

**Phoenix Program
Process Definition – HRMS**

Process	<i>Receive XFR Employee from a Different Company(FLX to FLX)</i>
Process Number	<i>BEN 0670 Revised 03/30/01</i>

Description of Process

This process describes the manner in which a Company receives/gains an employee transferring in from a different Company while remaining in the FLX Benefit Program (0 Employment Record #).

Input to Process

Losing Company has completed the transfer out process.

Output of Process

Transfer of appropriate leave balances; enrollment in new Company specific deductions (e.g., Agency Sponsored Plans); continuation of Flexible Benefits and Pension Plan enrollment, as appropriate.

PeopleSoft Panel Groups being Used

Window/Function	Panel Group/Mode
Go	
Compensate Employees	
Administer Base Benefits	
Use	Benefit Program Participation
Go	
Administer Workforce	
Administer Workforce (U.S.)	
Use	Employee Information Display

**Phoenix Program
Process Definition – HRMS**

Go	
Compensate Employees	
Administer Base Benefits	Use
	Leave Balance Transfer
	Use
	Leave Balances
Go	
Compensate Employees	
Maintain Payroll Data (U.S.)	
Use	General Deduction Data
	Update/Display All
Go	
Administer Workforce	
Administer Workforce (U.S.)	
Use	Pensionable Earnings
	Update/Display All

Phoenix Program Process Definition – HRMS

BEN 0670-Receive XFR Employee From a Different Company (FLX to FLX)

Process Description	Responsibility (Company/Centralized)
<p>Background. Receive notice that an employee has been transferred into your Company from a different Company from a zero Employment Record to a zero Employment Record.</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. General Deductions specific to the gaining Company including Agency Sponsored Plans are activated. Flexible Benefit and Savings Plan deductions will Transfer with the employee. Pension Plan election will transfer as well.</p>	Company
<p>Step 1 – Benefit Program. Verify that the Benefit Program assignment was FLX prior to the Transfer and will be FLX after the Transfer.</p> <ul style="list-style-type: none"> - Go, Compensate Employees, Administer Base Benefits - Use, Benefit Program Participation - When the dialogue box appears, enter the <i>EMPLID</i> and click on OK. <p>If the Benefit Program assignment was FLX prior to the Transfer, it is shown on this panel. Continue with this process.</p> <p>If the Benefit Program assignment was not FLX prior to the Transfer, do not continue with this process. Contact HR to determine if the employee is a Rehire (i.e., the employee is not a Transfer).</p>	Company
<p>Step 2 – Employee Status Verification. To verify that an employee is Transferred out by the losing Company and that HR completed the Transfer process:</p> <ul style="list-style-type: none"> - Go, Administer Workforce, Administer Workforce (U.S.) - Use, Employee Information Display - When the dialogue box appears, enter the <i>EMPLID</i> and click on OK. <p>Verify that the employee's status is Active in the gaining Company. If the status remains Leave of Absence, contact HR. Do not continue with this process until the employee's status is Active.</p>	Company

Phoenix Program Process Definition – HRMS

<p>Step 3 – Leave Balance Transfer. To transfer leave balances from the prior Company to the gaining Company.</p> <ul style="list-style-type: none"> - Go, Compensate Employees, Administer Base Benefits - Use, Leave Balance Transfer - When the dialog box appears, enter the <i>EMPLID</i> and click OK. - Using the drop down box, enter or select the three-digit code for the <i>From Company (Losing Agency)</i>; enter the code for the <i>To Company (Gaining Agency)</i>. - Click the <i>Save Icon</i>. 	Company
<p>Step 4 - Verify Leave Balances. Verify the leave balances are reflected in the gaining Company (i.e., the correct leave balances were transferred from the prior Company to the correct Company).</p> <ul style="list-style-type: none"> - Go, Compensate Employees, Administer Base Benefits - Use, Leave Balances - When the Dialogue Box appears, enter the <i>EMPLID</i> and click OK. <p>Check all balances that may not transfer from Company to Company (Holiday Deferred, GA Comp, and FLSA Leave) and ensure the leave balances were zeroed out. Notify the losing Agency of any existing FLSA and Holiday Deferred balances. If balances were not zeroed for Holiday Deferred, GA Comp and FLSA, see BEN 0192, BEN 0186, and BEN 0185.</p>	Company
<p>Step 5 – Company Specific Deductions (e.g., Agency Sponsored Plans.) The employee’s prior Company must turn-off Company specific deductions when the employee is placed in Transfer Out status. Company specific benefits from the losing Company not allowed in the gaining Company, must be stopped. Add any new Company specific benefits elected by the employee. See BEN 0150, BEN 0151 and related Payroll processes for details.</p>	Company
<p>Step 6 – Flexible Benefits. Changes to the Annual Benefits Base Rate and Flexible Benefit options are not allowed as a result of an employee Transfer. If the Transfer results in a geographic move that qualifies as a Family Status Change, the plan may allow a change in option(s). See the Regulations of the Employee Benefit Plan Council for the Flexible Benefits Program for details.</p>	Company
<p>Step 7 – Savings Plans. The employee’s Savings Plan elections will remain in place with the Transfer. Review existing Savings Plans elections:</p> <ul style="list-style-type: none"> - Go, Compensate Employees, Administer Base Benefits - Use, Savings Plans, Update/Display All. <p>If changes are appropriate, see BEN 0140 through BEN 0143.</p>	Company

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Step 8 – **Pension Plan.** Verify Pension Plan and compensation information is correct; update compensation rate, Pension Plan assignment, and additional pay amounts as necessary:

- Go, Administer Workforce, Administer Workforce (U.S.)
- Use, Pensionable Earnings, Update/Display All.

See BEN 0111 and BEN 0112 for details on updating this panel.

Company