

Transfer vs. Termination

Knowing when to transfer an employee versus when to terminate an employee is an important distinction in ConnectCarolina with pay, benefits, and potential compliance implications.

When to Transfer

If an employee is moving from one position to another within the same department or to a new department without a break in service, the receiving department should submit a Transfer action using the Hire an Employee ePAR.

Things to keep in mind with transfers:

- If the employee needs to be paid out leave, enter the Applied Termination Codes into TIM based on the effective date of the transfer and based on deadlines on the Payroll calendar. TIM information is fed over in real time so closely monitor leave accruals and leave payouts.
- If the employee is moving from SHRA to EHRA or from EHRA to SHRA, both departments should closely monitor employee pay and information in TIM and submit a Service Request for any needed pay corrections when reviewing preliminary payroll.
- The HR Rep in the receiving department needs to first double check the end dates for the employee in the current (or exiting) department before submitting the hire/transfer.

- If the transfer is for a student job and the current department needs to extend the current student job where there will be an overlap in employment dates, then process a hire rather than a hire/transfer.
- If the student is on a Short Work Break, the student must be returned from Short Work Break before a transfer is done, since the hire/transfer action will not update their status to active in Payroll. If the current department will reemploy the student, then process a hire rather than a hire/transfer and the primary job will terminate based on the Expected End Date.

Exceptions to Transferring

There are two exceptions to transferring:

- If an employee is leaving due to Retirement, then there must be a clean break from ALL employment instances for a retirement to occur and be reported out to the State Retirement Program correctly. Therefore, all active jobs must be terminated. Note: If the employee is a retired faculty member who will be hired as an adjunct, process as a rehire.
- If the employee is moving from a Contingent Worker appointment (Faculty Zero Base, no intent to pay or Post Doc – External Payroll) to an Employee job (or vice versa), such as Intermittent faculty or Post Doc Trainee, then Termination and Hire ePARs are necessary because transfers cannot occur between these employee types.

Transferring with the Hire an Employee ePAR

Transferring an employee is done via the Hire an Employee ePAR. The difference on a transfer vs. a hire is checking the Edit Existing Job box on a transfer and leaving the field blank on a hire.

Other Job Actions

This employee has at least one active job with the university already. Is he/she leaving a job at the university for this one?

Edit Existing Job?

Important: When transferring an employee from one job to another via the Hire ePAR, move down the ePAR form and complete fields in the order they appear and complete all fields before selecting the Edit Existing Job checkbox on the first page. When this box is selected out of order, it causes Primary/Secondary and compensation issues.

Once the Edit Existing Job is selected, the ePAR will pull in and list active job rows for the employee. Select the job row that you intend to move the employee from into the new job.

Tip: When you are entering information on the first page of the ePAR and you realize have made an error (for example: the incorrect Effective Date was used) best practice is to close the ePAR and start again.

When to Terminate

Here are the situations when you would terminate rather than transfer an employee:

- If there is a break in service between jobs, then the current department would submit a Change Employment Status ePAR to terminate. After the action has executed the receiving department would submit a Hire/Rehire action.
Important: Weekends are not considered a break in service.
- If the employee is retiring from a permanent job. A termination is needed even if they will continue to work in a temporary job after retirement.
- If the employee is severing the relationship with UNC-CH.
- If the employee is moving from an employee type with no intent to pay to an employee type with intent to pay or vice versa, such as moving from CWR (Faculty Zero Base, no intent to pay OR Post Doc – External Payroll) to an Intermittent Faculty or Post Doc Trainee.

Terminating Student and Temporary Jobs

When terminating an SHRA student or SHRA temporary job, use an effective date within the current bi-weekly unless you need to enter a retro date for compliance reasons (such as work authorization or the student graduated). Entering a date one or multiple pay cycles in the past can create an unintended employment gap on secondary jobs. You can use the UNC Employee Information page in the Person Data folder from the HR WorkCenter to see secondary jobs.

Transfer vs Termination Scenarios

Scenario	Is a Transfer or Termination needed?
<p>Maria is being hired into a permanent SHRA position beginning January 19, 2021. She is currently a temporary SHRA employee at UNC.</p>	<p>Transfer. If the current temporary job is not within the existing department, follow up with the HR Rep to let them know of the plan to submit a transfer effective 01/19/21 (to prevent a break in service). Both departments should monitor pay for B16 and the receiving department needs to review TIM for leave accruals including any needed adjustments for the holiday due to the effective date of hire.</p>
<p>John is a permanent EHRA Assistant Professor faculty who has resigned his tenure-track position beginning July 1, 2021. The school would like for him to have an adjunct faculty position beginning July 1, 2021.</p>	<p>Transfer. John has resigned, not retired. If John was retiring instead, a termination would be needed for the State Retirement Program and a rehire would be processed for the adjunct faculty position.</p>
<p>Jin has resigned her permanent EHRA position effective February 1, 2021 at UNC. She will be working some intermittent hours as an SHRA temporary employee through May 1, 2021.</p>	<p>Transfer. Jin will not have a break in service. The Applied Termination Codes should be entered to coincide with the effective date/payroll due date of the termination for her to receive leave payout at the end of January. The department should monitor January pay for the monthly, and monitor B17, B18, and beyond for biweekly pay and make sure TIM is accurate.</p>
<p>Pranav is currently an SHRA permanent employee who has 12 years of state service. He has accepted a job in another department as an EHRA NF permanent employee effective March 1, 2021.</p>	<p>Transfer, but first the current home department should submit a pro-rata longevity lump sum payment once HR Records verifies the amount to be paid. Then the receiving department would submit a transfer for the applicable Monday start date with no break in service. The outgoing dept should monitor B18 and B19 payrolls for pro-rata longevity and final hours worked. The receiving department should closely monitor TIM accruals and March pay.</p>

Transfer vs Termination Scenarios (continued)

Scenario	Is a Transfer or Termination needed?
<p>Susan is in a SHRA Student Work Study position and she has worked all allowable hours to equal her student award. The department would like to continue her work to the end of the semester as a SHRA Student Temp.</p>	<p>Transfer. The HR Rep identifies a vacant SHRA Student position or creates a new one with the applicable FTE and reporting relationship (Note: using the existing WS position and making updates does not make all the needed changes). If a position was updated or is being created, once the position ePAR is executed and writes into ConnectCarolina, then the HR Rep processes a hire/transfer for Susan into the new position. If there is a rate change, the HR Rep closely monitors the pay to relate to the hours worked in each position.</p> <p>Reminder: To ensure proper pay and funding distribution for SHRA employees, the recommendation is to use the beginning of a pay period as the effective date of the transfer.</p>
<p>Eduardo has a courtesy Adjunct Lecturer position with zero base pay (set up as a CWR). The department has asked Eduardo to teach in Spring semester beginning January 15, 2021.</p>	<p>Terminate. Transfer is not possible since he is not able to transfer from a CWR to a paid employee job. The HR Rep will need to hire Eduardo into a paid intermittent faculty position, which requires a recruitment and an I9. Then the department would Terminate the CWR position.</p>
<p>Hanna is being hired as an EHRA Graduate Assistant for Spring semester. She is currently an SHRA student assistant in another department with an end date of January 16, 2021.</p>	<p>Depends. Both HR Reps should check to see what the overall plan will be. If Hanna is resigning her SHRA student assistant job, then the action would be a transfer. If she will continue the other job with overlap, then the SHRA student assistant job will terminate based on the Expected End Date and the EHRA Graduate Assistant action is a regular hire rather than a transfer. Both departments need to monitor that pay is correct.</p>
<p>Hanna is placed on Short Work Break at the end of Spring semester beginning May 15, 2021 from the EHRA Graduate Assistant job. Another department would like to hire Hanna as a SHRA student assistant over the summer.</p>	<p>Depends. Both HR Reps should check to see what the overall plan will be. If Hanna is not returning in the Summer or Fall to the EHRA Graduate Assistant appointment, the HR Rep can return her from Short Work Break to place back in an active Payroll status. Then the receiving department can submit a hire/transfer into the SHRA student assistant position. The other option would be to process a hire rather than a hire/transfer and Hanna will be terminated from the EHRA Graduate Assistant job based on the Expected End Date.</p>