Quick Reference	Transfer an Employee - Receiving Agency

Remember to use the Visual Assist to search for information.

To	Do This
Transfer an Employee - Receiving Agency	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. **Navigation** Human Resources and Payroll - Agencies > Employee Maintenance > Employee Information **Steps** Start this Work Instruction from the Employee Information – Work with Employee Information window. 1. Enter all or part of the employee name (+ *) in the query-by-example (QBE) line directly above the Alpha Name column in the grid. 2. Click **Find.** 3. Choose the employee on the grid row to be transferred. 4. Click **Row**, **Employee**. 5. Update the following fields: • Security Business Unit • Check Route Code • Pay Frequency • Pay Status • Employee Benefit Status • Benefit Group • Adjusted Service Date (if applicable) • Agency Original Hire Date The Date Pay Starts field on the Organization window must be changed before the Agency Original Hire Date is changed. • Termination Date (remove date if applicable) 6. Click **OK.** The Employee Information – Change Reason window appears. 7. Enter the effective date and appropriate change reason code. 8. Click **OK** to return to the Work with Employee Information window. 9. Click **Row**, **Organizational**. 10. Update the following fields: • Supervisor • Home Business Unit • Position ID

To	Do This
	• Job Code • Date in Current Position ID • Date in Current Job • Employment Status • Date Pay Starts 11. Click Form, User Def Cat 01-10. 12. Update the following fields: • Agency Number • O*Net Code • Union Code • Census Code • Benefit Payroll Cycle. 13. Click **OK**. 14. Enter the Effective On date and Change Reason Code. 15. Click **OK** to return to the Employee Information - Organization window. 16. Click **OK**. The Job Default window appears. 17. Select **Only Use Defaults to Overwrite Blank Values**. 18. Verify all information, make any necessary changes. 19. Click OK. 20. Enter the Effective On date and Change Reason Code. 11. Click **OK** to return to the Employee Information - Work with Employee Information window. 12. Click **Row**, **Basic Compensation**. 13. Complete the appropriate fields: • Hourly Rate – Hourly employees • Salary – Salaried employees • Pay on Std Hours 24. Click **OK**. A Reconfirm Salary Hrly Rate/Std Hrs/Yr warning appears. 25. Click **OK**. The Employee Information – Change Reason window appears. 26. Verify the Effective On date and type the Change Reason code. 27. Click **OK** to return to the Employee Information window. 28. Click **Row, Labor Distribution**. 29. 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. 30. Click **OK** to return to a blank Labor Distribution window. 31. Click **Cancel**. 32. Click **Close**.

<table>
<tr><th>To</th><th>Do This</th></tr>
<tr><td>Transfer Dependent/Beneficiary - Receiving Agency</td><td>
<h2>Navigation</h2>
Human Resources and Payroll – Agencies > Benefits Administration > Attach Dependent/Beneficiary to Plan
<h2>Steps</h2>
Start this instruction from the Attach Dependent/Beneficiary to Plan – Work with Employees window.
1. Enter the Address Book number of the employee that is transferring in the Employee Identification field in the header.
2. Choose the employee and click Select.
3. Choose the Dependent/Beneficiary who is being transferred and click Row, Dep/Ben Entry.
4. Click Form, Dep/Ben Address.
5. Change the Business Unit to the employee’s new Home Business Unit.
6. Click OK to return to the Attach Dependent/Beneficiary to Plan – Dependent/Beneficiary Entry window.
7. Click Cancel to return to the Attach Dependent/Beneficiary to Plan Dependent/Beneficiaries by EE window.
8. To change another Dependent/Beneficiary, repeat steps 3-7.
9. When finished changing Dependents/Beneficiaries, click Cancel to return to the Attach Dependent/Beneficiary to Plan – Work with Employees window.
10. Click Close. You will return to the menu.
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<tr><th>To</th><th>Do This</th></tr>
<tr><td>Transfer Benefits - Receiving Agency</td><td>
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.
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.
<h2>Navigation</h2>
Human Resources and Payroll – Agencies > Benefits Administration > Enrollment with Eligibility
<h2>Steps</h2>
End an Employee's benefits enrollment:
Start from the Work with Enrollment with Eligibility window.
1. Complete the following field:
Employee Identification
</td></tr>
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- Effective Date

2. Click **Find**.
3. To end enrollment in a plan use one of the following methods:
   - To end enrollment on the date that you defined in the enrollment parameters, choose the plan; click **Row**, **Stop – Auto Dt/Sts**.
   - To end enrollment in a plan on any date other than the date that you defined in the enrollment parameters, choose the plan; click **Row**, **Stop – Ovrd Dt/Sts**. The Enrollment With Eligibility – Stop – Override Date and Status window appears.
4. On the Enrollment With Eligibility – Stop – Override Date and Status window, complete the following fields:
   - Enrollment End Date
   - Enrollment End Status
5. Click **OK**.
6. To complete the change, click **Form**, **Submit**.
7. Click **Close**.

Enroll an Employee in Benefits with Eligibility:

Start this instruction from the Enrollment with Eligibility – Work with Enrollment with Eligibility window.

1. Complete the following fields in the header:
   - Employee Identification
   - Effective Date – enter the same date you entered in the Enrollment Effective Date on the Employee Master.
2. Click **Find**.
3. Review the information in the following fields:
   - Benefit Group
   - Benefit Status – The Benefit Status must be Active (A)
   - Last Start Date
   - Pay Frequency
4. On the grid, choose each row that contains a benefit plan or plan option in which you want to enroll the employee.

Some Categories require an election. You *must* elect one plan.

5. Click **Row**, **Elect**. The Enrollment with Eligibility - Change Amount or Rate window appears.

If any of the plans that you choose requires an amount or rate, the Change Amount or Rate form appears. Follow steps 6 – 9.

6. Type the amount or rate that the employee pays in the Employee Payroll Ded DBA field.
7. If applicable, complete the following field:
   - Employer Paid Benefit DBA field.
8. When you have entered the amount(s) or rate(s), click **OK**. The Enrollment with Eligibility – Work with Enrollment with Eligibility window appears with a check mark on the row of each plan elected.

   Before you click Submit to save the elections, you can undo an incorrect election. Choose the election on the grid, click **Row**, **Mistaken Enrollment**.

9. Click **Form**, **Submit** to save the information.

If a plan was not selected in a category that requires an election (ex. Medical), the Retest Eligibility window appears. Read the directions and click **OK** to return to the Work with Enrollment with Eligibility screen. Return to step 4 to elect a required benefit plan or plan option. (The required plan will be highlighted.)

10. Click **Close**.

Enroll Dependent/Beneficiary:

Navigation: Human Resources and Payroll - Agencies > Benefits Administration > Attach Dependent/Beneficiary to Plan

Start this instruction from the Attach Dependent/Beneficiary to Plan - Work with Employee window.

1. Enter the **Employee's address book number** in the Employee Identification field in the header.

2. Click **Find**.

3. Choose the appropriate row in the grid, click **Select**.

4. If there are dependents listed in the grid, be sure to look for the one you want to enter. If he/she already exists in the grid, there is no need to create a new/duplicate record. **Write down this number** and use it for any further entry involving this dependent/beneficiary.

Enter a separate row for each dependent/beneficiary and each Plan ID to which he/she is to be attached. For example, a person may be the dependent for medical, dental and vision insurance AND the beneficiary for 4 different life insurance plans = 7 rows in the grid for this dependent/beneficiary.

5. Complete the following fields on the Address Book tab:

- Alpha Name - use ALL CAPS (ex. LASTNAME, FIRSTNAME)

  For more information on how to properly enter a name in the address book, please refer to the Entering Information in the Address Book for HR Quick Reference Card.

- Tax ID – dependent/beneficiary's social security number.

  - When entering a newborn dependent/beneficiary for whom a social security number has not yet been assigned, enter "NEWBORN"
  - When entering a trust or estate that has not yet been issued a number, enter "TRUST"
  - When the employee does not know the dependent/beneficiary social security number, enter "PENDING"
  - When the dependent/beneficiary does not allow use of their social security number, or they are unable to provide it, use "UNAVAILABLE"

6. Click into the **Business Unit field and then click on the Visual Assist** Icon (flashlight) to view the options available to enter into this field. The Business Unit Mast Search window appears.

You will be looking for the **employee's Home Business Unit**.

7. In the Business Unit field in the QBE line, enter ***##*** (using the agency number as the #'s with asterisks before and after) (ex. *65*).

8. In the Agency Number field in the QBE line, enter "0##" (using the agency number as the #'s with an asterisk at the end (Ex. 065*).

9. Click **Find**.

	10. Click on the radio button to the left of the **employee's Home Business Unit** (ex. 650080000, DAS-STATE PERSONNEL). Click **Select**. Note that the Employee's Home Business Unit appears in the Business Unit field. 11. Click on the **Mailing Tab.** 12. Complete the following fields: • Mailing Name - ALL CAPS (ex. FIRSTNAME LASTNAME) This field is very important and must be entered accurately as this is what is used by the vendors to create benefit ID cards. For more information on how to properly enter a name in the address book, please refer to the Entering Information in the Address Book for HR Quick Reference Card. • Address Line 1 - enter the dependent/beneficiary's street address • City • State • Postal Code • County Do not use punctuation when entering these fields. 13. Click **OK**. You will return to the Attach Dependent/Beneficiary to Plan - Dependent/Beneficiary Entry window. 14. The system brings up a blank screen to allow you to enter another dependent/beneficiary. To enter another dependent/beneficiary, repeat steps 6-15. If you are done entering dependents/beneficiaries, continue to the next step. 15. Click **Cancel** to return to the Attach Dependent/Beneficiary to Plan - Dependent/Beneficiary by EE window and continue attaching this dependent to the plan(s) the employee enrolled in. Already appearing in this grid is the last dependent/beneficiary that you entered for this employee. To enter a row for a new dependent/beneficiary, enter their Q address book number and continue with the instructions below. 16. Click in the **RL** (Relationship) field to assign a relationship (spouse, child, parent, trust, other) to this dependent/beneficiary. 17. Click the **Visual Assist icon in the RL field**. The Select User Define Code window appears. 18. These are the RL options available. The first row of the grid is automatically highlighted. If you would like to choose another option, click on the appropriate radio button in the grid, and click **Select**. You will return to the Attach Dependent/Beneficiary to Plan – Dependent/Beneficiary by EE window will appear. 19. Click in the **horizontal scroll bar** to see the rest of the grid to the right. 20. Click in the **Plan ID field** and enter the Plan ID (from the employee) **or click on the Visual assist** icon. The Plan Search window appears. 21. Since Human Resources staff know the plans to attach dependents/beneficiaries to (based on the employee's submitted paper enrollment forms), search on the plans to determine the Plan ID. Enter the **Plan ID** in ALL CAPITAL LETTERS followed by an asterisk (ex.MED01*) in the Plan ID field of the QBE line to narrow the search. 22. Click **Find**.

	23. Click the **Down Arrow** next to Records 1-10 just above the grid to see the rest of the entries in the grid. 24. Compare the Plan IDs to the plan the employee has elected. Click the radio button next to the **Plan ID** the employee has elected, click **Select**. 25. If there is an option for the plan ID, click in the **Add Opt field and then click on the Visual Assist** icon. The Attach Dependent/beneficiary to Plan – Plan Options window appears. 26. Click the radio button next to the **type of coverage the employee has elected** via paper enrollment forms, click **Select**. You will return to the Attach Dependent/Beneficiary to Plan – Dependent/Beneficiary by EE window. 27. Click in the **DB field and then click on the Visual Assist icon**. The Select User Define Code window appears. 28 Click the radio button next to the option you choose. A Dependent is covered for Medical, Dental, and Vision plans. A Beneficiary receives death benefits from Life insurance plans. 29. Click **Select**. You will return to the Attach Dependent/Beneficiary to Plan – Dependent/Beneficiary by EE window. If the plan being attached is a Life Insurance plan, **DB Type** and **Ben %** must both be entered. Click into the DB Type field, then click the Visual Assist icon. The Select User Define Code window appears. Choose the **Dep/Ben type** from the grid by clicking on the appropriate radio button, then click **Select**. Enter the appropriate **percentage** (e.g. 100) in the **Ben %** field to indicate the amount this dependent receives of the death benefits from this plan. 30. Click into the **Effective Date** field and enter the **same date as entered for the employee**; the first date of the payroll in which you want the deduction to be effective. This depends on each agency's pay cycle. If the employee is not enrolled in the plan to which you are trying to attach a dependent/beneficiary, you will receive an error message. Either ensure you have the correct code for the plan in which the employee is enrolled, or make sure the employee is actually enrolled in the plan to which you are trying to attach dependents/beneficiaries (use menu path Benefits Administration > Terminate Override Benefits.) Another option is to delete this row of the grid, research for the correct information, and re-enter the correct plan later. 31. Repeat steps 5-32 to enter new dependents for this plan. To attach another plan to this dependent (Life, Dental, Vision, etc.), repeat steps 18-32. If finished entering/attaching dependents, continue to the next step. 32. When you are done entering and attaching plans to ALL the employee's dependents/beneficiaries, click **OK**. (The screen will not change.) Click **Cancel** to finish the process of attaching plans to the employee's dependent/beneficiaries. You will return to the Attach Dependent/Beneficiary to Plan - Work with Employee window. 33. Click **Close**.