HR Front End Transaction – Separating Faculty and Academic Professionals <u>Ineligible for SURS or Compensable Leave</u>

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
- ineligible for compensable leave (check the **Benefit Category** on the *Employee General Information* accordion) and/or
- ineligible for SURS (**Retirement Code** field of the *Employee General Information* accordion is blank)

Transaction type: Separation

Routing: Home Org Initiate, Home Org Review, Home College Review, Academic HR Apply, Academic HR 2nd 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 for Home Org.

        b. If initiator also has Org Review permissions, click the **Take Ownership** button in the Employee Record View. Otherwise, the transaction appears in Org reviewer **Group Inbox**. Home Org 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**.

        e. Transaction appears in Academic HR **Group Inbox** again for second apply. Academic HR must **Take Ownership**, review, and **Apply**. Once applied the employee is terminated in BANNER.