Employee transferring from state agency to university:

State Agency

- Make sure comp and on call pay off, if applicable, is on last timesheet. This would have to be manually coded on the timesheet using CPP or OCP. Code exactly what is listed in the balance to avoid errors in WFM.
- Process last payment and then inactivate work assignment.
- Update Retirement Plan to NE and Tier to *TN* to end their benefits.
- Let university know what balances to bring in for employee by completing HCM Record Update Request Form. Submit a support ticket to request balances transfer to university. SCO: remove balances from WFM. Note: U of I does not track or store CSS hours.

University

- University will add their work assignment through their interface.
- *Review Multi Entity report and manually update Employee Work Type if needed.*
- University will send employee balances on their interface.

Employee transferring from university to state agency:

University

- University will process last payment through interface. Make sure comp and on call pay off, if applicable, is on last timesheet. This may have to be manually coded on the timesheet.
- University will inactivate their work assignment on the interface after their last pay has processed. May have to manually inactivate if they do not do it on their interface.
- University will need to send state agency balances by completing the HCM Record Update Request Form and remove them from their system. Luma will update through their interface.

State Agency

- Process an add work assignment. Update employee record for all applicable fields normally on hire: Work Type, Retirement Plan, Tier, employee type, legal entity, legal establishment, Trial Period (if going on probation), email, etc.
- Email DHRsupport@dhr.idaho.gov or ask a Generalist 3 to update the adjusted start date.
- Once adjusted start date has been updated, generate a New Hire event to set up benefits for the employee or email OGI@adm.idaho.gov to generate the new hire event.
- Have employee update personal information: address, direct deposit, W-4, deductions, etc.

- Submit a support ticket to add balances from the university and submit the HCM Record Update Request Form. Note: U of I does not track or store CSS hours, so we might have to research legacy and university payroll history to get CSS hours for the employee.

OR If employee is coming through TA from a university to a state agency:

State Agency

- Attach internal candidate profile and disposition external application as a duplicate.
- Move internal application through the process (Define offer included).
- When you get to the hire step, right click the candidate and select add work assignment.
- Update employee record for all applicable fields normally on hire:
  - Work Type, Retirement Plan, Tier, employee type, legal entity, legal establishment, Trial Period (if going on probation), email, etc.
- Email DHRsupport@dhr.idaho.gov or ask a Generalist 3 to update the adjusted start date.
- Once adjusted start date has been updated, generate a New Hire event to set up benefits for the employee or email OGI@adm.idaho.gov to generate the new hire event.
- Have employee update personal information: address, direct deposit, W-4, deductions, etc.
- Submit a support ticket to add balances from the university and submit the HCM Record Update Request Form. Note: U of I does not track or store CSS hours, so we might have to research legacy and university payroll history to get CSS hours for the employee.

Employee leaving state agency with <u>break in service</u> and hired at university:

State Agency

- Process Termination so they go Term Pending. Will go Term Final after 45 days.
- If rehired at the university prior to changing to term final, the work assignment will need to manually be inactivated.
- Make sure vacation, comp and on call pay off, if applicable, is on last timesheet.
- Process last payment.
- Update Retirement Plan to NE and Tier to T*N* to end their benefits.
- Let university know CSS hours to bring in for employee. Submit a support ticket to request CSS hours transfer to university and submit the HCM Record Update Request Form. SCO: remove CSS hours from WFM. Note: U of I does not track or store CSS hours.

University

- University will hire employee which will come through their interface.
- *Review Multi Entity report and manually update Employee Work Type if needed*.
- University will send employee balances on their interface.

Employee leaving university with <u>break in service</u> and hired at state agency:
University

- University will process last payment through interface. Make sure vacation, comp and on call pay off, if applicable, is on last timesheet. This may have to be manually coded on the timesheet.
- University will inactivate their work assignment on the interface after their last pay has processed. May have to manually inactivate if they do not do it on their interface.
- University will need to send state agency CSS hours by completing the HCM Record Update Request Form and remove them from their system. Luma will update through their interface.

State Agency

- Process rehire for employee updating employee record for all applicable fields normally on hire: Work Type, Retirement Plan, Tier, employee type, legal entity, legal establishment, Trial Period (if going on probation), email, update adjusted start date, add new hire event to setup benefits, etc.
- Have employee update personal information: address, direct deposit, W-4, deductions, etc.
- Submit a support ticket to add CSS hours from the university and submit the HCM Record Update Request Form. Note: U of I does not track or store CSS hours, so we might have to research legacy and university payroll history to get CSS hours for the employee.

OR If employee is coming through TA from a university with a <u>break in service</u> to a state agency:

State Agency

- Once the candidate has been termed by the university, complete all steps using their external candidate profile.
- Process a rehire for employee updating employee record for all applicable fields normally on hire:
  - Work Type, Retirement Plan, Tier, employee type, legal entity, legal establishment, Trial Period (if going on probation), email, update adjusted start date, add new hire event to setup benefits, etc.
- Have employee update personal information: address, direct deposit, W-4, deductions, etc.
- Submit a support ticket to add CSS hours from the university and submit the HCM Record Update Request Form. Note: U of I does not track or store CSS hours, so we might have to research legacy and university payroll history to get CSS hours for the employee.