CENTRALLY HR (CHR) HIRING PROCESS – ADD / TRANSFER / SWITCH EIN

I. Add or Transfer to an EIN
- Adding or Transferring an employee to a new EIN

Login to Centrally HR (CHR) and go to My Teams

1. *1. Go to HR*

2. *Go to HR Actions*

3. *Click on Available tab*

4. *Click on Start.*
- *Choose* **EIN Transfer**, *if employee is transferring to a different   location/EIN.*
- *Choose* **HIRE EMPLOYEE**, *if adding a new location/EIN for an employee.*

CENTRALLY HR (CHR) HIRING PROCESS – ADD / TRANSFER / SWITCH EIN

EIN Transfer

Choose Employee *

Search and select employee

Target EIN *

Roman Catholic Bishop of Salt Lake City

Effective From *

08/06/2020

CANCEL   CONTINUE

5. *Choose Employee Name. Note: Effective date is when this profile can be accessible, and may be prior to hire date.*

6. *Click down arrow to choose NEW Employer Identifcation Number (EIN).*

7. *Enter Effective date.*

8. *Click Continue.*

Effective From *

08/01/2020

SAVE   CONTINUE

Personal Settings

Managers

Primary EIN

Personal Settings

Hired *

08/01/2019

Name

First Name *

Anil Kumar

Middle

Last Name *

Kakumanu

Suffix

Nickname

Salutation

Pay Period Profile *

Saint Francis of Assisi SM

9. *Choose new EIN Pay Period Profile*

CENTRALLY HR (CHR) HIRING PROCESS – ADD / TRANSFER / SWITCH EIN

Personal Settings

EIN *
Saint Francis of Assisi

Birth Date *

National ID

Primary National ID *
Social Security Number

Person Account
Anil Kumar Kakumanu

Employee Sync *

Employee ID

Started *
08/01/2019

10. *Click Sync.*

SAVE   CONTINUE

11. *Click Save.*

← EIN Transfer

Employee   AK   Anil Kumar Kakumanu (St. Helens Roman Catholic Church LLC)

Effective From *
08/01/2020

SAVE   CONTINUE

✓ Personal Settings

Managers

Managers

Primary EIN

Manager 1
Choose Employee...

HR Contact
Choose Employee...

SAVE   CONTINUE

12. *Click Managers tab.*

13. *Type or search for Managers.*

Note: Manager 1 approves Timesheet, and Manger 2 is the Location HR/Finance Manager. It can be the same person for some locations.

14. *Click Save.*

Employee   AK   Anil Kumar Kakumanu (St. Helens Roman Catholic Church LLC)

Effective From *
08/01/2020

12. *Primary EIN appears here.*

SAVE   SUBMIT

✅ Personal Settings
✅ Managers
Primary EIN

Primary EIN

Primary EIN
Saint Francis of Assisi

Submit HR action request?
You are about to submit HR action request.

CANCEL   **SUBMIT**

SAVE   SUBMIT

12. *Click Submit.*

– EIN Transfer

mployee   AK   Anil Kumar Kakumanu (St. Helens Roman Catholic Church LLC)

fective From *
08/01/2020

SAVE   SUBMIT

✅ Personal Settings
✅ Managers
✅ Primary EIN

Primary EIN

Primary EIN
Saint Francis of Assisi

✓ **Hooray!**
Request submitted successfully.

OK

SAVE   SUBMIT

HR Action shows Completed.

☰   HR   Feedback

← HR Actions

AVAILABLE   OPEN   **SUBMITTED**

Search Actions

All Statuses ▼ | This Year ▼ | All Employees ▼

Employee	EIN	Created On	Effective Date	Status	Workflow State	Notes	Actions
∨ EIN Transfer (5)							
AK Anil Kumar Kakumanu	Saint Francis of Assisi	08/06/2020	08/01/2020	Completed	Completed		•••

An email confirmation will be sent to initiating manager to confirm EIN transfer.
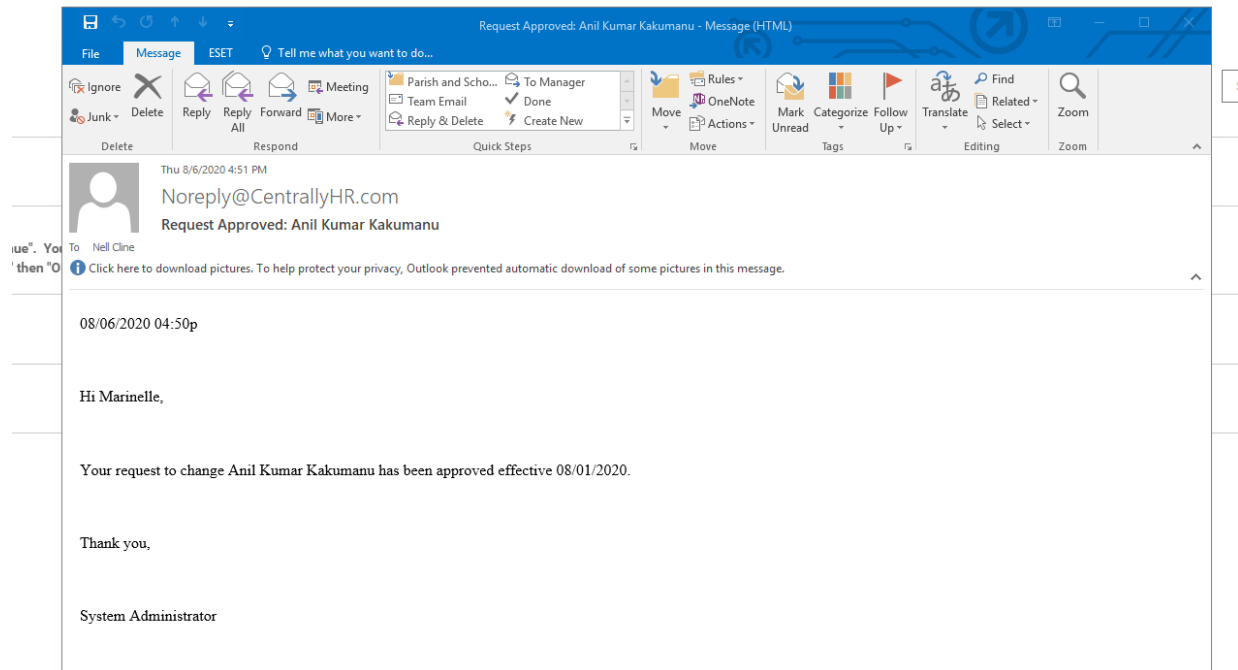
CENTRALLY HR (CHR) HIRING PROCESS – ADD / TRANSFER / SWITCH EIN

II. SWITCH Primary EIN

When an employee with existing 2 or more EIN is switching Primary EIN.

III. **Next Steps**
   A. Add Base Compensation in Employee Profile similar to New Hire Process.
   B. Add applicable Earnings, Deductions, Tax Info, and Direct Deposits similar to New Hire Process.
   C. Once A & B is completed, terminate Employee from old EIN if applicable.
   D. Print employee profile for record keeping.