

TRANSFERRING STAFF PROCESS GUIDE

*This process guide is to ensure a smooth transition of personal and benefits data for any staff person transferring to another location/entity within the Archdiocese of New Orleans. Following the below steps is critical to guarantee continuity of insurance coverage and retirement contributions. **This requires open communication between the releasing and receiving entities.***

	RELEASING ENTITY	RECEIVING ENTITY
IOI PAYROLL	<p>Mark the staff person as 'terminated' in your IOI payroll records. Please flag the Termination Reason as 'Transfer to other Archdiocesan location'.</p> <p>Within their benefits records, make them historic—DO NOT terminate their benefits record. <i>Make sure to communicate to the receiving location when this is completed.</i></p>	<p>Create new IOI payroll data. Record their File Number.</p>
BENEFITS CONNECT	<p>Change the person's file number prefix from your AN Location Number to the receiving AN Location Number</p>	<p>Once the staff person appears in your system, change the file number suffix to match the File Number that IOI has.</p>
401(K)	<p>Once the file is marked as terminated in the IOI payroll system, communicate to the receiving entity immediately. <i>*Weekly files are sent on Wednesdays*</i></p>	<p>As soon as the releasing entity marks the person as terminated in their IOI payroll, create the new file in your system within the same weekly file period. <i>*Weekly files are sent on Wednesdays*</i></p>
PRIMARY LOCATION FLAG	<p>Once the receiving entity alerts you that they have created the transfer staff's new payroll records, mark your record as "Not Primary" in the Primary Location field. Communicate this change to the receiving entity.</p>	<p>Alert the releasing entity after you create the new payroll record. Once they make the change of the Primary Location Flag, please change the flag in your records to be "Primary Location."</p>
VACATION TIME	<p>The releasing location should pay out any accrued vacation time. (Reminder: final paycheck is due 15 days after separation).</p>	<p>The receiving entity may consider allowing the transfer staff to continue accruing vacation at the same rate, if applicable. As a reminder, please do for all what you do for one.</p>

If you have any questions about your transfer staff members, or need contact information for another location/entity, please call the Office of Human Resources.

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