

HR Front End Transaction – Separating Faculty and Academic Professionals Eligible for SURS or Compensable Leave

NOTE: If the Employee is separating from the University within the next month use the Separation HRFE instructions. If the employee's separation date is greater than one month from now, use Job End Date now to put the end date on all jobs. Then process the Separation about one month before the employee intends to leave.

Overview

The following process is for employees who are

- eligible for compensable leave (check the **Benefit Category** on the **Employee General Information** accordion) and/or
- eligible for SURS (**Retirement Code** field of the **Employee General Information** accordion is not blank)

Transaction type: Separation

Routing: Home Org Initiate, Home Org Review, Home College Review, Academic HR Apply, Home Org Review, Home College Review, Academic HR Review, Payroll Review, Academic 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 – if employee is ending a Notice of Non-reappointment select *EJ001*).
5. Type a comment about the separation that includes contact email and phone number.
6. Click **Continue**.
7. Verify that all jobs now have a **Job End Date** equal to the **Separation Date** entered.
8. If the employee held any 9/12 or 10/12 jobs and the **Separation Date** is other than 8/15, the system generates a deferred pay (DP) job for each 9/12 or 10/12 job. Calculate and enter remaining pay owed for each DP job. If you are unfamiliar with this process contact your college for assistance.
9. Click once on the **Separation** tab.
10. 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).
11. 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**.
12. Routing:
- a. Review all changes and click **Route**. Should get message Success routing to ORG Review stop.
 - b. If initiator has Org Review Permissions, click the **Take Ownership** button in the Employee Record View. Otherwise, the 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 Academic HR **Group Inbox**. Academic HR must **Take Ownership**, review, and **Apply**. This ends all of the employee's jobs.
13. 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 and become workable again.
14. When the transaction comes out of hibernation, Home Unit should update PEALEAV in BANNER to show current academic year usage of vacation and sick leave.
15. Then in HR Front End, Home Unit must **Take Ownership**.
16. Click once on the **Separation** tab.
17. Answer the **Payout Required** question.
- a. If the employee has no remaining vacation (VACA/VACC) or compensable sick leave (SICC) to be paid out answer *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. If no jobs are listed, or if you need to include 0% jobs (such as Administrative Increments or paid faculty 0% jobs), then manually figure the weighted hourly rate and enter this rate in both **Manual Override** fields.
 - 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 the 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.
18. Routing:

8/11/09

- a. Review changes and click **Route**. 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 Academic HR **Group Inbox**. Academic HR must **Take Ownership**, review transaction, and **Route**. Should get message Success routing to System Created Stop PAY Review.
- d. Home Unit should monitor the progress of the transaction. When it is at the Payroll stop the unit should process a pay adjustment using PZAADJT in BANNER.
- e. Transaction appears in Payroll **Group Inbox**.
- f. Payroll reconciles pay adjustment in BANNER with **Separations** tab and processes the pay adjustment.
- g. Once all pay has been generated and the appropriate systems are updated Payroll must enter **LPI** date and **Route**. Should get message Success routing to System Created Stop Campus Apply.
- h. Transaction appears in Academic HR **Group Inbox**. Academic HR 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.