HR Termination Workflow Overview

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Each step noted below is referenced with the corresponding number in the Process Timeline Sample, HRJT Workflow, and HRST Workflow documents.

Key:

Pattern/Color:
- None/ White – occurs outside of Workflow Process
- Horizontal Lines/Yellow – Occurs in Banner
- Dots/ Light Blue – Occurs in Stop Job Workflow (HRJT)
- Vertical Lines/Light Red – Occurs in System Termination Workflow (HRST)

Document | Workflow Automation | Process | Manual Action

Employee Submits Resignation or is Terminated (1)

Supervisor, PPA, CCC or HR Personnel Tech enters termination (2)

Note:

Automated process begins once information is entered and then saved in the new Banner form, NEA2TRM.

WF HR Job Termination Workflow Begins (2)

Note:

The process will automatically assess and update the following, if needed:
- Employee has more then one job assignment open.
- Remove any future dated job records for terminating position beyond termination date.
- Clear the contract end date for terminating position.

During this processing the WF will determine which MAU to engage for processing.

Departmental email addresses are gathered for appropriate offices:

Budget	Recruitment	Supervisor
Personnel	HR Director	Submitter (PPA/CCC)
Payroll		

WF Stop Job Process Preliminary Steps (2)

HR Personnel Technician reviews job assignment and confirms termination to be processed (3)

Note:

Selected from Workflow worklist and confirms termination data through the NOAEPAF form in Banner.

Stop Job Workflow Sends Emails (4)

Note:

If this is a sensitive termination, the HR Director is notified via email.
If this is a benefit-eligible position, the Budget office is notified for future recruitment and budget issues.
The Supervisor of terminating job assignment is notified by email that employee assignment is ending.
The Submitter (PPA/CCC) receives a confirmation email if employee has other open job assignments.
The Payroll office is notified by email to anticipate a final timesheet for this employee. If this employee is benefit-eligible and this is a future termination, the Payroll office is notified, under a separate email of any potential terminal leave usage.
If this is the employee's primary job assignment, the Personnel office is notified by email to assess and reassign another secondary position as primary.
If this termination is for reasons that could impact a future re-hire of the employee, the Recruitment Office is sent an email.
If this employee is charging time to a restricted fund, either by job assignment or payroll, the MAU Grants and Contracts office is sent an email.

Job Assignment Record for Terminated Status is Applied to Banner (5)

Note:

The Electronic Approval application process will insert the termination record into the database.
This process is run at 9AM, 10AM, 11AM, 1:30 PM, 4:00 PM and 8:30 PM

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WF HR System Termination Process Begins (6)

Note:

This process will begin if the employee is terminating the last of multiple job assignments or the only job assignment with the University.
Email address information is gathered from Banner.
If employee is benefit eligible, process will automatically insert an end date for Health Care coverage and Flexible Spending Accounts.

Termination Workflow Sends Emails (7)

Note:

The process sends an email to the Employee and Submitter (PPA/CCC)

List of Terminations Generated for UA Departments (8)

Note:

The process to generate the termination lists is produced each noon and night and distributed via email to appropriate departments. Such departments include Business Offices, Campus Card, Library, Keys, Security Coordinators, Travel, Parking, etc. A full list of recipients is available on-line.

HR Technician Actions for Address Change and Final Timesheet Receipt (9)

Note:

The payroll offices acknowledge the receipt of the final timesheet.
The personnel offices can make address changes prior to the final pay processing, if applicable.

Email Receipt from Clearance Departments (10)

Note:

Payroll offices will receive via email any outstanding balance amounts to be collected from employee during final pay process.

Workflow Pre-Payroll Processing (11)

Note:

The workflow process obtains any leave balance amounts from Banner and displays within workflow form for determining final pay-off by payroll office.
The payroll office signify which payroll process to use for final pay (regular or adjustment).
The payroll office acknowledges any outstanding balances or charges to be collected from final pay and is automatically taken to appropriate Banner form for set-up prior to keying final pay.

Data Entry for Final Pay (12)

Note:

The pre-determined and appropriate Banner forms are available from the Workflow worklist for setting up new deductions and processing final pay.

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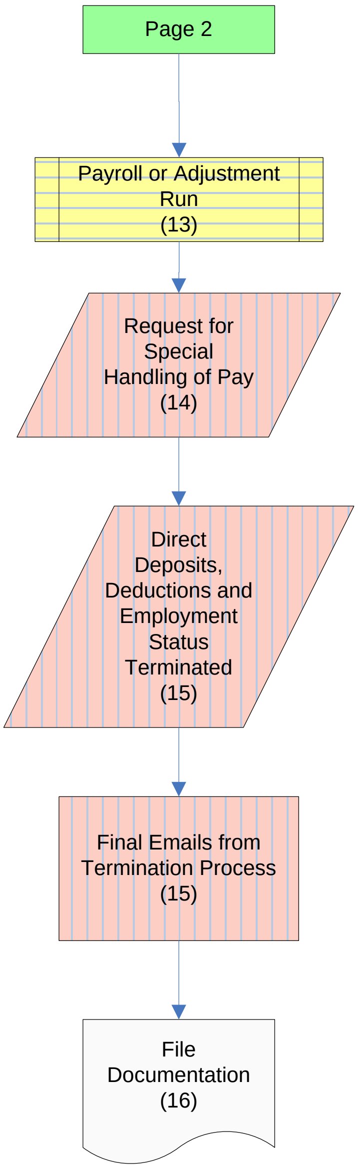

Note:

Payroll processing takes place.

Note:

The Payroll Office has an opportunity to email SWOHR with any special handling instructions for employee pay.

Note:

Payroll offices will clear leave balances and inactivate any direct deposit account set-ups for individuals terminating employment, if applicable.

Personnel will terminate all appropriate deductions and make any address information changes, if applicable.

If employee is terminating employment due to retirement, Personnel will enter appropriate retirement information.

Note:

An email is sent to the MAU and SW Foundation/Deveoplment Office if employee has an open payroll deduction.

A final email is sent to the records retention office containing termination information.

Note:

Termination information is printed and Personnel file is marked compliant to records retention policies.