Location Transfer

Overview

In alignment with our company's mission and values, we will treat all associates with respect, openness, honesty, and fairness.

Procedures

* If the associate is locating to a "different" division, the Division Transfer event must be handled through the Human Resources Shared Service Center (HRSSC).

1. Follow division policies and practices for the transfer process. All parties (associate, current and new manager) must agree on transfer terms and the associate must understand any benefit changes before moving to Step 2.
2. Determine if the associate is a manager who has assigned a Proxy:
   a. If the associate being moved is not a manager with a Proxy, continue to Step 3.
   b. If the associate being moved is a manager with a Proxy, the associate must remove the Proxy before moving to Step 3.
3. Initiate the Location Transfer event.
   Note: An associate can only be moved 7 days before the new location start date. The HRSSC will monitor to ensure the associate is moved to payroll in a timely manner.
4. Update all fields on the Transfer Location Data screen.
   Note: Click the View Full Profile link for associate's current job detail.
   a. **Division** – This field defaults based on the associate's division.
   b. **New Location Type** – Select one of the following:
      - **Retail Store** – Chosen when location is a store facility.
      - **Office** – Chosen when a location is an office facility.
      - **Manufacturing Facility** – Chosen with a location is a manufacturing facility.
      - **Distribution Center** – Chosen when a location is a distribution center.
   c. **New Location** – This field defaults with options based on New Location Type selected. Select the alphanumeric description of the associate's new location.
   d. **Effective Date** – Enter the date that the associate's work begins at the new location
   Note: For Hourly Associates, this will always be a Sunday effective date.
5. Search and Select the associate's new manager by using one or more of the following fields then click Search:
   a. **Manager with direct reports?** – This field defaults with the box checked that the associate's new manager has direct reports.
      - If the associate's new manager does not have direct reports, uncheck the box.
   b. **Enterprise User ID (EUID)** – Enter the EUID of the associate's new manager.
   c. **First Name** – Enter the first name of the associate's new manager.
   d. **Last Name** – Enter the last name of the associate's new manager.
   e. **Division** – Enter the division of the associate's new manager.
   f. **Location** – Enter the location of the associate's new manager.
   g. **Department** – Enter the department of the associate's new manager.
   h. **Position Title** – Enter the position title of the associate's new manager.
6. Confirm that the manager selected is correct or select the correct manager from the search list provided and then click Next.

7. Does the manager have direct reports?
    a. If No, proceed to Step 8.
       Note: The application will automatically bypass this step if there are no direct reports.
    b. If Yes, you will be prompted to answer "Will this manager's direct reports transfer with the manager?"
       ▪ If Yes, the direct reports will move with the manager to the new location.
       ▪ If No, select the new manager that the direct reports will report to.
          ○ Select the new manager by using the same process in Step 6.
8. Confirm and Acknowledge the Location Transfer information.
9. Current manager tracks the status of the event using your Workbox link.
10. New manager selects the Location Transfer event from Workbox link.
11. Confirmation page is sent electronically through Workflow within the ExpressHR application to the new manager
12. Upon notification from the HRSSC, the new manager selects the Location Transfer event from their Workbox link.
13. New manager verifies the Location Transfer event and selects one of the following and selects one of the following:
    a. **Approve** – Select to accept the event for an associate.
    b. **Reject** – Select to refuse the event for an associate.
       Note: Include a business-related reason for the reject in the **Comments** field.
    c. **Reassign** – Select to send the event to another manager.
    d. **Finish Later** – Select to complete the verification of the event at another time.

Note: An event expires within 12 days if the approval process is not complete. The event will have to be re-initiated.

> **Once the Location Transfer event has been accepted, the new manager MUST initiate the Job Change event the next day to complete the Location Transfer process.**
>
> **Note:** For Location Transfer events approved on Saturday or Sunday, the Job Change event should be initiated on Tuesday.

Frequently Asked Questions

- What is a Location Transfer event?
  - A change in a work location (store/zone/department/group) that does not include a division change.
  - A Job Change event MUST be initiated in order to complete this change after the location change has occurred, even if the job did not change.

- What are my responsibilities as the associate's current manager?
  - Follow division policies and practices for the transfer process.
  - Initiate, confirm, acknowledge and track the Location Transfer event.
    Note: An associate can only be moved 7 days before the new location start date. The HRSSC will monitor to ensure the associate is moved to payroll in a timely manner.

- What are my responsibilities as the associate's new manager?
  - Discuss the transfer terms with the associate and current manager. All parties must agree on the transfer terms and the associate must understand any benefit changes.
  - Verify the event from your Workbox link.
  - Approve, reject, or reassign the event.
  - Initiate the Job Change event.

- Why is it important to communicate the impact of the Location Transfer event?
  - Your associate must understand possible impacts on the following before accepting a location transfer.
    - Location Transfer Effective Date
    - Benefits
    - Vacation and Other Paid Time Off
    - Seniority
    - Service Date
    - Pay
    - Contract/Agreement/Overtime Rules
    - Effective Date
    - Correct Location use of the time clocks (this is for the company timekeeping system for hourly associates only)

- What happens if a new manager rejects the Location Transfer event?
  - The status will be "rejected" in the current manager's Outbox Complete.
  - The current manager should contact the new manager and discuss the Location Transfer event.
  - If applicable, the Location Transfer event may need to be reinitiated by the current manager.

- What are my responsibilities as the associate's new manager?
  - Agree on the location transfer terms with the associate.
  - Approve or reject the Location Transfer event in ExpressHR from the current manager.
    Note: If the Location Transfer event is rejected, a business-related reason must be given in the **Comments** field.
  - Once the Location Transfer event is accepted, initiate the Job Change event the next day to complete the Location Transfer process, even if there is no change to the associate's record.
    Note: For Location Transfer events approved on a Saturday or Sunday, the Job Change event should be initiated on Tuesday.

- How can I track the status of this event?
  - If the request is waiting on approval from the new manager, the request will be in your Outbox Pending.
  - If the request is approved or rejected by the new manager or if the event has expired, the request will be in your Outbox Complete.
    Note: If the event is rejected, a business-related reason is available in the **Comments** field.
- When will my event expire?
  - Your event expires within 12 days if no one approves your request.

- What happens if the event expires or is rejected?
  - If an event expires or is rejected by the new manager:
    - The event must be reinitiated (if applicable).
    - Follow up with the new manager.

- When will my associate see the changes in ExpressHR?
  - Once applied in payroll, the change is reflected in ExpressHR.

Reference

Please refer to the following for more details:
- Business Ethics Policy
- Corporate Values Statement
- Employment of Minors

- Equal Employment Opportunity Policy
- Pay Administration Guidelines
- Pharmacy (HIPAA) Privacy
- Protection of Confidential Information Policy
- Social Security Privacy
- Vacation Policy and Other Documents

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Definitions

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