Transfer

Introduction

In EHRP, when an employee transfers to HHS from another Federal agency, the employee will be processed similar to a new hire. The employee's data will be entered in the pages of the Hire page group with the NOA code of 130-0.

When a transfer is being processed, you will also need to process an action for transfer in data relative to Leave and TSP. Refer to page 3-10d – 1 for the transfer in leave procedure, and page __ for transfer in TSP.

NOTE: Fields that are not required are not listed within the procedure. Optional fields that an end-user may choose to complete are not detailed.

Navigational Path

Home ➔ Administer Workforce ➔ Administer Workforce (USF) ➔ Use ➔ Hire

Position Number

Before beginning to process a transfer, be sure to make note of the **position number** to which the employee will be assigned.

Navigational Tips

- The icon represents a look-up prompt. Clicking this button will allow you to look up all possible entry options for this field.
- The icon represents a date prompt. Clicking this button will produce a pop-up calendar for reference. To select a specific date from the pop-up calendar as the field entry, simply click on the date. Use the arrows to move through the months and years.

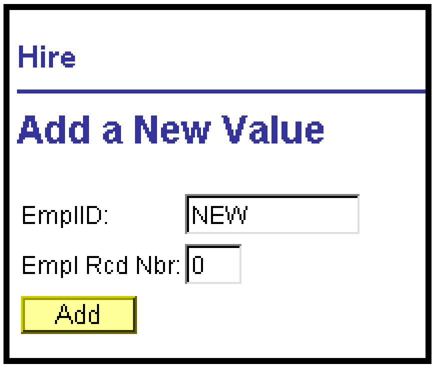
Procedure

The following steps detail the procedure for processing a Transfer:

1 Follow the navigational path:

Home ➔ Administer Workforce ➔ Administer Workforce (USF) ➔ Use ➔ Hire

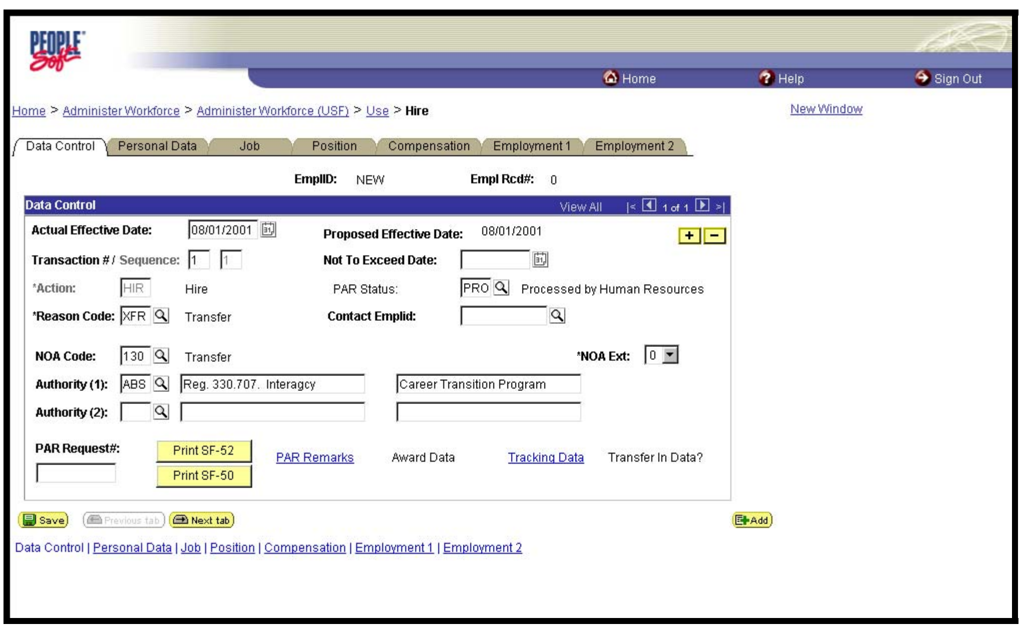
The following **Hire** sub-page appears:



*NOTE: Do not change the **Empl Rcd Nbr.** It must remain "0."*

2 Click Add.

The following **Data Control** page appears:



NOTE: The EmplID will default in as "New" until Save is clicked. EHRP will then autogenerate a sequential EmplID for the employee. Do not save until all required fields are completed.

3 In the **Actual Effective Date** field, type the date the appointment is to become effective in the system.

NOTE: The ***Proposed Effective Date*** *field is populated by default with the date entered in the Actual Effective Date field. Since human resources personnel processing a request have final authority on when the action becomes effective, and they will enter the official actual effective date, but the proposed effective date will remain unchanged.*

NOTE: The ***Transaction #****, will populate with a value of "1."*

4 Enter "XFR" (Transfer) in the **Reason Code** field.

5 In the **NOA (Nature of Action) Code** field, enter "130."

6 Enter the **NOA Ext** (Extension).

NOTE: The ***NOA Ext*** *has been carried over from the IMPACT 4-digit NOA codes. If, for example, the NOA Code in IMPACT was "130-0," the NOA Code in EHRP is "130" with a NOA Ext of "0."*

7 Enter the applicable authority in the **Authority (1)** field.

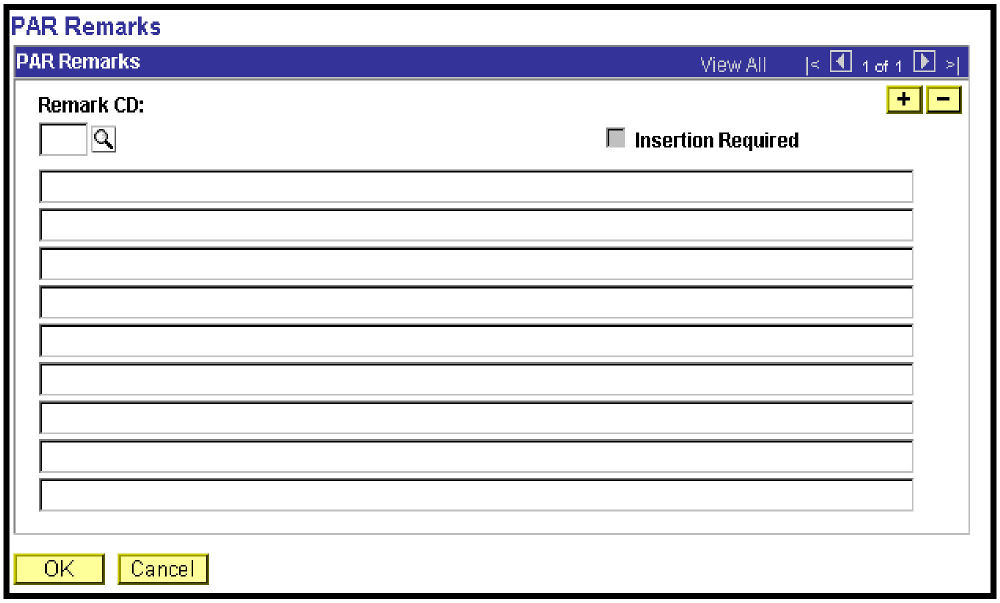
8 Enter **Authority (2)**, if applicable.

9 In the **PAR Request #** field, enter the applicable PAR Request number.

NOTE: This field is not required but can be used for PAR request tracking purposes.

10 To enter **PAR Remarks**, click the hyperlink of the same name.

The following **PAR Remarks** sub-page appears:



11 Enter the applicable **Remark CD (Code)** and tab out of the field to see the text of the remark.

NOTE: To add additional remarks, use the + to insert a row.

*NOTE: If the **Remark CD** contains a "****", you must replace the asterisks with specific information. (i.e. this field may prompt you to enter date)*

*NOTE: To enter freeform comments, enter "ZZZ" in the **Remark CD** field. Enter applicable remark text in sentence format. Text should fill the line. Once the line is filled, move to the next line. There is no autowrap feature. Do not hyphenate across lines. If a word requires hyphenation, move it to the next line. Do not use bullets or dashes. The "ZZZ" remark can only be used once for each personnel action. .*

NOTE: Within the EHRP system, there is no limit to the number of remarks that can be captured.

Mandatory Remarks

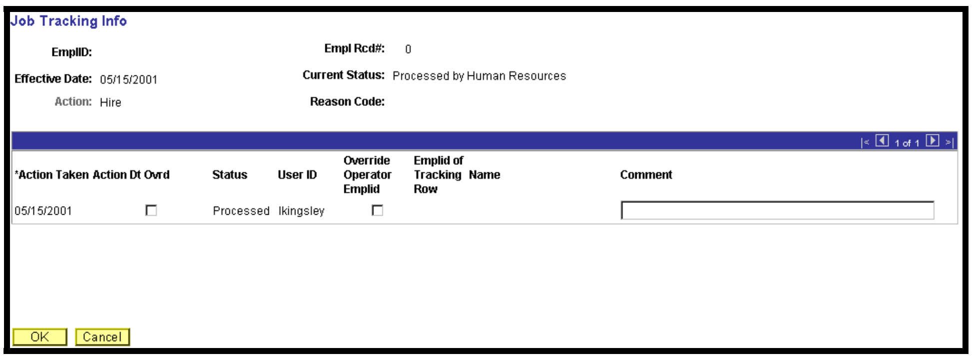
The system does not generate or suggest mandatory remarks that need to be entered in accordance with the NOA Code you are processing. Use the appropriate remarks based on OPM processing guidelines. There will no longer be HHS specific remarks for entry, except for the freeform ZZZ.

Procedure (cont'd)

12 When PAR Remarks entry is finished, click OK to return to the **Data Control** page.

13 Click the **Tracking Data** hyperlink.

The following **Job Tracking Info** sub-page appears:


Job Tracking Info

EmplID:
Empl Rcd#: 0
Effective Date: 05/15/2001
Current Status: Processed by Human Resources
Action: Hire
Reason Code:

1 of 1

*Action Taken	Action Dt Ovrd	Status	User ID	Override Operator Emplid	Emplid of Tracking Row	Name	Comment
05/15/2001	☐	Processed	lkingsley	☐			

OK Cancel

14 Enter any necessary **Comment** or review comments make by management**.**

NOTE: There is a 30 character limit in the ***Comment*** *field.*

Job Tracking Info

The **Job Tracking Info** page is to be used only for entering and reviewing comments. Only the **Comment** field should be used. Notes made by colleagues in relation to this particular action may be read and entered on this page

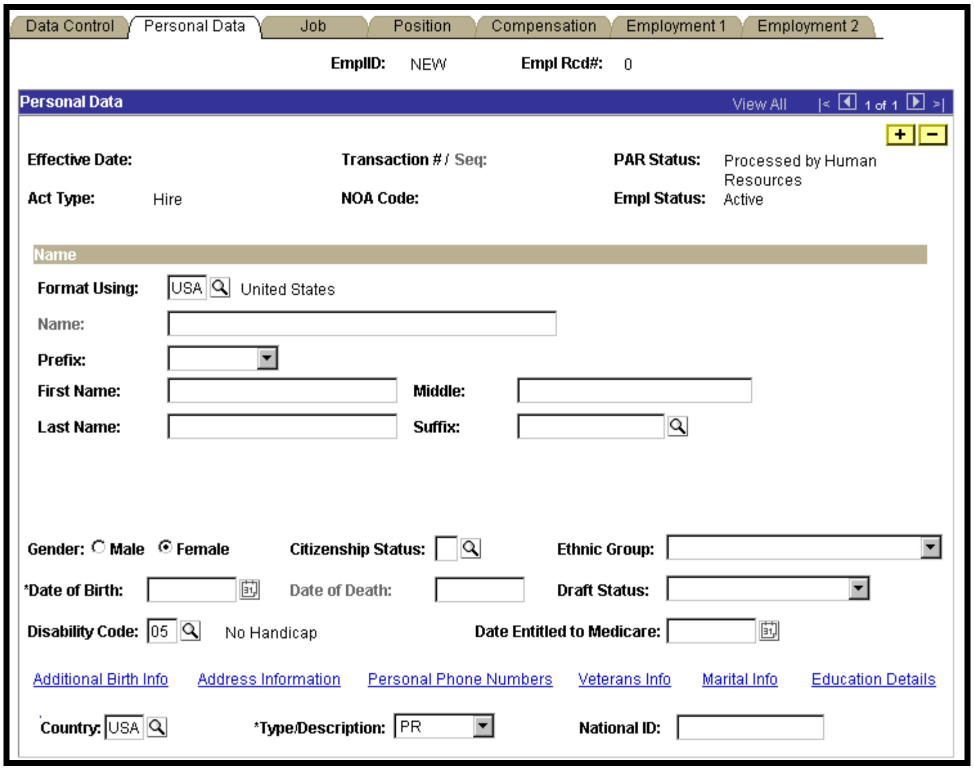
NOTE: There is a 30 character limit in the ***Comment*** *field. Insert additional rows to add comments beyond 30 characters..*

Procedure (cont'd)

15 Click OK to return to the **Data Control** page.

16 Click on the **Personal Data** tab.

The following **Personal Data** page appears:



17 Select the **Prefix** to the employee's name from the dropdown menu.

18 Enter the **First Name** of the employee.

19 In the **Middle** field enter the employee's middle name or middle initial, as applicable.

20 Enter the employee's **Last Name**.

NOTE: While EHRP accepts last names with an apostrophe, the legacy system does not. For last names with an apostrophe, leave a space in lieu of the apostrophe. For hyphenated last names, leave a space in lieu of the hyphen.

21 Enter the **Suffix** (i.e. Jr, Sr) for the employee, if applicable.

NOTE: The Name field (grayed out) will populate with the employee's full name.
NOTE: If the suffix you want to use is not available, add the suffix to the end of the last name field.

22 Select the appropriate radio button for **Gender**.

23 Enter the **Citizenship Status**.

NOTE: The default is "1" for US citizen. Possible citizenship status selections are limited to the following:

Description
U.S. Citizen
Naturalized
Alien Permanent
Alien Temporary
Permanent Resident
Employment Visa
Canadian Citizen
Other
Not Indicated

24 Select the **Ethnic Group** from the dropdown menu.

NOTE: Upon save, this field will diasappear from view.

25 Enter the employee's **Date of Birth.**

26 Enter the **Disability Code** if applicable.

NOTE: This field will default to "05," i.e., "No Handicap."
NOTE: Upon save, this field will disappear from view.

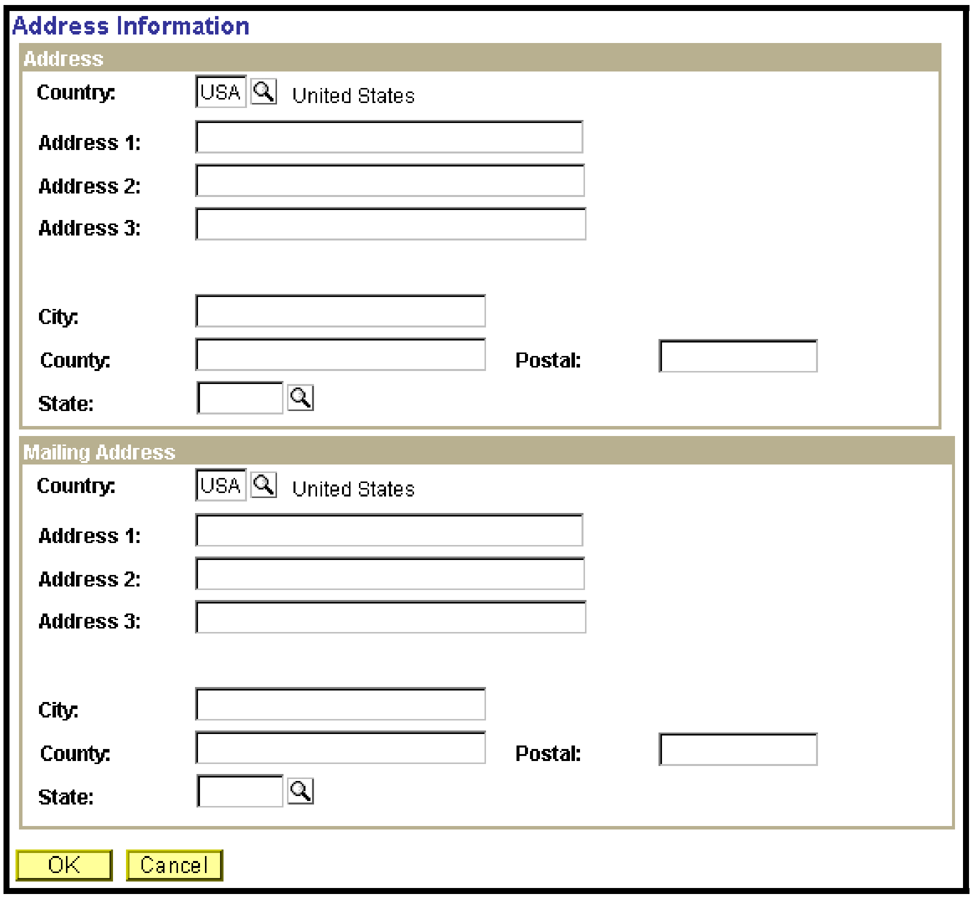
Multiple Disabilities

Only one disability will be recorded. If the employee has multiple disabilities, enter the disability that is most limiting to the employee.

Procedure (cont'd)

27 Click the **Address Information** hyperlink.

The following **Address Information** sub-page appears:



28 Confirm the default country of **USA** or enter another country.

29 Enter the address in the **Address 1** field.

*NOTE: The **Address 1** field is restricted to 25 characters.*

30 Enter the **City**.

31 Enter the **Postal** (Zip) code.

32 Enter the **State.**

*NOTE: To enter the **Mailing Address**, follow the same steps as the primary address. There is a 25 characters restriction in this address field as well.*

*NOTE: After the Hire action is completed and saved, you must immediately create another action to capture the address for Payroll. Add another row with the same effective date as the Hire, and use **999-5 NOA**. This new row will copy the address you created in the Hire action, and transmit the address to Payroll.*

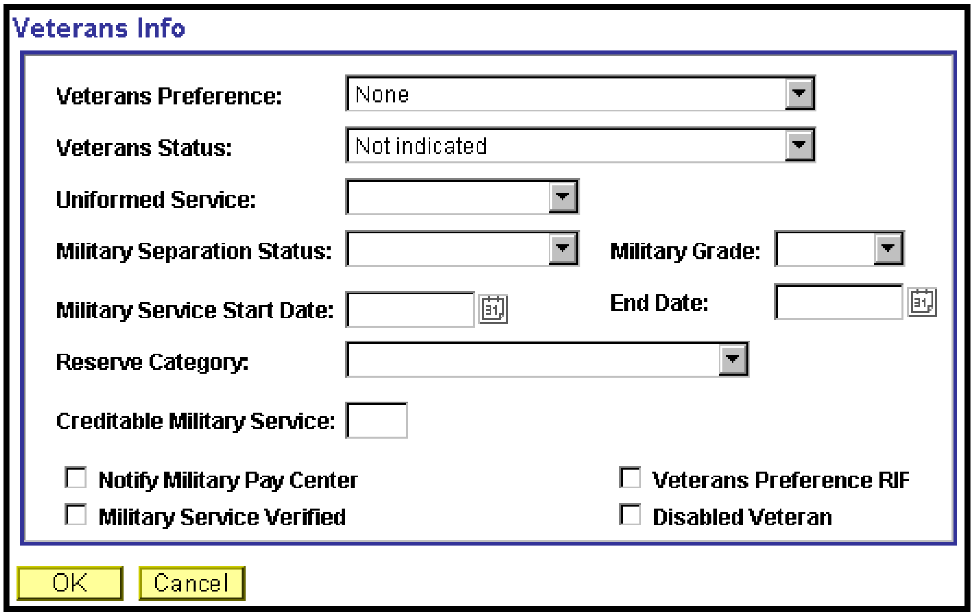
*NOTE: If the employee uses a different mailing address from his or her primary address, complete the **Mailing Address** area. The **Mailing Address** field is for information purposes only so it will not go to payroll. It could be used to record an employee's foreign address.*

33 Click OK to return to the **Personal Data** page.

34 Click the **Veterans Info** hyperlink.

*NOTE: If there is no Veterans information, you may skip to step 46. The **Veterans Info** defaults to None.*

The following **Veterans Info** sub-page appears:



35 Change the **Veterans Preference** from the **None** default using the drop-down menu, if applicable.

36 Select the **Veterans Status** from the dropdown menu.

37 Select the **Uniformed Service or Public Health Service** from the dropdown menu.

38 Select the **Military Separation Status** from the dropdown menu.

39 Select the **Military Grade** from the dropdown menu.

40 Enter the **Military Service Start Date**.

41 Enter the Military Service **End Date**.

42 Select the **Reserve Category** from the dropdown menu.

43 Enter the **Creditable Military Service** (months/year).

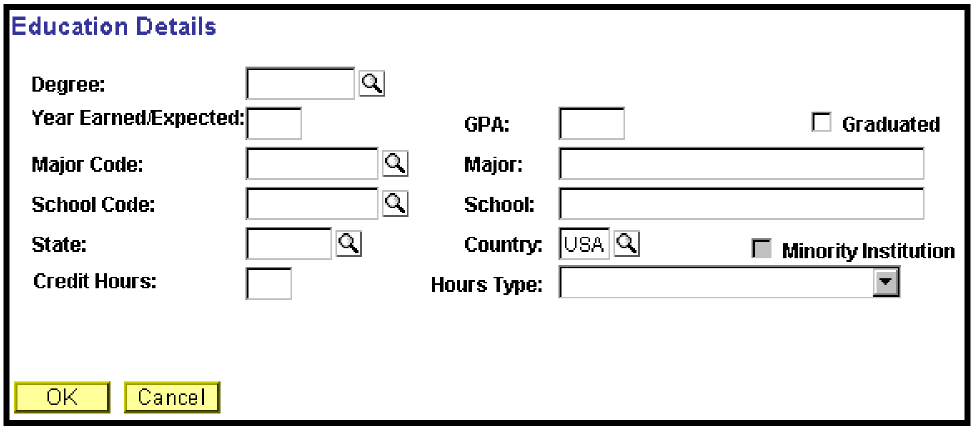
44 Confirm the status of the **Veterans Preference RIF** checkbox.

45 Click 

to return to the **Personal Data** page.

46 Click the **Education Details** hyperlink.

The following **Education Details** sub-page appears:



47 Enter the **Degree** the employee earned in the **Degree** field.

48 In the **Year Earned/Expected** field, enter the year of degree completion .

49 Enter the employee's **GPA**, if applicable.

50 Confirm the status of the **Graduated** checkbox, if known.

51 Enter the **Major Code.**

NOTE: The Major Codes are the OPM values.

*Note: To view or modify the Education information once the employee has been hired, the user would need to go to **Home>Develop Workforce>Manage Competencies>Use>Education** and update the necessary information.*

Note: The Education details hyperlink is not enabled when entering the hire in INI. The Processor must be sure to enter the education details prior to changing the PAR status to PRO and saving the action.

52 Click 

to return to the **Personal Data** page.

53 Confirm the default of "USA" or modify the **Country** field, if applicable

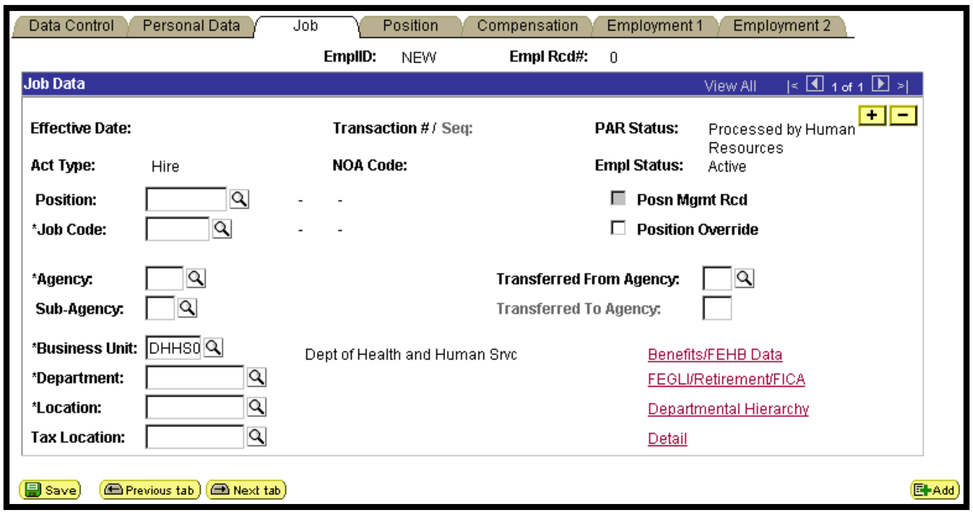
54 Confirm the default of "PR" or modify the **Type/Description** field.

NOTE:The Type/Description field indicates the type of National ID. "PR" is used for SSN.

55 Enter the **National ID**, which is the employee's Social Security Number (SSN).

56 Click on the **Job** tab to move to the next page.

The following **Job** page appears:



57 Enter the **Position** number.

*NOTE: The following fields on this page will populate based upon the **Position** that has been entered:*

- ***Job Code** (formerly the "PD#")*
- ***Agency***
- ***Sub-Agency***
- ***Business Unit***
- ***Department** (formerly the "Admin Code")*
- ***Location** (formerly the "GeoLoc Code")*
- ***Tax Location***

Position Override

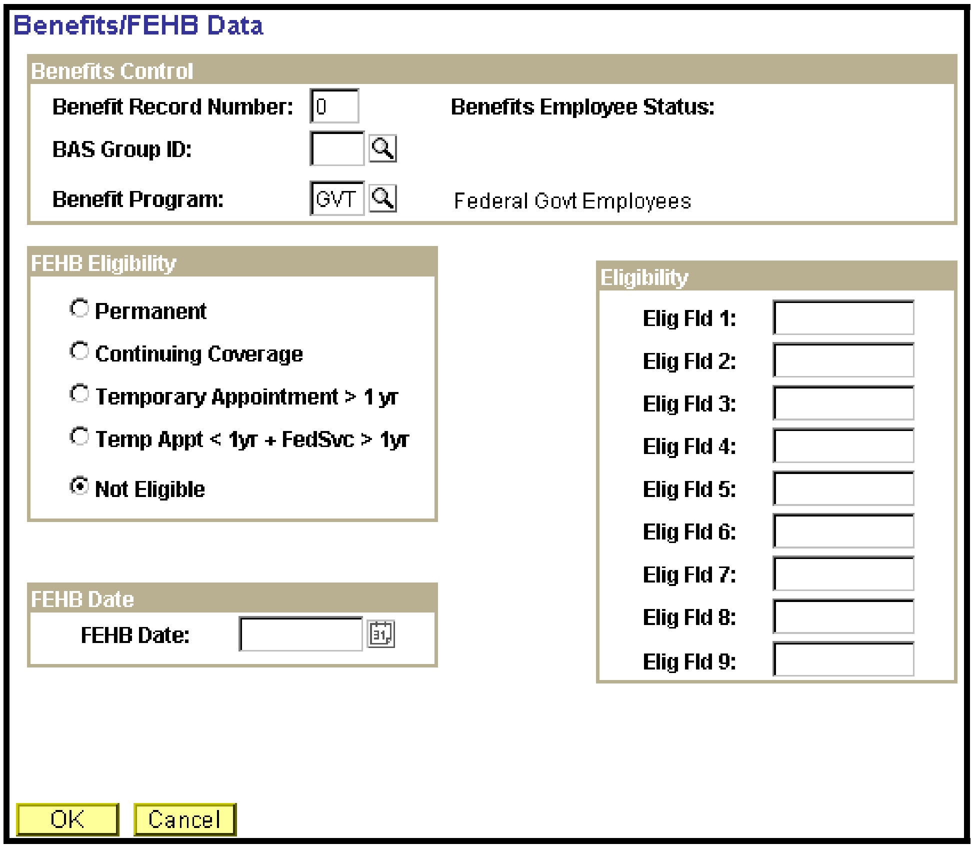
The **Position Override** checkbox will allow the user to modify the position management data for this employee. This function is to be used on a limited basis for extreme EXCEPTIONS. If the box is checked, the employee's data must be maintained manually, and automatic action functionality will be disabled for this employee record.

Procedure (cont'd)

58 Enter the **Transferred From Agency**.

59 Click the **Benefits/FEHB Data** hyperlink.

The following sub-page appears:



60 Select the appropriate radio button to indicate **FEHB Eligibility**.

*NOTE: The value in the Benefit Record Number field will default to "0". This is correct for nearly evey hire action you do, with one exception: For **Consultants,** enter the value of "1".*

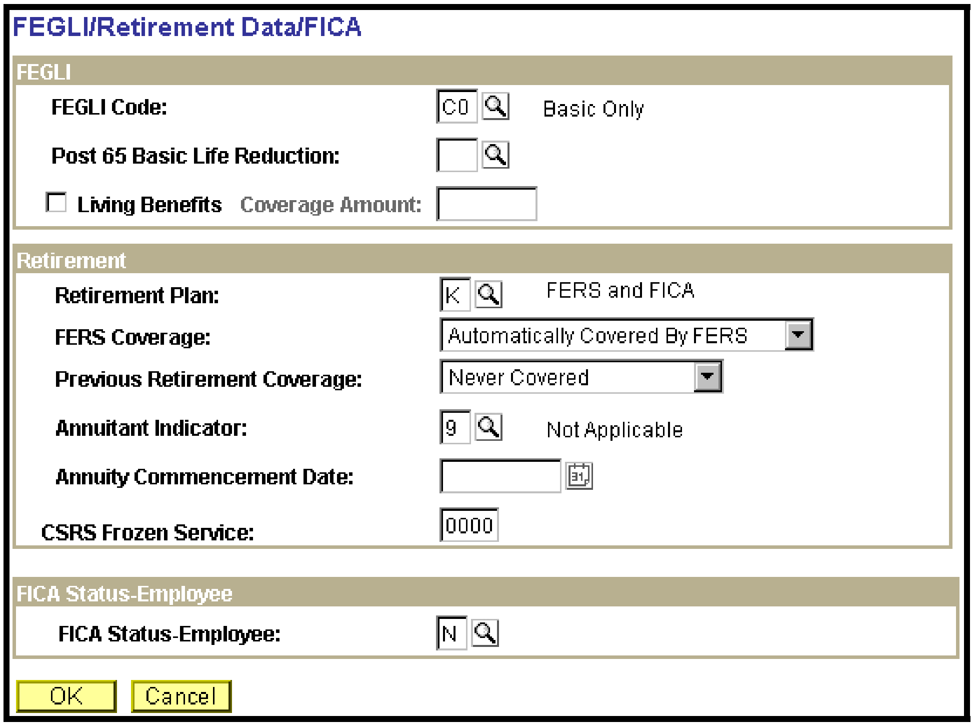
61 If the employee is **Not Eligible** for FEHB, enter the date on which they will qualify for the benefit in the **FEHB Date** field.

62 Click 

to return to the **Job** page.

63 Click the **FEGLI/Retirement/FICA** hyperlink.

The following sub-page appears:



64 Confirm the default of "**C0**" ("**Basic Only**") or modify the **FEGLI Code.**

65 Confirm the default of "**K**" ("**FERS and FICA**") or modify the **Retirement Plan**.

66 Select the **FERS Coverage** from the dropdown menu, if applicable.

67 Select the **Previous Retirement Coverage** from the dropdown menu, if applicable.

68 Confirm the default of "**9**" (Not Applicable) or modify the **Annuitant Indicator.**

69 Enter the **Annuity Commencement Date**, if applicable.

70 For **CSRS Frozen Service**, enter the appropriate service time, if applicable.

NOTE: In CSRS Frozen Service, this time span can be entered as a four-number code. The first and second positions indicate the number of years, while the third and fourth positions indicate the number of months. For example, a time span of 5 years and 3 months would be entered in CSRS Frozen Service as 0503.

71 Confirm the default of “N” or modify the **FICA Status-Employee** field.

The valid entries are:

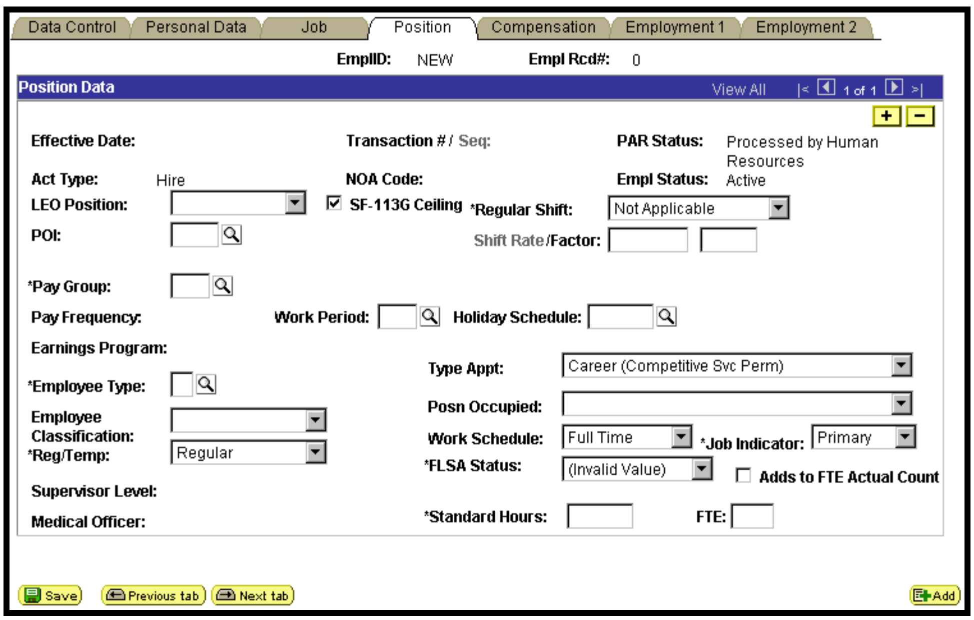
E	Exempt
M	Medicare only
N	Subject

.

72 Click OK to return to the **Job** page.

Click on the **Position** tab to move to the next page of entry fields.

The following **Position** page appears:



73 *NOTE: The following fields will populate based on the position selected:*

- ***LEO Position***
- ***Regular Shift***
- ***POI***
- ***Pay Group***
- ***Work Period***
- ***Reg/Temp***
- ***Posn Occupied***
- ***Work Schedule***
- ***FLSA Status***
- ***Supervisor Level***
- ***Medical Officer***
- ***Standard Hours** (Also known as Base Hours. Be sure this value is per week)*

74 Click the **SF-113G Ceiling** checkbox, if applicable.

75 Select the **Employee Classification** from the dropdown menu.

NOTE: This field is only used for Indian Preference.

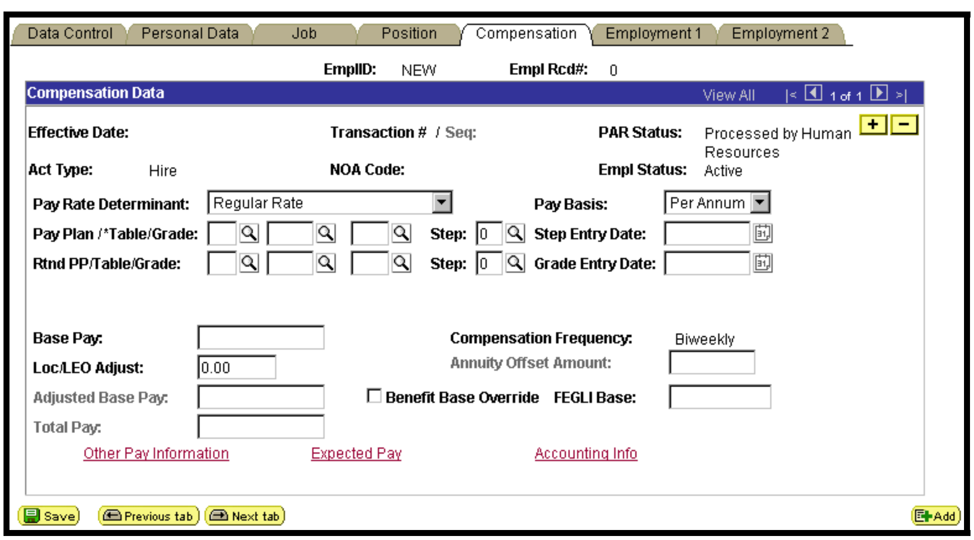
76 Select the **Type Appt** from the dropdown menu.

77 Select the **Job Indicator** from the dropdown menu.

Click on the **Compensation** tab.

The following **Compensation Data** page appears:

78



NOTE: The following fields default based upon the position selected:

- ***Pay Basis***
- ***Pay Plan***
- ***Table***
- ***Grade***

79 Select the appropriate **Pay Rate Determinant** from the drop-down menu.

80 Enter the **Step.**

NOTE: For those employees that do not have a step, "0" should be entered in the ***Step*** *field.*

NOTE: The page can not be saved until the Step is entered. After the Step is entered, the following fields will populate:

- ***Step Entry Date***
- ***Base Pay***
- ***Loc/LEO Adjust***
- ***Total Pay***
- ***FEGLI Base***

81 If the employee is an annuitant, enter the **Annuity Offset Amount.** This amount should be entered based on the employee's compensation frequency. If the employee's compensation frequency is annual, the annuity offset amount should be an annual amount.

Pay Impacts The annuity offset amount must be entered correctly in order to avoid significant payroll issues.

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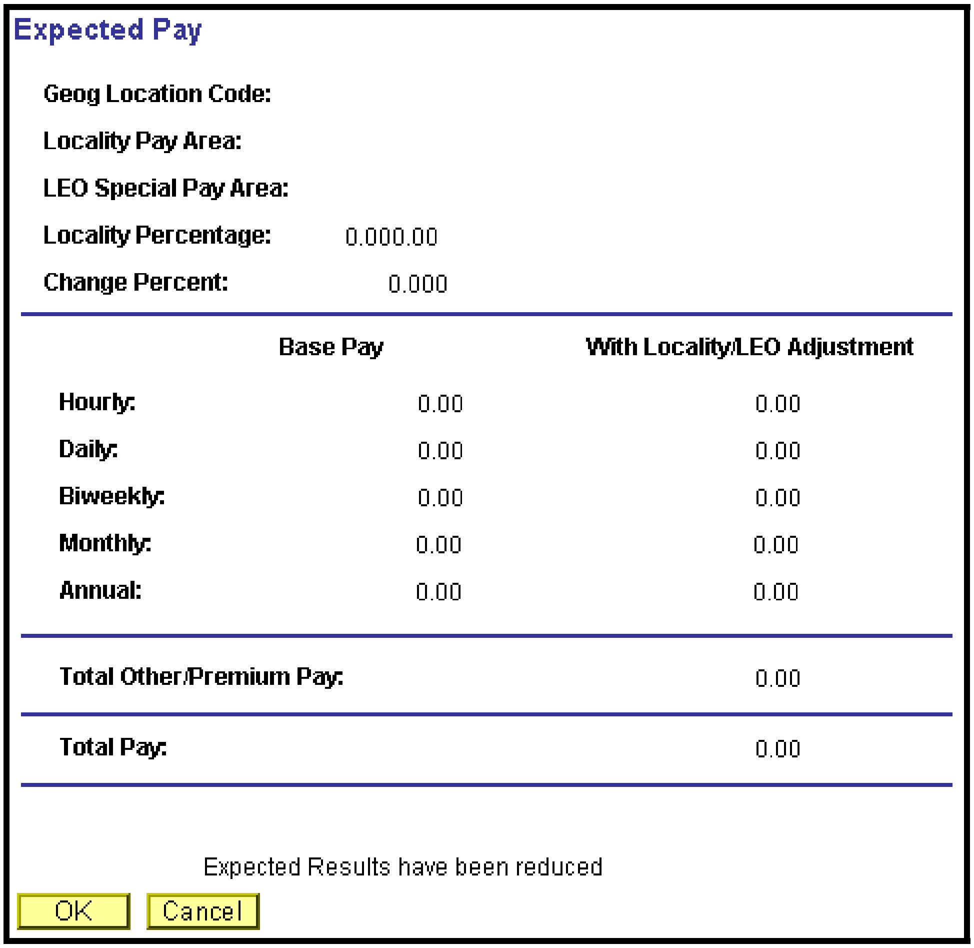
82 Click on the **Expected Pay** hyperlink to display payroll information.

The following sub-page appears:

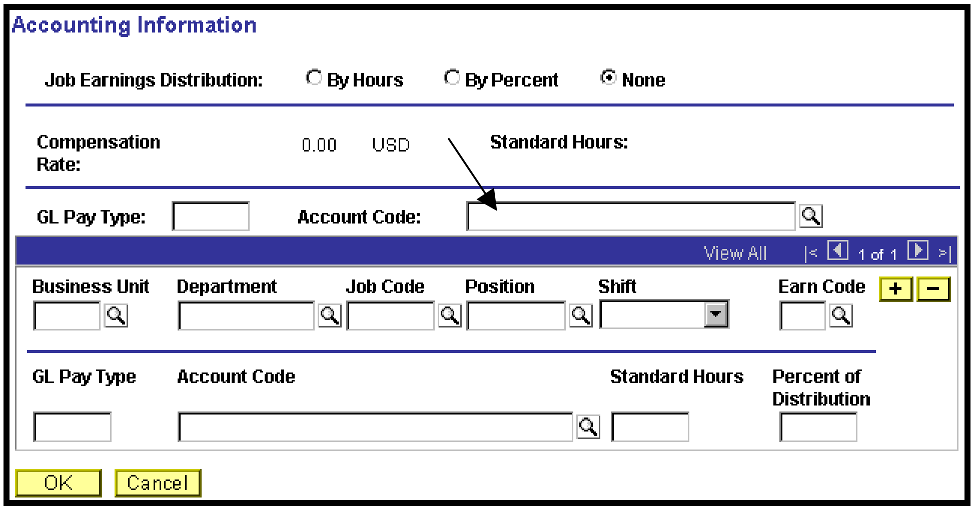


83 Verify the read-only information.

84 Click OK to return to the **Compensation** page.

85 Click on the **Accounting Information** hyperlink.

The following sub-page appears:



86 Enter the CAN in the **Account Code** field noted by the arrow.

Common Account Number

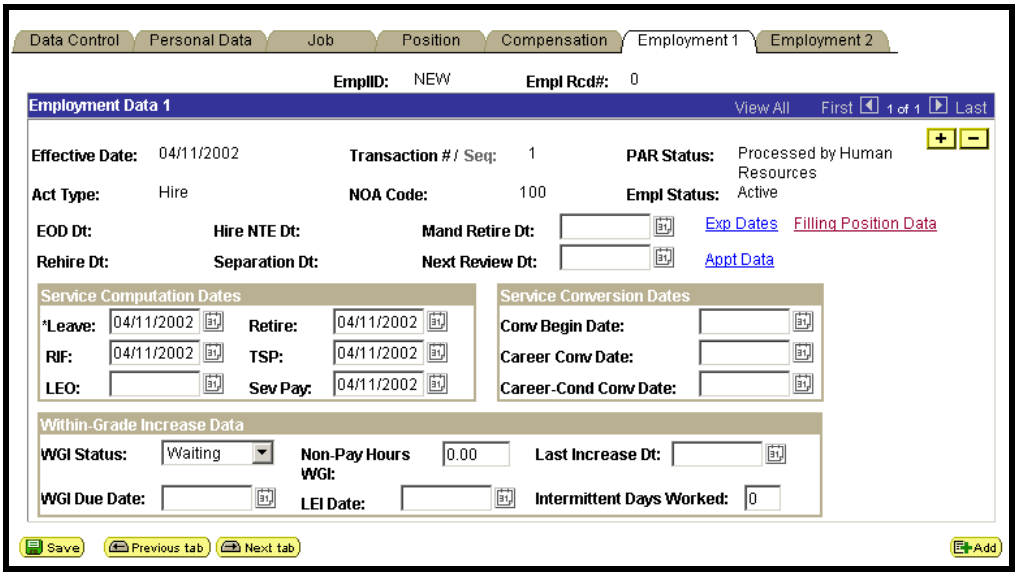
The Common Account Number (CAN) is a required field and must be entered to process the appointment. Once the Hire has been HR Processed, if the CAN was keyed incorrectly, it is the Personnelist's responsibility to process a 002 correction and correct the CAN. If a CAN is new and does not yet exist in EHRP, the EHRP team would need to obtain an official file updated from Financial Management to load the new value into EHRP.

Procedure (cont'd)

87 Click OK to return to the **Compensation** page.

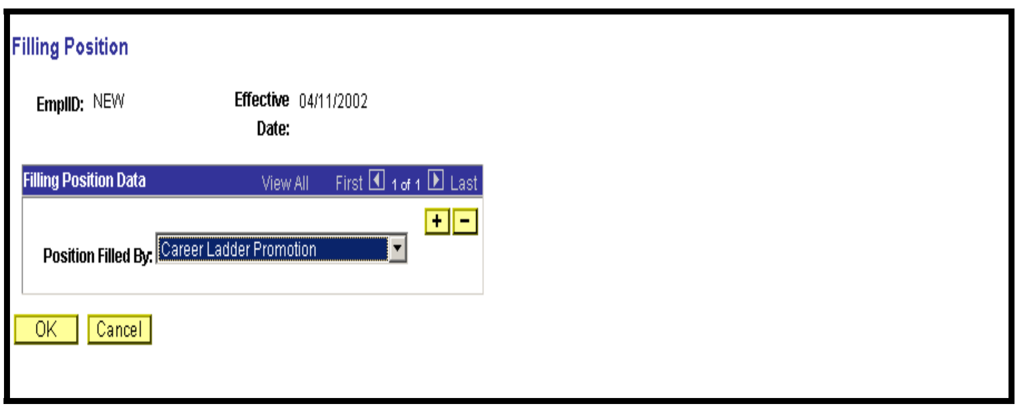
88 Click on the **Employment 1** tab.

The following page appears:



89 Click the **Filling Position Data** hyperlink.

The following sub page appears:

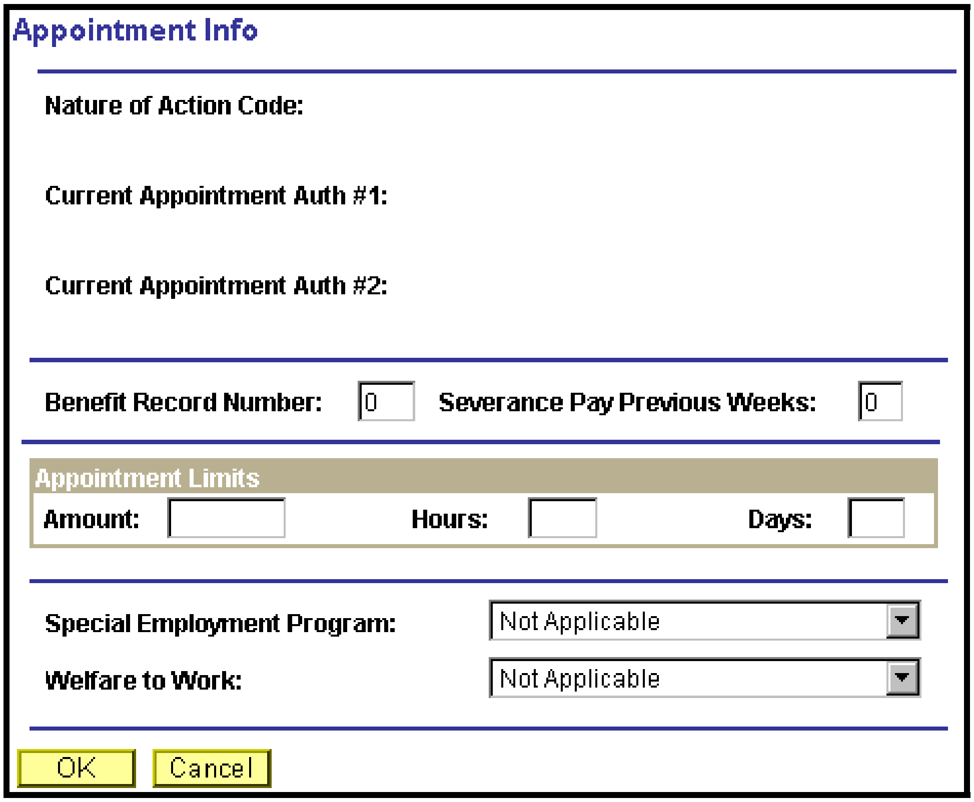


90 From the dropdown menu, select the correct method by which the position has been filled.

91 Click OK to return to the **Employment 1** page.

92 Click the **Appt Data** hyperlink.

The following sub-page appears:



93 From the dropdown menu, select the **Special Employment Program**, if applicable.

NOTE: This is where the Special Program ID would be entered.

*NOTE: **Welfare to Work** should <u>not</u> be captured here.*

94 Click 

to return to the **Employment 1** page.

95 In the **Service Computation Dates** section, modify the **Leave** date, if applicable.

NOTE: The Service Computation Dates will default to the hire date. Modify the dates for the employee's prior creditable service.

96 Modify the **RIF (Reduction in Force)** date, if applicable.

97 Enter the **LEO (Law Enforcement Officer)** date, if applicable.

98 Modify the **Retire** date, if applicable.

99 Modify the **TSP (Thrift Savings Plan)** date, if applicable.

100 Modify the **Sev (Severance) Pay** date, if applicable.

NOTE: The severance pay service computation date is for establishing the employee's severance pay computation.

101 Enter the **Conv (Conversion) Begin Date,** if applicable.

102 Enter the **Career Conv Date,** if applicable.

103 Enter the **Career-Cond Conv Date,** if applicable.

104 The **WGI Status** will default to "Waiting."

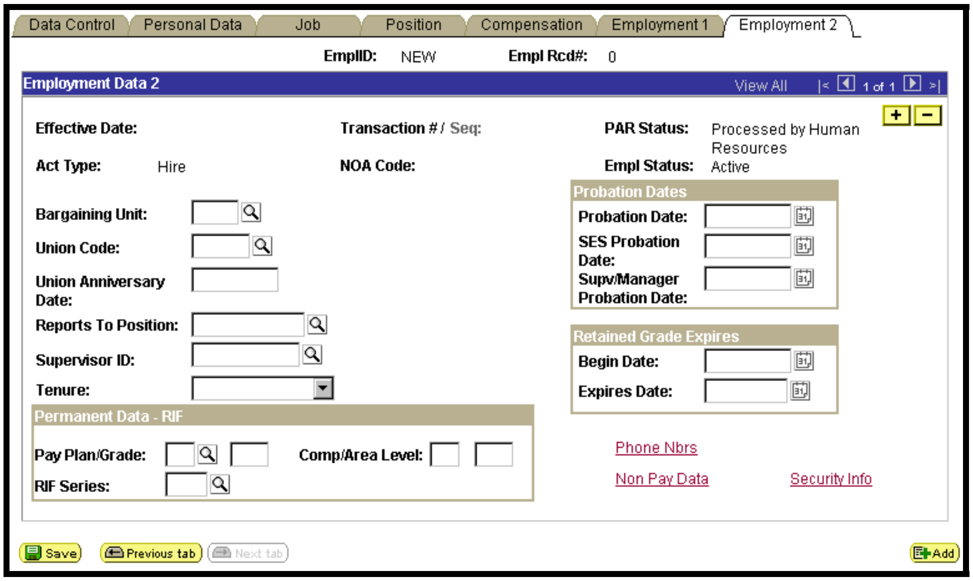
105 *NOTE: The **WGI Due Date** will populate automatically. THIS IS WGI DUE DATE NOT WGI START DATE.*

106 Modify the **LEI Date**, if applicable.

NOTE: The LEI Date is the date of the last equivalent increase for this employee. It is the begin date for the time counting towards the within grade increase. In the case of a transfer which represents a promotion, the LEI date will be the date of the transfer.

107 Click on the **Employment 2** tab.

The following **Employment Data 2** page appears:



NOTE: The following fields default based on the position selected:

- ***Bargaining Unit***
- ***Reports to Position***

108 Enter the employee's **Union Code,** if applicable.

109 Confirm or enter the appropriate **Reports To Position** for the employee.

110 In the **Tenure** field, select the appropriate type of tenure.

111 Enter the employee's compensation area and level in the **Comp Level** field as applicable.

NOTE: In EHRP, the Comp Level is a 3 digit code. Therefore, when a user enters a 3 character Comp Level Code, the Payroll Interface will automatically add a "0" to the beginning of the Comp Level Code when transmitting that data to Payroll

NOTE: Users should no longer enter any data related to the Comp Area Field. The entire Compl Level code should be entered into the Comp Level field only.

112 In the **Probation Date**, enter the completion date for the employee's probation.

NOTE: If this employee is a SES or Supervisor/Manager enter the probation completion date in the appropriate field.

113 As applicable, enter the employee security information in the **Security Info** hyperlink.

114 Return to the **Data Control** tab and change the **PAR Status** according to your role.

115 Click .

NOTE: Document the employee identification number (EMPLID) to facilitate processing benefits and pay documents.

Address Information

After the Transfer is completed, you must ensure that the address information is transmitted to Payroll. In order to do this, process a Data Change action to capture the address information you entered during the Hire process.

116 Follow the navigational path:

Home ➔ Administer Workforce ➔ Administer Workforce (USF) ➔ Use ➔ HR Processing

117 Access the employee record for the person you just hired.
NOTE: If you do this immediately after saving the Hire action, the same employee record will be available.

118 Click on the to add a row.

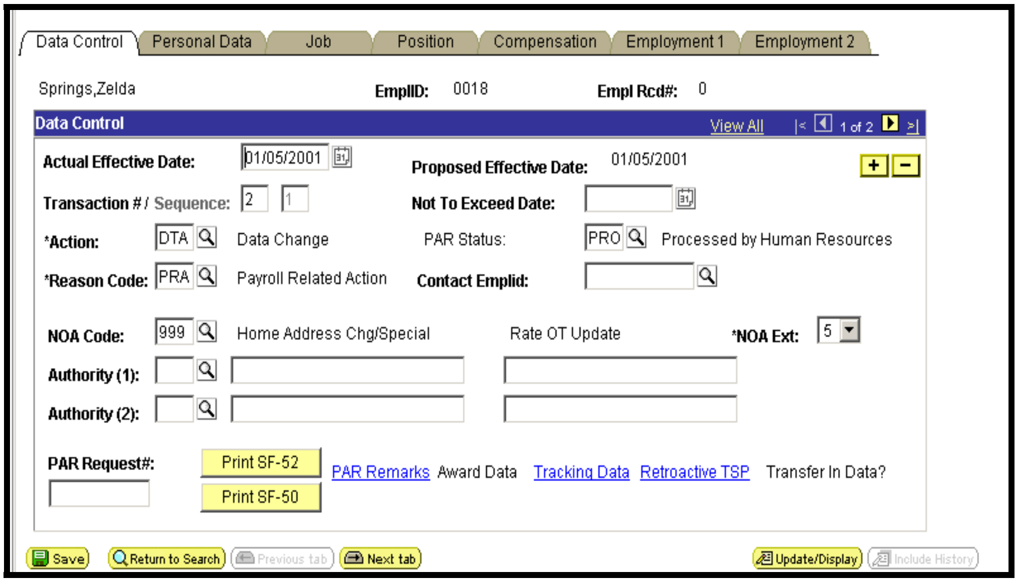
119 Use the same effective date as the Transfer.

120 Select the Action "**DTA**" (Data Change).

121 Select the Reason Code **"PRA"** (Payroll Related Action).

122 Select the NOA Code **999**, extension **5.**

123 **Click .**



Leave Plan Enrollment

All employees need to be enrolled in leave plans (annual and sick), which must be entered in the Administer Base Benefits module of the system. Follow the procedure below for detailed instructions on how to enroll the employee in the applicable leave plans. Other benefits will be covered in subsequent chapters.

Procedure

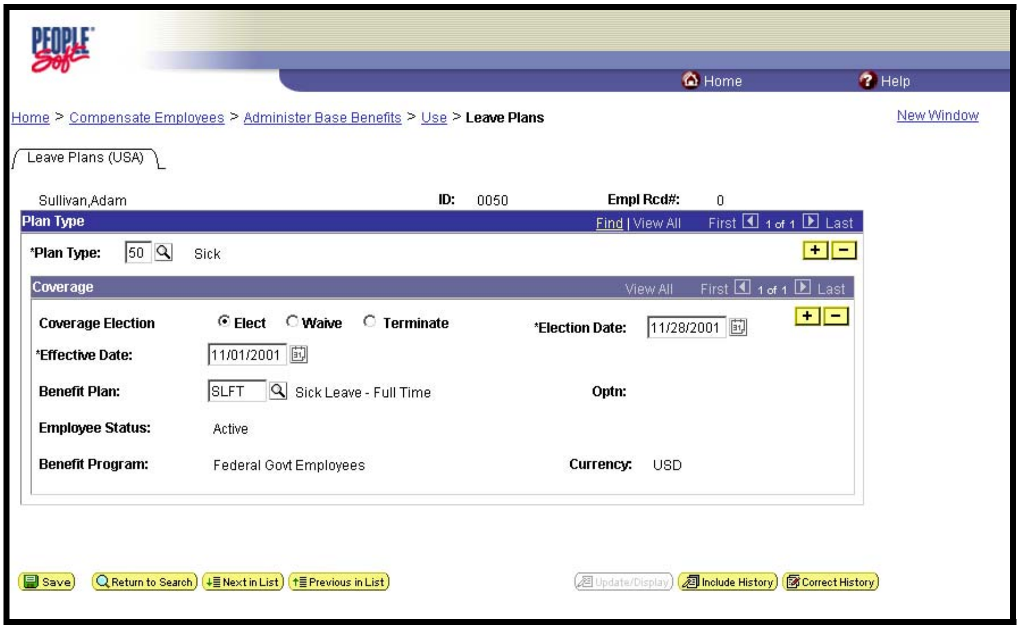
The following steps detail the procedure for enrolling an employee's into leave plans in EHRP:

124 Follow the navigational path:

Home ➔ Compensate Employees ➔ Administer Base Benefits ➔ Use ➔ Leave Plans

125 Select the appropriate employee's record.

The following **Leave Plans** page appears:



126 In the **Plan Type** field, select the applicable leave plan.

127 In the **Coverage Election** field, be sure the **Elect** radio button is selected to establish the new Leave benefit.

128 The **Election Date** field will default to today's date.

129 In the **Effective Date** field, enter the date on which the employee is eligible for the new leave benefit.

NOTE: This date should be identical to the date of the hire.

130 In the **Benefit Plan** field, enter the appropriate leave plan based on the employee's eligibility.

131 Click .

NOTE: Since both sick and annual leave plan require enrollment, the process must be repeated.

132 In the **Plan Type** box, use  to insert a new row.

133 Select the appropriate leave plan in the **Plan Type** field.

134 Follow the same steps to enter the coverage election, effective date, and benefit plan as shown above.

TSP Setup In order to later capture the employee's Thrift savings Plan election, you must set them up under the Savings Plan:

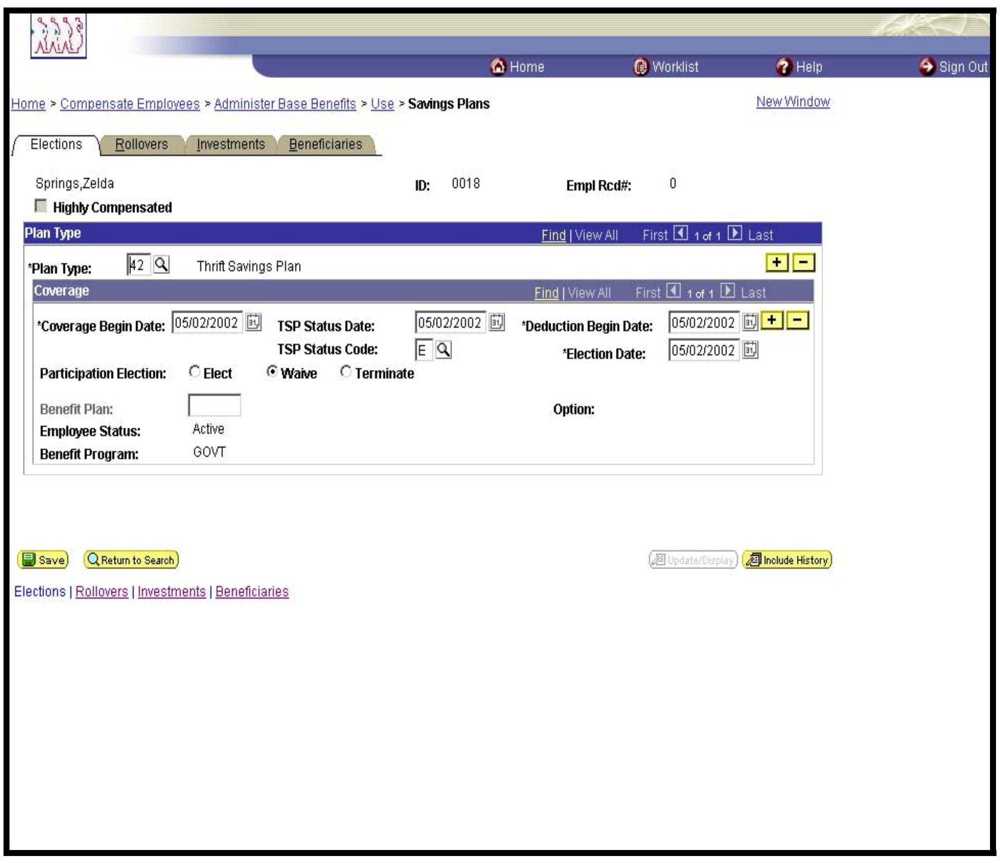
Follow the navigational path:

Home ➔ Compensate Employees ➔ Administer Base Benefits ➔ Use ➔ Savings Plan

Select the appropriate employee's record.

135

The following **Savings Plan** page appears:



136 The **Plan Type "42"** (Thrift Savings Plan) will default.

137 Enter the **Coverage Begin Date** (same as Effective date of the Hire); this date will also populate the **Deduction Begin Date** and **Election Date** fields.

138 Enter the **TSP Status Date**. (same as Effective date of Hire)

139 Select the correct value from the dropdown menu for the **TSP Status Code** field.

140 In the **Participant Election** field, select the "**Waive**" radio button.

141 **Click** 

.