PeopleSoft
Transfer Checklist
HR/Payroll/Benefits

Transfer is used when an employee does not have a break in service with the State. Once the Prepare for Hire is done by the Receiving agency OMB is notified by email. The Job Data transfer is done by OMB for all employees transferring to a different agency.

HR/Payroll Checklist for Transfer of an Employee employed by another Agency

TRANSFERRING AGENCY:

- Fill out the PERS transfer kit for employee and send to receiving agency
- Contact agency employee is transferring to and provide them with the number of Annual Leave hours they will have at time of transfer to see how many if any you will need to payout.
- The Job Data transfer is done by OMB for all employees transferring to a different agency.

RECEIVING AGENCY:

HR: The Job Data transfer is done by OMB for all employees transferring to a different agency.
- Once OMB does the transfer in Job Data, Verify the information on (Navigation: Workforce Administration> Job Information> Job Data)
  - Work Location
  - Job Information
  - Payroll
  - Salary Plan
  - Compensation
  - Employment Data
  - Earnings Distribution
And make any changes necessary or email OMB for corrections.
• Verify all personal information is correct in Modify a Person.  (Navigation: Workforce Administration> Personal Information> Modify a Person)
  o  Biographical Details
  o  Contact Information
  o  Regional
Make any necessary changes.

• Enter Workers Compensation (Navigation: Workforce Administration>Job Information> Workers’ Compensation)

• Emergency Contact (Navigation: Workforce Administration> Personal Information> Personal Relationships> Emergency Contact)

• Designated Medical Provider (Navigation: Workforce Administration> Personal Information> Personal Relationships> Designated Medical Provider)

• Driver’s License Data (optional) (Navigation: Workforce Administration> Personal Information> Biographical> Driver’s License Data)

• ACA Employee Eligibility - (Navigation: ND State Applications>Benefits>ACA Employee Eligibility)

**Payroll:** All of these pages should be verified that they are correct for the employee’s current position.

• **Direct Deposit** (Navigation: Payroll for North America> Employee Pay Data USA> Request Direct Deposit)
  *The ‘Suppress DDP Advice Print’ box should be checked for all employees with self service access*

• **Employee Tax Distribution** (Navigation: Payroll for North America> Employee Pay Data USA> Tax Information> Update Tax Distribution)
  *This panel should be checked for correct locality information*

• **Employee Tax Data** (Navigation: Payroll for North America> Employee Pay Data USA> Tax Information> Update Employee Tax Data)
  o  Federal Tax Data
  o  State Tax Data

**Commitment Accounting:**  (Navigation: Set Up HCM > Product Related > Commitment Accounting > Budget Information>Department Budget Table USA)

• **Department Budget Table** - *All employees must have a department budget table. If the hire is a permanent employee filling a previously existing position,*
the table may already be set up, but ensure the established combination code is correct for that employee.

Benefits: You should receive the PERS transfer kit from the transferring agency. Fill out the needed areas and send to PERS. Keep a copy to verify information once transfer is complete.

Benefits Administration: Once the transfer is done in Job Data, a benefit event is created. Before you can process the event, it needs to be assigned to your schedule. This is a centralized activity that automatically runs every half hour.

- **Prepare Benefit Options:** (Benefits>Manage Automated Enrollment>Events>On Demand Event Maintenance)
  - If the transfer does not result in the employee being newly eligible/ineligible for benefits, the event will close.
  - If the transfer does result in the employee having different benefit options, follow the next step.

- **Enter Benefit Elections:** (Benefits>Manage Automated Enrollment>Events>On Demand Event Maintenance>Election Entry)
  - Enter employee benefit elections (if applicable)

- **Finalize/Close Event:** (Benefits>Manage Automated Enrollment>Events>On Demand Event Maintenance>Validate/Finalize)

- **Review Paycheck:** Once a paycalc has run go to review paycheck and double check all benefits and salary are correct.