

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

I. Add or Transfer to an EIN

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

The image shows a two-part screenshot of the Centrally HR (CHR) interface. The top part is a dark sidebar menu with icons for a star, a person, a group of people, and a gear. The menu items are: TEAM, My Team, Time, Accruals, Benefits, HR, Dashboard, HR Actions, Checklists, Forms, HR Maintenance, and Employee Maintenance. Blue arrows point from callout boxes to the 'HR' and 'HR Actions' items. The bottom part of the image shows the 'HR Actions' page. It has a header with 'HR' and 'Feedback' icons. Below the header are tabs for 'AVAILABLE', 'OPEN', and 'SUBMITTED'. A search bar is on the right. The main content area lists three action types: 'EIN Transfer', 'Hire Employee', and 'Job & Salary Change'. Each item has a 'Start' button with an external link icon. A blue arrow points from a callout box to the 'Start' button for the 'Hire Employee' item.

1. Go to HR

2. Go to HR Actions

3. Click on Available tab

4. Click on Start.

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

Personal Settings

EIN * Birth Date *

National ID

Primary National ID *

Person Account Employee Sync * Employee ID

Started *

10. Click Sync.

11. Click Save.

SAVE CONTINUE

← EIN Transfer

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

Effective From *

SAVE CONTINUE

Personal Settings **Managers** Primary EIN

Managers

Manager 1 HR Contact

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 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. Primary EIN appears here.

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

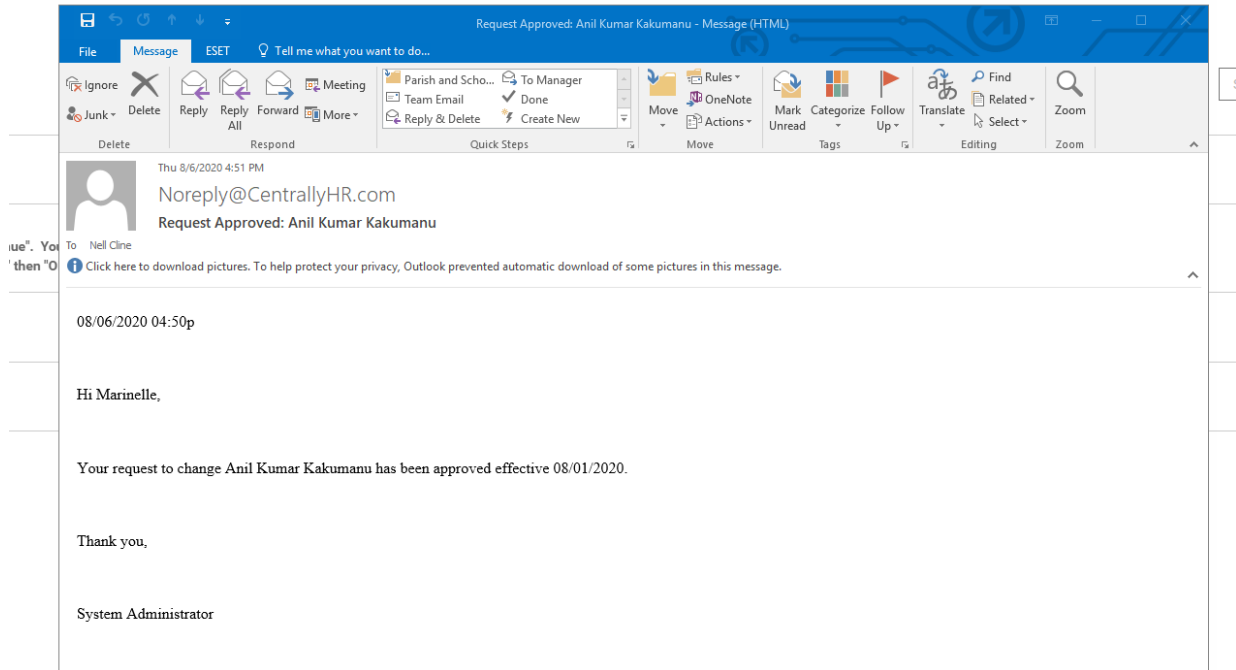
AVAILABLE OPEN SUBMITTED

All Statuses This Year All Employees

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

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

An email confirmation will be sent to initiating manager to confirm EIN transfer.



II. 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.