Agency Transfer Checklist

The steps in this guide should be completed when an Employee is transferring to another Process Level in another agency but remaining in State Service. Note: If you do not properly complete all of the following steps, the Employee's record will not be up to date and the Employee may be paid incorrectly in his/her new position.

In addition to the Agency policies, such as collecting company property, follow these HRIS procedures during a transfer.

Check	Task Description	Important Notes
	For Employees transferring to another agency, no change will be made to the Employee's status in the Transfer process. Do not terminate the employee unless there is a "break-in-service", prior to the move.	• **In the case of Inter-Agency Transfers, all of the items mentioned below must be completed prior to the transfer request being entered by the Central Human Resources Division.**
	Does the Employee have any existing **Agency Specific (or position specific) Voluntary Deductions**? If yes, contact your Agency Payroll Initiator to have stop dates entered on the *Employee Deduction form (PR14.1)*.	• These deductions will only be those specific to the Losing agency in the case of Inter-Agency Transfers. • Stop dates must be after the final payment date to the Employee.
	Does the Employee have any **existing Agency Specific (or position specific) Additional Payments** that have been set up by the Agency Payroll Initiator (on *Standard Time Record ZR30.1*) that should be stopped? If yes, contact your Agency Payroll Initiator to have stop dates entered on the *Standard Time Record (ZR30.1).*	• These payments will only be those specific to the Losing agency in the case of Inter-Agency Transfers. • Stop dates must be after the final payment date to the Employee. • Additional Payments added to the Employees record using an Employee Group will stop automatically.
	• **No stop dates** will be entered for **Direct Deposits** • **No stop dates** will be entered on **Time Accrual Plans** (unless they are specific to an agency).	• These will continue through out the process.
	Does the Employee have any hours worked in the current pay period for the losing agency that need to be recorded in HRIS? If yes, contact your Agency Payroll Initiator to have a **final time record** created for the Employee **for those hours worked at the losing agency (or in the losing position)**.The Agency Payroll Initiator will input time on the Employee Daily Time Entry Form (XR32.1 & XR32.2), prior to the transfer.	• Hours should only be for actual hours worked. Auto-fill will complete hours for two weeks. Remember to delete hours on any days the Employee did not work before the Transfer.
	Complete other items as defined by your Agency, such as: 1. Company property 2. Security cards 3. Keys 4. Exit Interview 5. Close-out evaluation	