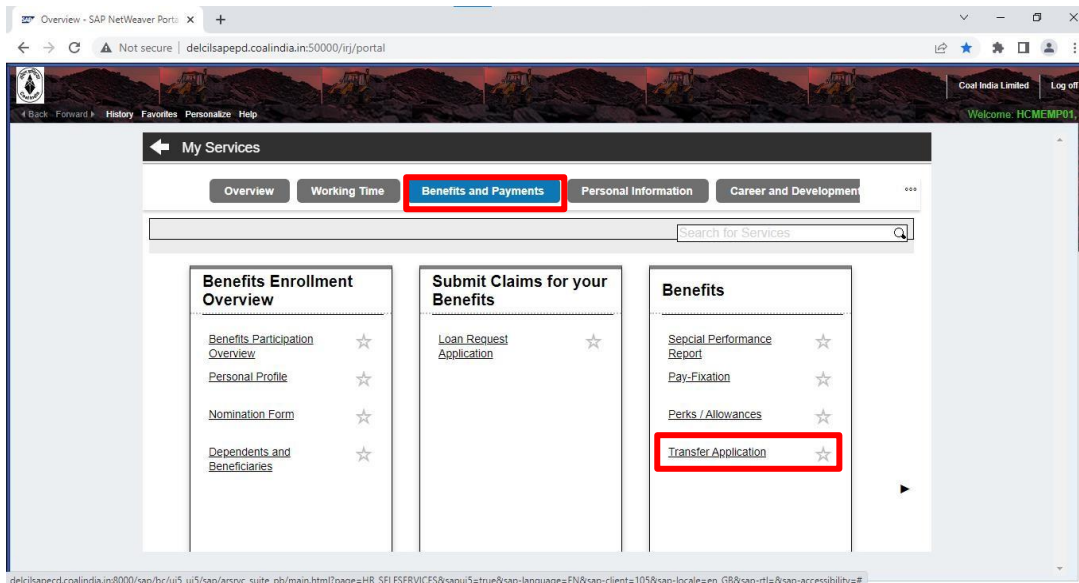
- iii. The following screen will be displayed.



- iv. Click on the **expand** option as shown above.
- v. The following screen will appear

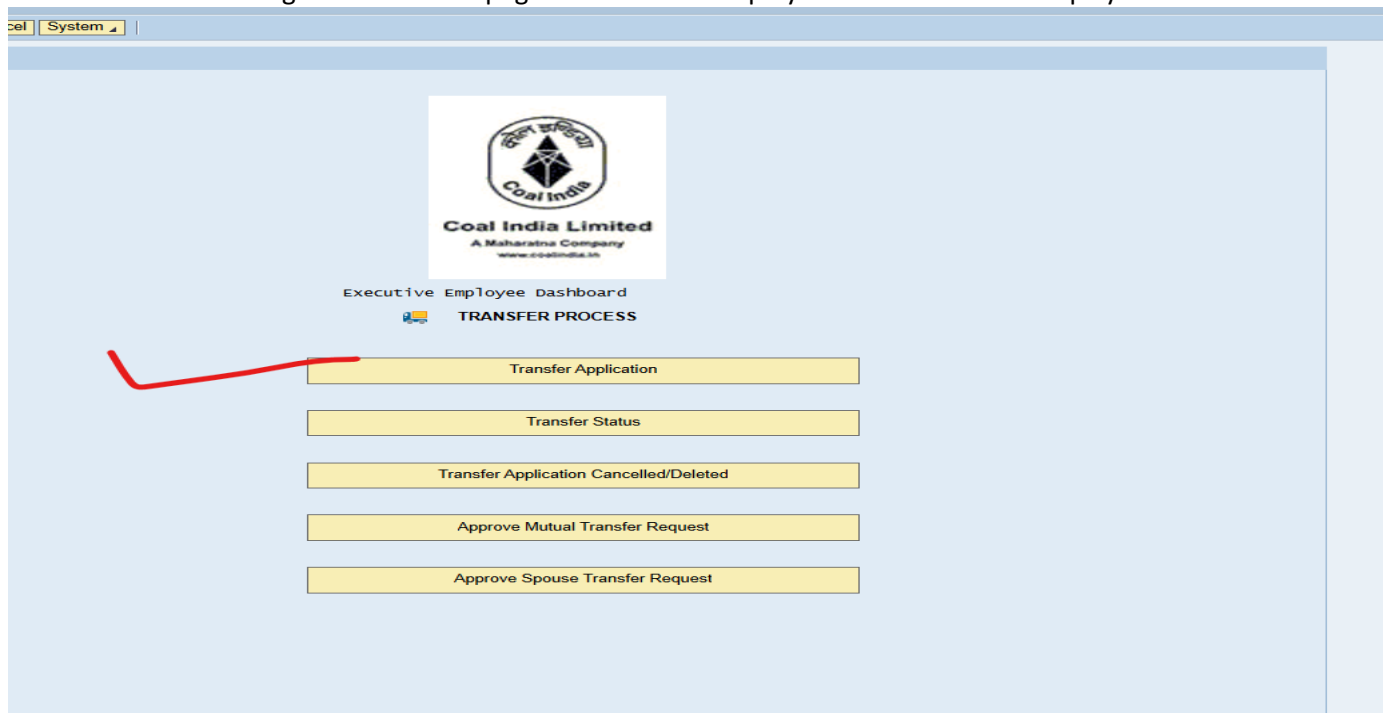
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vi. Go to the **Benefits and Payments** tab & click on **Transfer Application**

vii. The following Transfer Home page for Executive employees' transfer will be displayed.



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Five tabs available on the transfer home page for executive employee transfers that can be used to perform all possible actions related to executive employee transfers, including submitting transfer applications, checking transfer status, approving mutual & spouse requests, and cancelling or deleting transfer applications.

viii. Click on the **Transfer Application** tab from the executive transfer home page.

ix. The following screen will be displayed. The basic details will get auto fetched.

Transfer Application for Executive

Personnel Number: 90276163	Company Code: CIL
Employee Name: Swati Solanki	Personnel Area: 1A00 CIL HQ
Father's name:	Personnel Sub Area: 1A01
Date of Birth: 20.04.1987	Date of joining in service: 28.12.2011
Educational qualification: B.SC,M.B.A,ILLITERATE,B.E (BIOTECHNOLOGY ENGG)	Date of posting in the present subsidiary: 20.12.2023
Designation: SR.MANAGER(PERS )	Date of joining in present grade: 01.10.2024
Grade: E-6	Date of superannuation: 30.04.2047
	Reporting Authority: 90100918 Abhijit Saha

▼ Transfer Location

Inter Area

Inter Unit

Inter Subsidiary

\* Application Date: 11.11.2024

\* Type of Transfer:

\* Reason of Transfer:

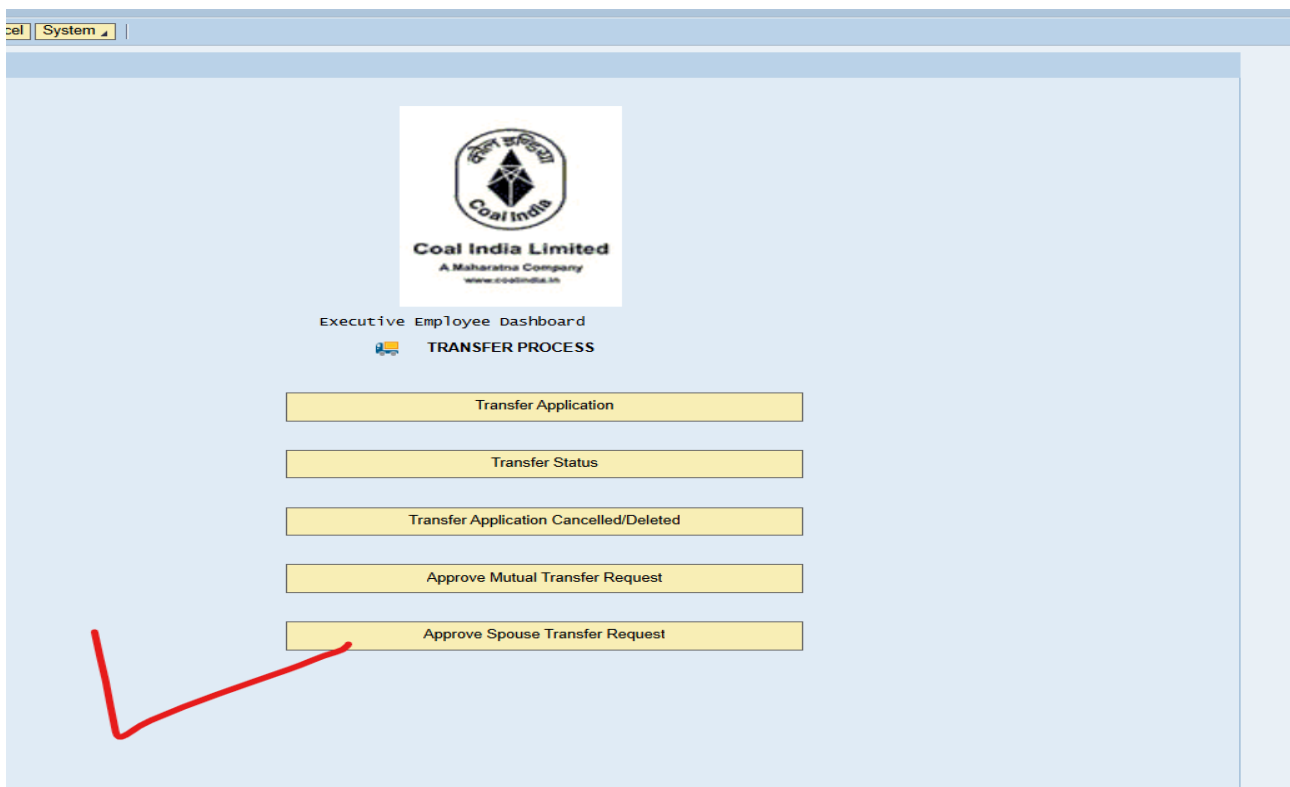
\* Reason in brief:

File Upload: No file chosen



- **Type of Transfer-** Choose the type of transfer as per the requirement
  - **Request**
  - **Mutual**
  
- Mutual employees should have same discipline but grade can be one grade above & below the current grade of applicant that is an executive belonging to E4 grade can apply for mutual transfer with an executive belonging to E3, E4 or E5 grade.
- If any employee applies for transfer, system will check date of posting in his current company, if it is less than 3 yrs from date of application, and 'To company' is same as last company, then application will not get submitted with reason 'Not eligible for transfer- less than 3 years in current company'.
- **Transfer location type-** Choose Transfer Location as per the requirement from the drop-down menu
- **Proposed subsidiary/ area/ sub-area-** Choose the proposed Subsidiary/ Area/Sub-area from the search option as per the requirement.
- **Reason for transfer-** Choose the reason for transfer from the search option as per the requirement.
- Reason 'Health ground' is bifurcated into '**Medical ground- Self**', '**Medical ground – Spouse**', '**Medical ground – Dependent children**'  
If reason of transfer is chosen as any of three in request transfer option, then another field 'Disease' will appear with following dropdown
  - Cancer (except for primary stage)
  - Paralysis of permanent nature
  - Leprosy
  - Kidney failure
  - Total blindness
  
- If reason for transfer is chosen as '**Working spouse (CIL)**', then another field will appear 'Employee no. of spouse'. On entering EIS/ NEIS no following fields will auto-populate. This fields will be seen in approver screen also-
  - Name of Spouse
  - EIS/NEIS No
  - Designation
  - Grade
  - Present Company
  - Present Area & Unit
  - Date of coming in present grade
  - Date of joining in the present company
  - Name of previous company

If spouse is executive, the consent for agreeing for transfer will go in ESS of spouse. On approval by spouse in the tab shown below, then only HoD of applicant can forward the application.

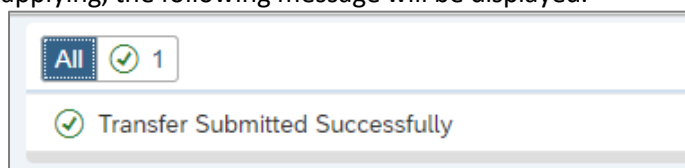


if spouse is a non-executive employee, he won't have access to ESS. In that case, EE department of the concerned subsidiary (where non-executive spouse is posted) will take written consent from her/ his ESS and upload it in approver screen.

- **Reason in brief** – Mention the reason for transfer in brief. It will be displayed to approvers.
- **Application Date**- The application date will always be the current day's date. It will appear automatically.
- **File Upload**- If any relevant file is available, choose that file from the storage and click on the upload option.

x. Then click on the **Submit**

xi. After applying, the following message will be displayed.



xii. A mail will be triggered automatically to the applicant when application is submitted. Mail Id needs to be maintained in IT 0105 in ERP for this purpose.



**Note:**

1. There are **two** types of transfer drop-down values available as shown in the screen below.
  - i. In **REQUEST** type of transfer, provide reason for transfer & brief, upload file if available and click on the Submit option to submit the application. The next level will automatically get fetched
  - ii. In **MUTUAL** type of transfer, the following screen will also be displayed.

Transfer Application for Executive

Personnel Number: 90276163	Company Code: CIL
Employee Name: Swati Solanki	Personnel Area: 1A00 CIL HQ
Father's name:	Personnel Sub Area: 1A01
Date of Birth: 20.04.1987	Date of joining in service: 28.12.2011
Educational qualification: B.SC,M.B.A,ILLITERATE,B,E (BIOTECHNOLOGY ENGG)	Date of posting in the present subsidiary: 20.12.2023
Designation: SR.MANAGER(PERS )	Date of joining in present grade: 01.10.2024
Grade: E-6	Date of superannuation: 30.04.2047
	Reporting Authority: 90100918 Abhijit Saha

▼ Transfer Location

Inter Area  
 Inter Unit  
 Inter Subsidiary

\* Proposed subsidiary:

\* Application Date: 11.11.2024

\* Type of Transfer: MUTUAL

\* Mutual Emp. ID: 90276817 Get Mutual Details

Employee Name: Sanjay Kumar

Personnel Area: 1A00 CIL HQ

Personnel Sub Area: 1A01

\* Agreed by Mutual: YES

\* Reason of Transfer:

\* Reason in brief:

File Upload: No file chosen

Search: VISIBLE

Items (2)

REQUEST


MUTUAL

- Enter **Mutual Emp. ID**
- Click on the **Get Mutual Details**, then mutual employee details will automatically get fetched.
- Select **YES** in the **Agreed by Mutual** field from the dropdown list. It is mandatory.
- Select reason for transfer from dropdown & mention reason in brief.
- Click on **Submit** button. Application will be submitted.

2. A mail will be triggered automatically to the applicant & mutual applicant. Mail Id needs to be maintained in IT 0105 in ERP for this purpose.
3. In case of mutual transfer, once application is submitted by applicant, a request to approve the mutual transfer will appear in transfer tab of mutual. Once accepted by mutual applicant, then


only HoD of applicant can forward the application further


cel System



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A Maharatna Company  
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Executive Employee Dashboard

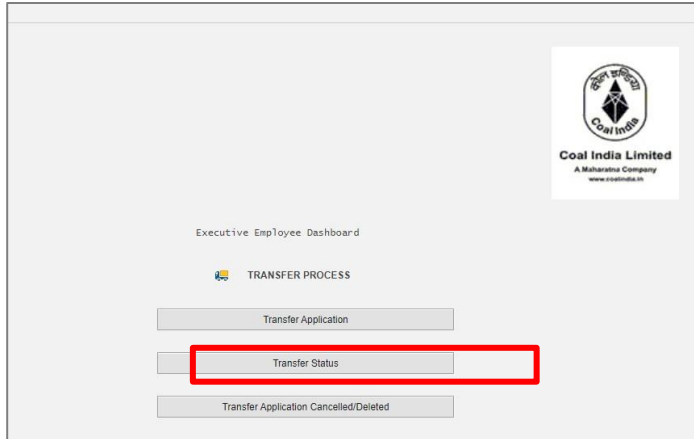
 **TRANSFER PROCESS**

- Transfer Application
- Transfer Status
- Transfer Application Cancelled/Deleted
-  Approve Mutual Transfer Request
- Approve Spouse Transfer Request

**3.2 TRANSFER STATUS**

After applying for transfer, executive employees can see application status of their application through ESS portal.

- i. Click on the **Transfer Status**.

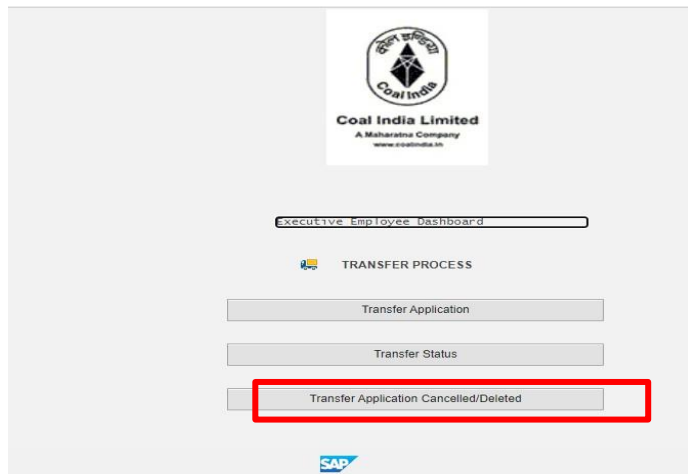


- ii. The following screen will be displayed to show the status of application.

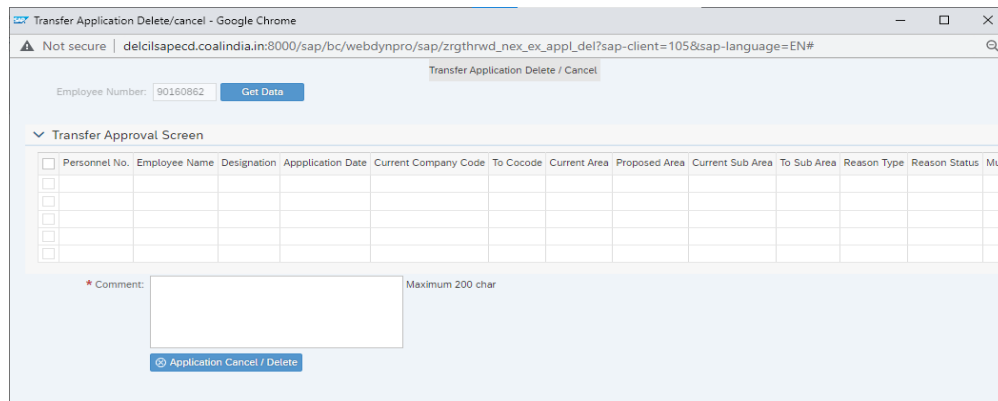
Transfer Status											
Menu <input type="text"/> <input type="button" value="Back"/> <input type="button" value="Exit"/> <input type="button" value="Cancel"/> <input type="button" value="System"/> <input type="button" value="Details"/> <input type="button" value="Sort in Ascending Order"/> <input type="button" value="Sort in Descending Order"/> <input type="button" value="Set Filter"/> <input type="button" value="Total"/> <input type="button" value="Print Preview"/> <input type="button" value="Local File..."/> <input type="button" value="Mail Recipient"/> <input type="button" value="Chart"/>											
Personal No	REF.No. for Transfer	Employee Name	Designation	Emp. Grade	Start Date	Frm Cocode	To Cocode	Frm pers. Area	To Pers. Area	Current Sub Area	To SubArea
90160862	1	Bhaskar Mandal	CHIEF MANAGER (MINING)	EXECUTI...	18.05.2021	CIL		1A00	1A00	1A01	
To SubArea	Transfer Type	Mutual Employee	Mutual emp. Name	Loc. Type	Attachment	Apprv Level	Apprv Id	Approver Name	Status	Action Date	Comments
	MUTUAL	90029026	Partha Mishra	Inter Area		1	90192...	Rakesh Kr Singh	PEN...	18.05.2021	

### 3.3 TRANSFER APPLICATION CANCELLATION

- i. Click on the **Transfer Application Cancelled/Deleted**. After applying for transfer, executives can cancel/ delete their applications through ESS portal only before approval.
-



ii. The following screen will be displayed:



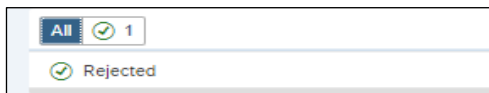
iii. Click on the **Get data** option

iv. The application details will appear on the Transfer Application Screen.

v. Enter the **comment**.

vi. Click on the **Application Cancel/Delete** button.

a. After cancelling the requested transfer application, the following comment will appear on the screen:



vii. The option for withdrawal of application to be limited to once in a cycle of six months, fixing 06 months tenure, as under –

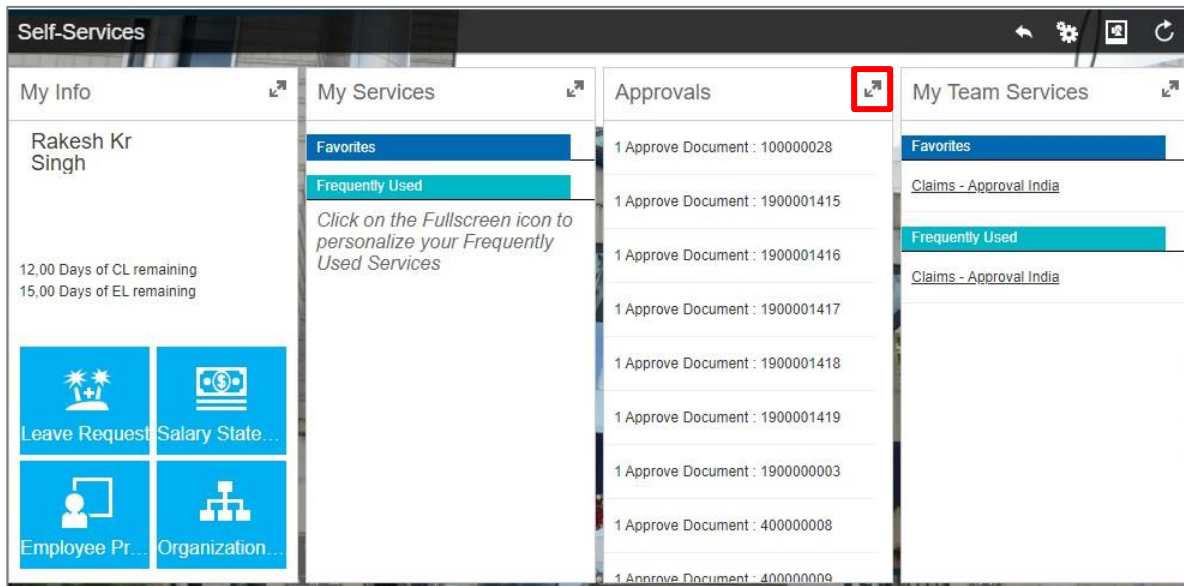
1. April to September
2. October to March

As such, if the executive withdraws & resubmits his application in the tenure- April to Sept, he will not be allowed to withdraw his application again in the said tenure and can only withdraw & reapply in the next tenure.

#### 4.0 TRANSFER APPROVAL PROCESS THROUGH MSS

The approver will login into MSS screen and the following screen will be displayed.

- I. Click expand button in **Approvals** tab.



The following screen will be displayed.

- ii. Click Transfer process.

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← Approvals

Open Tasks On 18.05.2021, 12:30:34

Sort By: Creation Date

	<b>Transfer process</b>	18.05.2021 12:26
HCME...	Claim · Release · Forward	Ready
	<b>Approve Document : 1900000111</b>	18.05.2021 12:23
Workfl...	Claim · Release · Forward	Ready
	<b>Approve Document : 1900000110</b>	18.05.2021 12:23
Workfl...	Claim · Release · Forward	Ready
	<b>Transfer process</b>	18.05.2021 12:07
HCME...	Claim · Release · Forward	Ready

The following screen will be displayed.



➤ Total blindness

- Comments & other details can be viewed at each level of approval.
- All the data visible in approver screen has to be maintained in relevant info types in ERP by concerned personnel dept

## 5.0 Workflow

**Mutual Transfer** applications is merged as one application instead of two individual applications. The workflow for inter-subsidary Mutual transfer will be as follows:

### a) Executives posted at Subsidiary level

Applicant (ME1) -> Mutual Executive (ME) no 2 (a pop to agree the transfer application will appear in Mutual ESS screen, upon accepting the workflow will trigger) -> HOD ME1 (20 days auto-forward) -> GM(EE) Subsidiary ME1 -> HOD ME2 (20 days auto-forward) -> GM(EE) Subsidiary ME2 -> GM (EE), CIL

### b) Executives posted at Area/ unit level

Applicant (ME) no 1 -> Mutual Executive (ME) no 2 (a pop to agree the transfer application will appear in Mutual ESS screen, upon accepting the workflow will trigger) -> HOD ME1 (5 days auto-forward) -> AGM ME1 (15 days auto-forward) -> GM (EE) Subsidiary ME1 -> HOD ME2 (5 days auto-forward) -> AGM ME2 (15 days auto-forward) -> GM (EE) Subsidiary ME2 -> GM (EE), CIL

## 2. Request Transfer

### a) Executives posted at Subsidiary level

Executive -> HOD (20 days auto-forward) -> GM (EE) Subsidiary 1 -> GM (EE) Subsidiary 2 -> GM (EE), CIL

### b) Executives posted at Area/ unit level

Executive -> HOD (5 days auto-forward) -> AGM (15 days auto-forward) -> GM (EE) Subsidiary 1 -> GM (EE) Subsidiary 2 -> GM (EE), CIL

## 6.0 Pre-requisite for workflow

### Maintenance of data

HoD - Default from org structure

GM (EE) Subsidiary - Z37 in PO13 between position id & org id of GM(EE)

AGM- Relationship Z07 IN P013 between position id & org id of AGM