

Separate an Employee (PA40)

Purpose

Use this procedure to separate an employee from any type of classification with the University. It is not used for employees transferring to another department or campus or taking a leave of absence. Initial termination information is gathered after or prior to the actual termination date and then entered in the SAP R/3 system. This transaction does not affect the employee's benefits, but it does allow reporting to notify Benefits personnel that a benefits termination action needs to occur.

For example, John Brown resigns his position with the University and will not continue to be paid. He is not accepting a different paid position at any other department or campus of the University.

Prerequisite:

Before proceeding, please contact the department Time Coordinator and verify that before the Leave Payout form was completed they check the employee record and removed any future approved leave entries, based on the employees last working day.



If this check is not performed and the employee has future approved leave, then the Time Coordinator will have to redo and resubmit the Leave Payout request form once they have removed the future approved leave entries. Then changes will have to be made by the Central Office and Human Resource in addition to the department re-entering the separation action.

SAP Menu:

Start the transaction using the menu path or transaction code below.

- Human Resources → Personnel Management → HR Master Data → Personnel Actions

Transaction Code:

PA40

Helpful Hints & Reminders:

When viewing a field definition table, use the following guidelines for reading the **R/O/C** column:

- R** = Required
 - O** = Optional
 - C** = Conditional
- Do NOT page forward on any screen unless instructed to in the following pages.

Personnel Actions

Personnel no. 11232
Michael K Jones Active
UNMC REG MGR PROF SALARY
PEDIATRICS
From 06/30/2016

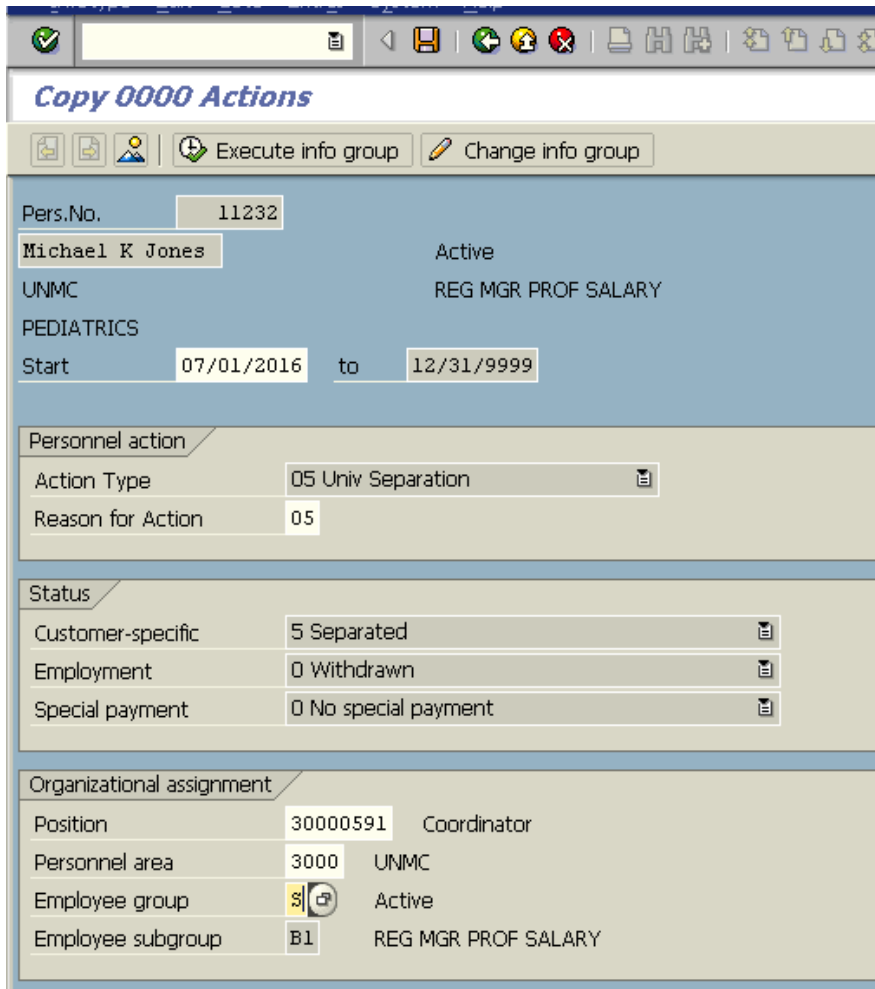
Personnel Actions	Personn...	EE group	EE subgr...
Univ Hire			
Univ Student Hire			
Univ Ancillary Hire			
Univ Volunteer Hire			
Univ. NRA Hiring Addendum			
Univ NRA Implementation			
Univ Funding Change			
Univ Empl% (FTE)/Sched Change			
Univ Rate/Salary Change			
Univ Org Change			
Univ Separation			
Univ Separation with Pay			
Univ LOA without Pay			

2. As required, complete/review the following fields:

Field Name	R/O/C	Description
Personnel no.	R	Enter a personnel number. Example: 11232
From	R	Enter employee's last work date. Example: 06/30/2016

- Click the margin box beside **Univ. Separation**.
- Click  (Execute).

Copy 0000 Actions




The Start date changes to the date the employee is no longer employed, which is the day after the employee's last work day, for payroll purposes.

5. As required, complete/review the following fields:


Field Name	R/O/C	Description
Reason for Action	R	Enter appropriate action code. Example: 05
Employee group	C	Enter S for Separated, if needed. Example: S





The Personnel area, Employee group and Employee subgroup field will default to values assigned to position.

6. Click  (Continue). Message **'Person and position have different employee groups/subgroups'** appears.

7. Click  (Continue). Message **'Record valid from mm/dd/yyyy to 12/31/9999 delimited at end'** appears

8. Click  (Enter). If information entered is complete, message **'Save your entries'** appears on the message bar at the bottom of the screen.

9. Click  (Save).

10. Click  (Enter). If warning message(s) are repeated, click  (Enter) until advanced to the next screen.

Copy 0001 Organizational Assignment

Copy 0001 Organizational Assignment

Org Structure

PersNo: 11232 Michael K Jones
UNMC Active
PEDIATRICS REG MGR PROF SALARY
Start: 07/01/2016 to 12/31/9999

Enterprise structure

CoCode: 1000 University of Nebraska
Pers.area: 3000 UNMC Subarea: 2080 PEDIATRICS
Cost Ctr: 3319530506 Epley Histology Ser Bus. Area: 3200 UNMC-Auxiliary Operations

Personnel structure

EE group: S Separated Payr.area: M0 Monthly
EE subgroup: B1 REG MGR PROF SALARY Benefit %: 1A 100% Ben (12...)

Organizational plan

Position: 99999999 Integration: default p...
Job key: 49095786 Coordinator
Org. Unit: 50000021 Department B2 UNMC...
Org.key: 3000



Position field defaults to 99999999 in order to remove this employee as a holder for the position number.

11. Click (Enter). Message '**This entry deletes a record**' appears. Previous record for this screen is NOT deleted even though you have received this message.
12. Click (Enter). If information entered is complete, message '**Save your entries**' appears on the message bar at the bottom of the screen.
13. Click (Save).

Change 9001 Appointments

Infotype Edit Goto Distribution list Extras System Help

Change 9001 Appointments

PersNo: 11232 Michael K Jones
 UNMC Active
 PEDIATRICS REG MGR PROF SALARY
 Chngd 03/08/2013 MUSER60
 From 03/01/2013 to 06/30/2016

Paid Positions


No	Start Date	End Date	Position	Tmod	Pos Desc	Org Unit Des	ESG	Bud Salary	FTE %	D0
1	03/01/2013	06/30/2016	30000591		Coordinator	Department B2 UNMC-T	B1	42,000.00	100.00	
2										
3										
4										
5										
6										
Totals								42,000.00	100.00	

Unpaid Positions

No	Start Date	End Date	Title	Tmod	Org Unit	Org Unit Desc	D0
1							
2							
3							
4							

14. As required, complete/review the following fields:

Field Name	R/O/C	Description
To	R	Change the end date 12/31/9999 to the employee's last working day.
End Date	R	Change the end date for each appointment to employee's last working day. Example: 06/30/2016

15. Click  (Enter). If information entered is complete, message 'Save your entries' appears on the message bar at the bottom of the screen.

16. Click  (Save).

Change 0041 Date Specifications

PersNo 11232 Michael K Jones
 UNMC Active
 PEDIATRICS REG MGR PROF SALARY
 Start 03/01/2013 to 12/31/9999 Chng 03/08/2013 MUSER60


Date type	Date	Date type	Date
01 Leave Accrual Date	03/01/2013	40 First working day	03/01/2013
I9 I-9 Date	03/01/2013	UD Univ. Service Date	03/01/2013
42	06/30/2016		




Do NOT enter employees last working day into the “To” field.

17. As required, complete/review the following fields:

Field Name	R/O/C	Description
Date type	R	Enter 42 for last working date. Example: 42
Date	R	Enter date of employee's last working day. Example: 06/30/2016

18. Click  (Enter). If information entered is complete, message ‘**Save your entries**’ appears on the message bar at the bottom of the screen.

19. Click  (Save). You will be returned to the Personnel Actions screen and the transaction is complete.



If the employee has provided you with a forwarding address you will need to enter this through “Maintain Master Data.” If it is a foreign address please email it to the HR Records department at hrrecords@unmc.edu for processing.

20. Scan your document(s) to the employee’s ADIS record and assign them to the appropriate template, please see instruction guides under the “Appendix D ADIS Handbook” located in the HR SAP Resource Guide.