

NEA2TRM Entry Procedures for Job or System Termination

Purpose	Page 1
NEA2TRM Form	Page 1
NEI2TRM Form	Page 7
Email Samples.....	Page 7

Troubleshooting:

Warning Messages	Page 8
Error Messages.....	Page 8

Purpose:

The purpose of this process is to stop a job assignment and, possibly, to initiate a full system termination via Banner and Workflow. This process should be used when terminating one of multiple jobs for an employee or when terminating full employment with the University for an employee. ***Do not use this process for employees who are transferring from one department to another within the University system.***

Once the process is initiated in Banner, Workflow will automatically terminate the specific job assignment (a “turnaround” job form will be produced when the NHR2PAF process is run in Banner HR for the effective date range). Workflow will route the termination information to the appropriate contacts based on the specific information entered into the NEA2TRM form. See the Termination Workflow documentation for additional information at <http://www.alaska.edu/hr/workflow/index.xml>.

NEA2TRM (UA System Termination Form)

The purpose of this Banner form is to collect the necessary information to initiate a Workflow in order to end a job assignment and, if appropriate, to process a system termination. Access to this form requires the Banner security class of HR_TERMWF_CLS (Banner Term Class).

If a terminating employee has more than one active job assignment (PCN/Suffix), the data entry for the final job assignment must occur at least three hours after entering any of the employee’s other assignment(s) in the NEA2TRM form.

If one of the jobs is in another department, coordinate the entry in NEA2TRM with the department to ensure that the other job assignment(s) is/are entered before the final job in NEA2TRM. Again, the data entry for the final job assignment must occur at least three hours after entering any of the employee’s other assignments in the NEA2TRM form.

Access Banner PROD and type NEA2TRM in the “Go To:” box. Hit Enter. *Note: All fields noted below are required unless stated otherwise in the procedures.*

ID: Enter the employee ID. The employee name will default into the name field. If you do not have the employee ID, select F9 or the Search button while in the ID field to search the List by Employee in the POIIDEN form. Refer to the Name/ID Search procedures on the proper search process at http://www.alaska.edu/hr/procedures/PDF/banner.data_entry.name_id_search.pdf. Although these procedures refer to the GUIALTI form, POIIDEN can be used for the termination process.

Position/Suffix: Enter the appropriate PCN and Suffix for the position that is to be terminated. If you are unsure of the position number, select the Search icon to open the NBIJLST form. The NBIJLST form allows you to see the employee's work history so you can confirm the proper TKL in the Organization box for each position. Note that you may have to change your query date in the key block to see the job in the date range for which you are looking.

Once you have entered the appropriate ID, PCN, and Suffix, select Page Down. Values will automatically default in some fields on the NEA2TRM form.

Term Code: Enter the appropriate two-digit termination code or select the Search icon for a list of valid termination codes. You may determine the proper termination code from the information provided to you from the employee's supervisor; for exceptions, please see the "Coordination with HR Required" section below.

Once a Term Code is entered, the corresponding Termination Description is displayed. If the description is not displayed, an invalid term code has been entered. Termination Code definitions can be found at http://www.alaska.edu/hr/workflow/pdf/termination_code_definitions.pdf.

Coordination with HR Required

The selection of any of the following termination codes must be determined based on UA Policy and Regulations, Termination Protocols, and coordination with your campus HR office.

FA	Dismissal - Attendance	FN	Dismissal – Not Eligible Employ
FC	Dismissal - Cause	FO	Dismissal – Other
FE	Dismissal - Credentials Revoked	FP	Dismissal - Performance
FF	Dismissal - Unable Perform ADA	FQ	Dismissal - Probationary
FH	Dismissal - Non/Return from FML	FR	Dismissal – Reduction in Force
FI	Dismissal - Inelig for Re-Hire	FS	Dismissal – Temporary At Will
FJ	Dismissal - Job Abandonment	FW	Dismissal – Union Enforcement
FK	Dismissal - Layoff	OT	Other
FM	Dismissal – Non Retention	QB	Resigned – By Mutual Agreement

Resigned or Retirement Codes

If selecting any of the “Resigned” or “Retirement” codes, you are required to forward a resignation letter from the employee to your HR office.

Term Date: Before entering the termination date, look at the value in the Last Paid Date field.

1. If the Termination Date is after or equal to the Last Paid Date,
 - a) enter the Termination Date in the Term Date Field and Last Work Date fields.
2. If the Termination Date is before the Last Paid Date AND:
 - a) is within the pay period in which time entry is currently being keyed, contact your campus payroll office so that the employee’s current pay record can be “re-extracted” in PHA HOUR.
 - b) is not during the pay period currently being processed for payroll, enter the date shown in the Last Paid Date field into the Term Date Field. Next, enter the actual Termination Date for the employee into the Last Work Date field (this date will appear in NBAJOBS in the Personnel Date field).

Last Work Date: Enter the date of the employee’s last work day. *The Last Work Date must match the last payment date (hours worked and/or leave taken) submitted on the employee’s timesheet.* This date will be applied in the Personnel Date field in NBAJOBS for the employee’s TERM job record.

Final Pay Not Required: Check this box if final pay is not required for the employee (i.e., the employee has already received all required pay or you want to “clean up” (terminate) active records for a past employee).

Check box if termination date is more than 10 days from today: Check this box if the employee’s termination date is more than 10 calendar days from today’s date.

Check box if Terminal Leave will be used: Check this box if the employee has requested and been approved to use terminal annual and/or sick leave. Refer to UA Regulations R04.06.120.F. and R04.06.130.G. for more information at <http://www.alaska.edu/bor/policy/04-06.doc>. If the checkbox is selected, an email will be sent to your campus payroll office to alert them of the employee's possible terminal leave usage.

Title (System): No entry required. Defaults from NBAJOBS based on the position/suffix.

ECLS: No entry required. Defaults from NBAJOBS based on the position/suffix.

Job TKL: No entry required. Defaults from NBAJOBS based on the position/suffix.

Contract Type: No entry required. Defaults from NBAJOBS based on the position/suffix.

Job End Date: No entry required. Defaults from NBAJOBS based on the position/suffix.

Last Paid Date: No entry required. Defaults from Banner HR.

Employee MAU_Route: Defaults based on the TKL in NBAJOBS. This field identifies the campus email and workflow routing. If the default is incorrect, select the correct value from the pull-down menu.

Employee Phone: Optional entry. If available, enter the employee's area code in the first field, phone number in the second field (do not include dashes), and extension in the third field (if applicable). The employee phone number should preferably be one that is valid after the employee's termination date.

Employee Email: Optional entry. If available, enter the employee's full email address.¹ This address is used to communicate termination information and provide address update information to the employee as part of the workflow process. The employee email should preferably be one that is valid after the employee's termination date.

¹ Sensitive Terminations – Do Not Enter Employee Email

If entering a "sensitive" termination code, do not enter an email address for the employee (otherwise, the employee will receive a termination email). The following termination codes are considered "sensitive":

FA	Dismissal - Attendance	FP	Dismissal - Performance
FC	Dismissal - Cause	FQ	Dismissal - Probationary
FE	Dismissal - Credentials Revoked	FR	Dismissal – Reduction in Force
FF	Dismissal - Unable Perform ADA	FS	Dismissal – Temporary At Will
FH	Dismissal - Non/Return from FML	FW	Dismissal – Union Enforcement
FI	Dismissal - Inelig for Re-Hire	OT	Other
FJ	Dismissal - Job Abandonment	QB	Resigned – By Mutual Agreement
FK	Dismissal - Layoff	QL	Resigned – By Legal Agreement
FM	Dismissal – Non Retention	QN	Resigned - Occupational Disability
FN	Dismissal – Not Eligible Employ	RD	Retirement - Disability
FO	Dismissal – Other	RS	Retirement - Special

For a full listing of termination code definitions, refer to http://www.alaska.edu/hr/workflow/pdf/termination_code_definitions.pdf.

Employee Exit Letter for Sensitive Terminations

Once the employee is informed of his/her termination by the supervisor, make sure that the employee receives a hard copy of the Employee Exit Letter. The letter is available at http://www.alaska.edu/hr/workflow/pdf/term_employee_notice_ent.pdf.

Supervisor ID: Enter the supervisor's employee ID. If you do not have the supervisor's ID, a search by name can also be conducted on the adjacent field. Refer to the Name/ID Search procedures on the proper search process at http://www.alaska.edu/hr/procedures/PDF/banner.data_entry.name_id_search.pdf. Although these procedures refer to the GUIALTI form, POIIDEN can be used for the termination process.

Supervisor TKL: Display only. Defaults from PEAEMPL based on the supervisor's employee ID.

Supervisor MAU_Route: Defaults based on the supervisor's TKL in PEAEMPL. If the default is incorrect, select the correct value from the pull-down menu.

Supervisor Email: If available, the supervisor's University email account address will default into this field; if necessary, the email address may be overwritten. You may add more than one supervisor email to the field, as long as the emails are separated by a comma and a space (i.e., jane@ak.edu, john@ak.edu). This email address is used for communications during the workflow process and notifies the supervisor of their responsibilities.

Submitter ID: Enter your employee ID. If you are unsure of your ID, a search by name can also be conducted on the adjacent field. Refer to the Name/ID Search procedures on the proper search process at http://www.alaska.edu/hr/procedures/PDF/banner.data_entry.name_id_search.pdf. Although these procedures refer to the GUIALTI form, POIIDEN can be used for the termination process.

Submitter TKL: Display only. Defaults from PEAEMPL based on your employee ID.

Submitter Phone: Enter your university phone number with your area code in the first field, your phone number in the second field (do not include dashes), and your extension in the third field (if applicable).

Submitter MAU_Route: Defaults based on your TKL in PEAEMPL. If the default is incorrect, select the correct value from the pull-down menu.

Submitter Email: If available, the University email account address will default into this field; if necessary, the email address may be overwritten. You may add more than one submitter email to the field, as long as the emails are separated by a comma and a space (i.e., jane@ak.edu, john@ak.edu). This email address is used to notify you that the workflow process has been initiated.

Entry of Multiple Terminations

During the course of a current Banner session, the default supervisor information will be retained in the ID, TKL, MAU_Route, and Email fields. If you are entering more than one termination in the NEA2TRM form for employees with the same supervisor, these fields do not need to be reentered. However, if entering termination information for employees with different supervisors, make sure that the correct data is entered in these fields before saving the record.

NOTE: It is the responsibility of the Submitter to ensure that the employee's supervisor is aware of their responsibility to adhere to the campus policies regarding the collection and recovery of all keys, cards, and/or equipment from the terminating employee and to revise any employee security access associated with the duties of this position.

Employee Address: No entry required. The HR address type defaults from PPAIDEN. If the address is incorrect, the employee (or approved designee) must complete a Change Form and submit the form to the appropriate campus Human Resource office as soon as possible (the Change Form is available at www.alaska.edu/hr/forms/PDF_ent/change_form_ent.pdf). The address change may also be noted on the Resignation Letter or in an email from the employee.

Address Changes for Terminating Employees

The HR address is used for mailing pay checks/pay stubs and all other HR-related documents such as W-2's, benefits information, etc. Since the effective date of the address change in the Banner HR system will directly affect the mailing of the employee's final pay, verify with the employee whether the address change should occur immediately (before the employee's final pay is processed) or should occur at a future date (future communications, after final pay).

Address Change Information: If applicable, enter the employee's new address using current U.S. postal standards define on the USPS web site at <http://pe.usps.gov/cpim/ftp/pubs/Pub28/Pub28.pdf>.

The first three lines are available for street address entries. The fourth and fifth lines are for city and state or province. Enter the two-digit state abbreviation or select the Search button (down-arrow) for a list of state and province abbreviations.

Enter the appropriate zip code in the sixth line or select the Search button (down-arrow) to search a list of U.S. zip codes. If you enter a 5-digit zip code first, the appropriate city and state will default. If the zip + 4 code is available, enter a dash between the zip and + 4 code.

If the employee has a non-U.S. address, enter the Nation in the seventh field; do not enter a value in this field if the employee has a U.S. address.

Before Final Pay: Select this radio button if the address change will become effective before the employee's final pay is processed.

Future Communications (post final pay): Select this radio button if the address change will become effective after the employee's final pay is processed and should be used for future communications, such as W-2's, etc.

Select Save (F10) once all of the required fields are entered. If the required fields are not entered correctly, an error message will be displayed. Correct the information indicated and Save the record again. Once you Save the record, the workflow is automatically started.

If any errors have been made once the termination record is entered and saved, you must contact your local campus Human Resource office *immediately* for intervention.

You can always review the data that was keyed into the NEA2TRM form by going to NEI2TRM. This is an inquiry form that shows you any previous entries made for any PCN/Suffix combination for a given

employee. The NEI2TRM form can be accessed in Banner from the Direct Access field or from the Options list of some HR forms.

**** NEA2TRM Data Entry Completed ****

The termination is automatically routed via Workflow. The termination information entered in NEA2TRM will be reviewed by the appropriate MAU HR office before insertion into the Banner system.

After confirmation by the HR office, the termination entry waits until the insertion process runs at either 9 a.m., 10 a.m., 11 a.m., 1:30 p.m., 4 p.m., or 8:30 p.m. (whichever time occurs first after your entry and the HR office confirmation is completed).

The Workflow process will assess if the employee's job assignment already has an end date or any future effective date records, remove any records or dates as necessary, and insert a new end date if appropriate.

During the process, you, the employee, the employee's Supervisor, your campus Human Resources office, and the appropriate campus clearance and notification contacts will receive an email notice of the employee's termination.

Samples of emails from the Stop Job and System Term workflow are available at <http://www.alaska.edu/hr/workflow/index.xml#block3>.

NEI2TRM Form

Previous entries made in NEA2TRM can be viewed from the NEI2TRM form in Banner.

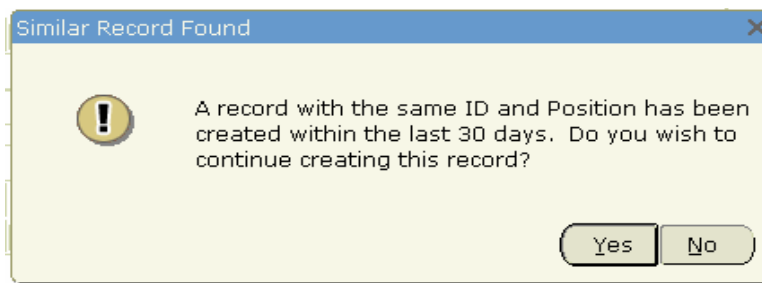
NEA2TRM Troubleshooting

Below are some Warning and Error messages you may encounter in the NEA2TRM form.

Warnings:

Previous Entry of Same Termination Information

The following pop-up window will appear if an entry for the same employee ID, Position, and Suffix has been entered and saved in NEA2TRM within the past 30 days. You will need to verify whether the entry of a duplicate record is warranted. Selecting “Yes” from the pop-up window will display the NEA2TRM form. Once the data entry is completed and the record is saved, another workflow for the employee’s PCN/Suffix combination will be initiated.



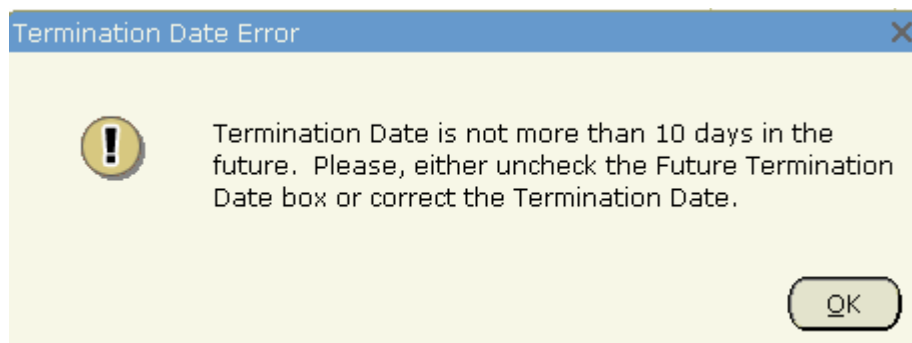
Error Messages:

Error Message Locations

Error messages are displayed on either the auto-help line at the bottom of the screen or in a pop-up window in the middle of the screen.

Termination Date Error Message

If you have selected the future termination check box and the termination date is not more than 10 days in the future, the following error message window will appear.



Select OK. Make the appropriate corrections to the form and save the record.

You can always review the data that was keyed into the NEA2TRM form by going to NEI2TRM. This is an inquiry form that shows you any previous entries made for any PCN/Suffix combination for a given employee. The NEI2TRM form can be accessed in Banner from the Direct Access field or from the Options list of some HR forms.