Separation
Human Resources Front End
How-To Guide

HR Front End Training Team
Separation

HR Front End

How-To Guide

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APPROPRIATE USE AND SECURITY OF CONFIDENTIAL AND SENSITIVE INFORMATION

Similar to Banner, HRFE allows you to access confidential and sensitive information. Guidelines have been created to help you manage your responsibility.

You are responsible for any activity that occurs using your logon

• Do not share your passwords or store them in an unsecured manner.
• Do not leave your workstation unattended while logged on to administrative information systems.

You have access to very sensitive personal information

• Do not share confidential and sensitive information with anyone, including colleagues, unless there is a business reason.
• Retrieve printed reports quickly, and do not leave the reports lying around in plain view.
• Secure reports containing confidential and sensitive information (e.g., FERPA, EEO, or HIPAA protected data).
• Shred the documents in a timely manner when disposing of reports containing confidential or sensitive information.

Any violation could subject you to disciplinary action.

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### HR Front End Separation Quick View

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Introduction

Assumptions

What is a Separation?

Separation transactions are initiated in the HR Front End when an employee is leaving the University. Only the home department of the separating employee can initiate the separation transaction. The separation transaction includes a wizard, which will guide users through the Separation process. Once separated, a returning employee will need to go through the new hire process. The principles and steps related to Separation will be explained in this guide.

NOTE: Changes in Employee Group or Employee Class will no longer be processed through the Separation. If a person is transferring from one job to another, see the Employee Group Changes and Employee Record Changes courses for more information.

Conventions Used in this Guide

Indicates a Note or additional information that might be helpful to you.

Indicates a Hint such as a tip, shortcut, or additional way to do something.

Indicates a Warning of an action that you should not perform or that might cause problems in the application.
Performing a Separation in the HR Front End

Initiating a Separation

As stated before, only the Home Department of the Employee can initiate a separation. The beginning (initiating) steps of a separation transaction will be performed by the Home Department.

1. Use the Employee Search (or Quick Search if you know the employee’s UIN) to locate the employee and open the Employee Record View (ERV).

   The Employee Search screen appears.

   ![Employee Search screen](image)

   Figure 1: Employee Search screen
2. From the **Transactions** menu, select **Separation**.

   *Separation Wizard is displayed.*

3. Enter the **Separation Date** (MM/DD/YYYY) – the date that the employee is being separated from the University.

   **NOTE**: If job(s) have an end date, the Separation Date will default to the job end date, but can be overridden. The Separation Date will be applied to all jobs that do not have a previous end date. Jobs with an end date prior to the Separation Date will not be changed.

4. Select a **Job Change Reason** for the separation.

   **HINT**: For help with Separation Job Change Reason Codes, see Appendix B.

5. Enter **Separation Comments** – Comments will be saved on the transaction **Memo** tab on the Employee Record View and in the **Job Comments** section for each job that is affected by the separation transaction.

6. Click **Continue**.

   **Transaction is saved and Employee Record View is displayed.**

   **WARNING**: Clicking the **Save** button will save the transaction to the Inboxes to be accessed at a later time. Clicking the **Close** button will close the transaction without saving any changes. If the transaction is not saved, all data will be lost.

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**Figure 2: Separation Wizard**
7. Review the Proposed Changes on the Employee Record View.
   Jobs being ended are highlighted in Red. Deferred Pay (DP) job(s) are added for any 9/12 or 10/12 jobs ending prior to the end of the contract year and will display in green. The HR Front End adds the DP jobs automatically, but the pay amounts need to be entered manually.

8. If necessary, expand any deferred pay jobs and enter the correct pay amounts in the Pay Rate fields.
   Pay Rate fields on DP job(s) are updated.

9. Attach supporting documentation, if necessary.
   Documents show in the Attachment Tab. Attachment Tab is displayed in Red to indicate documents exist.

10. Click the Separation tab. Verify or select the correct Separation Reason Code.
    Appropriate Separation Reason Code is displayed.
11. **Save** the transaction.

   Transaction is saved.

12. Click the **Route** button

   Transaction is sent to the next stop along the pre-determined routing path.

---

**Reviewing the Transaction**

Separation Transactions will be routed to an Org Review for all Orgs that own effected jobs, the Home College, and the Campus.

1. Transaction shows in the Group Inbox. Open the transaction and click **Take Ownership**.

   Employee Record View is displayed.

2. Verify that the transaction has been initiated correctly. Click **Route** to move transaction to the next route stop in the predetermined routing path.

   **NOTE:** Use the **Return** button to return the transaction to the previous route stop. Use the **Memo** tab to add a memo to specify the reason for the return.
Initial Apply of the Transaction

Once the transaction has routed to all necessary units and colleges, it will be routed to the Campus Apply stop. The Campus Applier will review the transaction and apply the changes to Banner,

1. Transaction shows in the Group Inbox. Open the transaction and click Take Ownership.

   Employee Record View is displayed.

2. Verify that the transaction has been initiated correctly. Click Apply.

   • Job information is applied to Banner
   • If there are Deferred Pay Jobs, FYI’s are sent to applicable Timesheet Organizations and to Payroll.
   • The transaction hibernates until the Final Regular Pay is processed.
   • Apply Status under proposed changes shows Pass.

   NOTE: Use the Return button to return the transaction to the previous route stop. Use the Memo tab to add a memo to specify the reason for the return.

Figure 5: Success Applying Message
**Hibernation**

Once the Separation transaction is initially applied by Central HR, it goes into a read-only state, called **Hibernation**. It remains in this status until the Final Regular Pay is processed in Banner and will not be editable until the transaction comes out of hibernation. The date that the transaction comes out of hibernation is defined as the **Transaction Enabled Date**, which can be found on the **Separation** tab in the Employee Record View. During hibernation, the transaction remains in the Group Inbox of either the Home Organization or Central HR.

- If the Employee is Compensable Leave or SURS Eligible, the transaction will hibernate in the **Home Department Group Inbox** until the Final Regular Pay is processed.
- If the Employee is **NOT** Compensable Leave or SURS Eligible and there are Monthly/Biweekly (payable) job records, the transaction will hibernate in the **Central HR Group Inbox** until the Final Regular Pay is processed.

**HINT**: Look on the transaction bar in the Employee Record view to see if a Separation transaction is in hibernation.  *See Below.*

**Figure 6: Separation in Hibernation**

**HINT**: Add a **Transaction Enabled** column to your In/Outboxes makes it easy to see when Separation transactions will come out of hibernation. To do this, select **User Preferences** from the **Transaction Menu**. Then select **In/Outbox Columns**. For more information, see the **Additional Components** guide.
**Post-apply Process**

**Employees who are NOT Compensable Leave or SURS Eligible**

When a University employee is not Compensable Leave or SURS eligible and the Final Regular Pay has been processed, the transaction will hibernate in the Campus HR Group Inbox.

The Campus HR processor will:

1. Open the transaction from the Group Inbox and click **Take Ownership**
   
   *Transaction is editable.*

2. Once the transaction has been accessed, click on the **Separation** Tab
   
   *Separation tab is displayed.*

3. Select **No** from the **Payout Required** menu.

4. Click **Apply**.

   *The screen will refresh and success applying message is displayed. Person is terminated and all benefits and deductions are stopped.*

![Figure 7: Final Separation Apply – Non-compensable / SURS eligible employee](image-url)
Compensable Benefit Payout or SURS Eligible Employees

When a University employee is Compensable Leave or SURS eligible, the transaction will hibernate in the Home Department’s Group Inbox until the final regular pay is processed.

Home Department

1. Access the PEALEAV form in Banner to verify / modify leave balances.

   NOTE: PEALEAV balances are only modified for Academic employees. Do not modify PEALEAV balances for Civil Service employees.

2. In the HR Front End, open the transaction from the Group Inbox and click Take Ownership.
   
   Transaction is editable.

3. Once the transaction has been accessed, click on the Separation Tab
   
   Separation screen is displayed.

4. Select Yes or No from the Payout Required drop-down menu
   
   If Yes is selected, the Determination of Payout screen is displayed.

   NOTE: If no payout is required, skip the following steps and click Route.

5. Review / update the Determination of Weighted Rate - If any jobs are not required for the determination for Weighted Rate, click the check box to de-select the job. If a Manual Override is needed for the Hourly Rate, enter the amount in the Manual Override field.

   If Manual Override is entered, calculations in the Information section are updated accordingly.

6. Review the Listing of 0% Jobs to determine if a Manual Override is needed.

7. Enter an explanation of the override for Payroll in the Separation Memos, and then click Add.

   Separation Memo is displayed and is not editable.

8. If employee is waiving any of their Payable Sick time for SURS, enter the Sick to Waive hours in the Determination of Payout section.

   If Sick to Waive time is entered, Payable Sick field is adjusted, as are the calculations in the information section.

9. The Information to be Used to Enter Payout Adjustable in Banner section is used as a guideline for the actual adjustment. The payout amount will adjust based on the information entered in other sections of the payout screen.

10. Click the Route button

    Success Routing message is displayed. Transaction is routed to the College Review Stop.

11. Monitor the transaction in the My Outbox screen. Watch for the transaction to be routed to the Campus Payroll Review stop
12. When transaction is routed to the Payroll Department, complete the adjustment in **PZAADJT** in Banner. Open the transaction in the HR Front End, and use the Separation Tab as a guideline for the adjustment. Forward adjustment to Payroll using Workflow.

![Separation Data Screen](image)

**Figure 8: Separation Data Screen**
Home College and Campus HR Reviews

Once the Home Department routes the Separation transaction, it will route to the Home College for approval and then to the Campus HR office for approval. When the transaction is received by the Home College and the Campus HR office, they will:

1. Open the transaction from the Group Inbox, and click Take Ownership.
   
   Transaction is editable.

2. Click Separation Tab to review the payout information.

3. Click the Route button
   
   Transaction is routed from the Home College to the Campus HR, and then to Payroll.

Payroll Review

Payroll will receive both the HR Front End transaction and the adjustment. At this point, Payroll will:

1. Open the transaction from the Group Inbox, and click Take Ownership.

2. Click the Separation tab,

3. Review pay adjustment information and process the payout.

4. Hold the transaction until Last Paid Information can be entered on the Separation tab.

5. Click Route button.
Figure 9: Separation Tab at Payroll Stop
Campus HR Final Apply of the Transaction

The transaction will be in Central HR’s Group Inbox to be applied. Upon their final review, they are able to apply the transaction. Central HR will:

1. Open the transaction from the Group Inbox, and click Take Ownership.
2. Review and the transaction
3. Once the user has reviewed and/or made changes to the transaction, they may click the Save button.
4. Click the Apply button to perform the initial apply on the transaction.

NOTE: The transaction will again hibernate until SURS separation process runs. At which point the transaction is successfully applied and the Employee is separated from the University.

The screen will refresh indicating that the data has been successfully applied to Banner and the Employee Record View will read Historical Employee Record View.
Appendix A – Business Process Flows
Unit initiates End Job transaction in HRFE using the last work date for Job End Date.

Does Job have end date? [Diamond]

YES

Is end date < original end date on Job? [Diamond]

NO

Transaction is Routed to college/unit level as required

If End Dated record has same end date, no transaction is needed. Cancel Current Transaction

YES

User deletes original JOB END record in HRFE

Transaction is routed to Central HR

FWS? [Diamond]

YES

End FWS allocation in HRFE

NO

Central HR reviews and applies Transaction in HRFE

HRFE updates NBAJOBS

Enrollment Monitoring
Central HR runs report to find active status student employees that are not registered for classes on any campus (once per semester term, including summer)

Central HR notifies units prior to PEASCH process via email

Is there an exception that would keep employee from being PEASCH'd? [Diamond]

NO

End of Process

YES

Central HR will PEASCH employees in Banner

Unit or student provides proof or enrollment or files an exemption for lack of enrollment.

End of Process
Is employee with the temporary pool?

**YES**

Extra Help Services initiates End Job transaction in HRFE

Transaction is directly applied in HRFE

Assigned unit returns employee evaluation to Extra Help Services upon completion of assignment (usually via campus mail)

**NO**

Unit initiates End Job transaction in HRFE

End date should equal last day worked

Transaction is routed to college level (if applicable)

Transaction is routed to Central HR for review

Transaction is Applied by Central HR

Did transaction memo request that employee be terminated?

**YES**

Central HR will PEASCH employee in Banner

**NO**

Central HR applies Separation transaction

Central HR receives “no pay within 18 mos” report
Jobs ended after separation date updated with sep date & selected job change reason

Home Department routes transaction

FYI sent to all depts that own jobs with employee where an end date was entered

Transaction routed to Home College level for review

Home College level approves. Routes to Central HR

Benefits set up as a Central HR user to view transactions in group inbox

Central HR applies transaction

Transaction applied to Banner

Transaction goes into hibernation

Final regular pay processed

Transaction comes out of hibernation

Transaction automatically appears in Home Dept. inbox

End of Process

Transaction automatically appears in Central HR inbox

End of Process

Terminate Employee Record?

Central HR selects to terminate the employee record and deductions on the separations data tab

End of Process
Unit initiates End Job transaction in HRFTE. End date should equal last day worked.

Unit may attach separations form to the transaction. Not required.

Transaction is routed to college level (if applicable).

Transaction is routed to Central HR for review.

Transaction is Applied by Central HR.

Central HR receives report each pay period—Terminated employees with no active jobs.

Central HR PEASCH’s employee in Banner.

Central HR will occasionally send the unit an employee evaluation to determine reemployment eligibility.

Not a formal process at UIS. When Central HR knows person has truly left university, they PEASCH. They are currently talking about receiving a report to show active employee with no active job. Not paid for 18 mos.

Under certain circumstances, employee can be PEASCH’d immediately.

UIS not currently doing this, but is considering it.
Separations
Employee group: Students
Campus: Springfield

Unit initiates End Job transaction in HRFE using the Last Paid date for Job End Date

Does Job have end date?

YES
Unit enters end job information in HRFE

NO

Is end date < original end date on Job?

YES
User deletes original JOB END record in HRFE

NO
Transaction is routed college level for approval if applicable

Transaction is routed to Financial Aid to be applied

Financial Aid reviews and applies Transaction in HRFE

HRFE updates NBAJOBS

Financial aid occasionally will PEASCH employees in Banner. No set process in place to do this

If End Dated record has same end date, no transaction is needed. Cancel Current Transaction

NOTE: Often FWS jobs are ended directly by Financial Aid. If the job is ended based on FWS award is reached.
Separation

Home Department initiates Separation in HRFE

User enters Employee's Separation Date

Separations Wizard Appears.
Separation Date Field Populated with last End Date.

All Jobs have End Dates?

Yes: Jobs Ended After Sep. Date updated with Sep. Date and Selected Job Change Reason

No: User selects job change reason from list of valid separation reasons and enters transaction memo

User attaches documentation:
- Dismissal Letter
- Resignation Letter
- Written form of termination
- SURS Comp Waiver Form

Active 9/12 or 10/12 Job Exists?

Yes: User is requested to come in the Staff HR office to complete resignation forms and complete Exit Survey or packet is mailed to employee (CIVIL SVC ONLY)

No: User taken to ERV. All job changes display.

Separation Date < 8/15?

Yes: DP Job added with DP suffix. FTE and Salary are blank.

No: User taken to ERV. All job changes display.

Notification of separation (Letter of resignation / retirement, etc.) to/from employee

Page 2
Separations

Jobs Ended After Sep. Date updated with Sep. Date and Selected Job Change Reason

Transaction Applied to Banner

Transaction goes into Hibernation.

Final Regular Pay processed

Transaction comes out of Hibernation

Transaction automatically appears in Home Dept. inbox

Vacation or sick leave eligible AND/OR SURS eligible

Transaction automatically appears Central HR inbox

Terminate Employee Record?

End of process

Yes

Central HR selects to terminate the employee record and deductions on the separations data tab

End of process

No

Central HR applies transaction

FYI’s sent to benefits if Benefit Eligible Employee Separation.

Home Dept. User routes transaction

Home College Level approves. Routes to Central HR

Transaction routed to Home College Level for Review.

FYI sent to all Depts. That own jobs with employee where an end date was put in

Transaction goes into Hibernation.

Transaction automatically appears in Home Dept. inbox

End of process

Page 2

Page 3
Unit initiates End Job transaction in HRFE using the Last Paid date for Job End Date

Does Job have end date?

YES

Is end date < original end date on Job?

NO

Unit directly applies transaction in HRFE

NO

Is Job FWS?

YES

Transaction is routed to Central HR

NO

User deletes original JOB END record in HRFE

YES

Central HR corrects authorization end dates in RJASEAR (Financial Aid)

Central HR runs report using PEAEMPL data to find active status student employees that are not registered for classes on any campus (run annually end of August)

Central HR runs report using PEAEMPL data to find active status student employees that are not registered for classes on any campus (run annually end of August)

Central HR will PEASCH employees in Banner

Separations
Employee group: Students
Campus: Champaign / Urbana

If End Dated record has same end date, no transaction is needed. Cancel Current Transaction

HRFE updates NBAJOBS
# Appendix B - Separation Job Change Reason Codes

<table>
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<th>Definition</th>
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<td>EJ001 – End Job</td>
<td>Job requiring an end date (used on the terminated status record)</td>
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<tr>
<td>EJ002 – Employee Resignation</td>
<td>Employee resigns/separates from the University</td>
</tr>
<tr>
<td>EJ003 – Employer Termination</td>
<td>Visa issue, job abandonment, int’l over allowed FTE, falsifying information, extra help problem employee (UIUC); job entered in error (UIUC)</td>
</tr>
<tr>
<td>EJ006 – Job Terminated</td>
<td>Ending non-status job (HA, SA, EH, UA e-classes).</td>
</tr>
<tr>
<td>NR002 – Ending Notice of Non-Reappointment</td>
<td>Ending notice and reappointing</td>
</tr>
<tr>
<td>NR006 – Trunc Job w/o Notice of Non-Reappointment</td>
<td>UIC ONLY- Contract (for employees entitled to formal notice of rights) truncated due to unexpected loss of funding.</td>
</tr>
<tr>
<td>SP001 – Deceased</td>
<td>Death of employee.</td>
</tr>
<tr>
<td>SP003 - Retired</td>
<td>Employee is retiring from the University</td>
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