

## Overview

This SOP describes the process for transferring an employee from UGA to another USG institution in OneUSG Connect, UGA's online HR/Payroll system. The same process would be followed when a staff employee is transferring from another USG institution to UGA, except that the roles outlined below (Receiving Institution-B and Transferring Institution-A) would be reversed. The process is managed for the most part by OneUSG Connect Support (USG Shared Services Center), which makes the entries into the employee's record in OneUSG Connect to complete the transfer.

## Roles and Responsibilities

Roles involved in transferring a staff employee to another USG institution include the following:

- **Recruiting Department Manager (Inst. B):** Starts the process by recruiting and requesting the employee transfer.
- **Employee's UGA Department Manager (Inst. A):** Notifies their departmental HR Practitioner that employee is transferring to another USG institution.
- **Employee's UGA Department HR Practitioner (Inst. A):** Submits the Employee Transfer Form to OneUSG Connect Support.
- **OneUSG Connect Support:** makes the changes in OneUSG Connect to complete the transfer.
- **UGA Central HR.** Monitors the transfer activity for any errors in the system.

## Key Process Steps

- 1. The Hiring Department (Inst. B) contacts the employee's current UGA Department Manager (Inst. A) and requests the transfer. The Department Manager at Inst. A notifies the Department HR Practitioner.**
- 2. The Employee's current Department HR Practitioner (Inst. A) must fill out the [Employee Transfer Form \(PRA-HR-3004F\)](#) and submit to OneUSG Connect Support.**

Note that the form will require the following information: leave balances, what retirement plan the employee participates in (and allocations), and what Compliance training has been completed by the employee.

Notify OneUSG Connect Support of the employee transfer by emailing [oneusgsupport@usg.edu](mailto:oneusgsupport@usg.edu), and to ensure confidentiality, load the Employee Transfer Form to the secure OneUSG Connect Support FTP site once complete.

**Transfer Employee to USG Institution****SOP\_WFA\_005**

When emailing OneUSG Connect Support, please include the following information in the email:

- Employee Name
- Employee ID
- Institution A (current institution, transferring from)
- Institution B (new institution, transferring to)
- Effective Date of Transfer
- Location of Employee Transfer Form on the ONEUSG CONNECT SUPPORT FTP site

**3. A OneUSG Connect Support HR Analyst will then review the transfer documentation and provide guidance and instructions. The OneUSG Connect Support Analyst will then begin the transfer process in OneUSG Connect.**

- a. For Institution A, OneUSG Connect Support adds a new row for the employee in OneUSG Connect keeping the primary job flag on Institution A.
- b. OneUSG Connect Support monitors OneUSG Connect Benefits to ensure the termination for Institution A is received. OneUSG Connect Benefits receives the HR file every other business day.
- c. Once OneUSG Connect Benefits reflects a termination status for Institution A, OneUSG Connect Support adds the following in OneUSG Connect:
  - i. A new row for Institution A removing the primary flag
  - ii. A new record for the employee for Institution B adding the primary job flag
- d. OneUSG Connect Support monitors general deductions in OneUSG Connect Benefits to ensure the end date is added for Institution A and general deductions are entered for Institution B.
- e. OneUSG Connect receives the Payroll Instruction File (PIF) on Mondays. Depending on the timing of the transfer, general deductions may need to be manually updated for payroll processing.
- f. As needed, OneUSG Connect Support updates retirement and savings plan deductions; end date deductions for Institution A and enter deductions for Institution B.
- g. As needed, OneUSG Connect Support updates absence balances; enters "0" for Institution A and enters transfer leave balance for Institution B.
- h. OneUSG Connect Support notifies the institutions that the transfer is complete and leaves the incident open until payroll confirm day for the employee's next pay period.

**4. Once the transfer is initiated by the submittal of the Employee Transfer form, OneUSG Connect Support notifies the hiring department (Inst B) to fill out the [Personnel Action Request Form-Transfers \(PRA-HR-031-F-003\)](#) and submit to OneUSG Connect Support via secure the FTP site.**

Transfer Employee to USG Institution	SOP_WFA_005
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5. **Once OneUSG Connect Support notifies the institutions that the transfer is complete in the system, the UGA Department HR Practitioner (Inst. A) should terminate the employee from their current position via a termination request in OneUSG Connect.**
  - The terminating department should note the transfer details in the comments section of the termination request form. For step-by-step instructions, see the tutorial [Requesting Termination of an Employee](#) in the OneSource Training Library.
  - You can also see [SOP\\_TRM\\_001 Terminate an Employee or Affiliate](#) for an overview of requesting a voluntary termination in OneUSG Connect.
6. **The UGA Department HR Practitioner completes the separation checklist and performs an exit interview with the employee.**
7. **The hiring department (Inst. B) can then begin onboarding the transferred employee.**
8. **Once the employee is terminated in OneUSG Connect, IDM is notified via the integration process to de-provision the employee’s UGAID, MyID, and UGA email.**
9. **The position will automatically be vacated in UGAJobs once the termination is processed in OneUSG Connect.**

### Relevant Resources

List of resources and links:

- [Employee Transfer Form \(PRA-HR-3004F\)](#)
- [Personnel Action Request Form-Transfers \(PRA-HR-031-F-003\)](#)
- [Requesting Termination of an Employee](#)
- [SOP\\_TRM\\_001 Terminate an Employee or Affiliate](#)

### Approval

Name	Date
Lindsey Van Note	December 2018 April 2019