Separations
HR FRONT END TRAINING
HOW-TO GUIDE
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.
## HR Front End Separation Quick View

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<td>3</td>
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<td>- Transaction is routed, reviewed, and applied to Banner</td>
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**Introduction**

This guide will help you understand and process Separation transactions in the HR Front End. It includes an explanation of the Separation transaction and gives general guidelines about when it is appropriate to use the Separation transaction type. It also provides instructions on how to complete Separation transactions.

**Assumptions**

This guide assumes that you have completed the *HR Front End Overview and Navigation* online course. This prerequisite helps acquaint you with the general functionality of and navigation in the HR Front End. Material presented in the *HR Front End Overview and Navigation* course is not repeated in this guide.

**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]
   
   **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]
   
   **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]
   
   **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.

---

**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.
Figure 4: Separation Tab

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.

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*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 SARS Eligible

When a University employee is not Compensable Leave or SARS 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 / SARS eligible employee
**Compensable Benefit Payout or SARS Eligible Employees**

When a University employee is Compensable Leave or SARS 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 SARS, 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.

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**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

1. Notification of separation (Letter of resignation/retirement, etc.) to/from employees
2. Home Department initiates Separation in HRFE
3. All Jobs have End Dates?
   - Yes: Separations Wizard Appears. Separation Date Field Populated with last End Date.
   - No: User enters Employee’s Separation Date
4. User Selects Job Change Reason From list of Valid Separation Reasons
5. User enters transaction memo, noting whether employee is eligible for rehire
6. Active 9/12 or 10/12 Job Exists?
   - Yes: Separation Date < 8/15?
     - Yes: OP Job Added with DP Suffix. FTE and Salary are Blank.
     - No: User takes to ERV. All job changes display.
   - No: Jobs Ended After Sep. Date updated with Sep. Date and Selected Job Change Reason
7. User attaches documentation:
   - Dismissal Letter
   - Resignation Letter
   - Written form of termination
   - SURS Comp Waiver Form

Separations Academics and Civil Service UIC
Separations

Page 2

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

- Vacation or sick leave eligible AND/OR SURS eligible
  - Yes: Transaction automatically appears Central HR inbox
  - No: End of process

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

- FYI's sent to benefits if Benefit Eligible Employee Separation.

- Transaction automatically appears in Home Dept. inbox

- Home College Level approves. Routes to Central HR

- Home Dept. User routes transaction

- Transaction goes to Home College Level for Review.

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

- Transaction routed to Home College Level for Review.

- Transaction automatically appears in Home Dept. inbox

- End of process

HR Front End Training
Unit initiates End Job transaction in HRFE using the last work date for Job End Date

Does Job have end date?

NO

YES

Is end date < original end date on Job?

NO

User deletes original JOB END record in HRFE

Transaction is Routed to college/unit level as required

Transaction is routed to Central HR

FWS?

NO

YES

End FWS allocation in HRFE

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?

NO

End of Process

End of Process

Central HR will PEASCH employees in Banner

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

YES

HR Front End Training

Separations
Employee group: Students
Campus: UIC

If End Dated record has same end date, no transaction is needed. Cancel Current Transaction
Is employee with the temporary pool?

YES
- Extra Help Services initiates End Job transaction in HRFE
- Assigned unit returns employee evaluation to Extra Help Services upon completion of assignment (usually via campus mail)
- Transaction is directly applied in HRFE

NO
- Unit initiates End Job transaction in HRFE
- Transaction is routed to Central HR for review
- Transaction is Applied by Central HR
- Central HR receives "no pay within 18 mos" report
- If no, Central HR applies Separation transaction
- Central HR will PEASCH employee in Banner

Did transaction memo request that employee be terminated?

YES
- Central HR applies Separation transaction

NO
- Central HR receives "no pay within 18 mos" report
- Central HR applies Separation transaction
- Central HR will PEASCH employee in Banner

Central HR initiates End Job transaction in HRFE
- End date should equal last day worked
- Transaction is routed to college level (if applicable)
- Transaction is directly applied in HRFE

Central HR receives "no pay within 18 mos" report
- Central HR initiates End Job transaction in HRFE
- End date should equal last day worked
- Transaction is routed to college level (if applicable)
- Transaction is directly applied in HRFE

Separations
Extra Help
Campus: Chicago
Jobs ended after separation date updated with separation 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

Transaction automatically appears Central HR inbox

End of Process

Transaction applied to Banner

End of Process

Terminate Employee Record?

Yes

End of Process

Transaction automatically appears in Home Dept. inbox

Final regular pay processed

Transaction comes out of hibernation

Transaction automatically appears Central HR inbox

End of Process

Terminate Employee Record?

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

Vacation or sick leave eligible AND/or SURS eligible

Yes

Transaction automatically appears in Home Dept. inbox

Final regular pay processed

Transaction comes out of hibernation

Transaction automatically appears Central HR inbox

End of Process

Terminate Employee Record?

Yes
Separations

HR Front End Training

Page 3

Home Dept verifies final leave balances

Central HR clicks on Separation tab

Central HR selects jobs to be included in weighted hourly rate for payout

Central HR overrides hourly rate if necessary

Hours for payout waiver to SURS entered (attach waiver form if applicable)

Transaction routed to home dept. for approval

Transaction routed to payroll

HR performs adjustment in Banner PZAADJT

Payroll reviews transaction and pay adjust. Allows adjustment to pay

Payroll enters last pay and clicks route

Transaction routed to Central HR

SOURS process successful?

Yes

Transaction becomes active & Separation tab indicates SURS notified

Central HR applies transaction

FYI’s sent to International Office, BOT, and Benefits as needed

Employee is removed from CS registers (CS only)

Central HR manually enters additional information on SURS website (Academic contract, termination information, and employee type)

End of Process

NO

Terminate Employee record?

YES

Central HR applies transaction and separations document goes to BXS

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

Transaction hibernates until SURS separation process runs

End of Process

Transaction becomes active & Separation tab indicates SURS error

Central HR Applies transaction and separations document goes to BXS
Unit initiates End Job transaction in HRF transaction in HRF.
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

Separations
Extra Help
Campus: Springfield

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’ed immediately

UIS not currently doing this, but is considering it
Employee 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)

Home Department initiates Separation in HRFE

All Jobs have End Dates?

Yes

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

No

User enters Employee’s Separation Date

Yes

User Selects Job Change Reason From list of Valid Separation Reasons and enters transaction memo

No

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

Active 9/12 or 10/12 Job Exists?

Yes

Separation Date < 8/15?

Yes

DP Job Added with DP Suffix. FTE and Salary are Blank.

No

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

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

User taken to ERV. All job changes display.
Jobs Ended After Sep. Date updated with Sep. Date and Selected Job Change Reason

Home Dept. User routes transaction

Transaction Applied to Banner

Transaction goes into Hibernation.

Final Regular Pay processed

Transaction automatically appears in Home Dept. inbox

Transaction automatically appears Central HR inbox

End of process

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

End of process

Transaction routing to Home College Level for Review.

Home College Level approves. Routes to Central HR

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

Transaction comes out of Hibernation

No: Vacation or sick leave eligible AND/OR SURS eligible

Yes: Transaction Applied to Banner

Central HR applies transaction

FYI's sent to benefits if Benefit Eligible Employee Separation.
Separations

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

Does Job have end date? YES

NO

Does end date < original end date on Job? YES

NO

Is Job FWS? YES

NO

User deletes original JOB END record in HRFE

Unit directly applies transaction in HRFE

NO

Transaction is routed to Central HR

Central HR reviews and applies Transaction in HRFE

HRFE updates NBAJOBS

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 will PEASCH employees in Banner

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

Separations
Employee group: Students
Campus: Champaign / Urbana
Separations

Clerical Extra Help?

YES

Extra Help Services initiates End Job transaction in HRFE

Unit initiates End Job transaction in HRFE
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

NO

Transaction is directly applied in HRFE

Central HR waits at least two pay periods before continuing with PEASCH process

Central HR will enter a Separation Transaction through the HRFE

Central HR applies Separation transaction

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

Separations
Extra Help
Campus: UIUC

Under certain circumstances employee can be PEASCH’d immediately
# Appendix B - Separation Job Change Reason Codes

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<th>Reason Code</th>
<th>Definition</th>
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<td>EJ001 – <em>End Job</em></td>
<td>Job requiring an end date (used on the terminated status record)</td>
</tr>
<tr>
<td>EJ002 – <em>Employee Resignation</em></td>
<td>Employee resigns/separates from the University</td>
</tr>
<tr>
<td>EJ003 – <em>Employer Termination</em></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 – <em>Job Terminated</em></td>
<td>Ending non-status job (HA, SA, EH, UA e-classes).</td>
</tr>
<tr>
<td>NR002 – <em>Ending Notice of Non-Reappointment</em></td>
<td>Ending notice and reappointing</td>
</tr>
<tr>
<td>NR006 – <em>Trunc Job w/o Notice of Non-Reappointment</em></td>
<td><strong>UIC ONLY</strong>- Contract (for employees entitled to formal notice of rights) truncated due to unexpected loss of funding.</td>
</tr>
<tr>
<td>SP001 – <em>Deceased</em></td>
<td>Death of employee.</td>
</tr>
<tr>
<td>SP003 - <em>Retired</em></td>
<td>Employee is retiring from the University</td>
</tr>
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</table>
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Appendix C: Screenshots from HRFE Video

Welcome to the:

Separation Transaction course
This course will help to equip you when you will be working with Separation transactions in the HR Front End Application.

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|                              | • What a Separation transaction is  
|                              | • Separation Quick View                                                             |
| 2 – Initiating the Separation Transaction | • How to initiate a Separation transaction  
|                              | • How to enter the date you wish the person to be separated  
|                              | • How to select a Separation reason  
|                              | • How to enter a Separation comment                                                 |
| 3 – Reviewing the Separation Transaction | • The Proposed Changes accordion  
|                              | • Reviewing and editing any information on the Employee Record View  
|                              | • Routing the transaction                                                            |
| 4 – Reviewing the Transaction at the College Level | • How to locate and take ownership of the transaction from the Group Inboxes  
|                              | • How to review the transaction                                                     
|                              | • How to route the transaction to the next stop in the pre-determined routing path  |
| 5 – Applying the Transaction at the Campus Level | • How to locate and take ownership of the transaction from the Group Inboxes  
|                              | • How to review the transaction                                                     
|                              | • How to apply the transaction                                                      |
This course will help to equip you when you will be working with Separation transactions in the HR Front End Application.

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<tr>
<th>CHAPTER</th>
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| 6 – Hibernation Defined | • What Hibernation is  
  • How to identify if the transaction is in Hibernation.  
  • How to see the Transaction Enabled Date in the inbox. |
| 7 – Post-apply Process for Employees who are Not Compensable Leave or SURS Eligible | • How to review the transaction  
  • How to answer the Payout Required question  
  • How to successfully apply the transaction to Banner |
| 8 – Post-apply Process for Employees who are Compensable Leave or SURS Eligible | • How to review the transaction  
  • How to answer the Payout Required question  
  • How to fill out payout information  
  • How to successfully route the transaction to payroll |
| 9 – Payroll Review | • How to review the transaction  
  • How to enter the Last Paid Information  
  • How to successfully route the transaction to Campus HR |
| 10 – Final Apply at the Campus HRIlevel | • How to review the transaction  
  • How to perform the final apply on the transaction |
| 11 – Course Review | • You will participate in activities that will assess your understanding of the content covered in this course |

Click the Next button to continue.
Appropriate Use and Security of Confidential and Sensitive Information

Users are responsible for any activity that occurs during their logon. The HR Front End Application allows users to access confidential and sensitive information. Guidelines have been created to help users manage their responsibility.

- Do NOT share passwords or store them in an unsecured manner
- Do NOT leave workstation unattended while logged on to administrative information systems
- 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
Chapter 1

Common Terminology

In this Chapter, you will learn:

- Common Terminology
- What a Separation transaction is
- Separation Quick View
# Separation Wizard - Button Functionality

<table>
<thead>
<tr>
<th>BUTTON</th>
<th>FUNCTIONALITY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Apply</strong></td>
<td>The Apply feature completes the transaction and applies the data to Banner. The User must have Apply permissions for this button to be active.</td>
</tr>
<tr>
<td><strong>Close</strong></td>
<td>The Close button enables the user to exit the transaction.</td>
</tr>
<tr>
<td><strong>Continue</strong></td>
<td>The Continue button is used to proceed through the screens of a Wizard.</td>
</tr>
<tr>
<td><strong>Delete Transaction</strong></td>
<td>The Delete Transaction button is used to delete a transaction from the system.</td>
</tr>
<tr>
<td><strong>Print Friendly View</strong></td>
<td>The Print Friendly View button opens a separate window that will align the data from the current screen in a format that can be easily printed.</td>
</tr>
<tr>
<td><strong>Route</strong></td>
<td>The Route feature sends the transaction on to the next stop in the predetermined routing for the transaction.</td>
</tr>
<tr>
<td><strong>Save</strong></td>
<td>The Save button is used to save the transaction to be worked on at a time in the future. Saved transactions can be accessed in the User's Inbox (My Inbox)</td>
</tr>
<tr>
<td><strong>Send To</strong></td>
<td>The Send To feature allows the transaction to be sent to a user that is not in the predetermined routing for the transaction.</td>
</tr>
</tbody>
</table>

Click the Next button to continue.
What is a Separation?

Separation transactions are initiated in the HR Front End when an employee is completely 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 as a rehire.
1. Locate the employee’s record and initiate a Separation transaction
2. Complete the Separations wizard and end all jobs
3. Review the Proposed Changes in ERU, editing data if necessary
4. Transaction is routed, reviewed and applied to Banner
5. After final regular pay has run, complete the Separations screen and process payout in Banner.
6. Transaction is routed and reviewed. Payroll enters Last Paid Information
7. Campus HR applies the transaction to Banner
Chapter 1 Review

In this Chapter, you have learned:

- Common Terminology
- What a Separation transaction is
- Separation Quick View
Chapter 2

Initiating a Separation Transaction

In this Chapter, you will learn:

- How to initiate a Separation transaction
- How to enter the date you wish the person to be separated
- How to select a Separation reason
- How to enter a Separation comment
To initiate the Separation transaction, click on Separation from the Transactions Menu.

To begin a Separation transaction, you must first open the employee's record. Once you have selected a UIN that you have permissions to, you will be taken to the Employee Record View.
You have now entered the Separation Wizard. You must enter the date that the employee is being separated from the University.

Enter a Separation Date of 12/31/2009 and then click the Job Change Reason List to continue.

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.
Next you must select a Job Change Reason.

Select Job Change Reason of EJ002 - Employee Resignation
Enter text: Employee leaving university effective 12/31/2009.

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.

Click the Next button to continue.
Chapter 2 Review

In this Chapter, you have learned:

- How to initiate a Separation transaction
- How to enter the date you wish the person to be separated
- How to select a Separation reason
- How to enter a Separation comment
Chapter 3

Reviewing the Separation Transaction

In this Chapter, you will learn about:

- The Proposed Changes accordion
- Reviewing and editing any information on the Employee Record View
- Routing the transaction
You have chosen to separate an employee from the University. Please complete the information below:

**SEPARATION DATE:**
12/31/2009

**JOB CHANGE REASON:**
EJ002 - Employee Resignation

Enter any comments for this transaction. Comments entered here will be saved on the transaction Memo tab on the Employee Record View and in the job comments section for each job affected by this transaction.

Employee leaving university effective 12/31/2009

Once you have entered the comment, you are ready to enter the Employee Record View.

Supporting documentation may be attached from the Attachments tab on the Employee Record View once the Separation Wizard is complete.

* denotes a required field

Click **Continue** to proceed to the Employee Record View.

Click **Continue.**
The **Proposed Changes** accordion summarizes all the changes proposed on this transaction. Click the **Wizard** link to make changes in the wizard.

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.
Once the transaction has been reviewed, click the **Route** button.

On the Separations tab, you will need to verify or select the correct **Separation Reason Code**. Also, notice the **Transaction Enabled Date**. This date is the date the transaction will come out of Hibernation, which is the date the home department can pick up the transaction again.
Once the transaction has been routed you will get a success routing message.

Click the Next button to continue.
Chapter 3 Review

In this Chapter, you learned about:

- The Proposed Changes accordion
- Reviewing and editing any information on the Employee Record View
- Routing the transaction
Chapter 4

Reviewing the Transaction at the College Level

In this Chapter, you will learn:

- How to locate and take ownership of the transaction from the Group Inboxes
- How to review the transaction
- How to route the transaction to the next stop in the pre-determined routing path
Separation transactions will be routed to an Org Review for all Orgs that own effected jobs, the Home College, and the Campus.

Once the transaction has been routed to the College level, it will show up in the Group Inbox for those with the appropriate permissions.

Double-click the transaction.
In order to review the transaction, you must first Take Ownership.
After the college level person has reviewed the transaction, it is ready to be routed to the next stop in the predetermined routing path.

Click the Route button.

Use the Return button to return the transaction to the previous route step. Use the Memo tab to add a memo to specify the reason for the return.
Once the transaction has been routed you will get a success routing message.

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.

Click the Next button to continue.
Chapter 4 Review

In this Chapter, you have learned:

- How to locate and take ownership of the transaction from the Group Inboxes
- How to review the transaction
- How to route the transaction to the next stop in the pre-determined routing path
Chapter 5

Applying the Transaction at the Campus Level

In this Chapter, you will learn:

- How to locate and take ownership of the transaction from the Group Inboxes
- How to review the transaction
- How to apply the transaction
Double-click the transaction.

Once the transaction has been routed to the Campus level, it will show up in the Group Inbox for those with the appropriate permissions.
Click the Take Ownership button.

In order to review the transaction, you must first Take Ownership.
Click the Apply button.

The Campus Applier will review the transaction and apply the changes to Banner. They must verify that the transaction has been initiated correctly.
Once the transaction has been applied you will get a success applying message.

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 for the job information but is blank for the Employee Data Change.
Chapter 5 Review

In this Chapter, you have learned:

- How to locate and take ownership of the transaction from the Group Inboxes
- How to review the transaction
- How to apply the transaction
Chapter 6:

Hibernation Defined

In this Chapter, you will learn:

- What Hibernation is
- How to identify if the transaction is in Hibernation
- How to see the Transaction Enabled Date in the inbox
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 SURA 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 SURA 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.
Add a **Transaction Enabled Date** column to your In/Outboxes. This makes it easy to see when Separation transactions will come out of hibernation. To do this, select **User Preferences** under the Admin Tools. Then select **In/Outbox Columns**.
Chapter 6 Review

In this Chapter, you have learned:

- What Hibernation is
- How to identify if the transaction is in Hibernation.
- How to see the Transaction Enabled Date in the inbox.
Chapter 7:

Post-apply Process for Employees who are NOT Compensable Leave or SURS Eligible

In this Chapter, you will learn:

- How to review the transaction
- How to answer the Payout Required question
- How to successfully apply the transaction to Banner
You will notice that you now have an Employee Data change in the Proposed Changes accordion. The General Info Tab is also highlighted in green.

Click the General Info Tab.

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. You must take ownership of the transaction before you can make any changes.
The Termination dates are populated automatically by the system with the separation date that was entered into the Separation Wizard.

<table>
<thead>
<tr>
<th>E-Class:</th>
<th>BENEFIT CATEGORY:</th>
<th>RETIREMENT CODE:</th>
</tr>
</thead>
<tbody>
<tr>
<td>UA - Unpaid</td>
<td>ZI - No Benefit Deductions</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CITIZENSHIP:</th>
<th>TYPE:</th>
<th>EXP DATE:</th>
</tr>
</thead>
<tbody>
<tr>
<td>US - Citizen</td>
<td>Blank</td>
<td></td>
</tr>
</tbody>
</table>
Click the Separation Tab.
Because the employee does not require a payout, answer No to the Payout Required question.

Select No from the drop down menu.
Click Apply.
The screen will refresh and a success applying message is displayed. The person is terminated and all benefits and deductions are stopped.
Chapter 7 Review

In this Chapter, you have learned:

- How to review the transaction
- How to answer the Payout Required question
- How to successfully apply the transaction to Banner
Chapter 8:

Post-apply Process for Employees who are Compensable Leave or SURS Eligible

In this Chapter, you will learn:

- How to review the transaction
- How to answer the Payout Required question
- How to fill out payout information
- How to successfully route the transaction to payroll
When a University employee is Compensable Leave or SARS eligible, the transaction will hibernate in the Home Department's Group Inbox until the final regular pay is processed.
Because the employee requires a payout, answer Yes to the Payout Required question.

Select Yes from the drop down menu.
The Separation Data screen displays the current balances as entered on the PEALEAV form in Banner.

The Home Department gains access to the PEALEAV form in Banner to verify/modify leave balances prior to completing this screen in the HR Front End.

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

Roll over each number to learn more about each section.
After the home department finishes verifying/modifying the Separation Data information the transaction is ready to be routed.

Click the Route button.
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.

When transaction is routed to the Payroll Department, complete the adjustment in PZAAJDT 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.

Click the Next button to continue.
The transaction will be in Central HR's Group Inbox to be applied. Upon their final review, they are able to apply the transaction.

Click the Apply button.
Chapter 8 Review

In this Chapter, you have learned:

- How to review the transaction
- How to answer the Payout Required question
- How to fill out payout information
- How to successfully route the transaction to payroll
Chapter 9:

Payroll Review

In this Chapter, you will learn:

- How to review the transaction
- How to enter the Last Paid Information
- How to successfully route the transaction to Campus HR
Click the Separation Tab.
Payroll will review the pay adjustment information and process the payout.
They will hold the transaction until the Last Paid Information can be entered.
Enter 10/15/2009 in the LPI field.
Click the Next button to continue.
After the Last Paid Information has been filled out, the transaction is ready to be routed to Campus HR.
Chapter 9 Review

In this Chapter, you have learned:

- How to review the transaction
- How to enter the Last Paid Information
- How to successfully route the transaction to Campus HR
Chapter 10:

Final Apply at the Campus HR Level

In this Chapter, you will learn:

- How to review the transaction
- How to perform the final apply on the transaction
Once Payroll routes it, the transaction will be in Central HR’s Group Inbox to be applied. Upon their final review, they are able to apply the transaction.

Once the transaction has been applied the employee is completely terminated from the system. The Last Work Date, the Termination Reason and the Termination Date on the PEAEMPL form are updated.

Click the Apply button.
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.
Chapter 10 Review

In this Chapter, you have learned:

- How to review the transaction
- How to perform the final apply on the transaction
You have reached the conclusion of the Separation Course. Feel free to navigate to any section of this course. In order to certify your completion of this course, please click the COMPLETE COURSE button below.