

# Transferring of an Employee

You can transfer an employee details to create a new employee record. This can be done by clicking the Transfer tab on the Employee Master Details screen. This allows you to transfer an employee from one company to another e.g. XBXS where the first X is the new Company Number.

The screenshot shows the 'Employee Master Details' window for 'Employee: 1UL Ursula Leibmann'. The window has a navigation bar with buttons: Previous, Next, Details, Bring-ups, History, Super, Leave, Earnings, and Folios. The main area contains fields for Name (First Name: Ursula, Last Name: Leibmann), Address (Address 1, Address 2: 4/45 Marine Towers, Address 3: Docklands), State: Victoria, Post Code: 3008, and Country. There is also an 'Employee Photograph' section. Below the address fields are fields for Home Phone No., Mobile No: 0421 568 974, and Email Address: tr001@training.lawmaster.local. A dialog box titled 'Transfer Employee to Another Company' is open, with a message: 'This module creates a new employee record and terminates the existing employee. Leave balances, employment history etc are transferred to the new employee.' It has input fields for 'Old Employee No' (1UL) and 'New Employee No' (XUL), and 'OK' and 'Cancel' buttons. At the bottom of the main window, there are tabs for 'Contacts', 'Next of Kin', and 'Other'. A status bar shows 'Last Updated: 26/09/2016 9:37:12 AM' and 'By: CJM'. A row of buttons includes 'Modify', 'Transfer' (circled in red), 'Fringe Benefits', 'Terminate', and 'Audit Trail'. A 'Master Details' tab is visible at the bottom left.

The following information is transferred to the new Employee details:

- Bring-ups
- Employee History
- Leave Balances
- Next of Kin
- Pay Details
- Banking Details
- General Ledger Accounts

You will need to review the General Ledger accounts to ensure the wages are being recorded against the correct Company's general ledger accounts.

You will need to review the General Ledger accounts to ensure that the wages superannuation accounts of the new company are using the same Account Numbers. The transfer deletes the old company ledger accounts and replaces this with the new ledger account number, by deleting the first digit. For example, GL Account Number 12045 will be converted to 32045 if the employee is being transferred across to Company 3.



A validation has been added when an employee is transfer to prevent assignment of the same resource number to another employee. This will mean the Resource Number will need to be erased on the employee record before the employee can be transferred across.

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