



## **process\_separation**



# Table of Contents

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



## Human Resources > Maintenance > PMIS Change in Position > Separation

Complete the following to process an employee separation.

### Current Position

Maintenance > PMIS Change in Position SessionTime: 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, SHELLY 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: ☐ Vacated: ☐ 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 Pos: 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 |          |

+ Add

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.<br><br>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.<br><br><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.

**Maintenance > PMIS Change in Position** 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     

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  

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 |          |

☐ 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.