



HRIS Job Role Training

Interagency Transfer – Agency
Version

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Inter-Agency Transfers For Agencies

Introduction

The purpose of this training is to explain the different roles of both the gaining and losing agencies involved when an employee transfer takes place.

The reason for performing an Inter-Agency Transfer is due to security. Agencies have viewing or update rights based on only their own Process Levels and Departments, and therefore cannot make changes to in-coming employees that have not been added to their Process Levels yet. This was determined at the inception of HRIS, by agencies who did not want their employee information viewed by other agencies.

To facilitate the change from one agency to another, Central HRD must complete a Personnel Action to electronically "move" an employee from one Process level (losing agency) to another (gaining agency). No additional information is entered by the Central HRD office.

Central HRD uses the "Fill Defaults" button within the Personnel Action, to change all process levels, departments, etc., of the employee to the new position's data. The gaining agency is then responsible for auditing and changing the employee record with either a "Job Chg" action or a "Rehire1" action, based on the employee's current status.

Employees are not terminated during a transfer unless there is an actual "break-in-service". Also, a "Status Chg" personnel action should never be used to update an employee who has been moved by Inter-Agency Transfer, due to benefits, deductions, stipends and employee groups.

Agency Transfer Request

- The Agency Transfer Request form can be accessed on the HRIS website.
- Inter-Agency Transfers move the electronic files of an employee from one agency to another.
- It is the Gaining Agency's responsibility to submit the Agency Transfer Request to ADOA Central HRD for processing. *The ADOA Central HR Administrator job role will complete the processing for the Inter-Agency Transfers.*
- It is the Gaining Agency's responsibility to request the paper Personnel File (if any) from the Losing agency. The Interagency Transfer Process will not notify or forward the paper copy to the gaining agency.
- Inter-Agency Transfers are actions that cannot be entered in advance. However, requests can be sent to ADOA Central HRD in advance of the effective date.
- Transfers will be processed by the system on the Effective Date of the action, and can be immediate.

AGENCY TRANSFER REQUEST
SOCIAL SECURITY NUMBER CHANGE

Submit the completed form to:

Employee Name (Last, First, MI)	EIN	Last Day Worked for Losing Agency	Effective Date of Transfer or SSN Change
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Select one of the following actions to be processed and fill in the appropriate information needed below

Transfer Request Social Security Number Change

TRANSFER REQUEST
(Transfer Request must be sent to the ADOA Central HR Administrator as soon as the effective date of the transfer has been established.)

POSITION NAME: _____ JOB/CLASS CODE: _____

New Information:

Position Number <small>(12 Character)</small>	<input type="text"/>	*Step <small>(D & DC)</small>	<input type="text"/>
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Gaining Agency Contact Name _____ Gaining Agency Contact Signature _____
Print Name

Gaining Agency Contact Number _____

Agency Code: _____

Current Social Security Number: _____ New Social Security Number: _____

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Agency Contact Name _____ Agency Contact Signature _____
Print Name

Agency Contact Number _____

ADOA HRD Employment
100 N. 15th Avenue
Suite 103

Transferring Employee's Name, EIN, Losing Agency and Effective Date.

X
 NEW Position Information, Gaining Agency Contact Information

Not Used For Transfers

- **Losing Agency Requirements:**

- The losing Agency will be responsible for entering all time worked by the Employee, for the losing agency by the C.O.B. (close of business) of the last day worked at that Agency.
- The losing agency WILL NOT terminate the employee unless there is a break in service, not covered by paid leave.
- The losing agency will provide the paper file of the employee to the gaining agency as requested.

- **Gaining Agency Requirements:**

- The gaining agency will submit the Agency Transfer Request to the ADOA Central HR Administrator.
- The gaining Agency must ensure the information tied to the position (Job Code, Process Level, Expense account information) is correct and that it is an active position.
- The gaining Agency will submit the Agency Transfer Request form to the ADOA Central HR Administrator as soon as the Agency has an effective date of the transfer, interagency.transfers@azdoa.gov
- The gaining Agency will receive notice of the transfer being completed on their personnel action update report (XP100) the morning after the Effective Date of the action (i.e., Effective Date 12/01/2003 will be seen on the report on 12/02/2003).
- The gaining Agency will enter a Job Change on the *Individual Action Form (XP52.1)* for the incoming Employee after the transfer has been completed and updated in HRIS. This must be used to update any pay or schedule changes.
- **Note** - HRIS will process the action the night of the Effective Date. The job change action may be entered once the transfer has been processed.
- The gaining Agency is responsible for requesting the Employee's personnel file (paper) from the losing Agency.

(The following materials are excerpts from the Central HR Inter-Agency Transfer Processor training).

The Human Resources (HR) Central Administrator will process all Employee Inter-Agency Transfers and Social Security Number changes.

The gaining Agency will submit the Agency Transfer Request form to the HR Central Administrator.

- **Inter-Agency Transfers:** *will be processed utilizing the Individual Personnel Action (XP52.1) form. Using Action, Nbr: INTRAGYTFR and Reason Code: JC-TRNFX. This action will move the Employee's Master File from the losing Agency to the gaining Agency. This action will be added to the Personnel Action History.....*

When processing a personnel action, HRIS requires that a Reason Code be supplied for the action being performed. HRIS displays the results of all processed personnel actions on various management reports. Detailed information (if required) can be displayed by running the report based on selected Reason Codes.

These actions may not be processed after close of business on Monday of compute week through close of business on a compute Tuesday. Entry of personnel actions may resume on Wednesday morning of the same week.

Step and Grade Positions

If an Employee is transferring **into** a position with a Step and Grade Schedule, you must add the step in the INTRAGYTFR Action. If you do not add the step, the action will not process and you will get an error message "Step and Grade Schedule Does Not Exist; or Has A Future Date".

If an Employee is transferring **out of** a position with a Step and Grade Schedule, you must remove the step in the INTRAGYTFR Action by using *BLANK in the Change To field. If you do not remove the step, the action will not process and you will get an error message "Step and Grade Schedule Does Not Exist; or Has A Future Date".

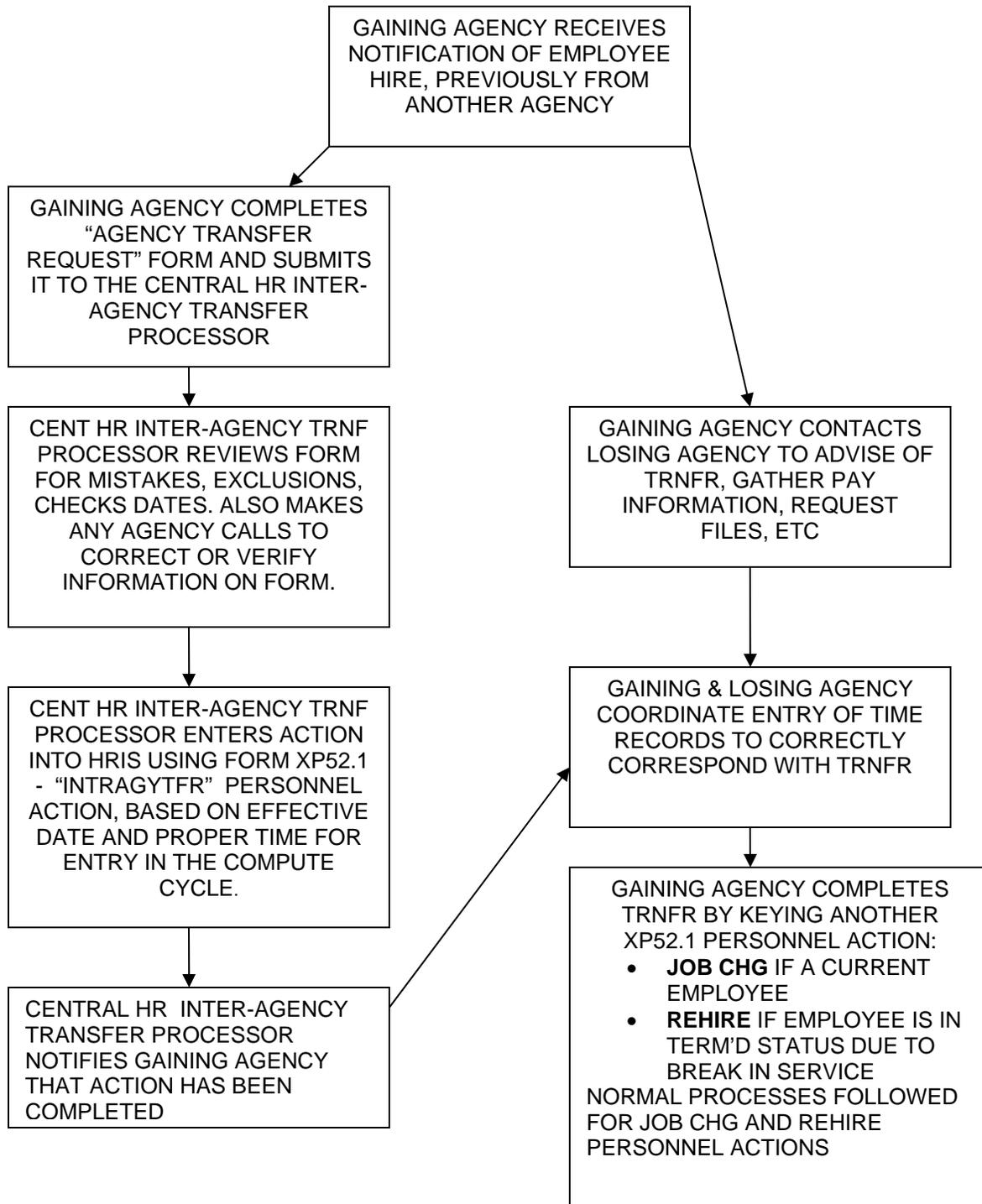
Time Records

All time records between losing and gaining Agencies must be coordinated. The losing Agency will be responsible to enter all time worked by close of business of the last day worked for that Agency. The Gaining Agency will be responsible for entering time worked since the transfer occurred. In case of a missed deadline the losing Agency can work with the gaining Agency to input their time and arrange for correct AFIS charges, etc.

A time record created in HRIS is like a snapshot of the Employee's information at that moment in time. If employee information is changed by personnel action, and reflected on the Employee Master Record (HR11.1) after the creation of the Employee's time record for that pay period, those changes would not be effective on the existing time record. For these changes to be reflected, the time record will have to be deleted and re-added.

All update programs will be run nightly (by effective date) to update Employees' records.

Work Flow for Inter-Agency Transfers



TRANSFER CHECKLIST

The steps in this guide will assist when an Employee is transferring to another Process Level in another agency but remaining in State Service. Internal agency policies must be reviewed as well.

In the case of Inter-Agency Transfers, all of the items mentioned below must be reviewed/completed prior to the transfer request being entered by the Central Human Resources Division.

Check	Task Description	Important Notes
	<p>For Employees transferring to another agency, no change will be made to the Employee's status in the Transfer process. Any status changes will be entered in the JOB CHANGE or REHIRE1 personnel action.</p>	<ul style="list-style-type: none"> • Do not terminate a transfer employee unless there is a "break-in-service", prior to the move.
	<p>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 <i>Employee Deduction form (PR14.1)</i>.</p>	<ul style="list-style-type: none"> • 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.
	<p>Does the Employee have any existing Agency Specific (or position specific) Additional Payments that have been set up by the Agency Payroll Initiator (on <i>Standard Time Record ZR30.1</i>) that should be stopped? If yes, contact your Agency Payroll Initiator to have stop dates entered on the <i>Standard Time Record (ZR30.1)</i>.</p>	<ul style="list-style-type: none"> • 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.
	<ul style="list-style-type: none"> • 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). 	<ul style="list-style-type: none"> • These will continue through out the process.
	<p>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.</p>	<ul style="list-style-type: none"> • 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.
	<p>Complete other items as defined by your Agency, such as:</p> <ol style="list-style-type: none"> 1. Company property 2. Security cards 3. Keys 4. Exit Interview 5. Close-out evaluation 	