

**ARCHDIOCESE OF LOUISVILLE
PERSONNEL OFFICE**

EMPLOYEE TRANSFER GUIDE/CHECKLIST

Do NOT mark an employee in Paycor as terminated who is going to be transferred to another location. All information for the employee in Paycor will be “picked up” from the location files that the employee is transferring from and “dropped into” the Paycor files for the location that the employee is transferring to. If the employee is marked as terminated then this transaction cannot take place.

Name of Employee

_____ Business Manager/Bookkeeper from location that employee is transferring from contacts the Business Manager/Bookkeeper that the employee is transferring to. (During this communication determination is made between the Business Managers/Bookkeepers in regards to final pay/benefits & date of transfer.)

_____ Both locations complete a change of benefit form and forward change form to the Benefits Assistant (Yhusman@archlou.org) at the Pastoral Center.

_____ No less than one week prior to needing transfer completed, Business Managers/Bookkeepers from both locations will e-mail Personnel Services Coordinator (CPearce@archlou.org) at the Pastoral Center with a cc to each other with the following information:

_____ Employee currently located at _____ / _____
Parish Name Parish #

_____ Employee currently located at _____ / _____
Parish Name Parish #

_____ Date of Transfer

_____ Final Pay at location transferring from will take place on mm/day/year

_____ First Pay at location transferring to will take place on mm/day/year

_____ Personnel Services Coordinator, will notify via e-mail Business Managers/Bookkeepers from both locations, once the transfer has taken place.

_____ Business Manager/Bookkeeper at location employee is transferring to will verify that all information under the employee tabs in Paycor are accurate and, if necessary, make any changes to the employee’s file before processing payroll. (A good way to verify this is to run an employee profile change report located under Reporting>Create Reports>Standard Template>Employee Profile Change Audit).

_____ Business Manager/Bookkeeper at location employee is transferring to will verify their Pre-Post Report in Paycor prior to submitting payroll to assure that all payroll data is correct.

Prepared By: _____

May 2020