

ARCHDIOCESE OF LOUISVILLE
OFFICE OF PERSONNEL AND PLANNING
EMPLOYEE TRANSFER AUTHORIZATION

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 at the location that the employee is transferring to. (During this communication determination is made between the business managers/bookkeepers in regard to final pay, benefits, and date of transfer.)

_____ Both locations complete a change of benefit form and forward form to Candy Wittenauer at the Chancery.

_____ No less than one week prior to the date the transfer needs to be completed, business managers/bookkeepers from both locations will e-mail Lisa Leister* at lleister@archlou.org (with a cc to each other) containing the following information:

_____ Employee's current location: _____ / _____
Parish Name Parish #

_____ Location employee is transferring to: _____ / _____
Parish Name Parish #

_____ Date of Transfer: ____/____/_____
mm/day/year

_____ 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

_____ Lisa Leister, Personnel Services Coordinator, will notify business managers/bookkeepers from both locations via e-mail 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 is 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 Tools>Reports>Report Wizard>Employee Profile Change Report).

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

**If Lisa will be out of the office for any length of time you will be notified via e-mail, and at that point your secondary point of contact to complete an employee transfer will be Kathy Downs (kdowns@archlou.org).*