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 (see Transferring an Employee to a New Agency – Transferring Agency). 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.

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.

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.

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.

The employee's benefits will also need to be reviewed and changed, if necessary. This work instruction shows how to:

Transfer an Employee to a New Agency – Receiving Agency

Transfer Dependents/Beneficiaries to a New Agency – Receiving 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

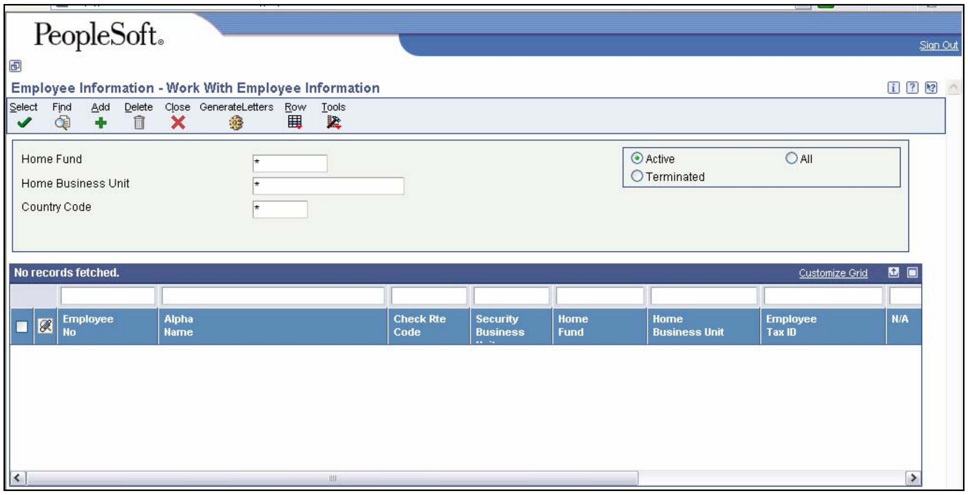
Click Roles, HR_PR .
(Citrix users – right click on the menu, choose View by Role, choose HR_PR.)

Human Resources and Payroll - Agencies > Employee Maintenance > Employee Information

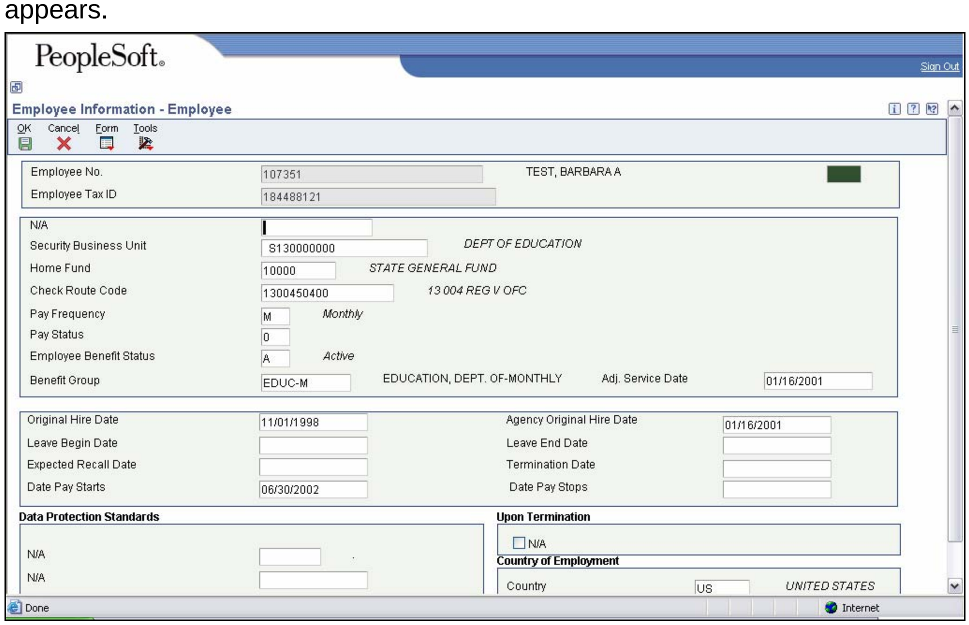
Steps

Transfer an Employee to a New Agency – Receiving Agency

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.** 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.



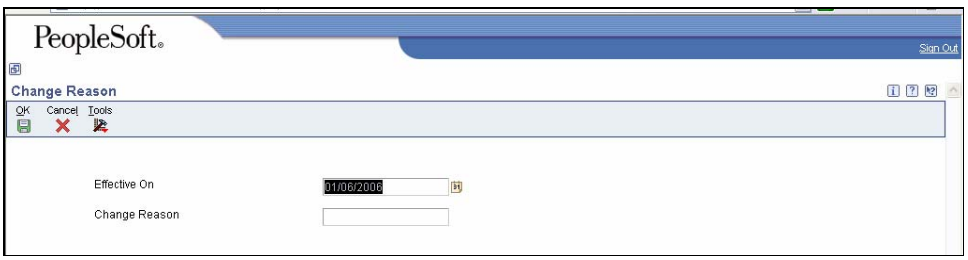
5. Update the following fields:
   - Security Business Unit

- Check Route Code
- Pay Frequency
- Pay Status
- Employee Benefit Status
- Benefit Group
- Adjusted Service Date (if applicable)
- Agency Original Hire Date - (date started) - MUST BE less than or equal to Date Pay Starts.
- Date Pay Starts

  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.

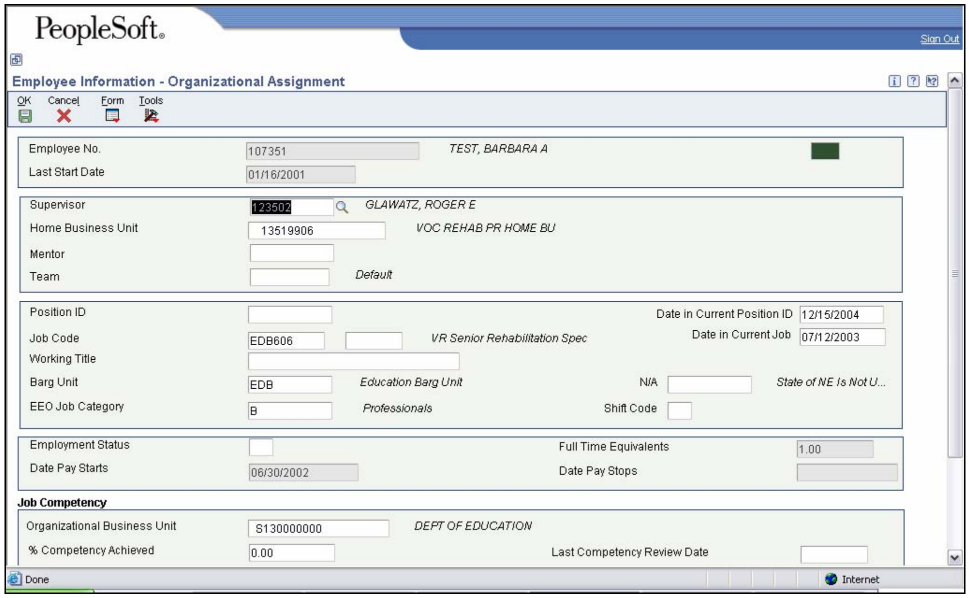
- Termination Date (remove date if applicable)

6. Click **OK.** The Employee Information – Change Reason window appears.

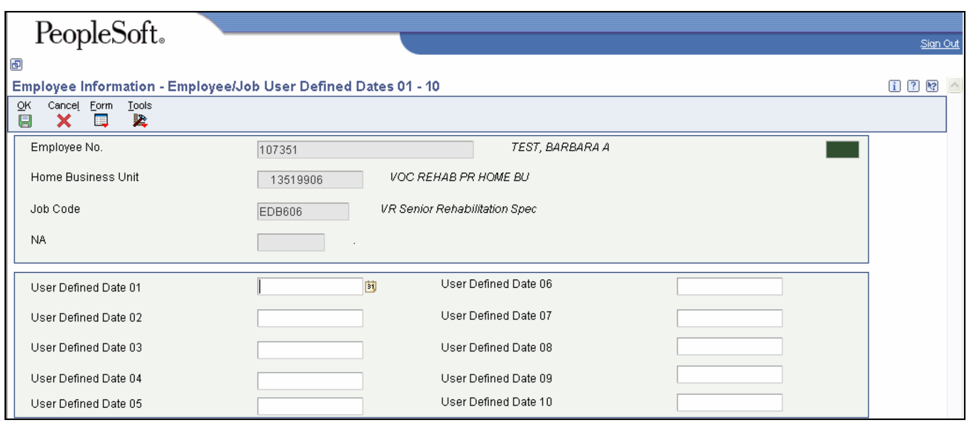


7. Enter the effective date and appropriate change reason code.
8. Click **OK** to return to the Work with Employee Information window.
9. Click **Row**, **Organizational**. The Employee Information – Organizational Assignment window appears.

The following example only shows the top portion of the window.



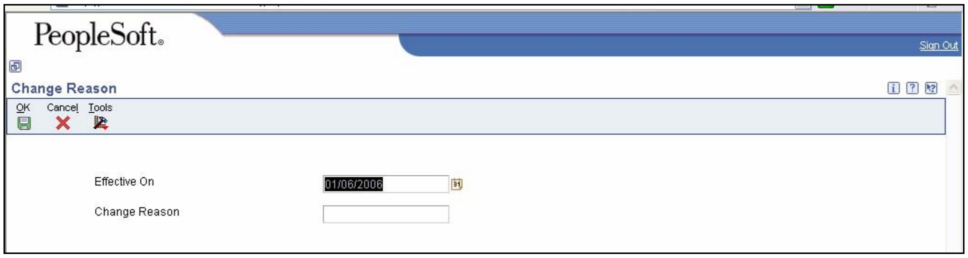
10. Update the following fields:
    - Supervisor
    - Home Business Unit
    - Position ID
    - Job Code
    - Date in Current Position ID
    - Date in Current Job
    - Employment Status
    - Date Pay Starts
11. Click **Form, User Def Cat 01-10**. The Employee Information - Employee/Job Category Code 01-10 window appears.



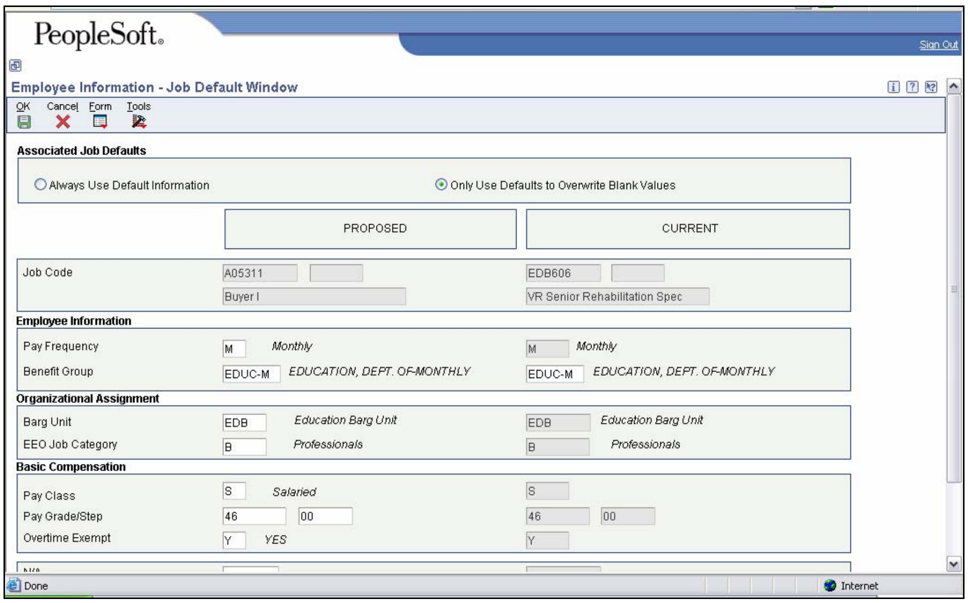
12. Update the following fields:
    - Agency Number
    - O*Net Code
    - Union Code

- Census Code
- Benefit Payroll Cycle

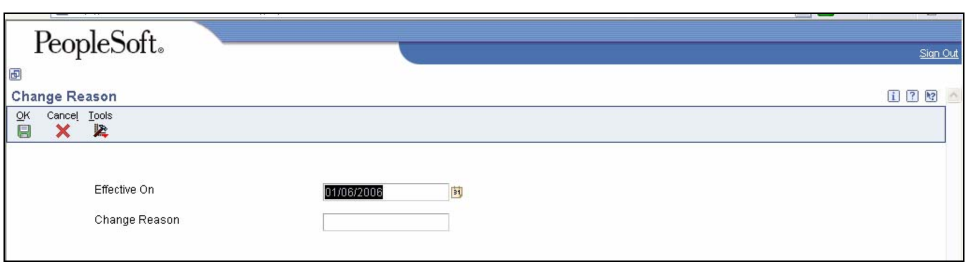
13. Click **OK**. The Employee Information – Change Reason window appears.
14. Type the Effective On date and Change Reason code.



15. Click **OK** to return to the Employee Information - Organizational window.
16. Click **OK**. The Job Default window appears.

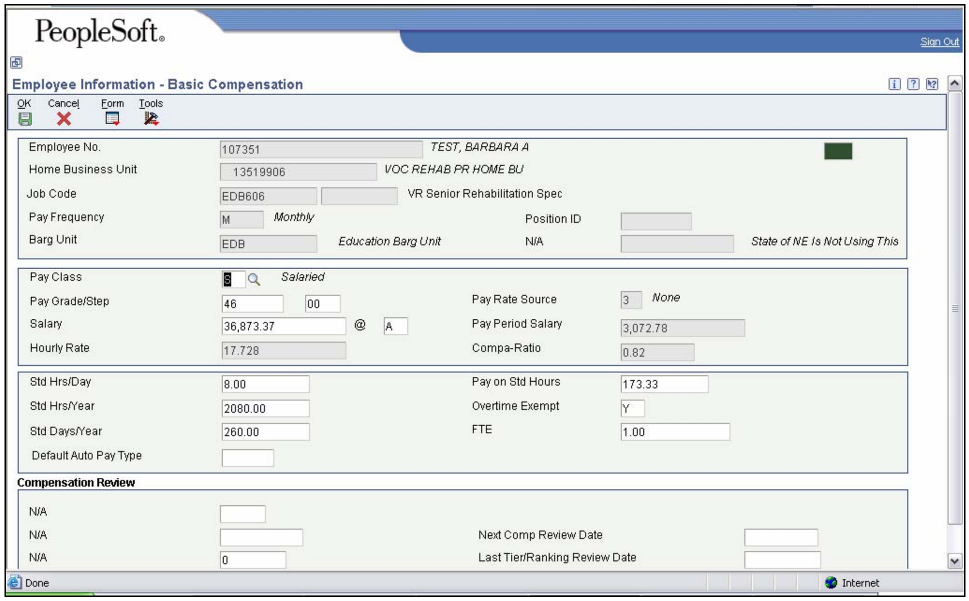


17. On the Employee Information – Job Default window, select **Only Use Defaults to Overwrite Blank Values**.
18. Verify all information, make any necessary changes.
19. Click **OK**. The Employee Information – Change Reason window appears.
20. Type the Effective On date and Change Reason code.

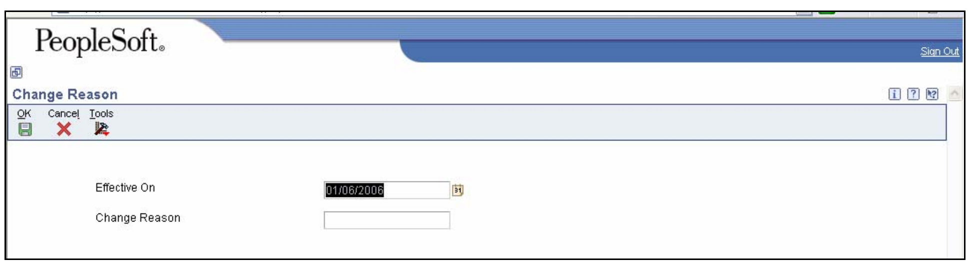


21. Click **OK** to return to the Work with Employee Information window.

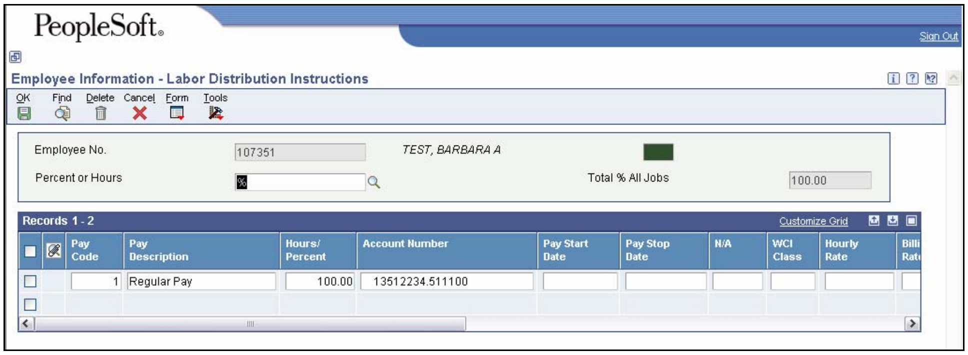
22. Click **Row**, **Basic Compensation**. The Employee Information – Basic Compensation window appears.



23. 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**. The Labor Distribution Instructions window appears.



29. Change or delete the Labor Distribution as necessary.

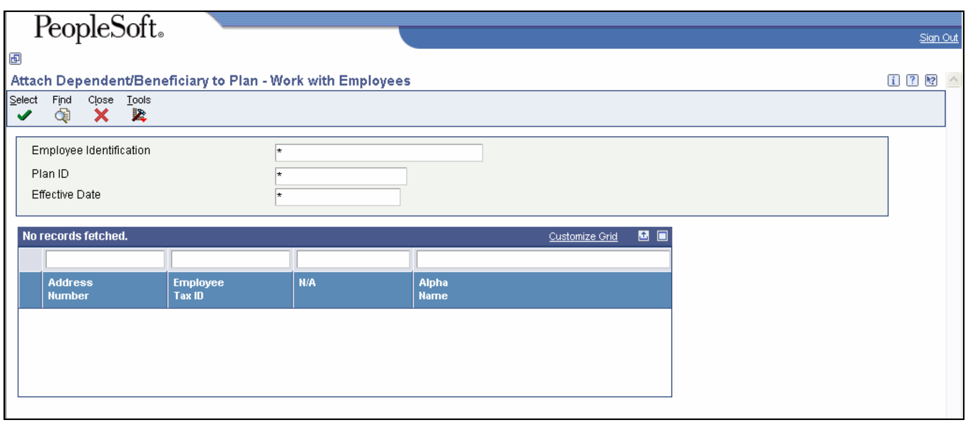
To delete the Labor Distribution, choose the line by placing a checkmark to the left of the row and click Delete.

30. Click **OK** to return to a blank Labor Distribution window.
31. Click **Cancel**.
32. Click **Close**.

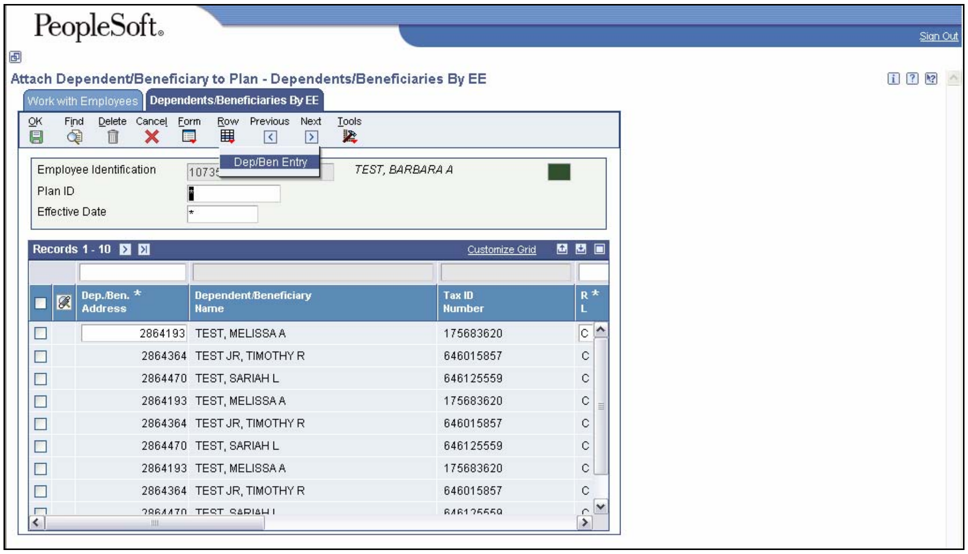
Transfer Dependent/Beneficiary to New Agency – Receiving Agency

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

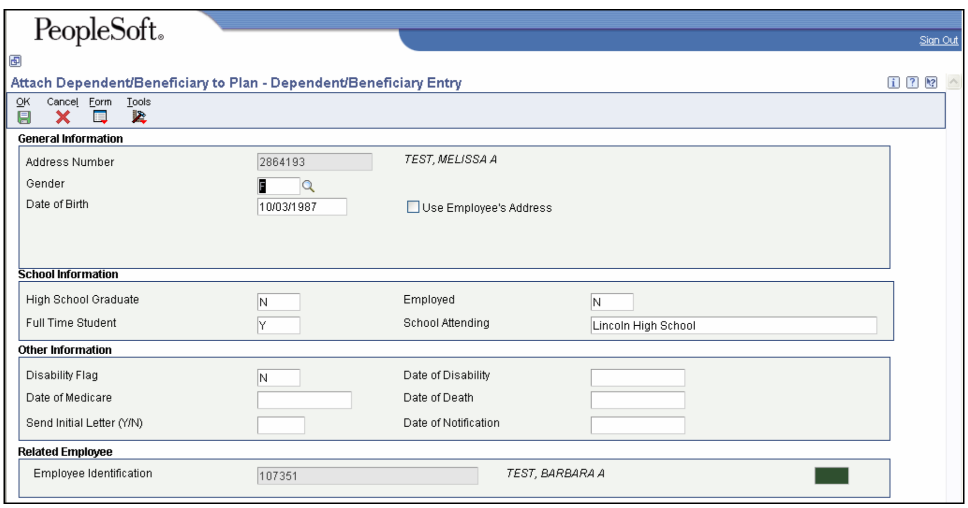
Start this instruction from the Attach Dependent/Beneficiary to Plan – Work with Employees window.



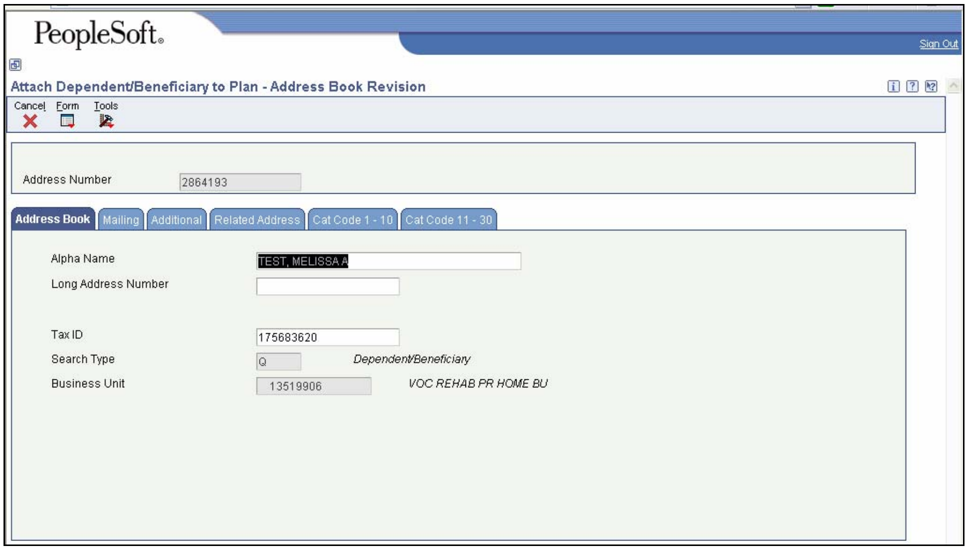
1. Enter the Address Book number of the employee that is transferring in the Employee Identification field in the header.
2. Choose the employee and click **Select**. The Attach Dependent/Beneficiary to Plan Dependent/Beneficiaries by EE window appears.



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.



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.

Transferring Employee to a New Agency - Receiving Agency - Benefits

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.

Please refer to the following work instructions to transfer an Employee's Benefits:

Change Enrollment with Eligibility (End Enrollment section)

Enroll an Employee with Eligibility

Enroll Dependent/Beneficiary