

Transferring Employees Between Operating Locations

Purpose

This document describes the procedures for operating locations to follow when a Research Foundation (RF) employee transfers from one RF operating location to another.

Background

When a Research Foundation employee transfers from one operating location to another it is essential that optional retirement benefits, welfare benefits, and leave accruals are transferred appropriately. If the transfer is not completed properly, gaps in health insurance, missed optional retirement deductions, and other problems can occur. Communication between the two operating locations is vital to ensuring a successful transfer.

Retirement Benefits

Transfers in the Current Calendar Year

If an employee changes RF operating locations within the calendar year that the current optional retirement Salary Reduction Agreement is in effect, the agreement is applicable at the new location. The new operating location should contact the original location for the details of the agreement. Once obtained, the appropriate deduction elements should be loaded into the RF business applications. Additionally, a copy of the Salary Reduction Agreement should be forwarded to the new operating location.

Transfers in a New Calendar Year

If the employee begins at the new location in a new calendar year, the original Salary Reduction Agreement is not valid. For example, if the agreement was in effect in 2005 and the employee begins employment at the new location on January 5, 2006, the 2005 agreement is no longer valid. If the employee wishes to participate in the plan they must complete a new Salary Reduction Agreement.

Welfare Benefits

Welfare benefits include health insurance, vision, dental, disability, life insurance, etc. All welfare benefits (voluntary and involuntary) that the employee participated in at the original location need to be transferred to the new location and new elements should be loaded into the RF business applications for each type of benefit. The start date of each element should be the effective start date of the new assignment, provided the applicable waiting period for the benefit was met at the prior location.

In addition, the new operating location is responsible for the following:

- reviewing break-in-service rules if the transfer was not immediate.

- verifying that the health plan the employee is enrolled in (if applicable) is also offered at the new location. For example, if an employee transfers from Albany to the Buffalo area, CDPHP is a valid HMO in Albany, but not Buffalo.
- contacting the original operating location for a copy of all enrollment forms. If they are unable to send a copy, the employee should complete a new form.

Paid Time Off (PTO) Leave Accruals

Sick, Holiday, and Personal Leave

An employee who transfers between operating locations within one calendar year retains all unused accrued sick leave, holiday leave, and personal leave. The new operating location should contact the original operating location to obtain the balances. If the employee is changing from nonexempt to exempt status, he or she may retain and use personal leave, but will not continue to accrue personal leave.

Vacation Leave

Unused accrued vacation time will be paid out to an employee transferring between operating locations unless the employee elects to have the time transferred.

Campuses Using Oracle Leave Accrual System

Regardless of whether the employee comes from an operating location using the Oracle Leave Accrual system, new elements must be loaded for each type of leave the employee is eligible for. Adjustments should then be made so that the record reflects the correct balance.

For More Information

For more information on the administration of leave accruals during a transfer, refer to the document, "[Leave Administration](#)."

Change History

- **January 31, 2006** - New document.

Feedback

Was this document clear and easy to follow? Please send your feedback to webfeedback@rfsuny.org.

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