

How to Transfer an Employee to a Different Branch

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When Should You Transfer an Employee:

If an employee moves and wants their records to move with them to another branch within Enterprise, you can change the branch affiliation of the employee's record. If another branch simply wants to "borrow" your employee to fill a position but their home branch remains, do not transfer the employee.

How to Determine an Employee's Branch:

Navigate to the Employee > Details page. Below is a highlighted Branch field indicating the current branch of that employee.

visifile

Andrew Aasen
6766 Lost Lane
Melbourne, FL 32908
ID: 4295003548
SSN: xxx-xx-8746

! Jim/Crom - call - peak season
! JillAbron - call re: move back to US
! RalphABCMfg - call - f/u to meet &...
Jim / Bigelow - call - f/u to our cold...

tasks appointments social email

personal information

Last Name: Aasen
First Name: Andrew
Middle Name:
SSN: 658-46-8746
ID: 4295003548
Act. Date: 10/15/2013
Deact. Date: 9/17/2015 2:03:00 PM

addresses

Street: 6766 Lost Lane
Street 2:
City: Melbourne
State: FL
Zip Code: 32908-____
County: Brevard
Country: United States of America

hiring information

Order Type: TE
Hire Status: Eligible for Hire
Profession: All
Washed Status: Familiar
I9 On File:
Orientation Date:
Resume On File:

Branch: Memphis NE
Staffing Specialist: dwood
Interviewed By: ben
Entered By: dwood
Vendor: High Tech Staffing
Job Title:
How Heard of:
How Heard Details:
Permanent Use Temporary

employee
customer

***Note:** Updating a branch with the drop down field will change the hierarchy that record is visible within to that of the user's current hierarchy. This can cause issues searching for employees. Do not update the branch using the dropdown field.

How to Transfer an Employee to a Different Branch:

Step 1: Verify that the employee is not currently on assignment.

Step 2: Expand the employee actions menu and select "Transfer to another branch":



Step 2: The "employee branch transfer" window will open. Select the new branch and hierarchy, and then save:

Andrew Aasen
Status:

Memphis NE

Name	Active	State
Canada 2	True	BC
Canada Test	True	AB
CardiffUK	True	GLA
Memphis CA	True	ON
Memphis NE	True	MN
Memphis NW	True	MN
Memphis SE	True	MN
Memphis SW	True	MN

Andrew Aasen
Status:

Memphis SE

Entity

- Hier
- System
- Entity
- Branch

Note When transferring an employee record to a different EINC, the original employee record will not be deactivated.

Instead, a new employee record will be created at the intended EINC, with the original remaining within the original EINC.

***Note:** The branches and hierarchy displayed will be dependent upon the branches and hierarchy you, the user, is currently in as well as the branches and hierarchy levels tailored for your company.

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