

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

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## SYSTEM POLICIES

The tasks in this documentation provide end users with the tools to enter data and collect data in system. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website.



# Training Guide

## Transferring an Employee to a New Agency - Transferring Agency

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

### **Transferring an Employee to a New Agency - Transferring 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. **Please note:** When an employee is transferred, you must also transfer all of the employee's dependents and beneficiaries so that the new agency can access the dependent/beneficiary records.

**Note:** Do not terminate the employee's benefits. This will be done by the receiving agency, if needed.

**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.

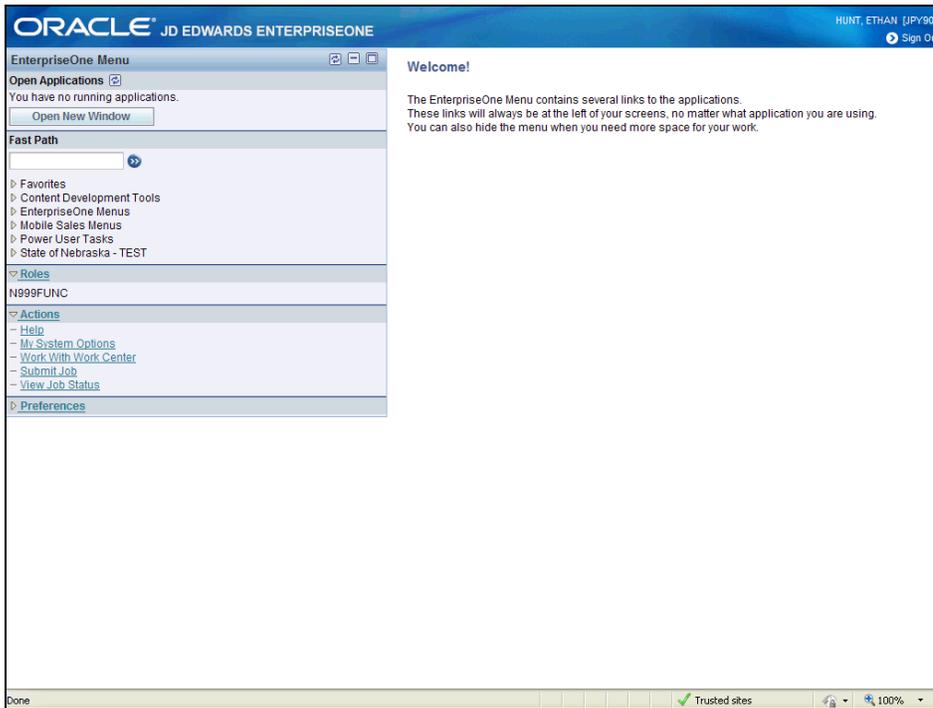
### **Transferring an Employee to a New Agency - Transferring Agency Lesson**

#### **Procedure**

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

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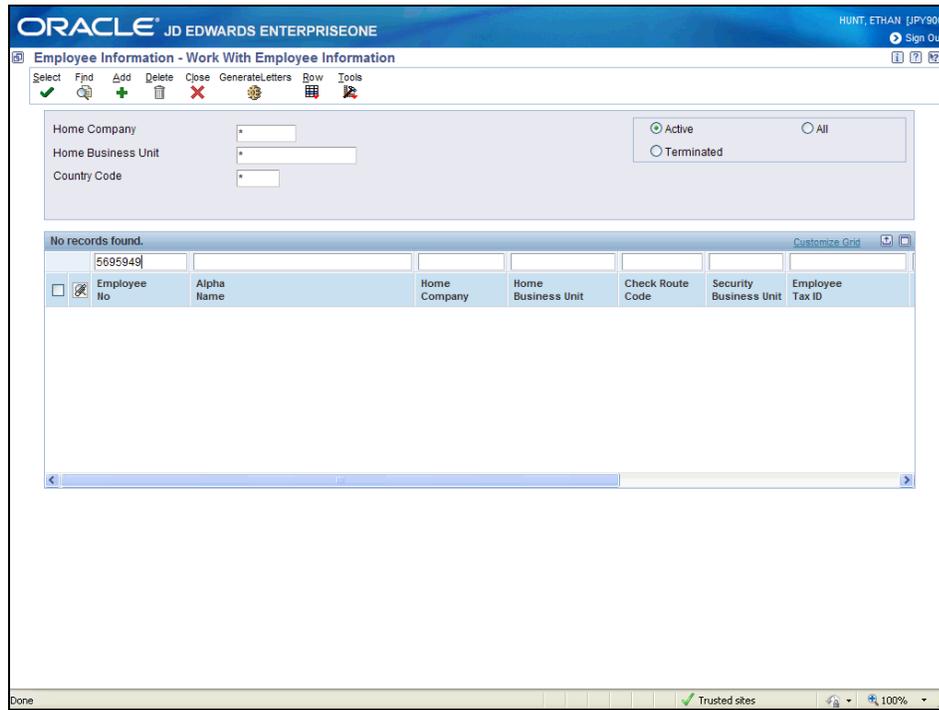
## Transferring an Employee to a New Agency - Transferring Agency

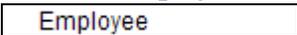


Step	Action
1.	Click the <b>State of Nebraska</b> link. <a href="#">State of Nebraska</a>
2.	Click the <b>Human Resources</b> link. <a href="#">Human Resources</a>
3.	Click the <b>Employee Maintenance</b> link. <a href="#">Employee Maintenance</a>
4.	Click the <b>Employee Information</b> link. <a href="#">Employee Information</a>
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 <b>Employee No</b> field (the employee's address book number), and the <b>Alpha Name</b> field.

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

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## Transferring an Employee to a New Agency - Transferring Agency



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Employee Information - Employee

OK Cancel Form Tools

Employee No. 5695949 KENT, CLARK S

Employee Tax ID 999010002

N/A

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 ACTIVE

Employee Benefit Status A ACTIVE

Benefit Group NAPE-B NAPE/AFSCME-BIWEEKLY Adj. Service Date 03/08/2010

Original Hire Date 08/17/2009 Last Start Date 03/08/2010

Leave Begin Date Leave End Date

Expected Recall Date Termination Date

Date Pay Starts 03/08/2010 Date Pay Stops

Data Protection Standards

N/A

N/A

Upon Termination

N/A

Country of Employment

Country US UNITED STATES

Done Trusted sites 100%

Step	Action
10.	Change the <b>Security Business Unit</b> field to " <b>S001234567</b> ".
11.	<p><b>Note:</b> The <b>S</b> (<b>S 00 1234567</b>) represents and distinguishes this business unit from all others, and tells you right away it is an HR SBU.</p> <p>The <b>00</b> (<b>S 00 1234567</b>) indicates no specific agency assignment.</p> <p>The <b>1234567</b> (<b>S 00 1234567</b>) makes it easy to enter the last seven digits of the number without counting zeros.</p>
12.	<p>Click the <b>OK</b> button.</p> 
13.	Enter the effective date in the <b>Effective On</b> field and the change reason code in the <b>Change Reason</b> field. Use the Visual Assist tool if necessary to locate the appropriate change reason code.

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## Transferring an Employee to a New Agency - Transferring Agency

Step	Action
14.	Click the <b>OK</b> button. 

Employee No	Alpha Name	Home Company	Home Business Unit	Check Route Code	Security Business Unit	Employee Tax ID
5695949	KENT, CLARK S	10000	65050008	6500150100	S650050000	999010002

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## Transferring an Employee to a New Agency - Transferring Agency

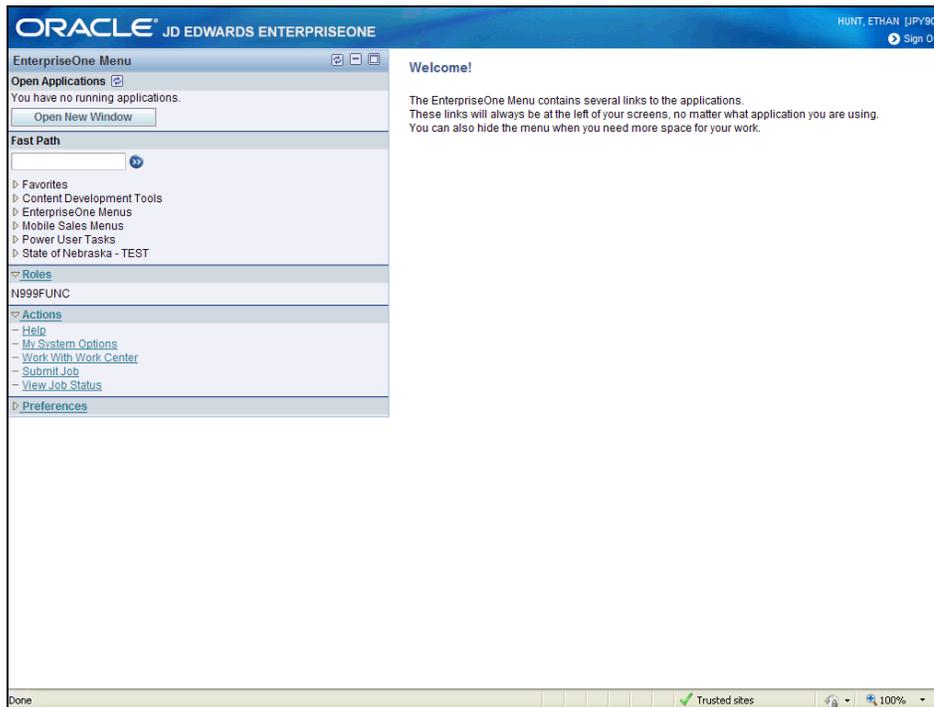


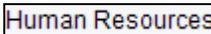
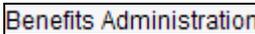
Step	Action
15.	Click the <b>Close</b> button. 
16.	You have successfully completed this lesson. <b>End of Procedure.</b>

## Transfer Dependent-Beneficiary to New Agency - Transferring Agency Lesson

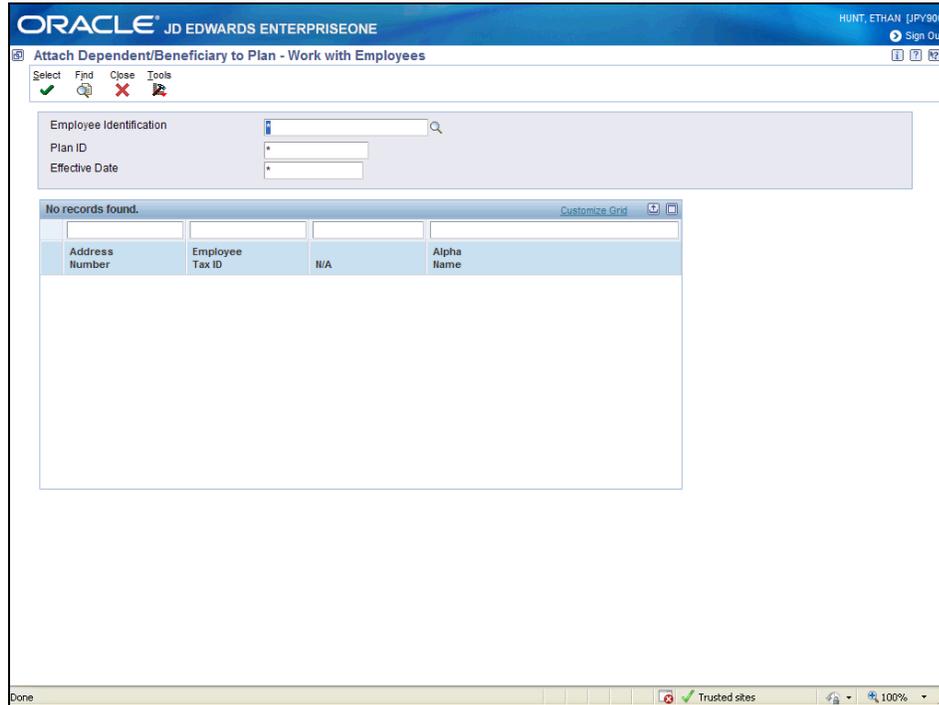
### Procedure

In this lesson you will learn the steps to take to transfer a dependent/beneficiary to a new agency when one of your employees is transferring from your agency to another.



Step	Action
1.	Click the <b>State of Nebraska</b> link. 
2.	Click the <b>Human Resources</b> link. 
3.	Click the <b>Benefits Administration</b> link. 

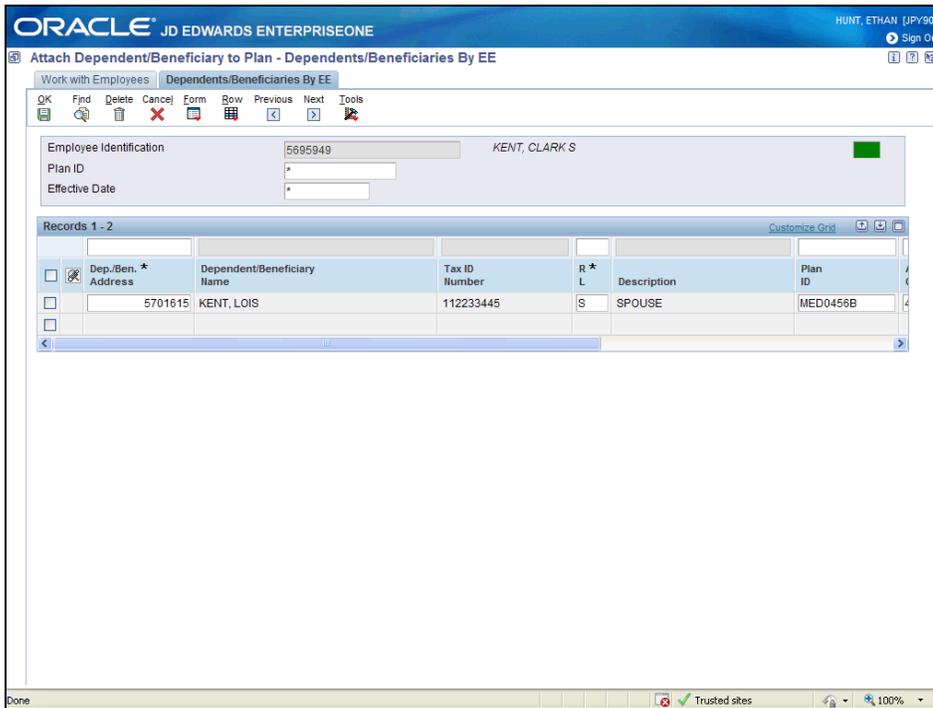
Step	Action
4.	Click the <b>Attach Dependent/Beneficiary to Plan</b> link. <a href="#">Attach Dependent/Beneficiary to Plan</a>

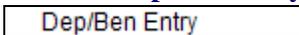


Step	Action
5.	Enter the employee's address book number in the <b>Employee Identification</b> field in the Header.
6.	Click the <b>Find</b> button. 
7.	Click the <b>Select</b> button. 

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## Transferring an Employee to a New Agency - Transferring Agency



Step	Action
8.	<p>Choose the dependent/beneficiary by clicking the check box next to the record.</p> <p><b>Note:</b> 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> 
9.	<p>Click the <b>Row</b> button.</p> 
10.	<p>Click the <b>Dep/Ben Entry</b> menu.</p> 

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Attach Dependent/Beneficiary to Plan - Dependent/Beneficiary Entry

OK Cancel Form Tools

**General Information**

Address Number: 5701615 KENT, LOIS

Gender: [dropdown]

Date of Birth: 02/07/1979

Country Code: [dropdown]

**School Information**

High School Graduate: Y [checkbox] Employed: Y [checkbox]

Full Time Student: N [checkbox] School Attending: [dropdown]

**Other Information**

Disability Flag: N [checkbox] Date of Disability: [dropdown]

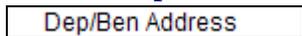
Date of Medicare: [dropdown] Date of Death: [dropdown]

Send Initial Letter (Y/N): N [checkbox] Date of Notification: [dropdown]

**Related Employee**

Employee Identification: 5695949 KENT, CLARK S [dropdown]

Done Trusted sites 100%

Step	Action
11.	Click the <b>Form</b> button. 
12.	Click the <b>Dep/Ben Address</b> menu. 

# Training Guide

## Transferring an Employee to a New Agency - Transferring Agency



ORACLE JD EDWARDS ENTERPRISEONE HUNT, ETHAN (JPY900) Sign Out

Attach Dependent/Beneficiary to Plan - Address Book Revision

OK Cancel Form Tools

Address Number 5701615

Select Tab: 1-Address Book

Alpha Name \* KENT, LOIS

Long Address Number

Tax ID 112233445

Search Type \* Q DEPENDENT/BENEFICIARY

Business Unit 1 STATE OF NEBRASKA

Done Trusted sites 100%

Step	Action
13.	Enter " <b>S001234567</b> " into the <b>Business Unit</b> field.
14.	<p>The <b>S</b> (S 00 1234567) represents and distinguishes this business unit from all others, and tells you right away it is an HR SBU.</p> <p>The <b>00</b> (S 00 1234567) indicates no specific agency assignment.</p> <p>The <b>1234567</b> (S 00 <b>1234567</b>) makes it easy to enter the last seven digits of the number without counting zeros.</p>
15.	<p>Click the <b>OK</b> button.</p> 

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## Transferring an Employee to a New Agency - Transferring Agency

**ORACLE** JD EDWARDS ENTERPRISEONE HUNT, ETHAN (JPY900) Sign Out

Attach Dependent/Beneficiary to Plan - Dependent/Beneficiary Entry

OK Cancel Form Tools

**General Information**

Address Number: 5701615 KENT, LOIS

Gender: [dropdown]

Date of Birth: 02/07/1979

Country Code: USA

**School Information**

High School Graduate: Y Employed: Y

Full Time Student: N School Attending: [dropdown]

**Other Information**

Disability Flag: N Date of Disability: [dropdown]

Date of Medicare: [dropdown] Date of Death: [dropdown]

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

**Related Employee**

Employee Identification: 5695949 KENT, CLARK S

Done Trusted sites 100%

Step	Action
16.	Click the <b>OK</b> button. 

**ORACLE** JD EDWARDS ENTERPRISEONE HUNT, ETHAN (JPY900) Sign Out

Attach Dependent/Beneficiary to Plan - Dependents/Beneficiaries By EE

Work with Employees Dependents/Beneficiaries By EE

OK Find Delete Cancel Form Row Previous Next Tools

Employee Identification: 5695949 KENT, CLARK S

Plan ID: [dropdown]

Effective Date: [dropdown]

Records 1 - 2 Customize Grid

Dep./Ben. Address	Dependent/Beneficiary Name	Tax ID Number	R L	Description	Plan ID
5701615	KENT, LOIS	112233445	S	SPOUSE	MED0456B

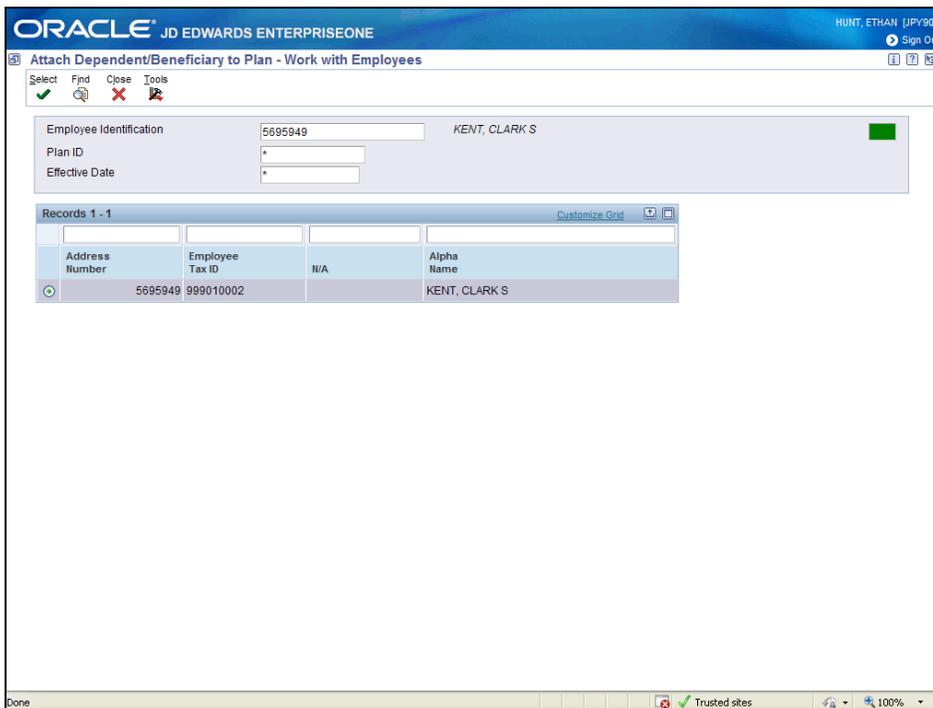
Done Trusted sites 100%

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Step	Action
17.	<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 <b>Cancel</b> button.</p> 



Step	Action
18.	<p>Click the <b>Close</b> button.</p> 
19.	<p>You have successfully completed this lesson.</p> <p><b>End of Procedure.</b></p>