

**Transferring an Employee to a New Agency - Receiving
Agency**

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Transferring an Employee to a New Agency - Receiving Agency

Transferring an Employee to a New Agency - Receiving Agency Overview

When an employee is transferred to another agency, the transferring agency must change the Security Business Unit to a generic Security Business Unit so that the new agency can access the employee's record to make the appropriate changes to complete the transfer. Fields within the Employee Master must be changed (for example, the supervisor, home business unit, position ID etc.) by the Receiving Agency. If the job attached to the new position is different from the employee's previous job, the job must be changed. Typically the employee's salary or hourly rate also will be changed. The receiving agency should review ALL fields within the employee master to ensure the employee information is correct for the employee's new job.

Warning: When an employee is transferred, the transferring agency must also transfer all of the employee's dependents and beneficiaries so that the receiving agency can access the dependent/beneficiary records. The Dependent/Beneficiary business unit will need to be changed to the employee's new Home Business Unit.

Warning: If Labor Distribution existed for the employee at the previous agency, it must either be deleted or appropriate changes need to be made to reflect the Labor Distribution for the new agency.

Note: The agency's Authorized Security Agent should be notified to make appropriate changes to Security and Batch Management. If this employee works in Procurement, ensure the appropriate changes are made to Approval Routes.

If an Employee's benefit group or pay frequency changes, the employee's benefits will need to be changed. End the employee's current benefits and re-enroll them in the appropriate benefits.

Warning: When an employee's benefits are stopped, benefits for any dependents/beneficiaries attached to the plan will automatically be stopped as well. If any dependents/beneficiaries are attached to existing enrollments, they will need to be re-enrolled in the new plans.

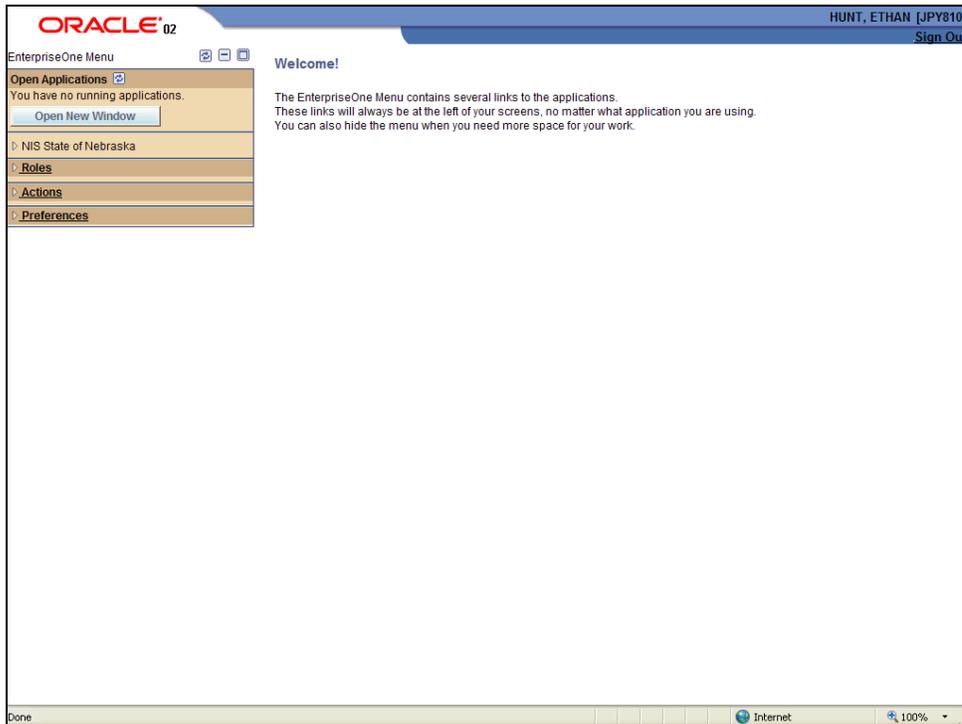
Transferring an Employee to a New Agency - Receiving Agency Lesson

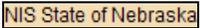
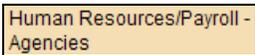
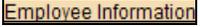
Procedure

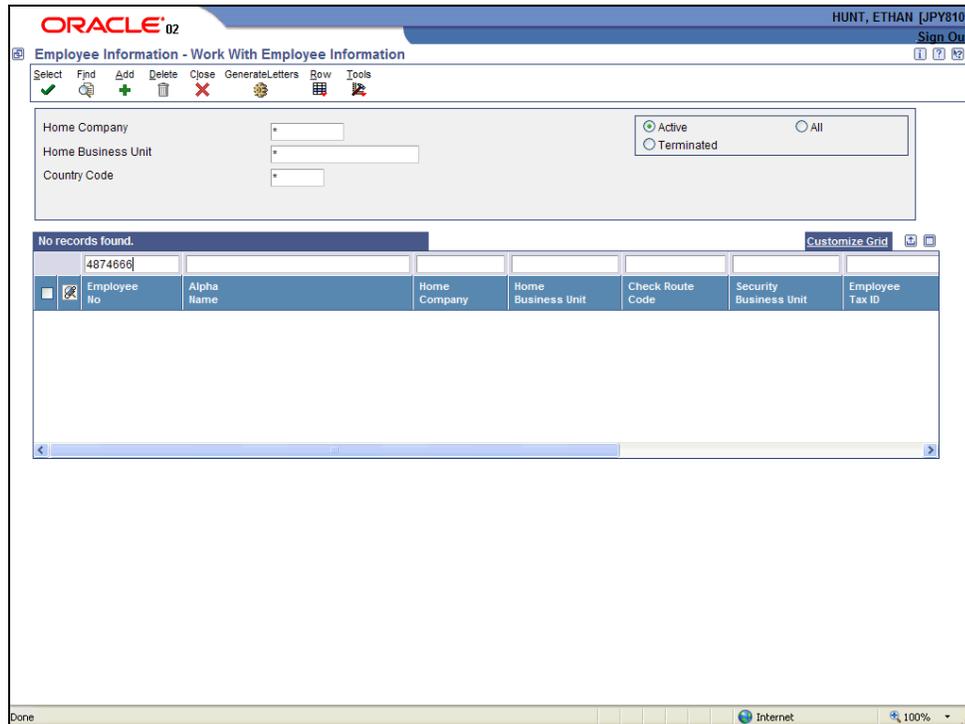
In this lesson you will learn the steps to take when an employee is transferring to your agency.

Training Guide

Transferring an Employee to a New Agency - Receiving Agency



Step	Action
1.	Click the NIS State of Nebraska link. 
2.	Click the Human Resources/Payroll - Agencies link. 
3.	Click the Employee Maintenance link. 
4.	Click the Employee Information link. 
5.	First you will need to find the employee record. You can narrow your search by using the fields in the QBE line. Specifically the Employee No field (the employee's address book number), and the Alpha Name field.



Step	Action
6.	After entering your search criteria in the QBE line click the Find button. 
7.	Choose the employee by clicking the check box next to their record. 
8.	Click the Row button. 
9.	Click the Employee menu. 

Training Guide

Transferring an Employee to a New Agency - Receiving Agency

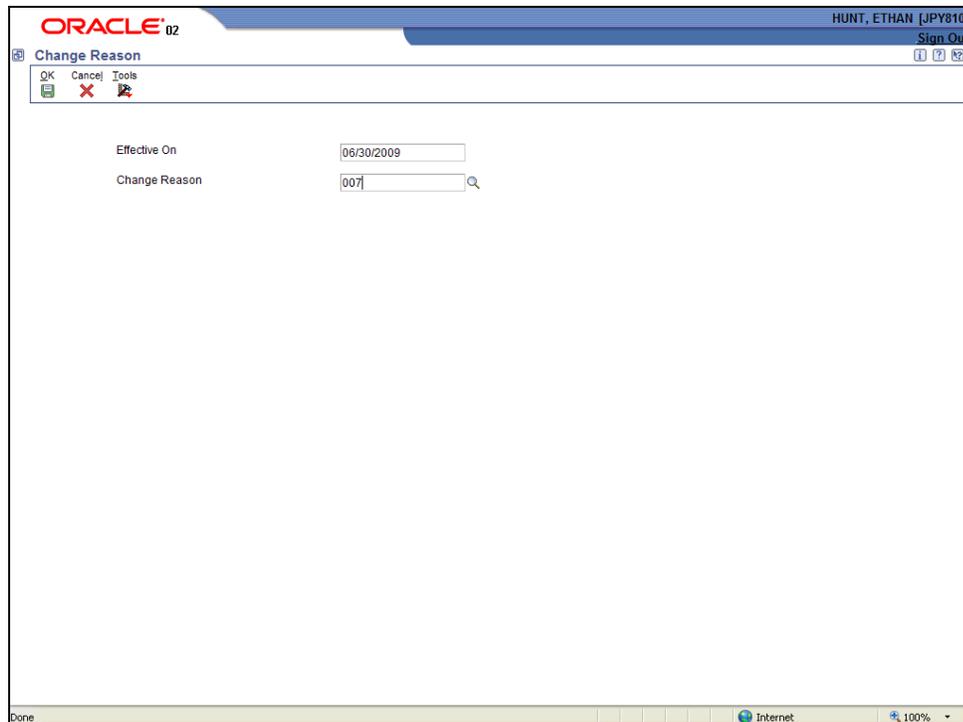


Step	Action
10.	<p>You will need to update the following fields as needed:</p> <p>Security Business Unit Check Route Code Pay Frequency Pay Status Employee Benefit Status Benefit Group Adjusted Service Date (if applicable) Agency Original Hire Date - (date started) - MUST BE less than or equal to Date Pay Starts. Date Pay Starts - Warning: After you click OK on the Employee Information - Employee screen, if Agency Original Hire Date is greater than the Date Pay Starts, the Employee Information - Date in Job and Position Selection screen will appear. You will need to make the appropriate selections and click OK. You will still need to change the Date Pay Starts to be greater than or equal to Agency Original Hire Date. Termination Date (remove date if applicable)</p>

The screenshot shows the Oracle HRMS 'Employee Information - Employee' form for KENT, CLARK S. The form is divided into several sections:

- Employee Information:** Employee No. 4874666, Employee Tax ID 999010002, Name KENT, CLARK S.
- Security Business Unit:** S850050000, DAS-MATERIEL DIVISION.
- Home Company:** 10000, STATE GENERAL FUND.
- Check Route Code:** 6500150100, 65 001 ST CAPITOL.
- Pay Frequency:** B, BI-WEEKLY.
- Pay Status:** 0.
- Employee Benefit Status:** A, ACTIVE.
- Benefit Group:** NAPE-B, NAPE/AFSCME-BIWEEKLY, Adj. Service Date 06/30/2009.
- Original Hire Date:** 06/15/2009, Agency Original Hire Date 06/30/2009.
- Leave Begin Date:** (empty), Leave End Date (empty).
- Expected Recall Date:** (empty), Termination Date (empty).
- Date Pay Starts:** 6/30/09, Date Pay Stops (empty).
- Data Protection Standards:** N/A, Enrollment Date Code (empty).
- Upon Termination:** N/A, Country of Employment US, UNITED STATES.

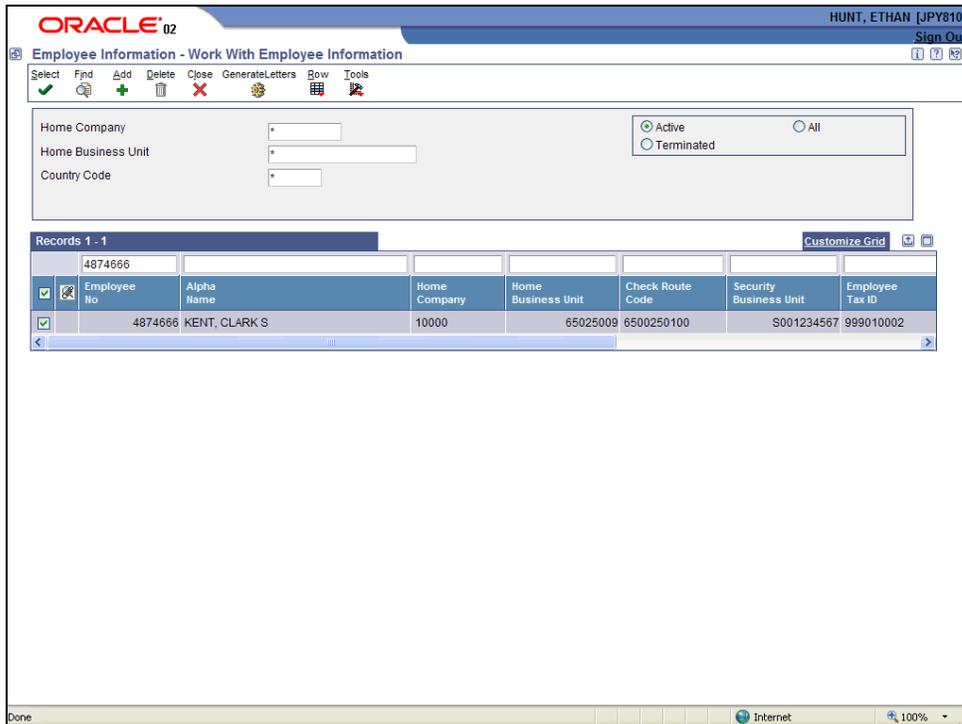
Step	Action
11.	When you are finished making your changes click the OK button. 
12.	Enter the effective date in the Effective On field and the change reason code in the Change Reason field. Use the Visual Assist tool if necessary.

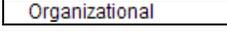


Step	Action
13.	Click the OK button. 

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Transferring an Employee to a New Agency - Receiving Agency



Step	Action
14.	Click the Row button. 
15.	Click the Organizational menu. 
16.	Update the following fields as necessary: Supervisor Home Business Unit Position ID Job Code Date in Current Position ID Date in Current Job Employment Status Date Pay Starts

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Employee Information - Organizational Assignment

Employee No. 4874666 KENT, CLARK S

Last Start Date 06/30/2009

Supervisor 4455871 HUNT, ETHAN

Home Business Unit 65050008 MATERIEL - ADMINISTRATION

Mentor

Team DEFAULT

Position ID 08551053 BUYER II Date in Current Position ID 06/30/2009

Job Code A05312 IT Manager I Date in Current Job 06/30/2009

Working Title

Barg Unit G MANAGEMENT GROUP N/A

EEO Job Category A OFFICIALS AND ADMINISTF Shift Code

Employment Status FULL-TIME REGULAR Full Time Equivalents 1.00

Date Pay Starts 06/30/2009 Date Pay Stops

Job Competency

Organizational Business Unit

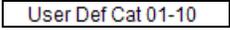
% Competency Achieved .00 Last Competency Review Date

Performance Appraisal

N/A .000

Last Review Type Last Review Date

Next Review Type Next Review Date

Step	Action
17.	When you are finished making your updates click the Form button. 
18.	Click the User Def Cat 01-10 menu. 
19.	Update the following fields as necessary: Agency Number O*Net Code Union Code Census Code Benefit Payroll Cycle

Training Guide

Transferring an Employee to a New Agency - Receiving Agency



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Employee Information - Employee/Job Category Codes 01 - 10

OK Cancel Form Tools

Employee No. 4874666 KENT, CLARK S

Home Business Unit 65025009 NIS

Job Code G07092 IT MANAGER I

NA

Agency Number 065 DEPT OF ADM SERVICES

Category Code 02

Category Code 03

NITC

O*Net Code 00 GENERAL DESCRIPTION

Union Code 004 RULES

Census Code 011 COMPUTER AND INFORMATION SYSTE

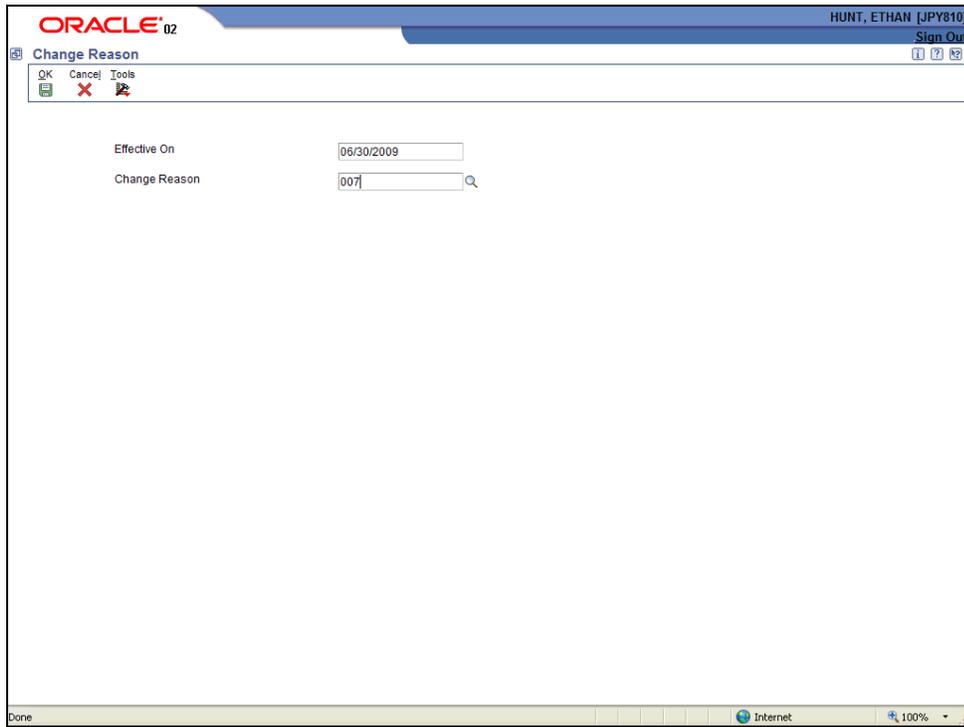
Benefit Payroll Cycle B10

Category Code 09

Category Code 10

Done Internet 100%

Step	Action
20.	When you are finished making your updates click the OK button. 
21.	Enter the effective date in the Effective On field and the change reason code in the Change Reason field. Use the Visual Assist tool if necessary.



Step	Action
22.	Click the OK button. 

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Transferring an Employee to a New Agency - Receiving Agency



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Employee Information - Organizational Assignment

OK Cancel Form Tools

Employee No. 4874666 KENT, CLARK S

Last Start Date 06/30/2009

Supervisor 4455871 HUNT, ETHAN

Home Business Unit 65050008 MATERIEL - ADMINISTRATION

Mentor

Team DEFAULT

Position ID 08551053 BUYER II Date in Current Position ID 06/30/2009

Job Code A05312 Buyer II Date in Current Job 06/30/2009

Working Title

Barg Unit G MANAGEMENT GROUP N/A

EEO Job Category A OFFICIALS AND ADMINISTF Shift Code

Employment Status FULL-TIME REGULAR Full Time Equivalents 1.00

Date Pay Starts 06/30/2009 Date Pay Stops

Job Competency

Organizational Business Unit

% Competency Achieved .00 Last Competency Review Date

Performance Appraisal

N/A .000

Last Review Type Last Review Date

Next Review Type Next Review Date

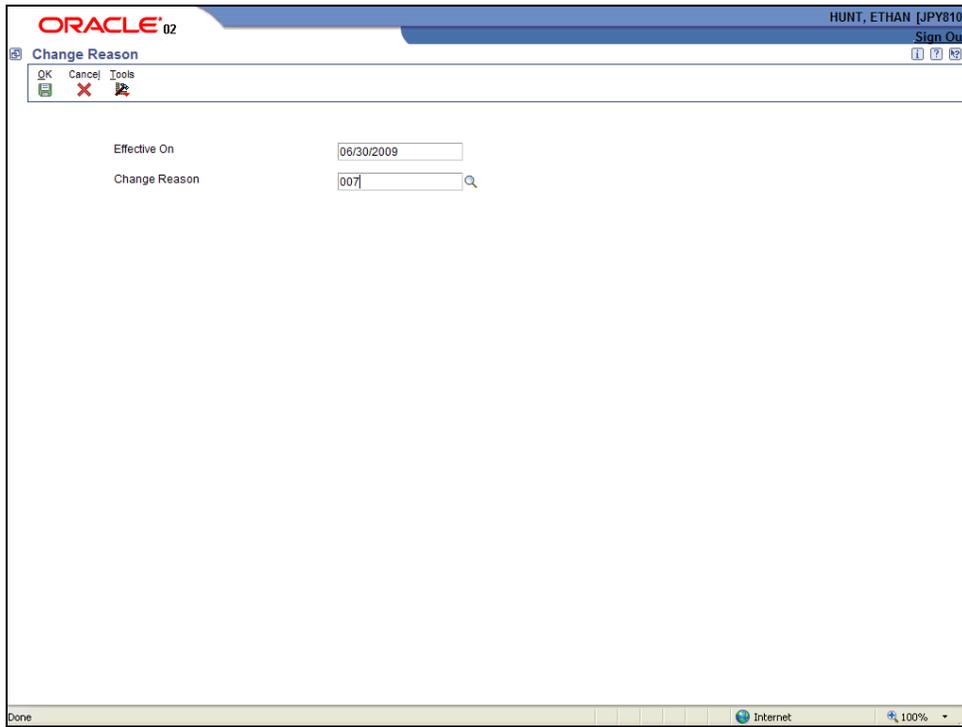
Done Internet 100%

Step	Action
23.	Click the OK button. 
24.	Verify the Only Use Defaults to Overwrite Blank Values option is selected. Also verify all other information and make any necessary changes.

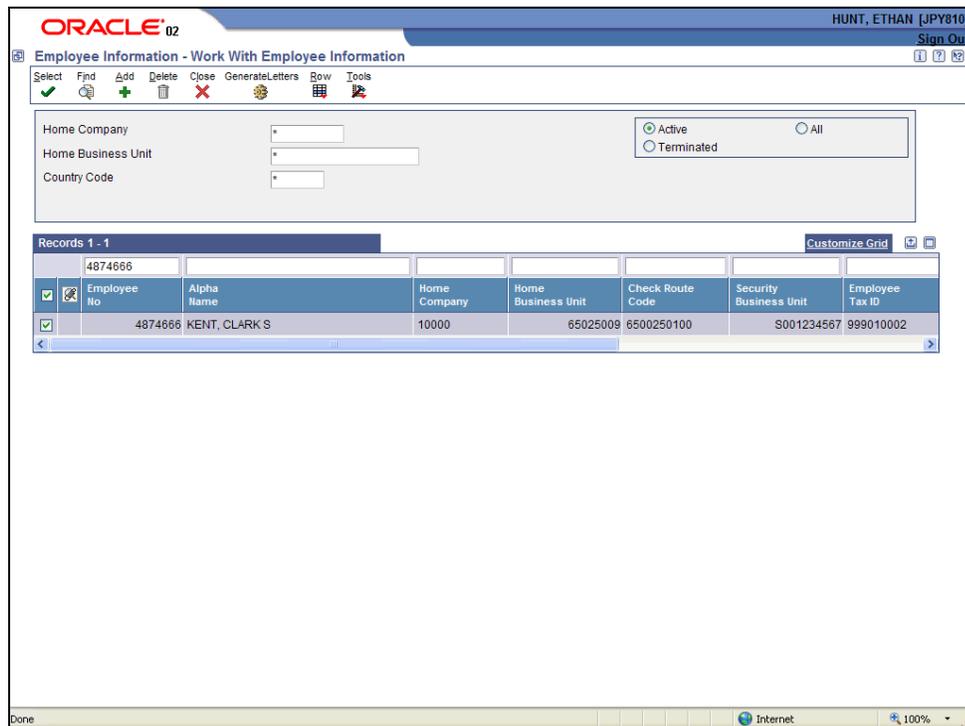
Step	Action
25.	<p>Click the OK button.</p> 
26.	<p>Enter the effective date in the Effective On field and the change reason code in the Change Reason field. Use the Visual Assist tool if necessary.</p>

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Transferring an Employee to a New Agency - Receiving Agency



Step	Action
27.	Click the OK button. 



Step	Action
28.	Click the Row button. 
29.	Click the Basic Compensation menu. 
30.	Complete the appropriate fields: Hourly Rate – Hourly employees Salary – Salaried employees Pay on Std Hours

Training Guide

Transferring an Employee to a New Agency - Receiving Agency



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Employee Information - Basic Compensation

OK Cancel Form Tools

Employee No. 4874666 KENT, CLARK S

Home Business Unit 65050008 MATERIEL - ADMINISTRATION

Job Code A05312 Buyer II

Pay Frequency B BI-WEEKLY Position ID 06551053 BUYER II

Barg Unit G MANAGEMENT GROUP N/A

Pay Class S SALARIED

Pay Grade/Step 20 00 Pay Rate Source 3 NONE

Salary 50000 @ A Pay Period Salary 1,538.46

Hourly Rate 19.231 Compa-Ratio .56

Std Hrs/Day 8.00 Pay on Std Hours

Std Hrs/Year 2080.00 Overtime Exempt N

Std Days/Year 260.00 FTE 1.00

Default Auto Pay Type

Compensation Review

N/A

N/A

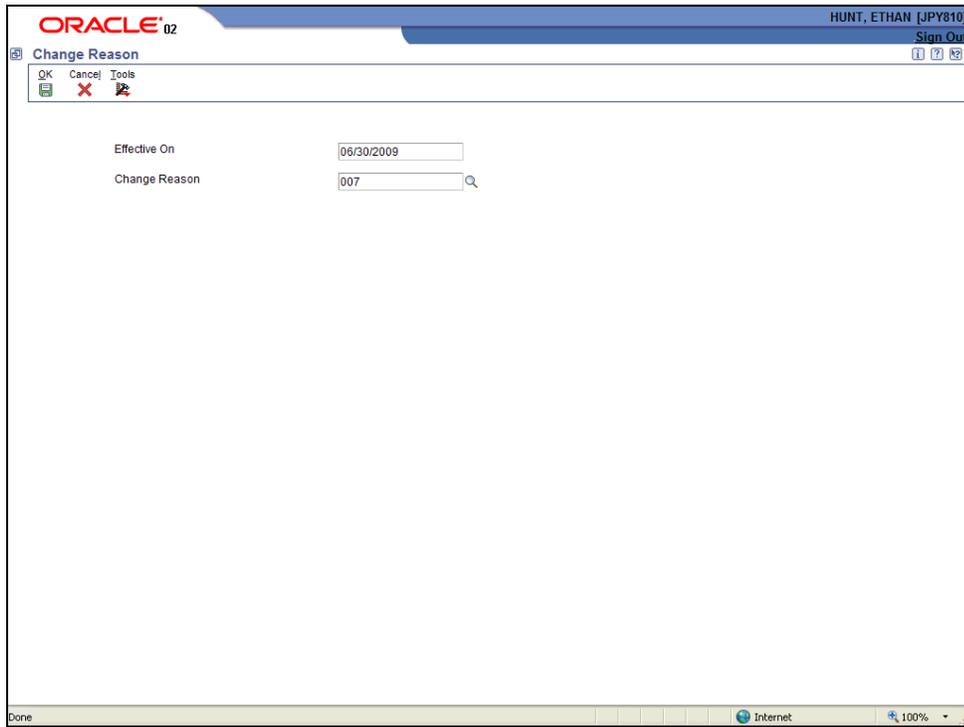
N/A 0

Next Comp Review Date

Last Tier/Ranking Review Date

Done Internet 100%

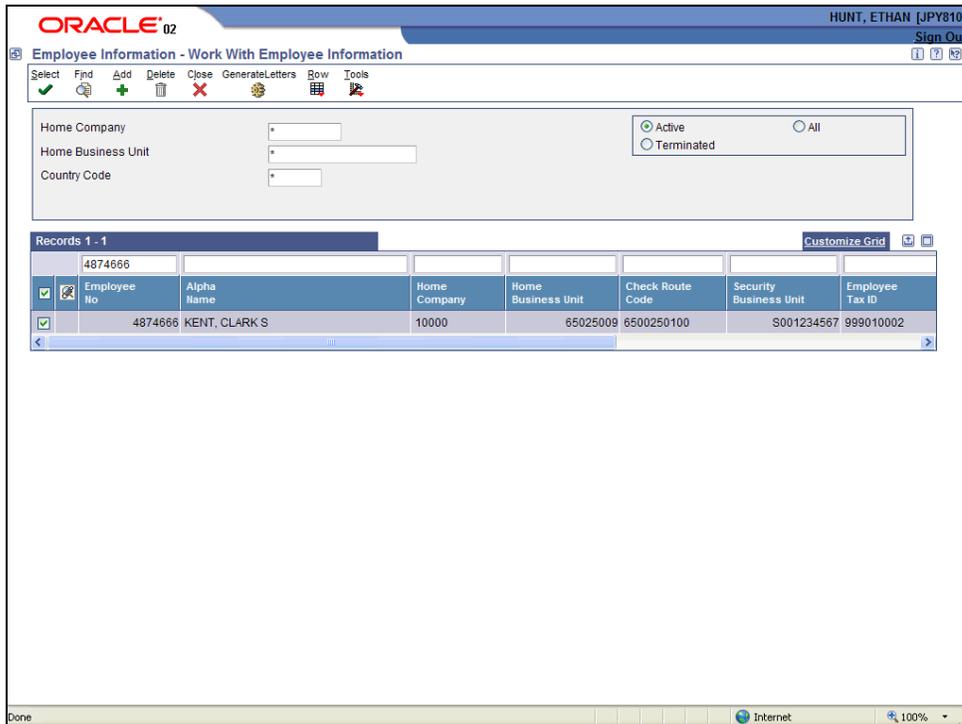
Step	Action
31.	After you have updated the fields click the OK button. 
32.	A Reconfirm Salary Hrly Rate/Std Hrs/Yr warning will appear. Click the OK button again. 
33.	Enter the effective date in the Effective On field and the change reason code in the Change Reason field. Use the Visual Assist tool if necessary.

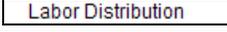


Step	Action
34.	Click the OK button. 

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Transferring an Employee to a New Agency - Receiving Agency



Step	Action
35.	Click the Row button. 
36.	Click the Labor Distribution menu. 
37.	Change or delete the Labor Distribution as necessary. To delete the Labor Distribution choose the line by placing a checkmark to the left of the row and click Delete .

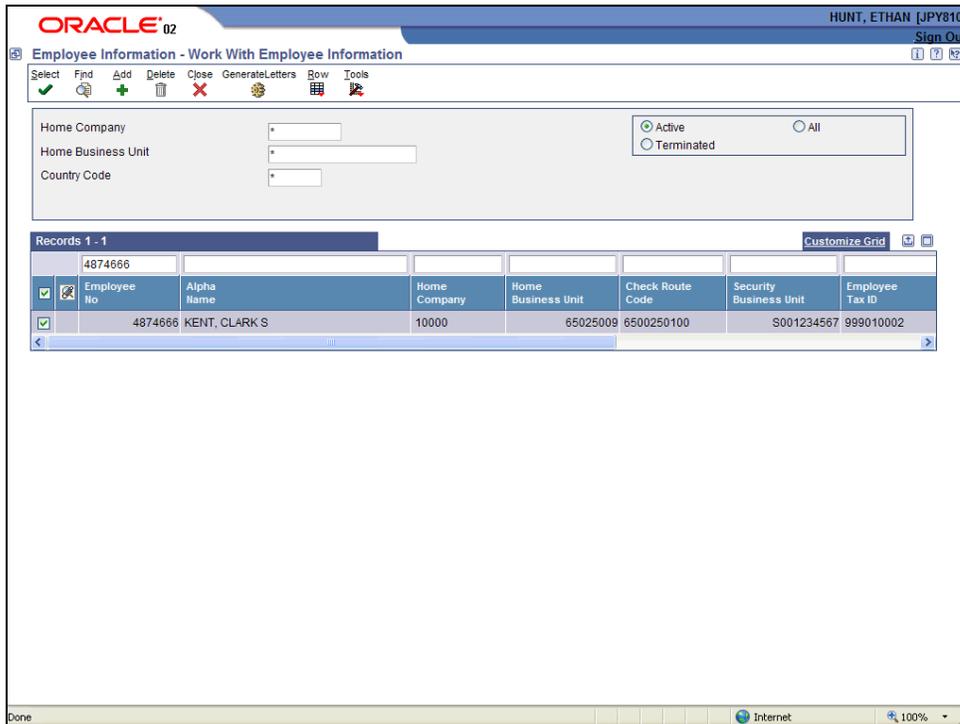
The screenshot shows the Oracle HR system interface for 'Employee Information - Labor Distribution Instructions'. The employee name is KENT, CLARK S. The Employee No. is 4874666. The Percent of Hours is 100.00. Below this is a table with the following data:

Records 1 - 2	Pay Code	Pay Description	Hours/Percent	Account Number	Pay Start Date	Pay Stop Date	N/A	WCI Class	Hourly Rate	B.R.
<input type="checkbox"/>	1	REGULAR PAY	100.00	65025009.511100						

Step	Action
38.	Click the OK button. 

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Transferring an Employee to a New Agency - Receiving Agency

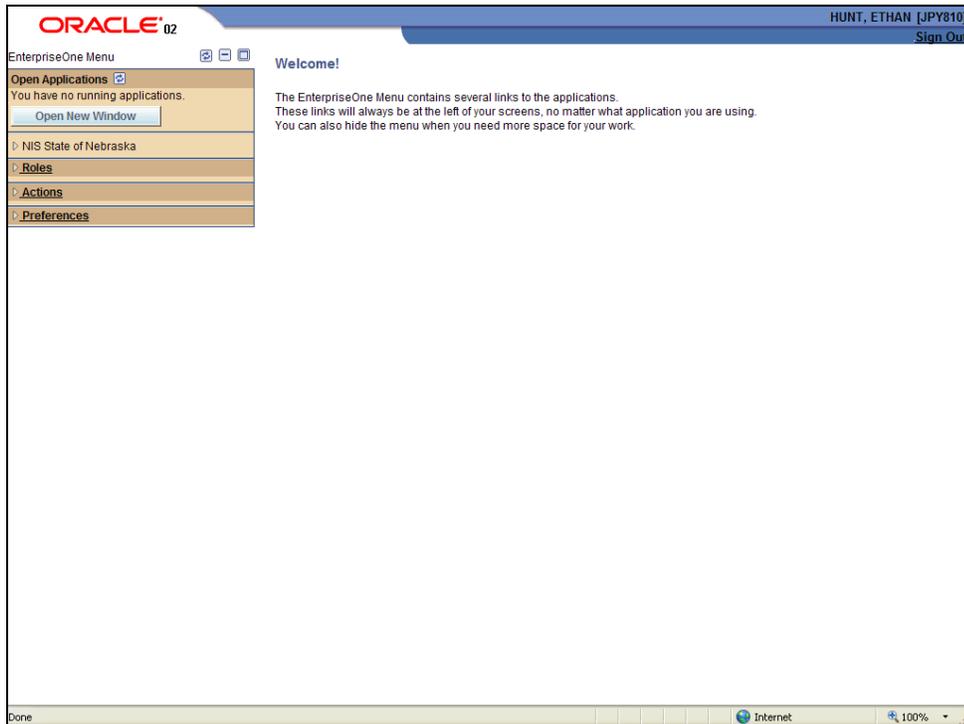


Step	Action
39.	Click the Close button. 
40.	You have successfully completed this lesson. End of Procedure.

Transfer Dependent-Beneficiary to New Agency - Receiving Agency

Procedure

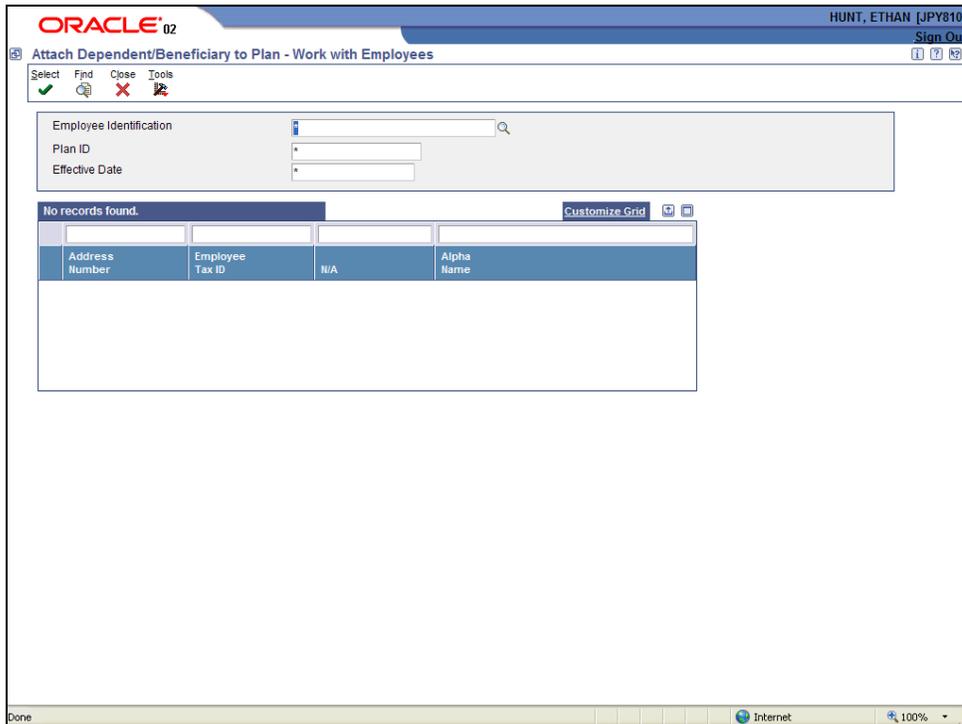
In this lesson you will learn the steps to take to transfer an employee's dependents/beneficiaries when that employee is transferring to your agency.



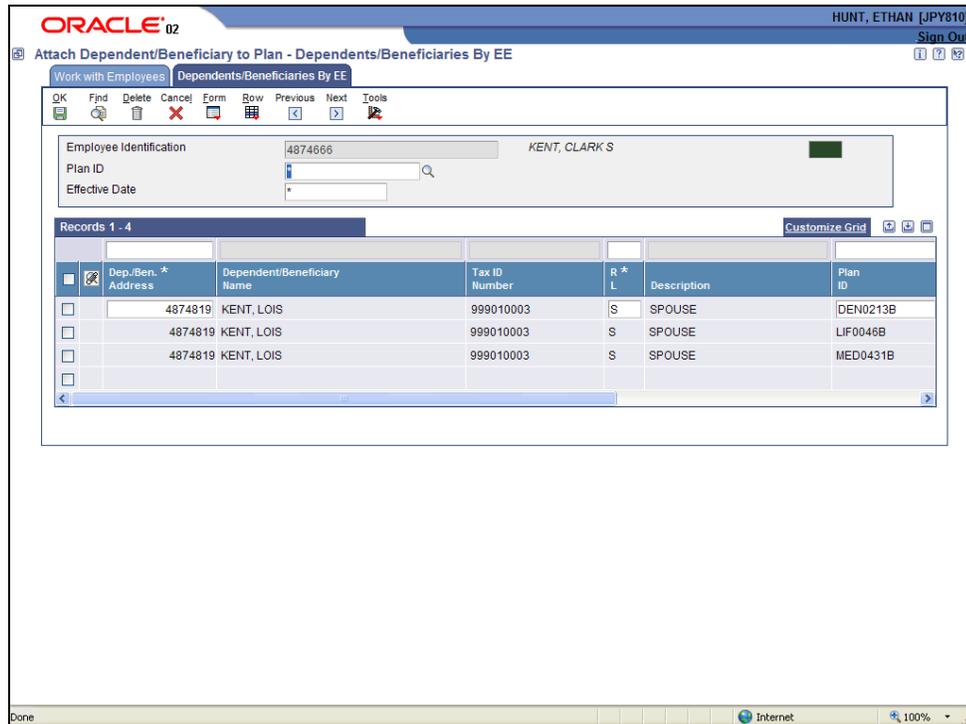
Step	Action
1.	Click the NIS State of Nebraska link. <div style="border: 1px solid black; padding: 2px; display: inline-block;">NIS State of Nebraska</div>
2.	Click the Human Resources/Payroll - Agencies link. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Human Resources/Payroll - Agencies</div>
3.	Click the Benefits Administration link. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Benefits Administration</div>
4.	Click the Attach Dependent/Beneficiary to Plan link. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Attach Dependent/Beneficiary to Plan</div>

Training Guide

Transferring an Employee to a New Agency - Receiving Agency



Step	Action
5.	Enter the employee's address book number in the Employee Identification field.
6.	Click the Find button. 
7.	Click the Select button. 



Step	Action
8.	<p>Choose the dependent/beneficiary by clicking the check box next to the record.</p> <p>Note: You may see the dependent/beneficiary listed more than once if they are enrolled in more than one plan. If that is the case you only need to check one check box for them.</p> <input type="checkbox"/>
9.	<p>Click the Row button.</p> 
10.	<p>Click the Dep/Ben Entry menu.</p> <input type="button" value="Dep/Ben Entry"/>

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Transferring an Employee to a New Agency - Receiving Agency



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Attach Dependent/Beneficiary to Plan - Dependent/Beneficiary Entry

OK Cancel Form Tools

General Information

Address Number: 4874819 KENT, LOIS
 Gender: [dropdown]
 Date of Birth: 08/18/2009 Use Employee's Address

School Information

High School Graduate: Y
 Full Time Student: N
 Employed: Y
 School Attending: [dropdown]

Other Information

Disability Flag: N
 Date of Medicare: [dropdown]
 Send Initial Letter (Y/N): N
 Date of Disability: [dropdown]
 Date of Death: [dropdown]
 Date of Notification: [dropdown]

Related Employee

Employee Identification: 4874666 KENT, CLARK S

Done Internet 100%

Step	Action
11.	Click the object. 

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Attach Dependent/Beneficiary to Plan - Dependent/Beneficiary Entry

OK Cancel Form Tools

General Inform Category Codes

Address Num: 4874819 Dep/Ben Address: KENT, LOIS

Gender: Supp. Data Entry: Supp. Data Inquir: 08/18/2009 Use Employee's Address

School Information

High School Graduate: Y Employed: Y

Full Time Student: N School Attending:

Other Information

Disability Flag: N Date of Disability:

Date of Medicare: Date of Death:

Send Initial Letter (Y/N): N Date of Notification:

Related Employee

Employee Identification: 4874666 KENT, CLARK S

Done Internet 100%

Step	Action
12.	Click the Dep/Ben Address menu. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Dep/Ben Address</div>

Training Guide

Transferring an Employee to a New Agency - Receiving Agency



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Attach Dependent/Beneficiary to Plan - Address Book Revision

OK Cancel Form Tools

Address Number 4874819

Address Book Mailing Additional Related Address Cat Code 1 - 10 Cat Code 11 - 30

Alpha Name KENT, LOIS

Long Address Number

Tax ID 999010003

Search Type Q DEPENDENT/BENEFICIARY

Business Unit S001234567 STATE OF NEBRASKA

Done Internet 100%

Step	Action
13.	Enter the employee's new Home Business Unit in the Business Unit field.
14.	Click the OK button. 

ORACLE 02 HUNT, ETHAN [JPY810]
Sign Out

Attach Dependent/Beneficiary to Plan - Dependent/Beneficiary Entry

OK Cancel Form Tools

General Information

Address Number: 4874819 KENT, LOIS

Gender:

Date of Birth: 08/18/2009 Use Employee's Address

School Information

High School Graduate: Y Employed: Y

Full Time Student: N School Attending:

Other Information

Disability Flag: N Date of Disability:

Date of Medicare: Date of Death:

Send Initial Letter (Y/N): N Date of Notification:

Related Employee

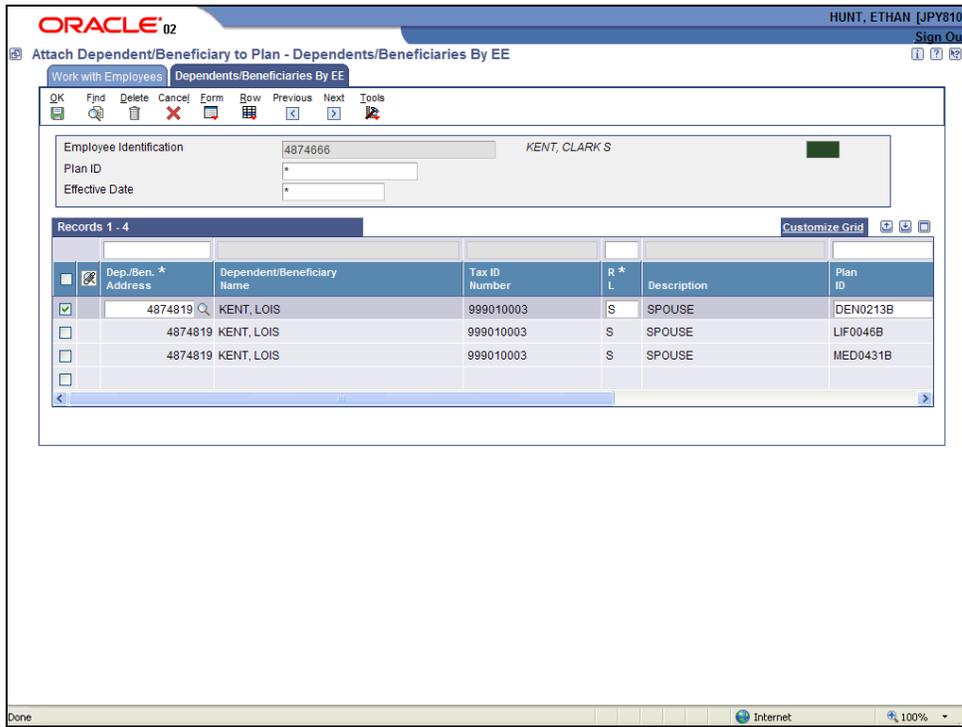
Employee Identification: 4874666 KENT, CLARK S

Done Internet 100%

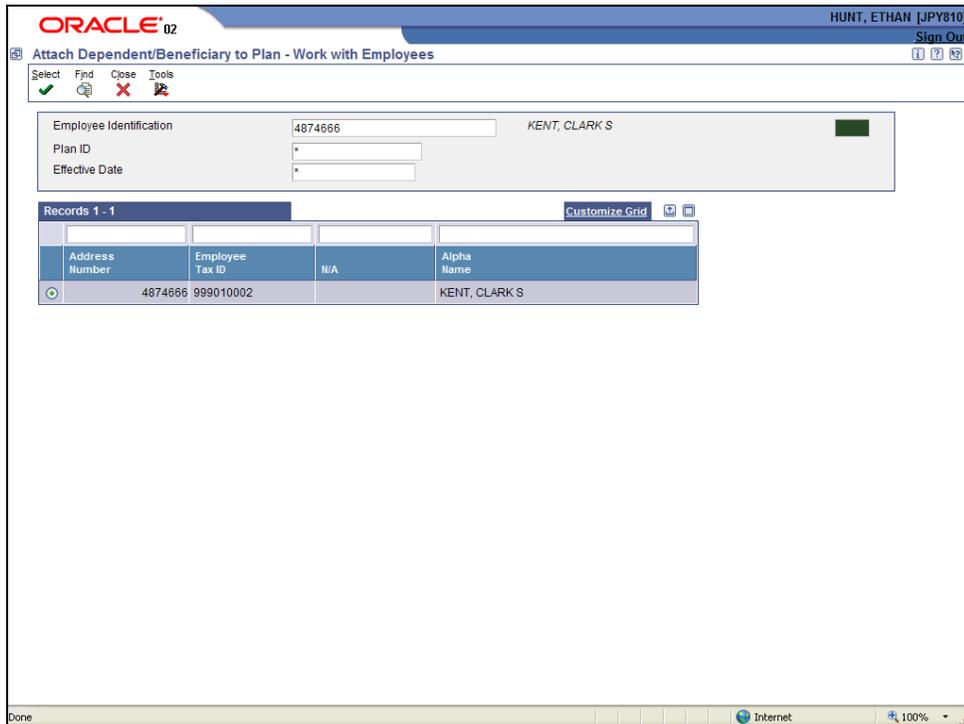
Step	Action
15.	Click the OK button. 

Training Guide

Transferring an Employee to a New Agency - Receiving Agency



Step	Action
16.	<p>You can repeat these steps if there are additional dependents/beneficiaries that need to be transferred.</p> <p>If you are finished click the Cancel button.</p> 



Step	Action
17.	Click the Close button. 
18.	You have successfully completed this lesson. End of Procedure.