



## **process\_separation**



# Table of Contents

**process\_separation** ..... i



## Human Resources &gt; Maintenance &gt; PMIS Change in Position &gt; Separation

## Current Position

Maintenance > PMIS Change in Position SessionTimer: 56 min and 50 sec

Change in Compensation Non-Comp Funding Changes Non-Comp Position Changes Separation

Pay Frequency: 6 - Monthly CYR Employee: 000830 : STEVENSON, SHELLEY EDITH Retrieve Notes

Effective Dt: 04-05-2019 Payoff Dt: 04-25-2019 Termination Dt: 04-05-2019 Early Contract Payoff: Action Reason: 01 - EMPLOYEE VACATED (SYS) TRS Status: 1 - Eligible

Current Positions

Details	Position Number	Position Description	Billet	Sch YR	Job Code	Status
	PDISTRICT	ASST SUPERINTENDENT	00401	2019	4100 - ASSISTANT SUPERINTENDENT	A

Occupant Information

Recalculate Position: ☐ Vacate: ☐ Effective Date: 04-05-2019 Worked 1 Day: ☐ Ignore Pct of Day for Salary Calcs: ☐ Ignore Pct of Yr for Salary Calcs: ☐

Job Code: 4100 - ASSISTANT SUPERINTENDENT Primary Job: ☒ Percent Day Employed: 100 Percent Year Employed: 100 Calculate

Pay Concept: Midpoint Pay Grade: AP6 Contracted emp: State Step: 12 Begin Date: 07-02-2018 End Date: 04-05-2019 Payoff Date: 04-25-2019

Max Days: 226.0 Days Off: 0.0 Nbr Days Employed: 226.00 Hours Per Day: 0.000 Hourly/Daily Rate: 397.407 Actual Salary: 89,813.98 Remaining Payments: 1


Primary Campus: 990 - TEXAS ISD ADMINISTRATION Dept: Calendar Code: CO TRS Member Post: 01 - Professional staff Incr Pay Step: ☒

Distribution Information

Delete	Activity Code	Account Code	Grant Code	Workers' Comp	Expense 373	Employer Contribution	Percent	Amount	Dup Acct
<input type="checkbox"/>	80 - Base Salary	199-41-6119.00-701-999000		A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	100.000	89,813.98	
Totals:							100.000	89,813.98	

Next Execute Cancel

Complete the following fields:

Field	Description
<b>Pay Frequency</b>	Click  to select a pay frequency.
<b>Employee</b>	Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee and click <b>Retrieve</b> . Or, click <a href="#">Directory</a> to perform a search in the Employees directory.
<b>Effective Dt</b>	Type the effective date for the change in compensation in MMDDYYYY format.  For example, what is the last day that should be considered for payoff calculations? If this employee is terminating employment, use the termination date.

☐ Be sure to click **Retrieve** to view and update the next few fields. If not retrieved, payoff dates are not available in the **Payoff Dt** drop-down field.

<b>Payoff Dt</b>	Type the payoff date, which is typically the date of the final check.
<b>Termination Date</b>	Type the date on which the employee will terminate employment.  <b>Note:</b> This field can be left blank if the employee is on a leave of absence and is being paid off for now, but will be returning to the LEA at a later date. Or, if the employee is being paid off for one contract to begin a new contract with the LEA.

<b>Early Contract Payoff</b>	Select to indicate that the change is for an early contract payoff.
<b>Action Reason</b>	Select the reason for separation from the position. The action reason codes are maintained on the <a href="#">District Administration &gt; Tables &gt; PMIS &gt; Action Reason</a> page.
<b>TRS Status</b>	This field displays the employee's TRS status. The field is populated based on the employee's payroll record.

☐ Click **Notes** to enter any details related to the separation. The notes can be used as a form of communication between the personnel and payroll departments. The notes are displayed on the [Payroll > Maintenance > Approve CIP Transaction](#) page under **CIP Notes**.

☐ Click **Retrieve**. The **Remaining Payments** and **Payoff Date** under **Occupant Information** are updated. If the payoff amount is equivalent to the standard gross of two or three regular pay periods, manually update the number in the **Remaining Payments** field to 2 or 3 in order to correctly calculate the income tax and State Min 373 amounts.

**Position Management**

Year: C

**CHANGE IN COMPENSATION** **NON-COMP FUNDING CHANGES** **NON-COMP POSITION CHANGES** **SEPARATION**

Pay Frequency: 6 - Monthly CYR Employee: 000445 - HIGBEE, JEFFREY STEVEN Retrieve Notes

Effective Dt: 12-17-2021 Payoff Dt: 12-17-2021 Termination Dt: 12-17-2021 Early Contract Payoff: ☐ Action Reason: 24 - TERMINATION TRS Status: 1 - Eligible

**Current Positions**

Details	Position Number	Position Description	Billet	Sch YR	Job Code	Status
	PAUXILIARY	MAINTENANCE WORKER	00701	2022	5300 - MAINTENANCE WORKER	A

**Occupant Information**

Recalculate Position: ☐ Vacate: ☒ Effective Date: 12-17-2021 Worked 1 Day: ☐ Ignore Pct of Day for Salary Calcs: ☐ Ignore Pct of Yr for Salary Calcs: ☐

Job Code: 5300 - MAINTENANCE WORKER Primary Job: ☒ Percent Day Employed: 100 Percent Year Employed: 100 Calculate

Pay Concept: Midpoint Pay Grade: AX4 Non-Contracted emp State Step: ☐ Begin Date: 07-01-2021 End Date: 12-17-2021 Payoff Date: 12-17-2021

Max Days: 256.0 Days Off: 0.0 Nbr Days Employed: 256.00 Hours Per Day: 0.000 Hourly/Daily Rate: 146.450 Actual Salary: 37,491.20 Remaining Payments: 1

Primary Campus: 995 - 995 School Dept: ☐ Calendar Code: 12 TRS Member Pos: 03 - Support staff Incr Pay Step: ☒

**Distribution Information**

Delete	Activity Code	Account Code	Grant Code	Workers' Comp	Expense 373	Employer Contribution	Percent	Amount	Dup Acct
	80 - Base Salary	199-51-6129-51-999-299000		C	<input type="checkbox"/>	<input checked="" type="checkbox"/>	100.000	37,491.20	
Totals:							100.000	37,491.20	

Add

☐ Click **Next**. The Supplements page is displayed.

Maintenance > PMIS Change in Position SessionTimer: 59 min and 55 sec

Change in Compensation | Non-Comp Funding Changes | Non-Comp Position Changes | Separation

Pay Frequency: 6 - Monthly CYR Employee: 000830: STEVENSON, SHELLY EDITH Retrieve Notes

Effective Dt: 10-11-2018 Payoff Dt: 10-25-2018 Termination Dt: 10-11-2018 Early Contract Payoff: ☐ Action Reason: 23 - TERMINATED TRS Status: 1 - Eligible

**Current Supplements**

Details	Position Number	Position Description	Billet	Sch YR	Job Code	Status
	COMM	CELL PHONE	00004	2019		A

Occupant Information

Recalculate Position: ☐ Vacate: ☐ Effective Date: 10-11-2018 As of First of Year: ☐

Extra Duty Code: 27 - CELL PHONE Type: B - Non-TRS taxable bus allow Primary Campus: 101 - TEXAS ELEMENTARY Dept:

Attached To Position:  Billet:  Emp Nbr/Name:

Pay Amount Based on Employee Pay: ☐ Max Amount: 300.00 Supplement Pay Amount: 300.00 Percent Year Employed: 100 Supplement Recalculate: ☒

One Time Supplement: ☐ Pay Date:  Max Payments: 12 **Remaining Payments: 1** Max Days: 0.0 Nbr Extra Days: 0.0 Calculate

Distribution Information

Delete	Activity Code	Account Code	Grant Code	Workers' Comp	Expense 373	Percent	Amount	Dup Acct
<input type="checkbox"/>	79 - Other Supplemental	199-23-6135.00-999-999000		A	<input type="checkbox"/>	100.000	300.00	
Totals:						100.000	300.00	

+ Add

Back Next Execute Cancel

If a supplement position exists, update the number of **Remaining Payments** and click **Execute**. The Separation Report is displayed with the salary that the employee would have earned if they worked a full year. It also displays the salary that the employee actually earned if they did not complete the contract year. The new pay rate is also displayed.

Date Run: 05-06-2019 12:28 PM Change In Position - Separation Report Page: 1 of 1  
 Cnty Dist: ISD

Frequency: 6 Emp Nbr: 000830 Employee Name: STEVENSON, SHELLY EDITH  
 Pos Sch Yr: 2019 Action Reason: 01 User ID:  
 FICA/Med: M TRS Status: 1 - Eligible Employment Date: 04-05-2019  
 Unemp Elig: ☒ Wholly Sep Amt: 0.00 Dock Rate: 397.407  
 Early Contract Payoff: ☐

Notes:

----- Job Code Information: -----

Job Code: 4100 - ASSISTANT SUPERINTENDENT Effective Date: 04-05-2019 As of First Of Yr: ☐  
 Pay Type: 1 - Contracted employee TRS Mem Pos: 01 - Professional sta Contract Date Begin: 07-02-2018 Vacate: ☒  
 Pay Grade: AP6 Pct Day Empld: 100.00 % Contract Date End: 04-05-2019 Primary Job: ☒  
 Pay Step: Pct Yr Empld: 100.00 % Payoff Date: 04-25-2019 Ovtm Elig: ☐  
 Pay Sched: Job Pct Assgnd: 100.00 % Days Earned Adjustment: 0.00 Ovtm Rate: 0.00  
 St Step: 12 Hrs Per Day: 0.000 Nbr Mos In Contr: 12 State Basic Days: 226  
 Pay Rate: 993.500 State Min Sal: 36,467.10 Nbr Ann Pymts: 12 Nbr Days Empld: 172  
 Hrly/Dly Rate: 397.407 Contr Amt: 68,354.00 Nbr Rem Pymts: 1 Incr Elig: ☒  
 Hrly Rate: 0.000 Contr Bal: 993.50 Wholly Sep Amt: 0.00

History From Pay Date: 07-25-2018 to 03-25-2019 Paid: 67,360.50 Reg Hrs Wrk: 0.00 Ovtm Hrs Wrk: 0.00

----- Position / Supplement Information: -----

Position: PDISTRICT Billet: 00401 Position Type: Regular Position  
 Descr: ASST SUPERINTENDENT Campus ID: 990 - TEXAS ISD ADMINISTRATION Dept:  
 Job Code: 4100 - ASSISTANT SUPERINTENDENT Extra Duty Cd: Type:  
 State Min Sal: 36,467.10 Pct Day Empld: 100.00 % Ovtm Elig: ☐ Rate: 0.00  
 Hrly Rate: 0.000 Pct Yr Empld: 100.00 %  
 Hrly/Dly Rate: 397.407 X Days: 172.000 X Percent: 100.00 % = Adj Contract Amt: 68,354.00  
 Hrly/Dly Rate: 397.407 X Days: 226.000 X Percent: 100.00 % = Annualized Contract Amt: 89,813.98  
 Annualized Amt: 89,813.98 / Max Pymts: 12 X Percent: 100.00 % = Pay Rate: 7,484.499  
 Pay Rate: 993.500 X Nbr Rem Pymts: 1 = Adj Contract Balance: 993.50  
 Annualized 1 Time Pay Date: Amt: 0.00 Recalculate Position: ☐ Supplement Recalculate: ☒  
 Ign Pct Day for Salary Calcs: ☐ Ign Pct Yr for Salary Calcs: ☐

----- Distribution Information: -----

Xmtil	Account Code	Acty	W/C	TRS Grt Cd	Extra Dty Cd	Exp 373	Emplr Contrib	Acct Type	Pct	Amt
<input type="checkbox"/>	199-41-6119.00-701-999000	80	A			<input type="checkbox"/>	<input checked="" type="checkbox"/>	G	100.000 %	68,354.00
Totals:									100.000 %	68,354.00

End of Report

Review the report for accuracy. If the information is correct, click **Process**. A message is displayed indicating that the Change in Position was successfully processed.

**Note:** In rare situations, the information calculated in a payoff may include special circumstances making it impossible for the system to perform the calculation. If the separation process is not used, it is important to manually update the position in the current year PMIS if the Staff Job/Pay Data fields were manually updated.