

Transfer an Employee to Another EIN

Last Modified on 02/10/2022 4:50 pm EST

NOTE: Transferring an employee to another EIN is a common practice when a business has multiple legal Employer IDs, for example, when they have merged or acquired another company, or when they have different business licenses for different locations, states, or business lines. In these situations, these companies may have more than one EIN registered with the government. When an employee needs to work under a different EIN, you may need to transfer them so that their pay, taxes, and so on fall under that EIN. When you complete the transfer, the employee's information, including all their employment tax forms such as 1099s, W4s, W2s, direct deposit settings, and so on will be "synced," meaning they will be moved under the new EIN tax ID and continue to process. The employee record under the old EIN will then be automatically terminated.

If you simply need to charge the employee's hours to a different department or team within the current EIN, use Cost Centers.

See Also: [Cost Centers for Managers](#)

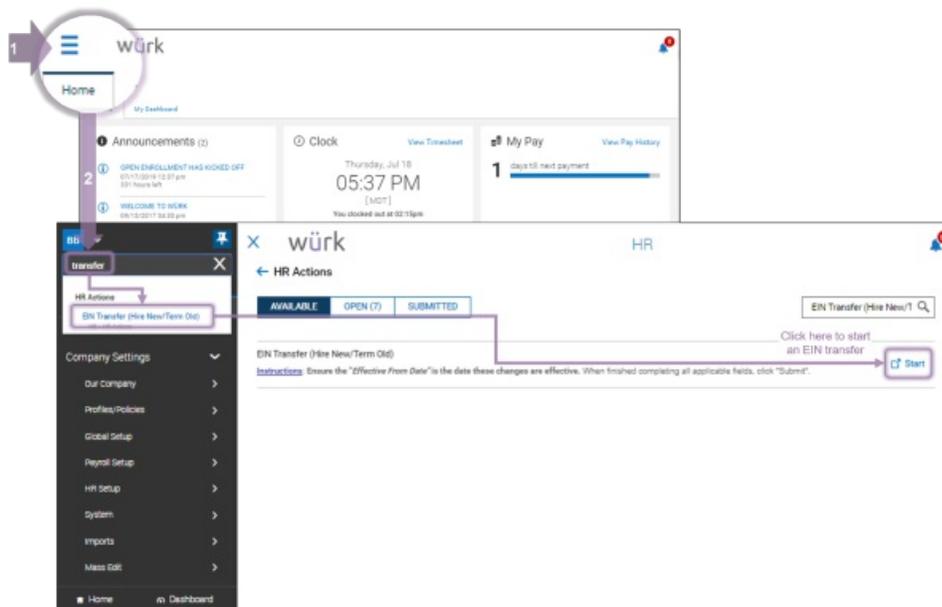
The employee must first be hired in the other EIN for this process to work.

This also means that your Wurk Administrator must first set up any additional EINs in Wurk in order for the employee to be hired in that EIN. If you do not see these options when attempting this task, please contact your Administrator. The process of adding an EIN to your Wurk system requires setup and assistance from the Wurk Support team, please contact them at support@enjoywurk.com for assistance.

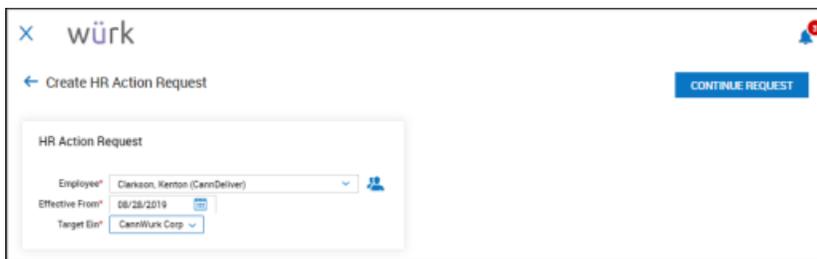
Menu items and on-screen options may vary depending on your configuration and Security Profile.

START HERE

1. From the Main Menu search for *Transfer* and then click the **EIN Transfer** HR action from the search results (or navigate to **Team>HR>HR Actions** and click the **AVAILABLE** tab). Then click Start to begin making the transfer.



2. On the next screen, enter the employee by name (or search  for the employee), the Effective From date of the transfer, and the EIN you want to transfer to. Then click **CONTINUE REQUEST** to proceed.



We recommend that you set the **Effective Date** to the day when the employee begins working under the new EIN (rather than their original hire date etc.). Their *original* hire date is brought over in a separate field. Additionally, if your company provides benefits and these have a set waiting period, you may need to adjust it so that it does not affect transferred employees. For assistance, contact Wurk Support: support@enjoywurk.com.

3. The next screen that appears summarizes important employee information that will be transferred to the EIN, including their tax deductions and payroll settings. You can review and make changes if needed, for example, you may wish to add a new Earning Type, such as for transferring the employee to Salary.

HR Action Request

HR Action into

Employee: Dixon, David (Carr/Deliver)

HR Action: Eln Transfer

Effective From: 06/22/2019

Click **SAVE** to keep working, click **SUBMIT** to send for approval

Set to Employee Sync

COVERAGE LEVEL	DEDUCTION EFFECTIVE FROM	DEDUCTION EFFECTIVE TO	COVERAGE EFFECTIVE FROM	COVERAGE EFFECTIVE TO
Dental	07/01/2019	12/31/9999	07/01/2019	12/31/9999
UMC Medical Silver	07/01/2019	12/31/9999	07/01/2019	12/31/9999
Vision	07/01/2019	12/31/9999	07/01/2019	12/31/9999

DEDUCTION	BEGIN DATE	END DATE	AMOUNTS	LAST PR	MTD	QTD	YTD
401k	07/01/2019	12/31/9999	\$45.79 \$45.79	\$45.79 \$45.79	\$45.79 \$45.79	\$45.79 \$45.79	\$45.79 \$45.79
Health	07/01/2019	12/31/9999	\$92.31 \$138.46	\$92.31 \$138.46	\$92.31 \$138.46	\$184.62 \$276.92	\$184.62 \$276.92
Dental	07/01/2019	12/31/9999	\$4.62 \$4.62	\$4.62 \$4.62	\$4.62 \$4.62	\$9.24 \$9.24	\$9.24 \$9.24
Vision	07/01/2019	12/31/9999	\$2.31 \$2.31	\$2.31 \$2.31	\$2.31 \$2.31	\$4.62 \$4.62	\$4.62 \$4.62

Be sure to set the Sync method to Employee Sync; this pushes the employee's records to the new EIN and creates an ongoing link between the two (so if the employee continues to work in both EINs, data that changes in one can properly update the other). The following data is typically synced (based on Administrator settings in the Employee Sync; **See Also: Defining Profiles**):

Synchronized Information

- Contact Information
- Credentials
- Disabilities
- Education
- Hardware Settings
- Login Information
- National ID Numbers
- Notes*
- Personal Information
- Skills
- Supporting Documents*
- Uploaded Personal Images
- Work Experience

*Only synchronized if attached to other synchronized information.

Close

Additionally, be sure to choose a **Pay Period** for the employee that is active in the new EIN, otherwise, you will get an error.

4. Click **SAVE** to continue working and **SUBMIT** to send the transfer for processing. The transfer will take place on the Effective From date you chose above.

5. Once you click **SUBMIT**, confirm you want to proceed.

Question

You are about to submit HR Action request. Do you want to continue?

6. Proceed to **Mass Editing Employee Information**, for the final step, where you will **SWITCH PRIMARY EINs** to move over all the employee information to the new EIN and assign it as their primary.

COMPANY SETTINGS

← Mass Edit Profiles

MASS EDIT TERMINATE SELECTED EMPLOYEES **SWITCH PRIMARY EIN**

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	Employee ID	Badge	Username	First Name	Last Name	Employee EIN	In Payroll	Lock
	starts with	*	*	starts with	starts with	starts with	All	All
<input type="checkbox"/>	00122		KWaters11	Katie	Waters	D&D	Yes	
<input type="checkbox"/>	00126		HLarkin12	Harold	Larkin	D&D	Yes	
<input type="checkbox"/>	00127		LDubois13	Lauren	Dubois	D&D	Yes	
<input type="checkbox"/>	00127		LDubois13	Lauren	Dubois	Second D&D	Yes	
<input type="checkbox"/>	00128		KClarkson14	Kenton	Clarkson	D&D	Yes	
<input type="checkbox"/>	00130		ANelson15	Ashley	Nelson	D&D	Yes	
<input type="checkbox"/>	00131		TTurner16	Tomas	Turner	D&D	Yes	
<input type="checkbox"/>	00132		CJones17	Cathy	Jones	D&D	Yes	
<input type="checkbox"/>	00133		MDonaldson18	Michael	Donaldson	D&D	Yes	

If you do not complete this final step, the employee's information will not carry over to the new EIN, and payroll totals (such as W2 calculations) will be incorrect.

Once you have transferred the employee, we recommend that you double-check and compare employee records in both EINs and confirm that they are Terminated in the old EIN.

Secondly, you may want to let the transferred employee know that he or she will have a W2, W4, or 1099 for each EIN they work for. You may also want to let stakeholders at the new EIN know you made the transfer.

If you believe that your EIN transfers do not allow for the described process please contact wurk support at support@enjoywurk.com to enquire about your available EIN transfer processes.