



# **ASCENDER - Position Management: Process Separations**



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# PMIS - Process Separations

This guide provides users with the necessary steps to remove an employee from all positions and calculate the employee's last paycheck. There are two types of separations:

- Separation due to termination (for contract, noncontract, or salaried employees). Contracted positions are determined by the pay rate code in the appropriate salary table (e.g., daily/hourly, midpoint, or annual).
- Separation due to contract payoff.

When a separation transaction is approved, the job codes are updated for the payoff amounts and information.

## Before You Begin

Review calendars for CIP calculations.

Before calculating a payoff in the system, it is important to consider any non-work days that the employee may have used. The following example is for an employee who works 226 days per year. When the calendar is created, any non-work days are entered as Not Applicable as there is no way of knowing when the employee will use non-work days. These days may be entered at the end of the school year.

In this example, for Calendar Code CO, the begin date is July 2, 2018 and the end date is June 28, 2019. June 24-27 are black indicating that Not Applicable was selected.

Selected Calendar Code: CO CENTRAL OFFICE(226)																																																																																																																																																								
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 | Legend                |                     |  |  |  |  |  |  |  |  |  |  | |-----------------------|---------------------|--|--|--|--|--|--|--|--|--|--| | Begin Date            | Not Applicable      |  |  |  |  |  |  |  |  |  |  | | Begin Date In Service | Not Applicable      |  |  |  |  |  |  |  |  |  |  | | Workday               | Workday             |  |  |  |  |  |  |  |  |  |  | | In Service            | In Service          |  |  |  |  |  |  |  |  |  |  | | Holiday               | Holiday             |  |  |  |  |  |  |  |  |  |  | | Bad Weather Day       | Bad Weather Day     |  |  |  |  |  |  |  |  |  |  | | Weekend               | Weekend             |  |  |  |  |  |  |  |  |  |  | | End Date              | End Date            |  |  |  |  |  |  |  |  |  |  | | End Date In Service   | End Date In Service |  |  |  |  |  |  |  |  |  |  | | Not Applicable        | Not Applicable      |  |  |  |  |  |  |  |  |  |  | | Undo Selection        | Undo Selection      |  |  |  |  |  |  |  |  |  |  | |  |  | | Workdays By Month |    |  |  |  |  |  |  |  |  |  |  | |-------------------|----|--|--|--|--|--|--|--|--|--|--| | July              | 19 |  |  |  |  |  |  |  |  |  |  | | August            | 23 |  |  |  |  |  |  |  |  |  |  | | September         | 19 |  |  |  |  |  |  |  |  |  |  | | October           | 23 |  |  |  |  |  |  |  |  |  |  | | November          | 17 |  |  |  |  |  |  |  |  |  |  | | December          | 14 |  |  |  |  |  |  |  |  |  |  | | January           | 19 |  |  |  |  |  |  |  |  |  |  | | February          | 20 |  |  |  |  |  |  |  |  |  |  | | March             | 16 |  |  |  |  |  |  |  |  |  |  | | April             | 20 |  |  |  |  |  |  |  |  |  |  | | May               | 21 |  |  |  |  |  |  |  |  |  |  | | June              | 15 |  |  |  |  |  |  |  |  |  |  | |  |  || | Day Count       |     |  |  |  |  |  |  |  |  |  |  | |-----------------|-----|--|--|--|--|--|--|--|--|--|--| | Workday         | 226 |  |  |  |  |  |  |  |  |  |  | | In Service      | 0   |  |  |  |  |  |  |  |  |  |  | | Holiday         | 24  |  |  |  |  |  |  |  |  |  |  | | Weekend         | 102 |  |  |  |  |  |  |  |  |  |  | | Not Applicable  | 11  |  |  |  |  |  |  |  |  |  |  | | Bad Weather Day | 2   |  |  |  |  |  |  |  |  |  |  | | Total Days:     | 365 |  |  |  |  |  |  |  |  |  |  | |  |  |  |  |  |  |  |  |  |  |  |

If the employee used three non-work days (March 18, 19, and 20), those days need to be identified in the system since employees are not paid for non-work days. Additionally, it is important to temporarily mark June 24, 25, and 26 as workdays (blue) while calculating this payoff, and change March 18, 19, and 20 to Not Applicable (black). In the following payoff example, the employee's last

day of work is April 5th so the workdays in June are not considered for the payoff since no days were worked in June.

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## Process an Employee Payoff

### 1. Review payoff information.

If you are performing an early payoff and need to add a new pay date to the [Payroll > Tables > Pay Dates](#) page, you can do so at this time.

If performing an early contract payoff, it is important to verify that the payoff, pay, and accrual dates are the same prior to processing the payoff through Payroll.

[Payroll > Maintenance > Staff Job/Pay Data > Job Info](#)

#### Example:

Salary (**Total**) = \$37,491 Balance = \$21,869.75

This employee was paid \$15,621.25 (Standard Gross to-date from the YTD Payroll Earnings Register). The monthly pay rate is \$3,124.25 and the daily rate is \$146.450.

The termination date is December 17, 2021 and the employee has worked 121 days.

121 days based on a daily rate of \$146.450 = \$17,720.00.

(Note that the \$17,720.00 is rounded in this example. If the **Round Salary to Nearest Whole Dollar** field is selected on the [District Administration > Options > PMIS District Options](#) page, the calculation of the salary will be automatically rounded in this process. If **Round Salary to Nearest Whole Dollar** field is not selected, then the salary amount used in the calculation will be \$17,720.45. This will explain any differences in a manual calculation versus the system calculation on the Separation Report. If the paid amount of \$15,621.25 is subtracted, this employee is owed \$2,098.75.

2. Perform a CIP separation.

[Position Management > Maintenance > PMIS Change in Position > Separation](#)

Complete the following to process an employee separation.

**Current Position**

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.

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

Pay Frequency: 8 - 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
<input type="button" value=""/>	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:  Percent Year Employed:

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:  Days Off:  Nbr Days Employed: 256.00 Hours Per Day:  Hourly/Daily Rate:  Actual Salary: 37,491.20 Remaining Payments:

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
<input type="button" value=""/>	80 - Base Salary	199-51-6129.51-999-299000	C	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	100.000	37,491.20	
Totals:									100.000    37,491.20

- Click **Next**. The Supplements page is displayed.
- If a supplement position exists, update the number of **Remaining Payments** and click **Execute**. The Separation Report is displayed. In addition to the new pay rate, the salary that the employee would have earned if they worked a full year as well as the salary that the employee actually earned if they did not complete the contract year is displayed.

Date Run: Cnty Dist:		Change In Position - Separation Report ASCENDER ISD				Page: 1 of 1				
Frequency: 6	Emp Nbr: 000445	Employee Name: HIGBEE, JEFFREY STEVEN								
Pos Sch Yr: 2022		Action Reason: 24			User ID: Employment Date: 12-17-2021					
FICA/Med: M		TRS Status: 1 - Eligible			Dock Rate: 146.450					
Unemp Elig: <input checked="" type="checkbox"/>		Wholly Sep Amt: 0.00								
Early Contract Payoff: <input type="checkbox"/>										
Notes:										
----- Job Code Information: -----										
Job Code: 5300 - MAINTENANCE WORKER			Effective Date: 12-17-2021	As of First Of Yr: <input type="checkbox"/>						
Pay Type: 2 - Non-contracted emp	TRS Mem Pos: 03 - Support staff	Contract Date Begin: 07-01-2021		Contract Date End: 12-17-2021		Vacate: <input checked="" type="checkbox"/>				
Pay Grade: AX4	Pct Day Empld: 100.00 %	Payoff Date: 12-17-2021		Days Earned Adjustment: 0.00		Primary Job: <input checked="" type="checkbox"/>				
Pay Step:	Pct Yr Empld: 100.00 %					Ovtm Elig: <input checked="" type="checkbox"/>				
Pay Sched:	Job Pct Assgnd: 100.00 %					Ovtm Rate: 27.46				
St Step:	Hrs Per Day: 0.000	Nbr Mos In Contr: 12								
Pay Rate: 2,098.750	State Min Sal: 0.00	Nbr Ann Pymts: 12				State Basic Days: 226				
Hrly/Dly Rate: 146.450	Contr Amt: 17,720.00	Nbr Rem Pymts: 1				Nbr Days Empld: 121				
Hrly Rate: 18.306	Contr Bal: 2,098.75	Wholly Sep Amt: 0.00				Incr Elig: <input checked="" type="checkbox"/>				
History From Pay Date: 07-23-2021	to 11-19-2021	Paid: 15,621.25	Reg Hrs Wrk: 0.00	Ovtm Hrs Wrk: 0.00						
----- Position / Supplement Information: -----										
Position: PAUXILIARY	Billet: 00701	Position Type: Regular Position								
Descr: MAINTENANCE WORKER		Campus ID: 995 - 995 School	Dept: <input checked="" type="checkbox"/>							
Job Code: 5300 - MAINTENANCE WORKER		Extra Duty Cd:	Type: <input checked="" type="checkbox"/>							
State Min Sal: 0.00	Pct Day Empld: 100.00 %		Ovtm Elig: <input checked="" type="checkbox"/>	Rate: 27.46						
Hrly Rate: 0.000	Pct Yr Empld: 100.00 %									
Hrly/Dly Rate: 146.450	X Days: 121.000	X Percent: 100.00 %	= Adj Contract Amt: 17,720.00							
Hrly/Dly Rate: 146.450	X Days: 256.000	X Percent: 100.00 %	= Annualized Contract Amt: 37,491.20							
Annualized Amt: 37,491.20	/ Max Pymts: 12	X Percent: 100.00 %	= Pay Rate: 3,124.267							
Pay Rate: 2,098.750	X Nbr Rem Pymts: 1	= Adj Contract Balance: 2,098.75								
Annualized 1 Time Pay Date: <input type="checkbox"/>	Amt: 0.00	Recalculate Position: <input type="checkbox"/>	Supplement Recalculate: <input checked="" type="checkbox"/>							
Ign Pct Day for Salary Calcs: <input type="checkbox"/>	Ign Pct Yr for Salary Calcs: <input type="checkbox"/>									
----- Distribution Information: -----										
Xmtal	Account Code	Acty	W/C	TRS Grt Cd	Extra Dty Cd	Exp 373	Emplr Contrib	Acct Type	Pct	Amt
<input type="checkbox"/>	199-51-6129.51-999-299000	80	C		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	G	100.000 %	17,720.00	
Totals: 100.000 % 17,720.00										

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. Keep in mind that manual updates made in Payroll will not be displayed in PMIS historical records.

### 3. Approve a CIP transaction.

[Payroll > Maintenance > Approve CIP Transaction](#)

After processing the Change In Position - Separation Report, the information is displayed on the Approve CIP Transaction page, which is the final step before the employee record is updated on the Payroll > Maintenance > Staff Job/Pay Data page.

If the LEA has a personnel and a payroll department, it is possible that the personnel

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department submitted the information on the Change in Position - Change in Compensation page. This step allows the payroll department to review the salary calculation for the employee and perform one of the following actions:

- **Mark Reviewed** - If the payroll department needs additional time to review the information before approving it, enter a date in the **Date Reviewed** field and click **Mark Reviewed**. This informs the personnel department that the payroll department is still reviewing the information.
- **Approve** - If you click **Approve**, the Staff Job/Pay Data fields from the position. A message indicating that the transaction was approved is displayed.
- **Reject** - If the information is incorrect, click **Reject**. You are prompted to enter the rejection date and reason. Once an item is rejected, it must be reviewed on the Position Management > Maintenance > PMIS Payroll Rejections page. If you need to reverse and remove it from a pending status, click **Rollback**. All changes from the initial Change in Position request are reversed.

After processing, the following pages/fields are updated.

- If the employee had extra duty pay, the amounts are reflected on the Pay Info tab.
- The **Balance** and **Pay Rate** displays the payoff amount. The **End Date** is populated with the new date and the **Payoff Date** displays the employee's new payoff date.
- The distribution amount should display the amount that the employee earned for the current year based on the number of days worked.

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## Additional Verification & Updates