Mini HR Training: Transfers

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Housekeeping Items

• This WebEx is being recorded and the archive/presentation will be distributed following today’s meeting
• You will be muted upon entry, unmute if needed
• Do not place your call on hold
• Let us know if you have difficulty hearing or seeing the presentation
• Hold your questions until the end of the presentation
• We will keep a Parking Lot for items that require additional attention
Agenda

• Transfer Discussion
• Questions
• Parking Lot Review
• Future Sessions
• Wrap-up
Inter-Institutional Transfer Processing
What is a Inter-Institutional Transfer?

• The transfer of a benefited (partial/full) employee to another benefited (partial/full) position at another Institution in the USG within a 30 day time frame

• As a reminder, the SSC is handling the data entry for inter-institutional transfers for Institutions who are on the OneUSG platform
  – During the OneUSG fit gap sessions, decision made by institution practitioners to centralize the transfer process
  – Enhances communication between institutions through ServiceNow
  – Each transfer is well documented in ServiceNow
  – Minimizes risk (benefits, service dates, etc.)
Transfer Documents

• Institution A provides the Transfer Letter to SSC
  – Submit a draft first with all known information
  – Submit final copy that includes leave balances after last payroll is closed

• Institution B provides the Transfer PAR to SSC

• Submit a ticket to notify SSC
  oneusgsupport@usg.edu

• Upload the transfer forms to SSC’s FTP server

• The forms can be found at
  https://www.usg.edu/shared_services_center/practitioner_services/hr
Termination Action

- Once the Transfer Letter is received from Institution A, the SSC enters the Termination row into the system for Institution A
  - The Transfer Letter is needed in order for us to begin data entry
- SSC watches Alight for the termination
- Once the termination has been processed, the SSC will provide the Transfer Letter to Institution B via the FTP server
Hire Action

• Once the Transfer PAR is received from Institution B, the SSC enters the Hire row into the system for Institution B
  – The Transfer PAR is needed in order for us to begin data entry

• SSC watches Alight for the rehire
General Deductions

- Alight should send stop deductions for Institution A and start deductions for Institution B

- The SSC monitors Alight carefully and will manually enter the deductions if we see that we are nearing a payroll and the stop/start deductions have not loaded
Reminders

• If the EE is transferring from a OneUSG Institution to another OneUSG Institution, the panels listed below will “follow” the employee from Institution A to Institution B
  – Savings Plan
    • Institution A, do not terminate this panel
    • SSC will notify Institution B of any TSAs that are in the system so that these can be discussed with the employee
  – Direct Deposit
    • Institution A, do not terminate this panel
    • Institution B, review and make necessary updates as needed
  – Leave Balances
    • Institution A, do not zero out leave balances
    • SSC will monitor the leave balances until after the payroll calendar closes
Reminders

• If the employee works at least one day during the month for Institution A, Institution A is responsible for the benefits for that entire month
  – If arrangements are made outside of this process, please document this in the ServiceNow ticket so that all are aware
  – Please monitor payroll carefully to ensure benefits premiums are deducted appropriately
Institution Responsibilities

• Submit a ticket to the SSC
• Submit the Transfer Letter and Transfer PAR to the SSC as early as possible, via FTP server
• Be sure to use the NEW Transfer Letter and NEW Transfer PAR
• Review all data entry and report any inaccuracies to the SSC for correction
• Verify Personal Data and make necessary updates as needed
• Verify Direct Deposit and make necessary updates as needed
• Review and update TSAs as needed
• Update Tax Withholding panel
• Notify SSC of any partial vacation payouts
Questions
Future Sessions
Review Parking Lot
Wrap Up