

INTERNAL CHECKLIST

PROMOTION
 DEMOTION

UNIT/INSTITUTION TRANSFER

Employee Name: _____ SSN/OR#: _____ Date of Change: _____

Initials: _____ RDC: _____ Benefit Pkg Code: _____

SCREEN

ACTION

- Pbed Check P&F status _____
 Check WEST status _____
- P003 Check for split screens
- P010 Check coding for retirement system/change if P&F has changed
- P030 Check PERS JOB CLASS CODE for accuracy
 Check Timesheet CD (should be "2")
 Report discrepancies to Personnel Records staff
 Employee hourly rate _____
- P070 Union Dues / Fair Share – change, add or delete
 ASSURANT/FORTIS – add if WEST=Y; delete if WEST=N
 P&F units – delete if P&F status = N
 E-mail employee about recreation fund deductions
- P435 Zero GL if demoting to represented position
 Comp Time Hrs _____
 Verify VA accrual rate
 AOCE/AFSCME Non-Security to AFSCME Security
Delete PB & enter balance of PB as VA
- P050 Pay off comp time hrs when transferring units (Check for CTS if security)
- PEBB Enter new address
 Change medical/dental coverage if moving outside service area
- MISC Request files if necessary
 Request garnishments & child support from previous specialist
 Missing Forms Letter Sent _____