

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 Form	Access
Hierarchy Field	Read Write
Branch Field	Read Write

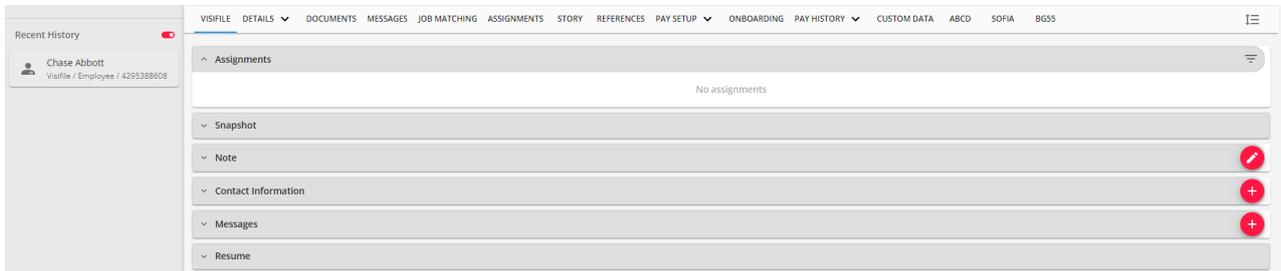
For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "[Beyond - Creating Security Groups with Advanced Permissions](#)".

Transferring an Employee to a Different Branch

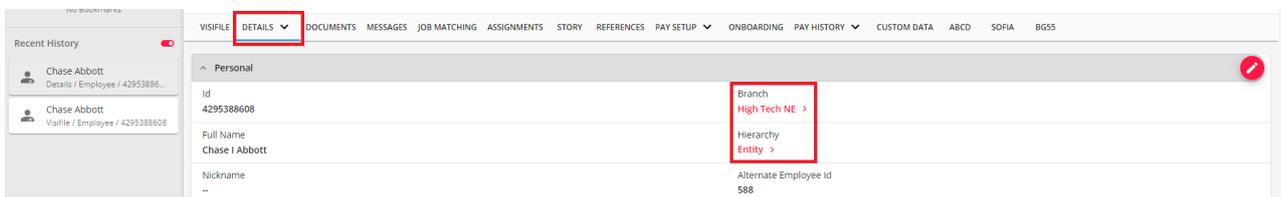
Note Employees are unable to be transferred to a different branch if they are currently on an active assignment.

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

Current Branch High Tech NE * New Branch

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":

<p>Recent History</p> <ul style="list-style-type: none"> Chase Abbott Details / Employee / 42953886... Chase Abbott Visifire / Employee / 4295388608 	<p>VISIFILE DETAILS DOCUMENTS MESSAGES JOB MATCHING ASSIGNMENTS STORY REFERENCES PAY SETUP ONBOARDING PAY HISTORY CUSTOM DATA ABCD SOPIA BG55</p> <p>Personal</p> <table border="1"> <tr> <td style="width: 50%;">Id 4295388608</td> <td style="width: 50%;">Branch High Tech SE ></td> </tr> <tr> <td>Full Name Chase I Abbott</td> <td>Hierarchy Entity ></td> </tr> <tr> <td>Nickname --</td> <td>Alternate Employee Id 588</td> </tr> </table>	Id 4295388608	Branch High Tech SE >	Full Name Chase I Abbott	Hierarchy Entity >	Nickname --	Alternate Employee Id 588
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.

Additionally, when transferring an employee record to a different EINC, in the event an employee record with

the same last name and last 4 digits of an SSN is found, you will be navigated to the "Duplicate Check" window which allows you to either merge the employee record with one that exists or apply the intended update to the original record:

Note This functionality is being released in waves between April 28th, 2023 and July 31st, 2023. Therefore, you may not see this functionality while the backend work is being completed for your environment.

If you still do not see this functionality by August 1st, 2023, please contact your TempWorks Account Manager.

Change Branch and Hierarchy - Duplicate Check

1 Change Branch and Hierarchy 2 Duplicate Check

6 employees are potential duplicates of the selected employee, based on the last name and last 4 digits of SSN. Choose to update the selected employee or merge with a matching employee.

Employee Selected	Matching Records
<p>Sarah Alaska 4296220855 (888) 333-3333 mail@mail.com SSN: ██████████7411</p> <p>SUBMIT UPDATE</p>	<p>Evelyn Alaska 4296221590 SSN: 000-00-7411</p> <p>MERGE WITH EXISTING RECORD</p>
	<p>Frank Alaska 4296221585 SSN: 000-00-7411</p> <p>MERGE WITH EXISTING RECORD</p>
	<p>Fred Alaska 4296220630 (651) 345-6789</p>

CANCEL < PREVIOUS

For more information on merging employee records, please see the article titled [Beyond - How to Merge Employee Records](#).

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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