

## HR Front End Transaction – Separating Staff

### Overview

Transaction type: Separation

Routing: Home Org Initiate, Org Review, College Review, Staff HR Apply, Home Org Review, Home College Review, Staff HR Review, Payroll Review, Staff HR Apply

Documents to attach:

- Separation documents appropriate to the separation reason (resignation/retirement letter, etc.)

### HR Front End Detailed Steps

*Note: If you process separations it may be helpful to set your In/Outbox Column Preferences to display the Transaction Enabled Date to help you track progress of Separation transactions.*

1. Search for the employee and open the **Employee Record View**.
2. Select **Transactions»Separation**.
3. Type the employee's last day in the **Separation Date** field.
4. Select a **Job Change Reason** (normally *EJ002* for resignation or *SP003* for retirement).
5. Type a comment about the separation with your contact e-mail address & phone number.
6. Click **Continue**.
7. Verify that all jobs now have a **Job End Date** equal to the separation date entered.
8. Click once on the **Separation** tab.
9. Review the **Separation Date**, **Last Work Date** (both default to separation date entered on previous screen), and **Separation Reason** (this value does not always default and you may need to select or change it).
10. If necessary, add attachment(s) as follows:
  - a. Click **Attachments** tab
  - b. Click **Add Attachment**
  - c. Click **Browse**, select document to attach (either on your hard drive or network drive).
  - d. Click **Open**
  - e. Click **Add**
  - f. Select **Document Type**, and type a **Description**.
  - g. Repeat as necessary for additional documents. Once all are listed, click **Upload**. Check the message at the top of the screen to ensure that no error occurred.
  - h. Click **Done**.
  - i. You may change the **Doc Type** in **Employee Record View** by using the drop down box. You can also edit the **Description**. Then click **Save Attachment**.
11. Click **Route**.
  - a. Should get message Success routing to ORG Review stop.
  - b. Transaction appears in Org reviewer **Group Inbox**. Org reviewer must **Take Ownership**, review, and **Route**. Should get message Success routing to COLLEGE Review stop. If

- other orgs own jobs for this employee they receive an FYI (read-only copy of the transaction).
- c. Transaction appears in College reviewer **Group Inbox**. College reviewer must **Take Ownership**, review, and **Route**. Should get message Success routing to CAMPUS Review stop.
  - d. Transaction appears in Staff HR **Group Inbox**. Staff HR must **Take Ownership**, review, and **Apply**. This ends all of the employee's jobs.
12. Transaction routes to the Home Unit's **Group Inbox**. If the employee is due final regular pay (i.e. the Separation Date is after the Last Paid Date) the transaction hibernates in a read-only state until final regular pay is processed. **Transaction Enabled Date** gives you an idea of when the transaction will come out of hibernation.
  13. When the transaction comes out of hibernation, Home Unit must **Take Ownership** and open the transaction.
  14. Click once on the **Separation** tab.
  15. Answer the **Payout Required** question:
    - a. If the employee has NO remaining vacation (VACA/VACC) or compensable sick leave (SICC) to be paid out, choose *No*.
    - b. If the employee has remaining vacation (VACA/VACC) or compensable sick leave (SICC):
      - i. Answer *Yes*.
      - ii. Verify the weighted hourly rates are correct by selecting or deselecting jobs to include in the hourly rate calculation.
      - iii. The total amount of Vacation and Compensable Sick Leave to be paid out is shown at the bottom of the screen. It is the weighted hourly rate times hours from PEALEAV (policy only allows ½ of compensable sick leave to be paid out).
      - iv. Type a payout comment in the **Separation Memos**, noting anything your college or Payroll would need to know, and click **Add**.
      - v. Enter 'Hours of SICC' to waive in the **Sick to Waive** field. This is normally ZERO unless employee has requested otherwise.
  16. Click **Route**.
    - a. Should get message Success routing to System Created Stop College Review.
    - b. Transaction appears in home college **Group Inbox**. College reviewer must **Take Ownership**, review transaction, and **Route**. Should get message Success routing to System Created Stop Campus Review.
    - c. Transaction appears in campus **Group Inbox**. Campus reviewer must **Take Ownership**, review transaction, and **Route**. Should get message Success routing to System Created Stop PAY Review.
  17. Home unit should monitor the progress of the transaction. When it is at the Payroll stop the unit should process any pay adjustment using PARIS (PUA).
    - a. Transaction appears in Payroll **Group Inbox**.
    - b. Payroll reconciles pay adjustment in BANNER with **Separations** tab and processes the pay adjustment.
    - c. Once all pay has been generated and the appropriate systems are updated Payroll must enter **LPI** date and **Route**.
    - d. Should get message Success routing to System Created Stop Campus Apply.
    - e. Transaction appears in campus **Group Inbox**. Campus applier must **Take Ownership**, review, and **Apply**. Once applied the employee is Terminated in BANNER and all deductions are ended. SURS is automatically notified if applicable.