

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. (see the [Transferring an Employee to a New Agency – Receiving Agency](#) work instructions.) **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.

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

This work instruction shows how to:

[Transfer an Employee to a New Agency – Transferring Agency](#)

[Transfer Dependents/Beneficiaries to a New Agency – Transferring Agency](#)

NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. 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: <http://www.das.state.ne.us/>.

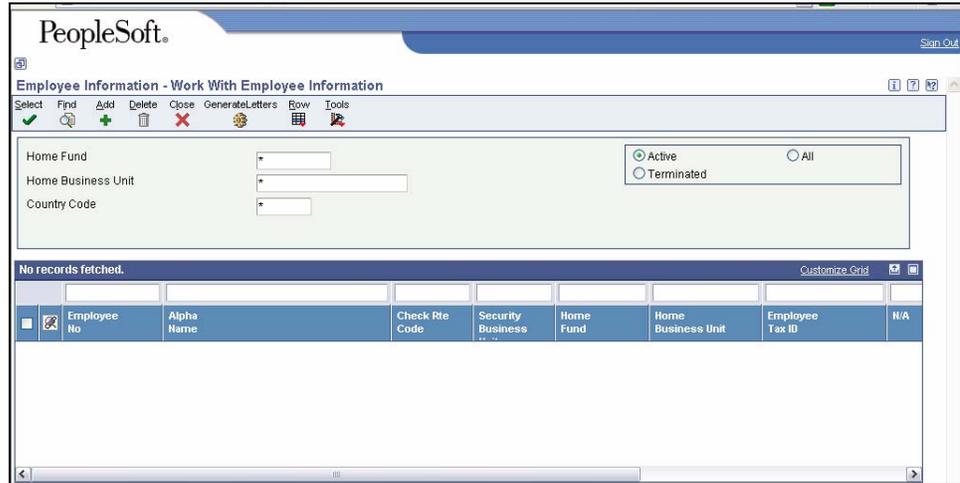
Navigation

Click Roles, HR_PR .
(Citrix users – right click on the menu, choose Apply Roles, choose HR_PR.)
Human Resources and Payroll - Agencies > Employee Maintenance > Employee Information

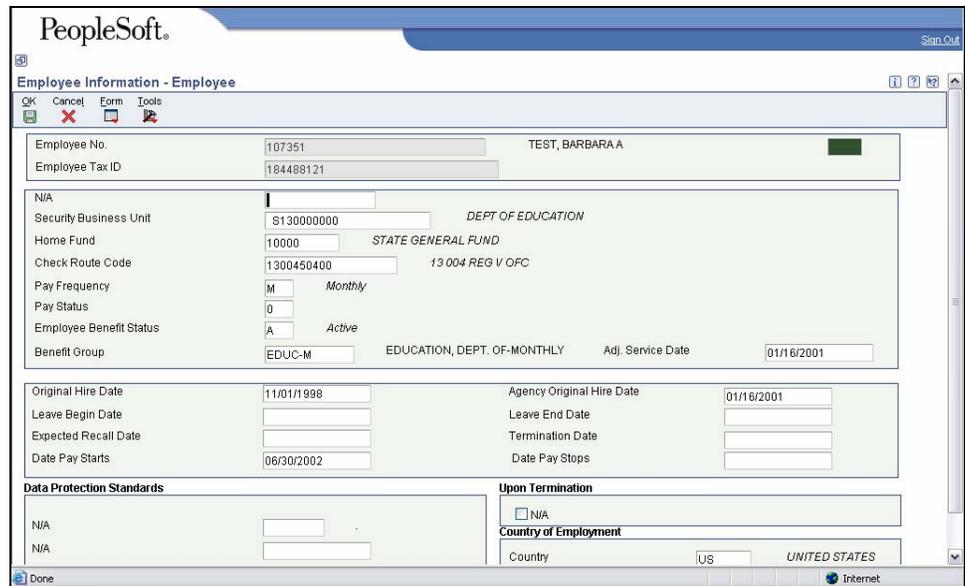
Steps

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Start this instruction from the Employee Information – Work with Employee Information window.



1. Enter all or part of the employee name in the QBE (query-by-example) line directly above the Alpha Name column in the grid to search.
2. Click **Find**. The Employee Information – Work With Employee Information window appears.
3. Choose the employee on the grid row to be transferred.
4. Click **Row, Employee**. The Employee Information – Employee window appears.



5. Change the Business Unit (SBU) to **S001234567**.
 - ✏ The **S** (**S 00 1234567**) represents and distinguishes this business unit from all others, and tells you right away it is an HR SBU.
 - The **00** (**S 00 1234567**) indicates no specific agency assignment.
 - The **1234567** (**S 00 1234567**) makes it easy to enter the last seven digits of the number without counting zeros.
6. Click **OK**. The Change Reason window appears.
7. On the Employee Information – Change Reason window, type the Effective On date and Change Reason code. (Use the visual assist, if needed, to locate the appropriate change reason code.)

8. Click **OK** to return to the Work With Employee Information window.
9. Click **Close**.

Transfer Dependent/Beneficiary to New Agency – Transferring Agency

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

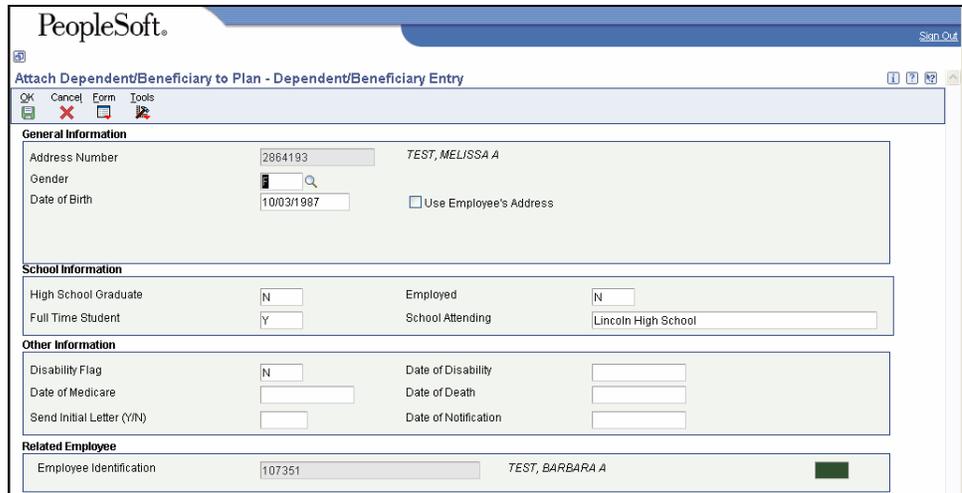
Start this instruction from the Attach Dependent/Beneficiary to Plan – Work with Employees window.

Address Number	Employee Tax ID	N/A	Alpha Name
No records fetched.			

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**. The Attach Dependent/Beneficiary to Plan Dependent/Beneficiaries by EE window appears.



3. Choose the Dependent/Beneficiary who is being transferred and click **Row, Dep/Ben Entry**. The Attach Dependent/Beneficiary to Plan – Dependent/Beneficiary Entry window appears.



4. Click **Form, Dep/Ben Address**. The Attach Dependent/Beneficiary to Plan – Address Book Revision window appears.

PeopleSoft® Sign Out

Attach Dependent/Beneficiary to Plan - Address Book Revision

Cancel Form Tools

Address Number: 2884193

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

Alpha Name: TEST, MELISSA

Long Address Number:

Tax ID: 175683620

Search Type: Dependent/Beneficiary

Business Unit: 13519906 VOC REHAB PR HOME BU

5. Change the Business Unit to **S001234567**.
 -  The **S** (**S 00 1234567**) represents and distinguishes this business unit from all others, and tells you right away it is an HR SBU.
 - The **00** (**S 00 1234567**) indicates no specific agency assignment.
 - The **1234567** (**S 00 1234567**) makes it easy to enter the last seven digits of the number without counting zeros.
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.