# PeopleSoft Transfer Checklist HR/Payroll/Benefits

June 13, 2008

This checklist highlights the Menu Items, Components, and Pages necessary for basic initial processing. The checklists focus on the most common general situations. For specific detail see relevant manual.

Transfer is used when an employee does not have a break in service with the State.

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

You will need to contact the agency that the employee was previously employed by. You will need to provide them with the transfer date and the position number that the employee will now be employed in.

## TRANSFERRING AGENCY:

**HR:** (Navigation: Workforce Administration> Job Information> Job Data)

Transfer (work location tab)

- Insert an effective dated row (Transfer date is 1st day in the new agency)
- Action of Transfer
- Reason of Inter-Agency Transfer
- Enter the position number (Given by receiving agency)

Save

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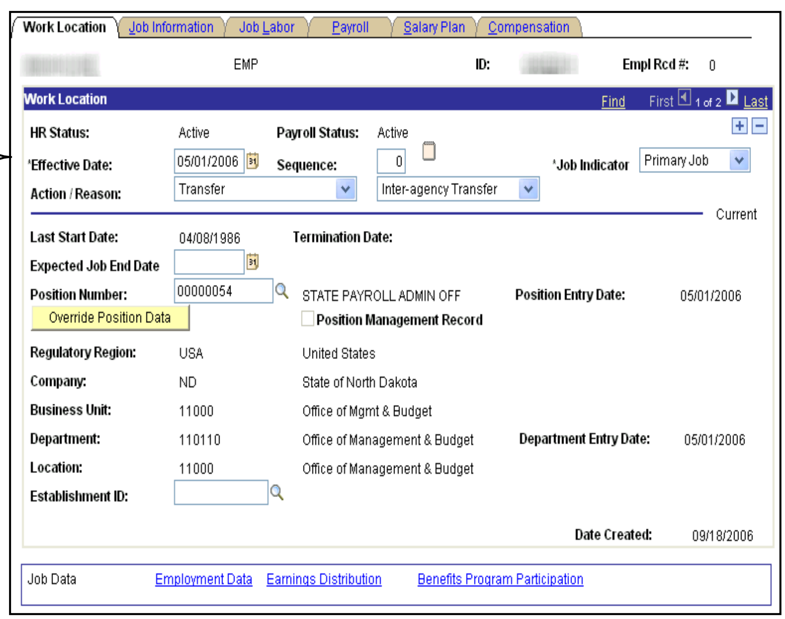


# RECEIVING AGENCY:

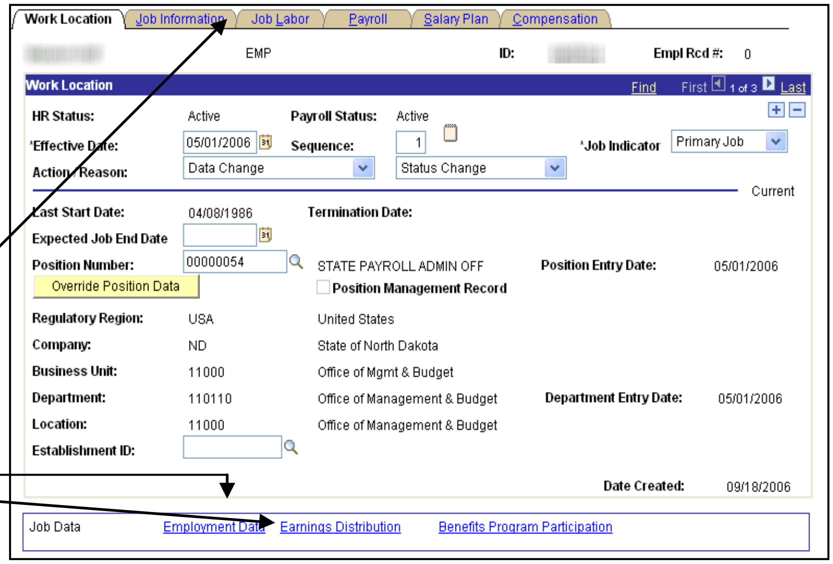
## HR: (Navigation: Workforce Administration> Job Information> Job Data)

Transfer (work location tab)

- Insert an effective dated row (Transfer date is 1st day in the new agency)
- Effective sequence of 1
- Action of Data Change

- Verify the information on
  - Work Location
  - Job Information
  - Payroll
  - Salary Plan
  - Compensation
  - Employment Data
  - Earnings Distribution

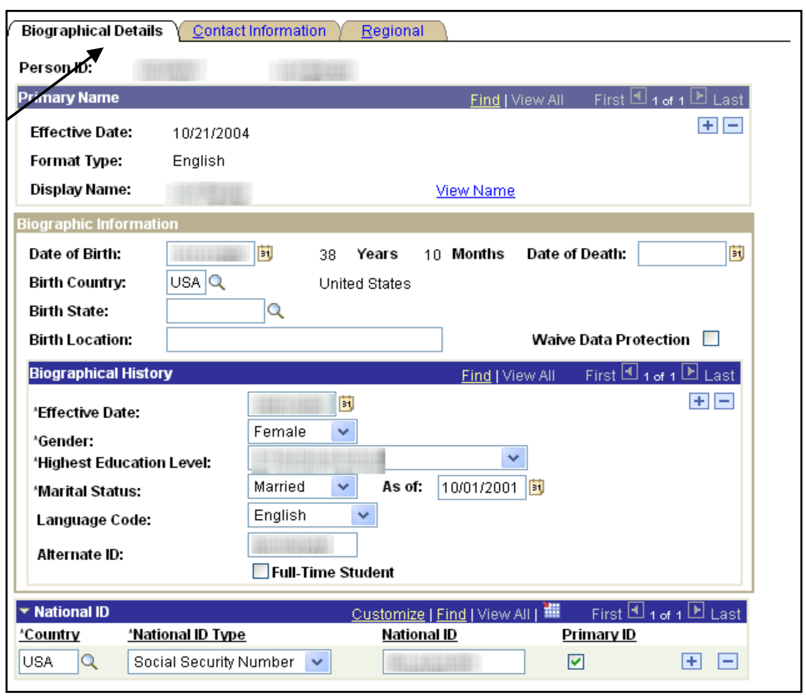
And make any changes necessary.




Once the job data pages are complete you will need to go to Personal Data. (Navigation: Workforce Administration> Personal Information> Modify a Person)

- Verify the information on
  - Biographical Details
  - Contact Information
  - Regional

Add a new effective dated row and make any necessary changes.



The other HR pages that should be verified are:

Workers Compensation (Navigation: ND State Applications> Human Resources> 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)

## 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)

- Federal Tax Data
- State Tax Data

## Commitment Accounting:

(Set Up HRMS > Product Related > Commitment Accounting > Budget Information)

**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:** Once you have entered and saved the Transfer Data Change 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>Run Automated Event Processing)

- 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/Participant Enrollment>Perform Election Entry)

- Enter dependent information for medical, dental and vision plans (if applicable)
- Enter employee benefit elections (if applicable)

**Finalize/Close Event:** (Benefits>Manage Automated Enrollment>Run Automated Event Processing)