



If you have a staff member who is transferring to another location within the Archdiocese of New Orleans, follow these guidelines for a smooth transition of their personal and benefit data.

- This process of data transfer is critical for the transferring staff member as it provides continuity of insurance coverage as well as the continuation of contributions to retirement.

	Releasing Entity	Receiving Entity
IOI Payroll	Terminate the employee from your IOI records (they are no longer active or inactive, they are 'terminated'). Please flag the Termination Reason as ' Transfer to other Archdiocesan location '. Within their benefits records, make them historic—DO NOT terminate their benefits record. Make sure to communicate to the receiving location when this is completed.**	Create new IOI payroll data.
Health Insurance	Make benefits record Historic in IOI; do not send cancellation form to BCBSLA.	Submit the transfer form to BCBSLA. Please be sure there is no gap in dates of health insurance coverage.
Dental / Vision	Make benefits record Historic in IOI; do not send cancellation form to Guardian.	Email Guardian regarding the employee's change in location.
Voluntary Life (VOL)	Communicate to the receiving location what the transfer employee has for VOL.	If you have not received information, contact the other location for the new employee's VOL information.
401(k)	Complete the ANO Location Transfer Form and submit to VOYA, Human Resources, and the receiving location.	Notify VOYA about the employee's location transfer **after the employee has been transferred in IOI.
Vacation time	The releasing location should pay out any accrued vacation time. (Reminder: final paycheck is due 15 days after separation).	The receiving entity may consider allowing the transfer staff to continue accruing vacation at the same rate, if applicable. As a reminder, please do for all what you do for one.

If you have any questions about your transfer staff members, please call the Office of Human Resources for the Archdiocese of New Orleans.

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