Transferring an Employee to a New Department within the Same Agency

Overview

When an employee is transferred to another department within their agency, the supervisor, home business unit and position ID must be changed via the Employee Master. 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 employee master screens should be reviewed for any additional changes that may be necessary. Benefits should also be reviewed for any possible changes. Please note: If changes are made to an employee's benefit enrollments, you will also need to change the dependent/beneficiary enrollment.

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 department within the same Agency

Transferring Employee Benefits

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

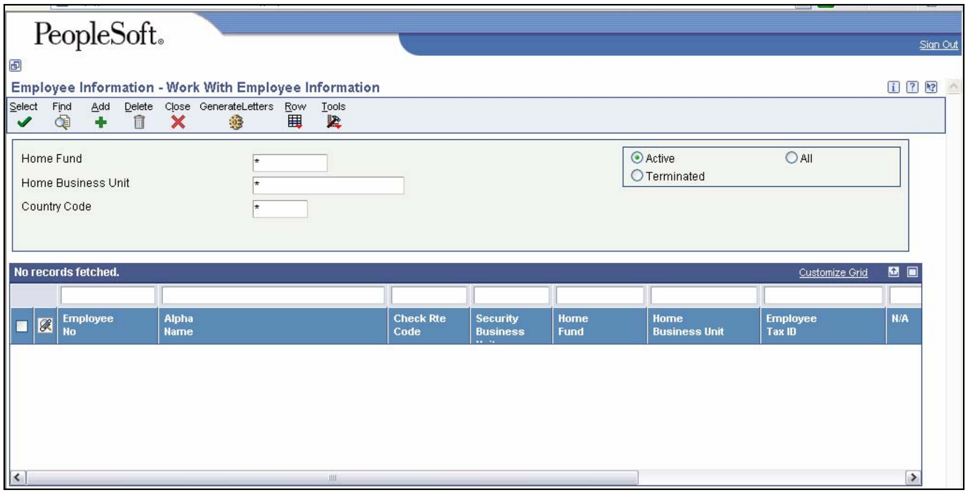
Click Roles, HR_PR .
(Citrix users – right click on the menu, choose View by Role, choose HR_PR.)

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

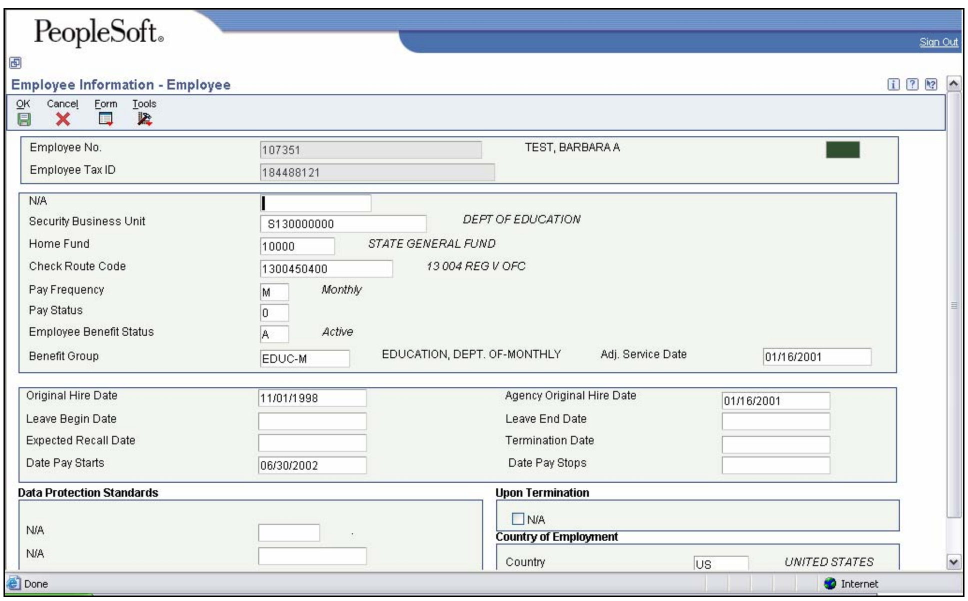
Steps

Transfer an Employee to a New Department within the Same 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 QBE (query-by-example) line directly above the Alpha Name column in the grid.
2. Click **Find**.
3. On the Employee Information – Work with Employee Information window, choose the employee on the grid row to be transferred.
4. Click **Row, Employee**. The Employee Information - Employee window appears.

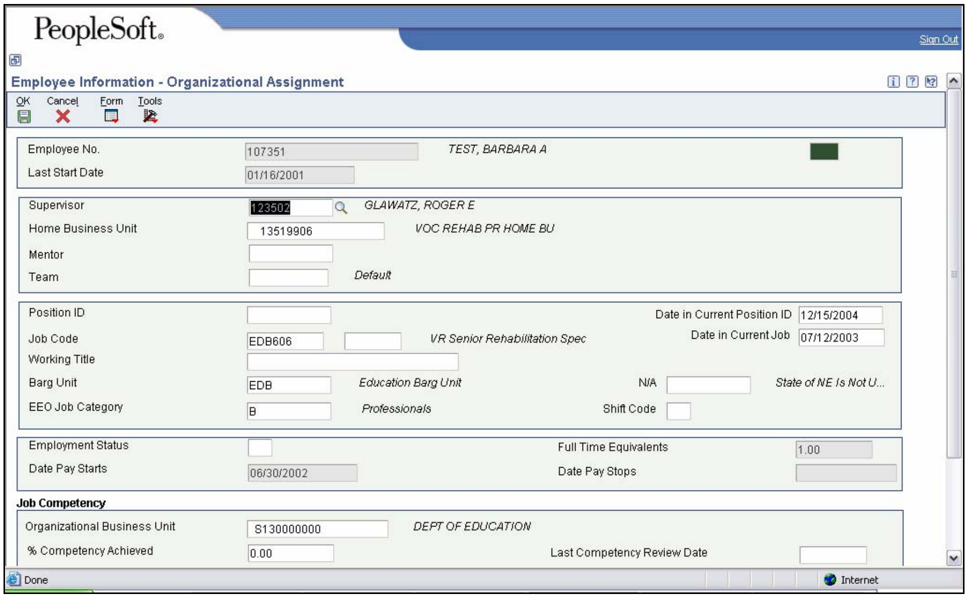


5. Complete the following fields, if necessary:
   - Security Business Unit
   - Check Route Code
   - Pay Frequency
   - Benefit Group

   If changes are made to benefit enrollments for the employee, dependent/beneficiary enrollments will need to be changed as well.

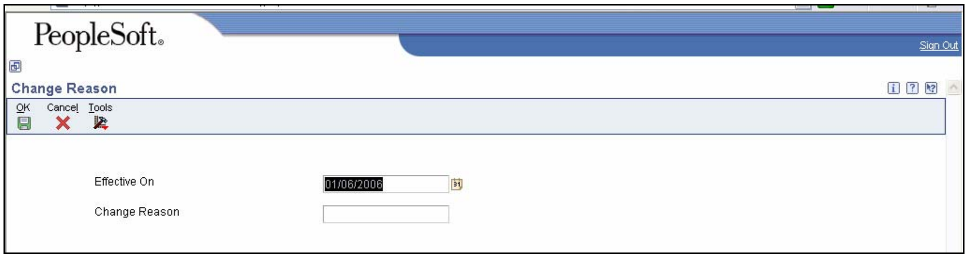
6. Click **OK**. The Change Reason window appears.
7. Enter the Effective On date and Change Reason code.
8. Click **OK** to return to the Employee Information - Work with Employee Information window.
9. Click **Row**, **Organizational**. The Employee Information – Organizational Assignment window appears.

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

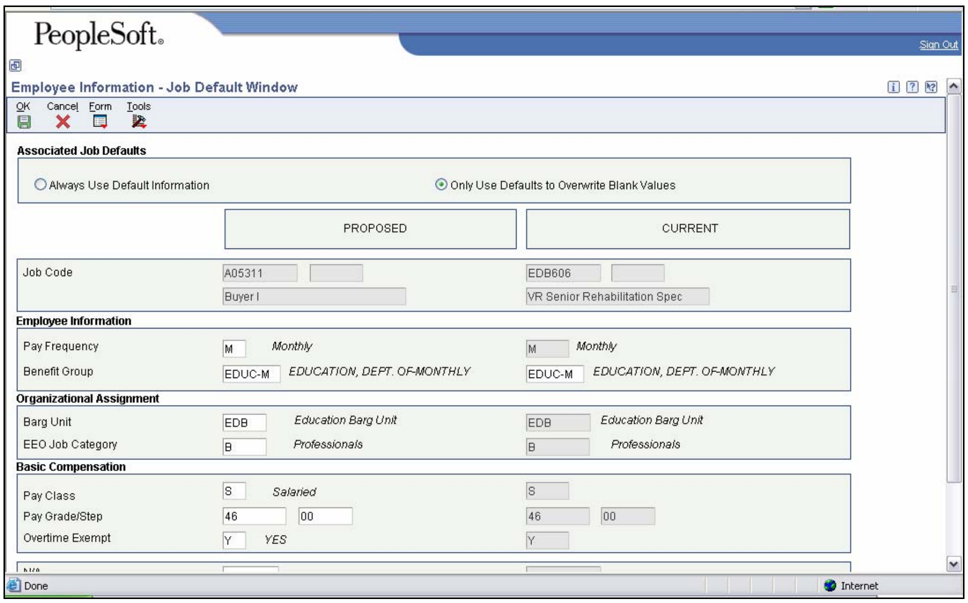


10. Complete the following fields, if necessary:
    - Supervisor
    - Home Business Unit
    - Position ID
    - Job Code
    - Date in Current Position ID
    - Date in Current Job
    - Date Pay Starts
    - Next Review Type
    - Next Review Date
11. Click **Form, User Def Cat. 01-10**. The Employee Information - Employee/Job Category Codes 01-10 window appears.
12. Complete the following fields:
    - O*Net Code
    - Union Code
    - Census Code
    - Benefit Payroll Cycle

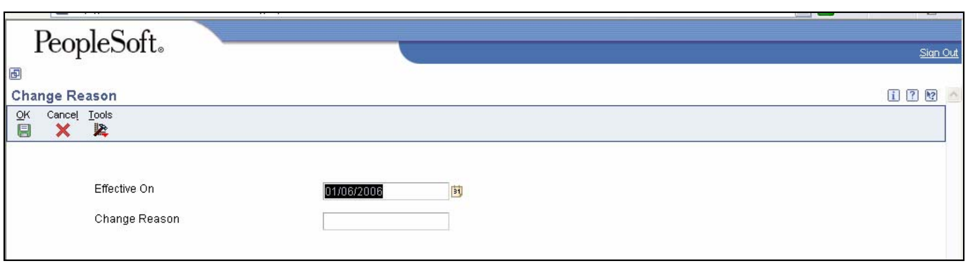
13. Click **OK**. The Employee Information - Change Reason window appears.
14. Verify the Effective On date and type the Change Reason code.



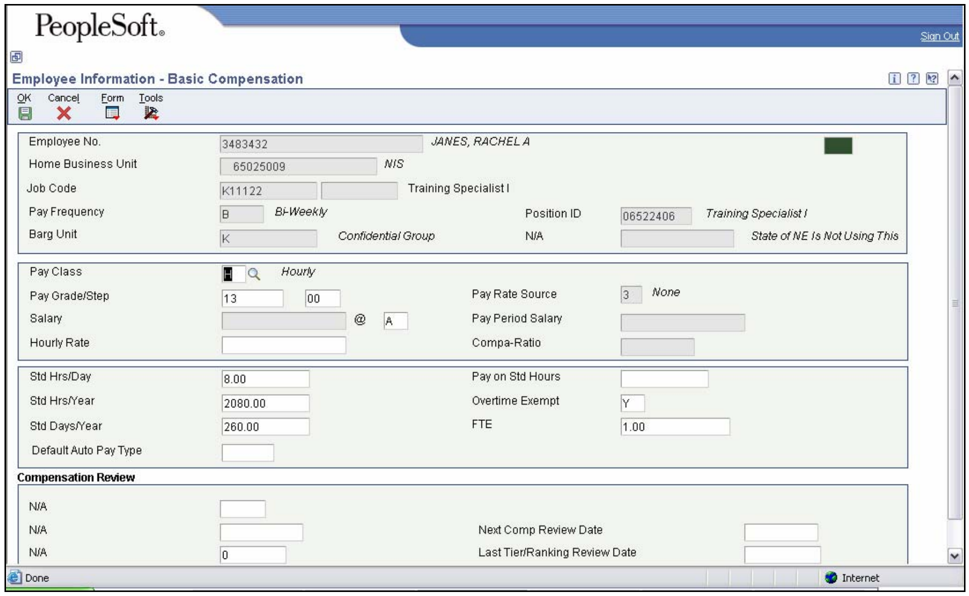
15. Click **OK** to return to the Employee Information - Organizational window.
16. Click **OK**.
17. The Employee Information – Job Default window appears only if job information changed. Verify all information, make any necessary changes,
18. Click **OK**.



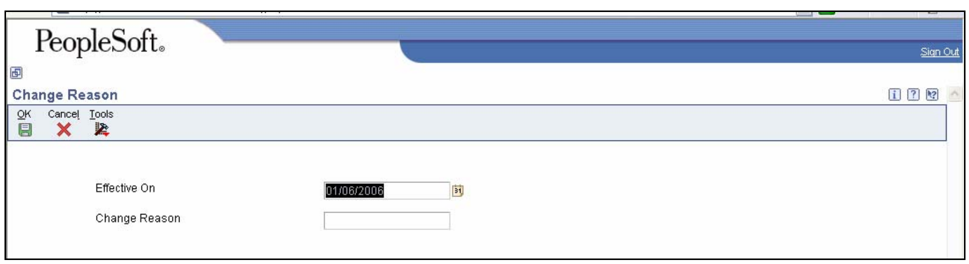
19. On the Employee Information – Change Reason window, type the Effective On date and Change Reason code.



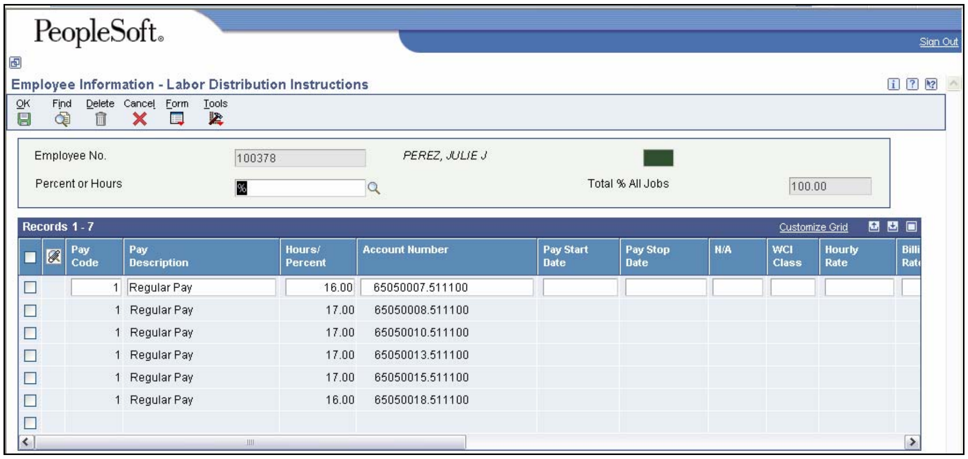
20. Click **OK** to return to the Employee Information - Work with Employee Information window.
21. Click **Row**, **Basic Compensation**. The Employee Information – Basic Compensation window appears.



22. Complete the appropriate fields:
    - Hourly Rate – Hourly employees
    - Salary – Salaried employees
    - Pay on Std Hours
23. Click **OK**. A Reconfirm Salary Hrly Rate/Std Hrs/Yr warning appears.
24. Click **OK**. The Employee Information – Change Reason window appears.
25. Verify the Effective On date and type the Change Reason code.



26. Click **OK** to return to the Employee Information - Work with Employee Information window.
27. Click **Row, Labor Distribution**. The Labor Distribution Instructions window appears.



28. 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.

29. Click **OK** to return to a blank Employee Information - Labor Distribution Instructions window.

30. Click **Cancel**.

31. Click **Close**.

Transferring Employee's 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