

**Phoenix Program  
Process Definition – HRMS**

Process	<b><i>Leave Balance Transfer</i></b>
Process Number	<b><i>BEN 0168 Revised 03/30/01</i></b>

***Description of Process***

This process describes the leave balance transfer when an employee has been transferred into your Company from a different Company.

***Input to Process***

Losing Company has completed the HR transfer out process.

***Output of Process***

Transfer of appropriate leave balances from the losing company to the gaining company.

***PeopleSoft Panel Groups being Used***

Window/Function	Panel Group/Mode
Go	
Compensate Employees	
Administer Base Benefits	
Use	Leave Balance Transfer
Go	
Compensate Employees	
Administer Base Benefits	
Use	Leave Balances

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Process Definition – HRMS**

***BEN 0168-Leave Balance Transfer***

Process Description	Responsibility (Company/Centralized)
<p><b>Background.</b> Receive notice that an employee has been transferred into your Company from a different Company.</p> <p>Leave balances will be transferred from one company to another company. All leave balances should be verified to make certain that balances were adjusted and transferred properly. Some leave balances should not transfer (i.e. GA Comp, FLSA, etc.)</p>	Company
<p>Step 1 - <b>Leave Balance Transfer.</b> To transfer leave balances from the prior Company to the gaining Company, select Go, Compensate Employees, Administer Base Benefits, Use, Leave Balance Transfer.</p> <p>Step 2 - Enter EmplID and select OK.</p> <p>Step 3 - Use the drop down box to enter or select the three-digit code for the <i>To Company (Gaining Agency)</i>.</p> <p>Step 4 - Click the <i>Save</i> icon.</p>	Company
<p>Step 2 - <b>Verify Leave Balances.</b> Verify the leave balances are reflected in the gaining Company (i.e., the correct leave balances were transferred from the Losing Company to the Gaining Company). Select Go, Compensate Employees, Administer Base Benefits, Use, Leave Balances.</p> <ul style="list-style-type: none"> <li>- Check all appropriate balances have transferred. Eliminate any balances that should not have transferred.</li> </ul>	Company