

# Transfer Employee – Cheat Sheet

See below instructions on how to transfer an employee from one employee group to another, **within the same school division.**

Note: If an employee is transferring from one school division to another school division, this would be a separate process in which the employee should be added using **Add Participant.**

1. If the employee’s email address is in the system, notify the employee to disregard the **Termination** and **New Hire** emails that will be triggered during this process.
2. Check to see if the employee carries any optional insurance under the **Coverage** tab. If they do, record this information as these benefits will need to be added back on after the employee is transferred.

Alert	Benefit	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume
	Employee Life	-	Employee Life	2 x Salary (B)	\$85,000.00	\$85,000.00
	AD&D	-	AD&D	2 x Salary (B)	\$85,000.00	\$85,000.00
	Long Term Disability	-	Long Term Disability	75% Taxable w/cola (C)	\$2,650.00	\$2,650.00
	Employee and Family Assistance Program	-	Employee and Family Assistance Program	Covered	-	-
	Extended Health	-	Extended Health (B)	Family	-	-
	Dental	-	Dental (C)	Family	-	-
	Health Care Spending Account	-	Health Care Spending Account	Covered	\$550.00	\$550.00
	Optional Life	-	Optional Life	Covered (A)	\$20,000.00	\$20,000.00
	Dependent Optional Life	-	Dependent Optional Life	No Coverage	-	-
	Optional AD&D	-	Optional AD&D	Covered (A) - Family	\$30,000.00	\$30,000.00
	Optional Critical Illness	-	Optional Critical Illness	Covered	\$25,000.00	\$25,000.00
	Spousal Optional Critical Illness	-	Spousal Optional Critical Illness	No Coverage	-	-
	Child Optional Critical Illness	-	Child Optional Critical Illness	No Coverage	-	-

3. Terminate the employee:

- a. Navigate to the **Participant Profile** page, select **Edit Participant**. On the **Member Identifier** page, enter the effective date: Effective date will be the day prior to the transfer (i.e., if transfer is effective Sept. 1<sup>st</sup>, terminate the employee effective Aug. 31<sup>st</sup>). Click **Next**.

1 Member Identifier      2 Member Data

Employee Identifier

Transaction Date \* 31/08/2023 (DDMM/YYYY) ←

← Cancel      Next > ←

- b. Change the work status to **Terminated**. Click **Next**.

Employment Info

School Division \* GOOD SPIRIT S.D. ▼

Employee Group \* GOOD SPIRIT S.D. (036) - Non-Union Office ▼

Pay Type ▼

Work Status \* Terminated ←

Benefit Continuation End Date DD/MM/YYYY (DD/MM/YYYY)

Extension of Benefits Beyond 75 End Date DD/MM/YYYY (DD/MM/YYYY)

Date of Hire \* 01/01/2023 (DD/MM/YYYY)

- c. Navigate to the **Employment Profile** page to ensure the work status has changed to **Terminated**.

Employment Profile

Employment History

Company	Company ID	Start Date	End Date
GOOD SPIRIT S.D. (036) - Non-Union Office,...	036	Jan 1, 2023	-

Employment Details: GOOD SPIRIT S.D. (036) - Non-Union Office, Prof. Service Providers, Councillors

Navigate timeline or select date: < 31/08/2023 >

Annual Salary 44444.00000000	Jan 1, 2023	Benefit Continuation End Date -	Date of Hire Jan 1, 2023
Original Date of Hire -	-	Pay Type -	Plan HY Jan 1, 2023
Work Status Terminated ←	Aug 31, 2023		

4. Reactivate the Employee:

- a. Navigate to the **Participant Profile** page and select **Edit Participant**. On the **Member Identifier** page enter the effective date: Effective date will be the day after the Termination date. Click **Next**.

1 Member Identifier 2 Member Data

Employee identifier

Transaction Date\* 01/09/2023 (DDMM/YYYY)

←

← Cancel Next →

- b. Change the current group number to the new group number.
- c. Change the work status to **Active**.
- d. Cut and paste the existing date in the **Date of Hire** field into the **Original Date of Hire** field.
- e. Enter the date of transfer into the **Date of Hire** field.
- f. Waive the waiting period – optional (waive if waiting period is to be waived in new group).
- g. Leave all other fields untouched and click **Next**.

Employment Info

School Division\* GOOD SPIRIT S.D. ▼

Employee Group\* GOOD SPIRIT S.D. (037) - All Support Staff ▼

Pay Type ▼

Work Status\* Active ▼

Benefit Continuation End Date (DDMM/YYYY) (DDMM/YYYY)

Extension of Benefits Beyond 75 End Date (DDMM/YYYY) (DDMM/YYYY)

Date of Hire\* 01/09/2023 (DDMM/YYYY)

Original Date of Hire 01/01/2023 (DDMM/YYYY)

Province of Work\* SK - Saskatchewan ▼

Salary Info

Annual Salary \$ 44444

Member Additional Info

Override Waiting Period Effective Date Yes ▼

Override Waiting Period Reason Employment contract requires immediate c ▼

Language\* English ▼

← Previous ← Cancel Next →

- h. Click **Continue**.

Please review the following information

An event is pending, would you like to continue making elections?

If you wish to continue making elections, click **Continue**

If you do not wish to continue making elections, click **Close**

Close Continue

←

- i. This will take you to the **Family** page. Click **Next** which will take you to the **Benefits** page. Add optional benefits back on if applicable and click **Complete**.
  - j. This will take you to the **Personalize your benefits plan** page. Click **Done**.
5. Navigate to the **Enrollment History** page to check that you see a **Termination** event and a **New Hire** event.

Enrollment History

Show Cancelled Events:  Yes  No

Status	Event	Effective Date
Processed	New Hire	01/09/2023
Processed	Termination	31/08/2023
Processed	New Hire	01/01/2023

6. Navigate to the **Coverage** page to ensure benefits and cost-sharing are showing correct. The change may reflect under the **Current** tab, or the **History** tab based on the effective dates.

Coverage

Current  History

Employee Set  Update Coverage

Alert	Benefit	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
	Employee Life	-	Employee Life	2 x Salary (B)	\$89,000.00	\$89,000.00	New Hire (01/09/2023)	01/09/2023	-	\$15.49	\$7.74	\$7.75
	AD&D	-	AD&D	2 x Salary (B)	\$89,000.00	\$89,000.00	New Hire (01/09/2023)	01/09/2023	-	\$1.96	\$0.98	\$0.98
	Long Term Disability	-	Long Term Disability	75% Taxable (A)	\$2,778.00	\$2,778.00	New Hire (01/09/2023)	01/09/2023	-	\$81.37	\$40.68	\$40.69
	Dependent Life	-	Dependent Life	No Coverage	-	-	New Hire (01/09/2023)	01/09/2023	-	\$0.00	\$0.00	\$0.00
	Employee and Family Assistance Program	-	Employee and Family Assistance Program	Covered	-	-	New Hire (01/09/2023)	01/09/2023	-	\$1.98	\$0.99	\$0.99
	Extended Health	-	Extended Health (B)	Single	-	-	New Hire (01/09/2023)	01/09/2023	-	\$49.32	\$24.66	\$24.66
	Vision	-	Vision (A)	Single	-	-	New Hire (01/09/2023)	01/09/2023	-	\$9.38	\$4.69	\$4.69
	Dental	-	Dental (B)	Single	-	-	New Hire (01/09/2023)	01/09/2023	-	\$41.71	\$20.85	\$20.86

7. Navigate to the **Employment Profile** page to see the new division and transfer date.

Employment Profile

Employment History

Company	Company ID	Start Date	End Date
GOOD SPIRIT S.D. (037) - All Support Staff	037	Sep 1, 2023	-
GOOD SPIRIT S.D. (036) - Non-Union Office,...	036	Jan 1, 2023	Aug 31, 2023