

# Beyond - How to Transfer an Employee to a Different Branch

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## Overview

If an employee moves and wants their records to move with them to another branch within Beyond, you can change the branch affiliation of the employee's record.

**\*Note\*** If another branch simply wants to "borrow" your employee to fill a position but their home branch remains, please do not branch transfer the employee.

## Getting Started

Before being able to transfer an employee to another branch, you must be a member of a Security Group with the "Can update employee branch and hierarchy" permission.

By default, the following Security Groups have been provided this permission:

- TempWorks Default - Administrator
- TempWorks Default - Back Office Manager
- TempWorks Default - Billing Clerk
- TempWorks Default - Pay Clerk

**\*Note\*** If you utilize custom Security Groups, please add the "Can update employee branch and hierarchy" permission to the Security Groups that require the functionality.

For more information on creating and managing Security Groups in Beyond, please see the following article titled "[Beyond - Managing Security Groups](#)".

**\*Note\*** If you utilize custom Security Groups with Advanced Permissions, please add the Read and Write access to the "Hierarchy" and "Branch" fields within Employee > Details > Details > Change Branch and Hierarchy to the Security Groups that require the functionality:

Employee	Access
Change Branch and Hierarchy <b>Form</b>	Access
Hierarchy <b>Field</b>	Read Write
Branch <b>Field</b>	Read Write

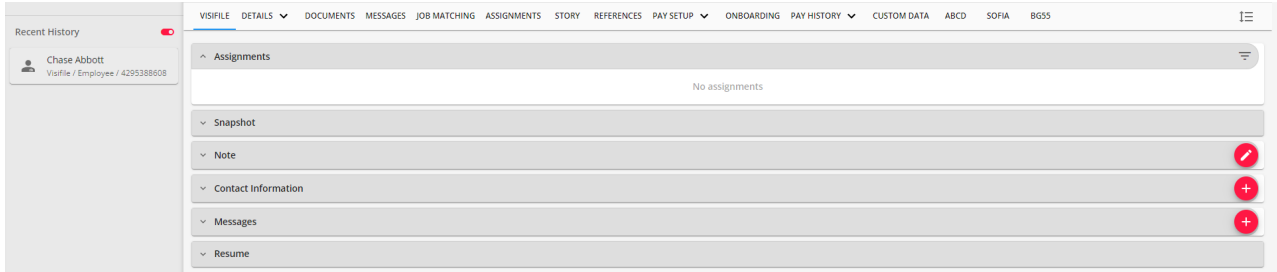
For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "[Beyond - Creating Security Groups with Advanced Permissions](#)".

## Transferring an Employee to a Different Branch

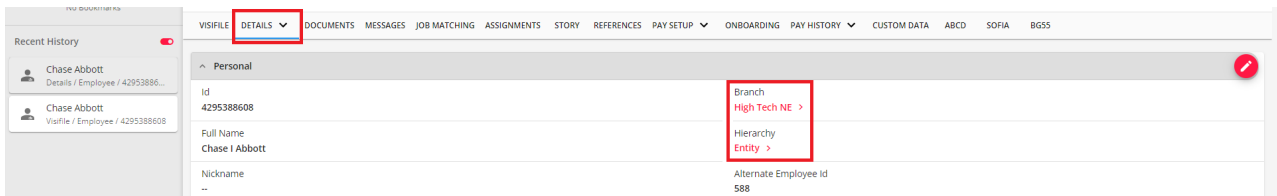
**\*Note\*** Employees are unable to be transferred to a different branch if they are currently on an active assignment.

If an employee is on an active assignment and needs to be transferred, please end the assignment and proceed with the following steps.

Begin by navigating to the employee record within Beyond:



Navigate to the "Details" tab of the employee record and you will see the current "Branch" and "Hierarchy" within the "Personal" card:



Select either the listed "Branch" or "Hierarchy" within the "Personal" card of the employee record and the "Change Branch and Hierarchy" window will open:

### Change Branch and Hierarchy

Chase Abbott

Current Hierarchy Entity \* New Hierarchy

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Current Branch High Tech NE \* New Branch

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CANCEL SUBMIT

Within the "Change Branch and Hierarchy" window, you will be able to select the following:

- New Hierarchy: Contains hierarchy levels that you are able to see.
- New Branch: Contains branches within the same EINC.

Select the proper hierarchy and branch and once confirmed, select "Submit" to save the changes:

### Change Branch and Hierarchy

Chase Abbott

Current Hierarchy Entity \* New Hierarchy  
Entity

---

Current Branch High Tech NE \* New Branch  
High Tech SE

---

CANCEL SUBMIT

With the information saved, you will see the new branch and hierarchy reflected within the "Personal" card of the employee "Details":

VISIFILE
DETAILS
DOCUMENTS
MESSAGES
JOB MATCHING
ASSIGNMENTS
STORY
REFERENCES
PAY SETUP
ONBOARDING
PAY HISTORY
CUSTOM DATA
ABCD
SOPIA
BG55

Recent History

Chase Abbott  
Details / Employee / 42953886...

Chase Abbott  
Visifile / Employee / 4295388608

^ Personal

Id 4295388608	Branch High Tech SE >
Full Name Chase I Abbott	Hierarchy Entity >
Nickname --	Alternate Employee Id 588

**\*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\*** Once the employee record has been transferred to another branch/hierarchy, the following will also be done/transferred:

- The Country Code of the phone Contact Methods on the employee record will also transfer.
- The hierarchy of the messages on the employee record will be updated to the hierarchy the employee was transferred to.
- The original upload and expiration dates for the employee's documents will be used once the transfer is complete.
- The following additional information will be transferred:
  - Notes
  - Interviews
  - Work History
  - Documents
  - Required Documents
  - Dependent Allowances
  - Extra Deductions
  - Other Income

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