

PERSONNEL POLICY #34 – TRANSFER POLICY

1. Initial Request by Current Staff Manager

- The current client home manager identifies the need for a staff transfer due to:
 - Staff performance or compatibility issues
 - Client needs or changes in care requirements
 - Operational or scheduling challenges
- The manager submits a formal transfer request via email to HR, including:
- Staff member's name and role – *have they been in their current role/home 6 months or more.*
- Reason for the transfer
- Preferred timeline for transition

2. HR Review and Assessment

- HR reviews the request and evaluates:
- Discussions with current Manager/ Director
 - Staff member's availability, and performance history
 - Current staffing levels at both the existing and potential new client homes
- HR speaks with the receiving client home manager/director to assess fit and availability.

3. Internal Approval Process

- HR prepares a transfer proposal outlining:
 - Justification for the transfer
 - New assignment details (location, role, schedule)
 - Proposed effective date
- The proposal is reviewed and approved by HR Director/Program Director.

4. Staff Notification

- HR and/or the current manager meet with the staff member to:
 - Communicate the transfer decision and rationale
 - Share details about the new assignment

- Address any concerns or questions
- Staff is given time to consider and formally accept the transfer within 24 hours.

5. Client Home Coordination

- HR notifies both the current and new client home managers of the approved transfer
- A transition plan is created, including:
- Final working day at the current home
- Start date at the new home
- Any necessary handover or training steps, if applicable

6. Documentation and Compliance

- HR will initiate the PAF transfer.
- Fiscal/ Payroll/HR updates internal systems and records with the new assignment
- Staff will sign a transfer agreement.

7. Handover and Orientation

- The current manager conducts a handover briefing with the staff
- The new manager provides orientation, including:
- Additional training, if applicable.
- Introduction to the client(s).
- Review of care plans, routines, and expectations
- Safety and emergency procedures

8. Post-Transfer Follow-Up

- HR checks in with the staff and new manager within the first week
- Feedback is collected to assess the success of the transition; HR will follow up.
- Any issues are addressed promptly to ensure continuity of care and staff satisfaction

Please note: This would apply to current staff that may want to transfer out.

- *Staff member SHOULD contact their Program Manager first, if they don't and they reach out to HR first, then HR would notify the current PM and assess the situation and move forward.*

- *If the staff member declines the transfer assignment and/or a suitable replacement home cannot be provided, the matter will proceed in accordance with established procedures, which may include termination of employment.*