



# Transferred Employees Leave Processing

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## OVERVIEW

Leave balances are recorded by Empl Record number in HIP. Understanding the situations where balance adjustments by HR Admin are important for processing help to avoid confusion of what the employee’s balances are at the department after the employee’s departure. In many circumstances, leave transfer processing for transferred employees requires coordination within and between departments.

Data in HIP will provide you with information needed to validate leave balance hours. After verifying the leave balances for transfer, the G2 or other necessary forms would be completed, and results shared with the new department staff for transfer processing.

## DIFFERENT EMPL RECORD

Use of different Empl Records may be typical for the following transfer situations:

1. Between Time and Leave jurisdictions (e.g., Legislature to Executive Branch)
2. Between a Non-Time and Leave department to a Time and Leave department or vice versa (e.g., UH to Executive Branch)
3. Accepting Exempt Appointments while being on LOA on previous positions (e.g., appointed positions)

## FORMER DEPARTMENT

If a vacation or comp time payout should occur, the steps mentioned for a vacation payout would be followed. See the Vacation and Comp Time Payout Upon guide at <https://ags.hawaii.gov/hip/files/2023/02/Vacation-and-Comp-Time-Payout-Upon-Termination.pdf>. Note that for comp time balances, it may be necessary to pay out the comp time balances upon the employee's departure since the new department may be unable to cover the cost of the comp time earned that was not worked at the new department.

If the employee should carry over their leave balance hours to their new position, the steps are like processing a payout. The main differences are the former department would:

1. Determine the number of hours that needs to be transferred over
2. If necessary, determine the monetary value of those hours to transfer to the new department and process accordingly (e.g., calculation of vacation hours dollar value).

The HR Admin will still need to zero out the hours balances showing in the system. This would avoid issues of the employee using leave on their old position when they are not working there or having those hours available if rehired on that Empl Record.

If the comp time hours need to be paid out upon departure from former department, use of comp time hours may need to be monitored until the comp time balances reduced to 0 and the payout has occurred.

## NEW DEPARTMENT

The new department fiscal office will need to coordinate with the former department regarding the funds transfer of the vacation hours that is being carried over.

The new department HR Admin will need to input balance adjustments to grant the leave hours to the employee if the employee needs to use those hours at the new position. It is recommended to use the CNV adjustment option so that the hours will be available to the employee immediately.

See leave balance adjustment guide for example at <https://ags.hawaii.gov/hip/files/2021/11/Leave-Balance-Adjustment.pdf>

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## MID PERIOD TRANSFER CONSIDERATIONS

Leave accruals for the month when employees transfer in the middle of the month may need to be monitored. This is because the system may try to grant leave for the "hours worked" when the employee is being paid with Time and Leave but the former department may have already accounted for all hours worked in the month and granted leave hours accordingly.

For example, suppose an employee previously worked a Monday to Friday 8 hours scheduled and continues that schedule at the new department. If that employee transfers into the department effective 8/26/22, the employee would have worked 152 hours at the former department, and so the former department may

have granted 14 hours of sick and vacation for August 2022 on the G2 form. Then the employee would have worked 32 hours from 8/26/22-8/31/22 at the new department. The HIP system would recognize that the employee is in a Time and Leave department effective 8/26/22 and would try to grant 4 hours for the 32 hours worked. If the previous department already granted 14 hours for the full month of August 2022, then adjustment may be necessary to ensure that the employee does not earn more than 14 hours for August 2022.

# August 2022

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Former Department

New Department

### SAME EMPL RECORD

Use of the same Empl Record may be typical if a new Empl Record is not necessary (e.g., employee completely resigned from the former position to work in another position).

### DATA SECURITY

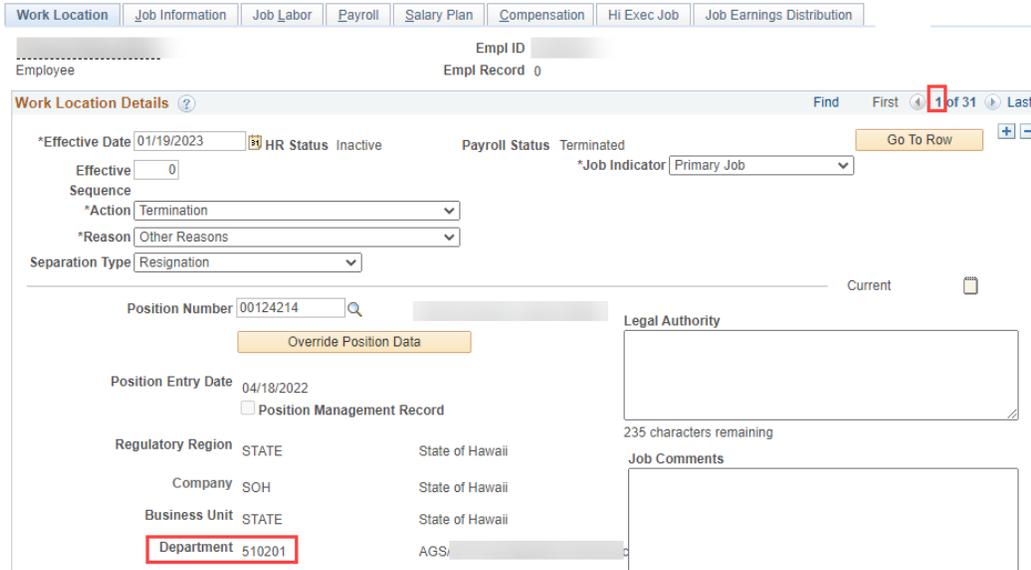
The HIP system controls the ability to view employee data depending on each user’s security access. This has become more prevalent with the integration of Time and Leave. A user’s ability to see a specific employee’s data depends on what department is on the most recent row of the employee’s HRMS Job Data and how the Department ID is organized in the Department ID Structure. See <https://ags.hawaii.gov/hip/files/2023/01/Refresher-Training-Job-Data-Payroll-Time-and-Leave-Relationship-PowerPoint.pdf> pg.7 for more information.

When the top row of an employee’s Job Data for a Empl Record has a Department ID within your Department organization, you can view the HR, Payroll, Time, and Leave data for that employee depending on what security role you have. However, when a row is added to an employee’s Job Data Record with a different Department ID, upon save of the new row, all that HR, Payroll, Time, and Leave data (e.g., Job Data, Review Paycheck, Timesheets, Create and Maintain page, etc.) moves with the employee to the new department.

EXAMPLE

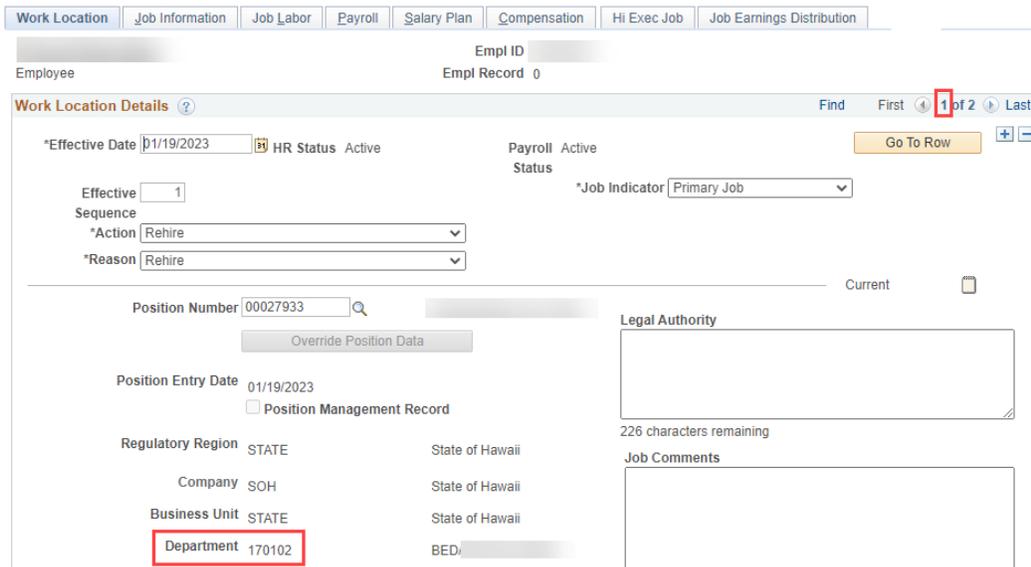
See below for an example where the employee only has Empl Record 0 and the record 0 was used for termination at DAGS and rehire at DBEDT effective 1/19/2023.

Upon termination, users with access to the DAGS Department 510201 would be able to see the employee’s data on the respective pages. If the termination is the last saved record, then DAGS will continue to have access to this employee’s data as system will recognize this is a DAGS Department 510201 employee.



This screenshot shows the 'Work Location Details' for an employee with Empl ID [redacted] and Empl Record 0. The record is highlighted as '1 of 31' in the top right. The record is for a termination at DAGS Department 510201, effective 01/19/2023. The HR Status is 'Inactive' and the Payroll Status is 'Terminated'. The Action is 'Termination' and the Reason is 'Other Reasons'. The Separation Type is 'Resignation'. The Position Number is 00124214. The Position Entry Date is 04/18/2022. The Regulatory Region is STATE (State of Hawaii), Company is SOH (State of Hawaii), and Business Unit is STATE (State of Hawaii). The Department is 510201 (AGS). The Job Indicator is 'Primary Job'. There are fields for Legal Authority (235 characters remaining) and Job Comments.

Once it’s determined a rehire is necessary using the same Empl Record, after the rehire is entered and saved to officially record the employee in the DBEDT Department 170102, all DAGS employees would lose access to this employee’s data. Only users in DBEDT with access to the Department 170102 would be able to see the employee data.



This screenshot shows the 'Work Location Details' for the same employee with Empl ID [redacted] and Empl Record 0. The record is highlighted as '1 of 2' in the top right. The record is for a rehire at DBEDT Department 170102, effective 01/19/2023. The HR Status is 'Active' and the Payroll Status is 'Active'. The Action is 'Rehire' and the Reason is 'Rehire'. The Position Number is 00027933. The Position Entry Date is 01/19/2023. The Regulatory Region is STATE (State of Hawaii), Company is SOH (State of Hawaii), and Business Unit is STATE (State of Hawaii). The Department is 170102 (BED). The Job Indicator is 'Primary Job'. There are fields for Legal Authority (226 characters remaining) and Job Comments.

Due to this concept of the data moving with the employee, coordination within and between departments is necessary for transferred employees to gain an understanding of how leave balances should be split between the departments, if any.

### FORMER DEPARTMENT

If a vacation or comp time payout should occur, the steps mentioned for a vacation payout would be followed. See the Vacation and Comp Time Payout Upon Termination guide at <https://ags.hawaii.gov/hip/files/2023/02/Vacation-and-Comp-Time-Payout-Upon-Termination.pdf>. Note that for comp time balances, it may be necessary to pay out the comp time balances upon the employee's departure since the new department may be unable to cover the cost of the comp time earned that was not worked at the new department. Assistance from the new department may be necessary to input any necessary adjustments (e.g., zero out comp time for payouts).

If the employee should carry over all leave balance hours to their new position on the same Empl Record, the steps are like processing a payout. The main differences are that the former department:

1. Determines the number of hours that needs to be transferred over
2. If necessary, determines the monetary value of those hours to transfer to the new department and process accordingly (e.g., calculation of vacation hours dollar value).
3. Does not need to input sick and vacation balance adjustment to zero out hours since the balances will flow over automatically when the same Empl Record is used.

If it is desired to review the accuracy of balances prior to the employee data moving to the new department, that can be accomplished before the new department data is saved on the employee's record (e.g., before transfer or rehire into new department is saved on Job Data).

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### MID PERIOD TRANSFER CONSIDERATIONS

Additionally, due to the nature of how the system grants leave accruals, manual calculation of leave earned at the former department is needed when an employee transfers from one department immediately to another department in the middle of the pay period. Remember that the HIP Time and Leave system typically grants leave accruals at the end of a month (see Leave Accruals guide for more details at <https://ags.hawaii.gov/hip/files/2022/12/Leave-Accrual-Guide.pdf>). Additionally, accruals in the first half of the month occur in the following unique circumstances:

- For vacation and sick leave if the employee is on Paid Leave of Absence/Workers' compensation (PLA/WC) on Job Data
- For sick leave for UPW employees
- For vacation and sick leave if the "Termination" or "Transfer" action is used with effective dates between the 1<sup>st</sup> and the 16<sup>th</sup> of the month

However, HIP does not prorate leave accruals in the middle of a pay period if an employee is transferring within Time and Leave departments (e.g., transfers after the pay period already started).

EXAMPLE

For example, suppose the following conditions for the employee:

- An ATF employee
- Has a term and rehire from DAGS to DBEDT effective 1/19 on the same Empl Record Number 0
- No leaves were taken in January 2023
- Has a M-F 8-hour work schedule
- The final check for time worked at DAGS (earnings period 1/16/23-1/19/23) would be 2/17/23

HIP will recognize the employee is still a state employee using Time and Leave, and the leave balances will flow from DAGS to DBEDT. Since the employee is paid for the full month of January, system will grant January leave accruals at the end of January. The leave earned for the January will appear on the queries, but system would not grant hours for just January 1- 18 and then the remainder from January 19-31. If there's a need to split the leave accruals in this situation based on where the employee was working in the month, in addition to the HIP\_TL\_G2\_INFO query, departments may use HIP\_TL\_EE\_BAL\_BY\_PERIOD and HIP\_TL\_EE\_APPRVD\_LV\_DTRNG\_EE queries to review the summary of leave earned and used at the department.

Suppose today was 2/1/23 and you ran the queries as shown below. Note that 14 hours are anticipated to be earned for January because this ATF employee has not yet been paid for their final check in DAGS as of 2/1/23. The final check covering the period at DAGS from 1/16/23-1/18/23 will be paid on 2/20/23 and that is also when the January accruals will officially post to the employee's record. The below queries are illustrating that the employee is anticipated to have a 134-hour vacation balance at the end of January 2023.

HIP\_TL\_G2\_INFO – Before period finalized:

HIP\_TL\_G2\_INFO - Employee G2 Information

\*Empl ID

Empl Record

\*Date

[View Results](#)

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File \(1 kb\)](#)

View All

Row	Empl ID	Rcd#	As Of Date	Name	Job EFDt	Action	Reason	DeptID	Dept Description	Position	Posn Title	Hire Date	Union Cd	Abs Pay Group	Abs Prd End Dt	Abs Prd Finalized	Abs Prd Process TS	Vac Earned YTD	Vac Taken YTD	Sick Earned YTD	Sick Taken YTD	Apply 336 Max Dt	Hourly Rate	Vac Balance
1		0	01/19/2023		01/19/2023	REH	SMX	170102	BED/			01/07/2013	35	ATF	01/31/2023	N	01/29/2023 5:39:27AM	14.0000	0.0000	14.0000	0.0000	12/31/2022	59.203846	134.0000

HIP\_TL\_EE\_BAL\_BY\_PERIOD – Before period finalized:

HIP\_TL\_EE\_BAL\_BY\_PERIOD - Employee Balances by Period

\*Empl ID

Empl Record

\*From Date

\*To Date

[View Results](#)

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File \(5 kb\)](#)

View All

Row	Empl ID	Rcd#	Name	Dept ID	Dept Description	Position	Posn Title	Union Cd	Abs Pay Group	Abs PRD Begin Dt	Abs PRD End Dt	Abs PRD Finalized	PRD Last Processed TS	PRD Sick Earn	PRD WC Sick Ent	PRD Sick Take	PRD Sick Adj	PRD WC Sick Adj	Sick Bal	PRD Vac Earn	PRD WC Vac Ent	PRD Vac Take	PRD Vac Adj	PRD WC Vac Adj	PRD Vac Don	Vac Bal
1		0		510201	AGS/			73	ATF	12/01/2022	12/15/2022	Y	12/15/2022 10:56:07PM	0.0000	0.0000	3.5000	0.0000	0.0000	102.5000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	106.0000
2		0		510201	AGS/			73	ATF	12/16/2022	12/31/2022	Y	12/29/2022 4:51:26AM	14.0000	0.0000	5.5000	0.0000	0.0000	111.0000	14.0000	0.0000	0.0000	0.0000	0.0000	0.0000	120.0000
3		0		510201	AGS/			73	ATF	01/01/2023	01/15/2023	Y	01/26/2023 10:46:48PM	0.0000	0.0000	0.0000	0.0000	0.0000	111.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	120.0000
4		0		170102	BED/			35	ATF	01/16/2023	01/31/2023	N	01/29/2023 5:39:27AM	14.0000	0.0000	0.0000	0.0000	0.0000	125.0000	14.0000	0.0000	0.0000	0.0000	0.0000	0.0000	134.0000

Now, suppose today is 2/17/23 and the queries were reran showing Y in the finalized columns. If it's desired to split the accrual based on specific hours worked at the department, then manual calculation can occur.

### HIP\_TL\_G2\_INFO – After period finalized:

HIP\_TL\_G2\_INFO - Employee G2 Information

\*Empl ID

Empl Record

\*Date

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)

View All

Row	Empl ID	Rcd#	As Of Date	Name	Job E#D#	Action	Reason	Dept ID	Dept Description	Position	Posn Title	Hire Date	Union Cd	Abs Pay Group	Abs Prd End Dt	Abs Prd Finalized	Abs Prd Process TS	Vac Earned YTD	Vac Taken YTD	Sick Earned YTD	Sick Taken YTD	Apply 336 Max Dt	Hourly Rate	Vac Balance
1		0	01/19/2023					170102	BED/			01/07/2013	35	ATF	01/31/2023	Y	01/29/2023 5:39:27AM	14.000	0.000	14.000	0.000	12/31/2022	59.203846	134.000

*If Abs Prd Finalized shows "N" then the months accruals has not officially posted to the employee's record yet*

### HIP\_TL\_EE\_BAL\_BY\_PERIOD – After period finalized:

HIP\_TL\_EE\_BAL\_BY\_PERIOD - Employee Balances by Period

\*Empl ID

Empl Record

\*From Date

\*To Date

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (5 kb)

View All

Row	Empl ID	Rcd#	Name	Dept ID	Dept Description	Position	Posn Title	Union Cd	Abs Pay Group	Abs PRD Begin Dt	Abs PRD End Dt	Abs PRD Finalized	PRD Last Processed TS	PRD Sick Earn	PRD WC Sick Ent	PRD Sick Take	PRD Sick Adj	PRD WC Sick Adj	Sick Bal	PRD Vac Earn	PRD WC Vac Ent	PRD Vac Take	PRD Vac Adj	PRD WC Vac Adj	PRD Vac Don	Vac Bal
1		0	510201 AGS/i				73	ATF		12/01/2022	12/15/2022	Y	12/15/2022 10:55:07PM	0.000	0.000	3.500	0.000	0.000	102.500	0.000	0.000	0.000	0.000	0.000	0.000	106.000
2		0	510201 AGS/i				73	ATF		12/16/2022	12/31/2022	Y	12/29/2022 4:51:26AM	14.000	0.000	5.500	0.000	0.000	111.000	14.000	0.000	0.000	0.000	0.000	0.000	120.000
3		0	510201 AGS/i				73	ATF		01/01/2023	01/15/2023	Y	01/26/2023 10:46:48PM	0.000	0.000	0.000	0.000	0.000	111.000	0.000	0.000	0.000	0.000	0.000	0.000	120.000
4		0	170102 BED/				35	ATF		01/16/2023	01/31/2023	Y	01/29/2023 5:39:27AM	14.000	0.000	0.000	0.000	0.000	125.000	14.000	0.000	0.000	0.000	0.000	0.000	134.000

Although the query displays 14 hours granted for January 2023 with 134 vacation hours at the end of January, manual calculation can be done if needed to split the hours earned based on department. It can be determined that the employee's hours worked at DAGS from 1/1/23-1/18/23 was 104 hours in January (13 days at 8 hours), which equates to 10 hours of leave to be awarded for the time at DAGS. Then, the prior month's ending balance of 120 + 10 = 130 and represents the hours at DAGS. The monetary value of 130 hours at the employee's hourly rate can be used on the G2 form to facilitate the transfer of funds to DBEDT for the vacation carryover from DAGS.

Due to the timing of "final" leave not granted until the employee's last check is complete, coordination with the new department may be necessary to retrieve detailed data of the employee's existing leave data since visibility will be lost once the transfer record is saved. In this example DBEDT may need to assist to provide DAGS with the HIP\_TL\_EE\_BAL\_BY\_PERIOD query reports after the 2/20 check have been finalized. However, the HIP\_TL\_G2\_INFO query can be run by either department as that security is based on whether the employee has ever existed in your department.

### NEW DEPARTMENT

If the employee is transferring between Time and Leave Departments and the same Empl Record is being used for HR transaction, leave balances will simply flow from the former department to the new

department because leave balances are maintained by Empl Record number. If some type of leave payout needs to occur, the new department HR Admin may need to assist with processing the adjustment as the former department will no longer have access to the employee data.

The new department HR Admin will need to assist with providing data to the former department if necessary. However, no action is needed to bring the balances over from the former department since the same Empl Record is being used.

The new department fiscal office may need to coordinate with the former department regarding the funds transfer of the vacation hours that is being carried over. The new department may also need to assist with inputting any comp time adjustments since the former department would no longer have access to the employee's record.

If the comp time hours should have been to be paid out upon termination from the former department, employee use of hours may need to be monitored until the comp time balances reduced to 0 and the payout has occurred.