

# 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

The screenshot shows the Centrally HR (CHR) interface. The top navigation bar includes a star icon, a person icon, a group of people icon, and a gear icon. Below this is a 'TEAM' menu with options: My Team, Time, Accruals, Benefits, HR, Dashboard, HR Actions, Checklists, Forms, HR Maintenance, and Employee Maintenance. A blue arrow points from the 'HR' option to a callout box labeled '1. Go to HR'. Another blue arrow points from the 'HR Actions' option to a callout box labeled '2. Go to HR Actions'. Below the menu, the 'HR' page is shown with a blue arrow pointing to the 'HR Actions' tab, which is labeled '3. Click on Available tab'. The 'HR Actions' page has three tabs: 'AVAILABLE', 'OPEN', and 'SUBMITTED'. Below the tabs, there are three rows of actions: 'EIN Transfer', 'Hire Employee', and 'Job & Salary Change'. A blue arrow points from the 'Start' button next to the 'Hire Employee' row to a callout box labeled '4. Click on Start.'.

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 Identification Number (EIN).

**7.** Enter Effective date.

**8.** Click Continue.

Effective From \*  
08/01/2020

SAVE CONTINUE

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.

11. Click Save.

SAVE CONTINUE

← EIN Transfer

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

Effective From \* 08/01/2020

SAVE CONTINUE

Personal Settings Managers Primary EIN

Manager 1 Choose Employee... HR Contact Choose Employee...

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.

SAVE CONTINUE

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

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

Effective From: 08/01/2020

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

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

Effective From: 08/01/2020

Primary EIN: Saint Francis of Assisi

Hooray!  
Request submitted successfully.

OK

SAVE SUBMIT

*HR Action shows Completed.*

HR

Feedback

HR Actions

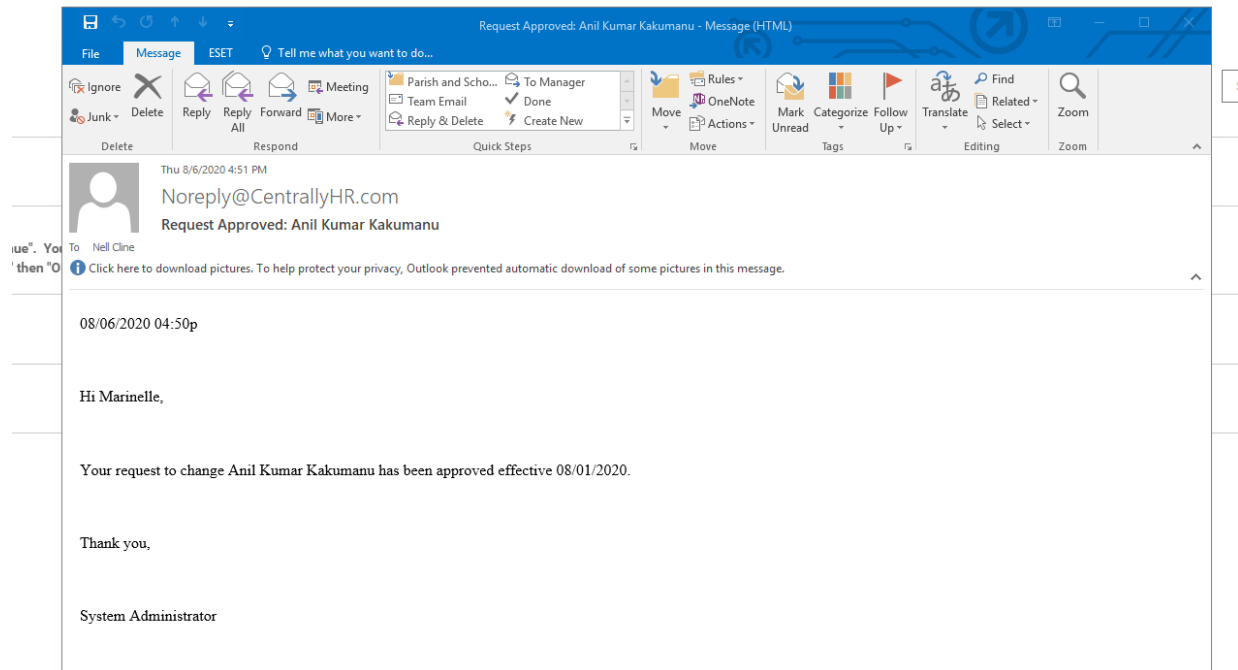
AVAILABLE OPEN SUBMITTED

All Statuses | This Year | All Employees

Employee	EIN	Created On	Effective Date	Status	Workflow State	Notes	Actions
<b>AK</b> Anil Kumar Kakumanu	Saint Francis of Assisi	08/06/2020	08/01/2020	Completed	Completed		...

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

*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.

← Employee Information

HIRE TERMINATE REHIRE VIEW ...

Page 1 of 1 1 - 4 of 4 Rows Saved: [System]

	Employee Id	Badge	Username	First Name	Last Name	Employee EIN	In Payroll	Locked	Worked 600 Hour...	WC Job Title	Employee Stat...
	starts with	=	=	starts with	starts with	starts with	All	All	=	=	Terminated
<input type="checkbox"/>	604		SOlvera7	Sergio	Olvera	Roman Catholic Bishop of Salt Lake City	Yes	No		Bookkeeper	Active
<input type="checkbox"/>	604		SOlvera7	Sergio	Olvera	Saint Therese of the Child Jesus	Yes	No			Active
<input type="checkbox"/>	604		SOlvera7	Sergio	Olvera	Saint Andrew	Yes	No			Active
<input type="checkbox"/>	604		SOlvera7	Sergio	Olvera	San Felipe Parish	Yes	No			Active

← Employee Profile

DOWNLOAD PDF SWITCH PRIMARY EIN SAVE

**SO** Sergio Olvera Employee ID: 604 Hired Date: 01 May 2003 (17 Years, 3 Months, 11 Days)  New Look

Main Payroll HR Schedules ACA Edit Tabs

JUMP TO

- Account Information
- Two-Factor Authentication
- Profiles
- Managers
- Workflow Delegation
- Cost Centers
- Personal Information
- Badges
- Account Demographics

### Account Information

EIN	Primary EIN	Username *
Roman Catholic Bishop of Salt Lake City	Roman Catholic Bishop of Salt Lake City	SOlvera7
New Password	Salutation	Nickname
First Name *	Middle	Last Name *
Sergio		Olvera
Suffix	First Screen	Locale (Language & Format)
	[ Security Profile Default ]	Company Default
Time Zone	<input type="checkbox"/> User Must Change Password at Next Logon	<input type="checkbox"/> Locked
Mountain		

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

Switch Primary EIN

Please select a new primary EIN.

Primary EIN \*

Roman Catholic Bishop of Salt Lake City

CANCEL SAVE

[ Security Profile Default ]

### 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.