SEPARATION ACTION
PER-81 | TRANSACTIONS ZPAA076, SWBP, PA30

PA

The purpose of this Business Process Procedure is to explain how to process a Separation Action in the Integrated HR-Payroll System.

Trigger: There is a need to process a Separation for one of the reasons listed in the Business Process Procedure Overview section.

Business Process Procedure Overview:

Separation - from State service occurs when an employee leaves for the following reasons: resignation, voluntary resignation w/o notice, separation due to unavailability, retirement, reduction-in-force, dismissal, appointment ended, and death.

- An employee provides notice that they will be leaving the State of North Carolina employment or an appointing department issues a letter to an employee telling them they will no longer be employed and the reason why.
- HR receives employee data and gathers additional information if needed.
- HR initiates PCR for approval via Workflow.
- HR receives approval via Inbox.
- HR executes Separation Action.

NOTE: If the individual is retiring, and has requested a one-time deferral, the deferral MUST be processed after the separation action has been completely processed in the system, including all payouts. If it is processed prior to the separation process being active in the system, the deferral will be taken from their last check, and potentially the entire check will be sent to their retirement system.

This action automatically converts the direct deposit to a check in 90 days from the Separation Action effective date. It is important to verify that the address is correct.

The following reasons are available for Separation:

- **01 - Better Employment** – accepted employment from private company.
- **02 -Personal Reasons** – leaving for personal reasons.
- **03 - Involuntary Separation** - (1) the employee's inability to return to all of his/her work schedule due to a medical condition or the vagueness of a medical prognosis; or (2) the employee and the agency cannot reach agreement on a return to work arrangement that meets both the operating needs of the agency and the employee's medical/health needs.
- **04 - Did not Report** – no show
- **05 - Voluntary resigned without Notice** - employee who is absent from work and does not contact the employer for three consecutive scheduled workdays can be separated from employment as a voluntary resignation.
- **06 - Reduction in Force (RIF)** - employee reduced in force for reasons of shortage of funds or work, abolishment of a position, or other material changes in duties or organization (Requires OSHR approval).
- **07 -No Reason Given** – employee didn't give a reason.

- **08 - Long-Term Disability** – employee has exhausted short-term disability and has been approved by the Retirement System to be separated to Long-Term Disability.
- **09 - Retirement** - The last day of work shall be the date separated, except in cases where an employee is exhausting leave prior to retirement. If the last day of work is the last workday in the month, the employee shall be paid for the full month. SEE NOTE ABOVE ABOUT DEFERRALS.
- **10 - Retirement Disability** – employee receives disability until they meet retirement eligibility.
- **11 - Contract Ended** – end of contract.
- **12 - Time Limited Appt. Term** – end of time-limited appointment.
- **13 - Supplemental Appt. Term** – end of temporary appointment.
- **14 - Appointment Ended** - separation occurs when an employee is terminated for reasons other than just cause from one of the following positions:
  - Exempt positions appointed by the Governor,
  - Policy-making positions,
  - Confidential assistants and secretaries, or
  - Chief deputy or chief administrative assistant.
  - Certain Judicial Branch positions.
- **15 - Not Re-Elected** – employee wasn't re-elected.
- **16 - Dismissed – Gross Inefficiency** – separated for gross-inefficiency.
- **17 - Dismissed – Conduct** – separated for conduct.
- **18 - Dismissed – Unsatisfactory Performance** – separated for unsatisfactory performance.
- **20 - Prior to achieving perm status** – employee involuntarily separated during probation at the initiation of management.
- **21 - Pay in lieu of notice** – employee is paid for notice instead of working the notice (Requires OSHR approval).
- **22 - Death** - The last day of work or the day of death shall be the date separated. If the last day of work is the last workday in the month, the employee shall be paid for the full month.
- **23 - Other** – no other reason is applicable.
- **24 - Terminate while on FMLA** – employee did not return from FMLA.
- **25 - Beacon to Non-Beacon Agency** – employee transfers to a Non-Beacon Agency. Note-- IT2012 (Time Transfer Specifications) has been added so pro-rated longevity will not be paid.
- **26 - Cancel Separation Pay Continuation** – moves separated employee from inactive to withdrawn status and will no longer receive pay from the Integrated HR-Payroll System.
- **27 – Removal from Office – AOC Only** - This reason should be used only by the Judicial Branch for elected/appointed officials removed from office.
- **28 – RIF – Discontinued Service Retirement** – employee is reduced in force and has been approved by the Office of State Budget and Management to receive discontinued service retirement. (Requires OSHR Approval).
- **29 – Unavailable to Work** – Employee becomes or remains unavailable for work after all applicable leave credits have been exhausted and agency management does not grant a leave without pay, or does not extend a leave without pay period, for reasons deemed sufficient by the agency.
- **40 – 115C Dismissal** – Dismissal of a teacher or school administrator who was hired in a position subject to the G.S. 115C public education human resources system. **Note**—Specific reason for the dismissal as outline in G.S. 115C-325$^{©}$ (1) must be placed in the comments section.

Tips and Tricks:

- Prior to initiating any workflow, ensure the data being used is valid and appropriate. For example, if working with a Separation action, ensure the individual is currently listed as a valid employee (and not already separated).
- Ensure the following have been completed:
  - all timesheets have been entered, released and approved

Access Transaction:

Via Menu Path: Your menu path may contain this custom transaction code depending on your security roles.

Via Transaction Code: ZPAA076

![info icon] **Information**	**Important!** Please review the employee's action history **prior** to creating the Separation PCR to ensure that the Action/Reasons below have been canceled**.** • ZC – Salary Adjustment/07 – Acting Pay • ZC – Salary Adjustment/04 – Temp In-Range for Job Change • Z1 – Promotion/03 – Acting Promotion

Procedure
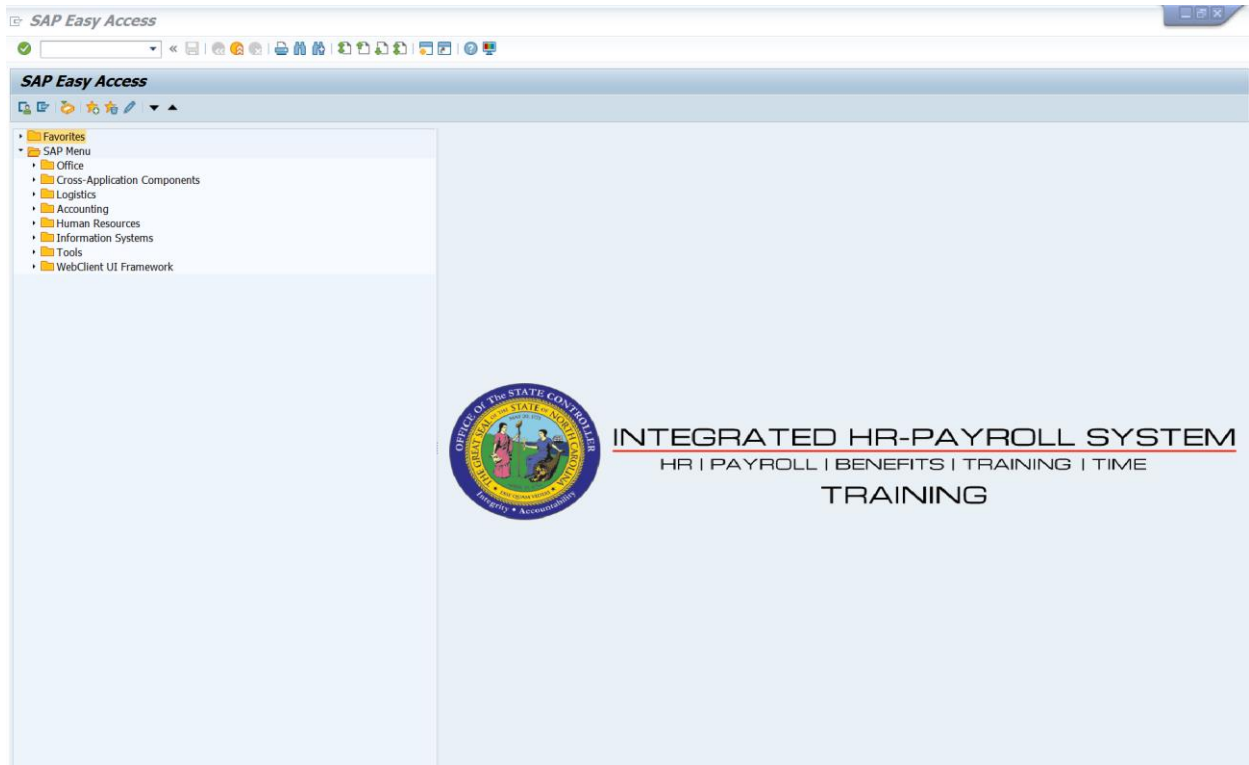
1. Update the following field:

Field Name	Description	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	Enter value in Command. **Example**: ZPAA076

2. Click the **Enter** ✅ button.

ℹ️ **Information**	You may want to enter this transaction code in your Favorites folder. • Choose Favorites > Insert Favorites • Type in ZPAA076 • Click Enter. To see the transaction code displayed in front of the link in your favorites: • Choose Edit > Settings • Place a check next to Display Technical Name • Click Enter

3. Update the following fields:

Field Name	Description	Values
Personnel No.	Unique employee identifier	Enter value in Personnel No. **Example**: 80000610
Effective on	The date on which the action will be effective	Enter value in Effective on. **Example**: 6/30/2011
Action Type	An action is a grouping of activities to perform a specific task. The action will prompt you for the Infotypes required to complete the task.	Enter value in Action Type. **Example**: ZG
Reason	Reason for the action, such as Better Employment	Enter value in Reason. **Example**: 01

4. Click the **Enter** ✅ button.

Enter the Personnel Number of the individual to be separated. Click Enter to retrieve the name of the individual and verify you have the correct Personnel Number.

Although the **Effective Date** is the next day **after** the last working day, the system will take this into account automatically, so you must enter the last day worked. For example, if my last day worked was 6/30/11, then the date entered would be 6/30/11, and the system will change the date to 7/01/11 when processing the action.

The system defaults the current date, but you can change the date to a day in the past or in the future.

There are several available **Reasons** from which to choose. For specific information on each reason, view the business process overview section at the beginning of these instructions.

Click **Enter** and verify the information is correct before proceeding.

NOTE: Enter the SSN and name for New Hire Actions only.

5. Click the **Create** button.

If the information is correct, click **Create** to begin the process.

Leave the **Existing PCR No.** field blank if you are creating a new PCR.

Several fields on this screen are mandatory. The system will not let you continue if you have not provided data for the mandatory fields. If you are unsure which fields are mandatory, click Enter, and the system will prompt you for information in the mandatory fields.

Employee Action Request

Initiate WF

PCR Number [ ]
Personnel Number [80000610] Susan Castro   Action: [ZG] Separation (NC)
Last 4 digits(SSN) [ ] [ ] [ ]   Reason: [01] Better Employment
Effective on [06/30/2011] Chng [ ] [ ]   St : [ ]

	CURRENT			PROPOSED	
Pers.Area	4601	Cultural Resources	Pers.Area	4601	Cultural Resources
Subarea	NC01	7day Norm	Subarea	NC01	7day Norm
EE Group	A	SPA Employees	EE Group	A	SPA Employees
EE Subgroup	A1	FT N-FLSAOT Perm	EE Subgrp	A1	FT N-FLSAOT Perm
Org. Unit	20010310	CR CDS A&H MOH Design Sec	Org. Unit	20010310	CR CDS A&H MOH Design Sec
Job	30001528	Museum Specialist	Job	30001528	Museum Specialist
EE Position	65001875	Lighting And Interactive Design…	EE Position	65001875	Lighting And Interactive Design…

Basic Pay

Pay Scale type [01] Graded   Pay Scale type [01] Graded
Pay Scale Area [01] Annual Salaries   Pay Scale Area [01] Annual Salaries
Pay Scale Group [GR66] Level [GR]   Pay Scale Group [GR66] Level [GR]

Annual Salary [31,959.00] Hrly Sal [0.00]   Annual Salary [31,959.00] Hourly Salary [0.00]
Calc Step - 0   Calc Step - 0   [0.00]
                                              Min [32,796.00]
                                              Max [51,446.00]   Next Inc Date [ ]

Dates

Last day worked [06/30/2011] 🗇

6. Update the following field:

Field Name	Description	Values
Last day worked	Individual's last day of work	Enter value in Last day worked. **Example**: 06/30/2011

7. Click the **Save (Ctrl+S)** 🖫 button.

The only field which requires entry on this Employee Action Request screen is the **Last day worked** field. Enter the date of the last day the individual was physically at work.

You may need to scroll down the screen to view this field.

NOTE: DO NOT change the EE Position field to 99999999. The system will change it within the processing of the action after it has been approved.

8. Click the **(Enter)** button.

Information	You can save this information as many times as you wish. Each time you will receive a confirmation of the save. You will not be able to create a note attachment until you have saved it at least once. If you have submitted the PCR to workflow already, you will not be able to change the details, nor save any new information, only display the existing details.
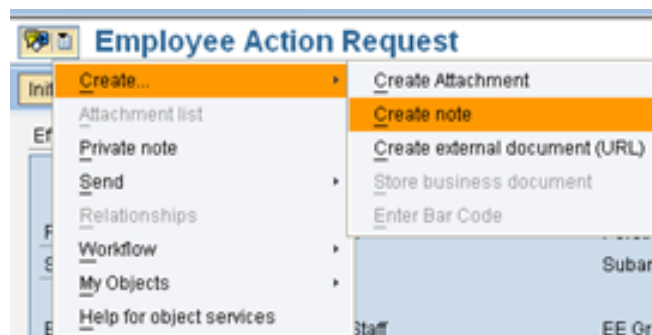
9. Click the **Services for Objects** button.

10. Click **Create… >> Create note**.

You can enter any information that would be useful to the approvers downstream using the notes area or attachment area. If you just need to type some information in, or copy and paste from an email, create a note. If you want to add a document as an attachment, use the attachment area.

This note and attachment area gets attached to this specific PCR only. It will follow the PCR through the approval/rejection process and live with the PCR into the future. When the PCR has been approved and you are processing the Action (such as a New Hire action), you will need to recreate any notes or attachments if they need to be attached to the Action record as well.

Notes entered during PA Workflow must follow OSHR's Action Notes Template:
https://www.osc.nc.gov/documents/action-notes-template

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11. Update the following fields:

Field Name	Description	Values
Title of note	The short text to act as the title of the attachment	Enter value in Title of note. **Example**: reason for separation note
Long text	An open text field	Enter value in Long text. **Example**: the appropriate note

12. Click the **(Enter)** button.

13. Click the **Save (Ctrl+S)** 💾 button.

14. Click the **(Enter)** ✅ button.

15. Click the **Initiate WF** [Initiate WF] button.

    Select the **Initiate Workflow** button to send the Separation Action through the approval process. No changes can be made after the PCR has been submitted for approval, unless the PCR is rejected at any stage and sent back to you (the initiator/requestor).

16. Click the **Enter** [✓] button.

Employee Action Request

Existing PCR No.

Personnel No.

Last 4 digits (SSN) ___ First ___ Last ___

Effective on 06/09/2011

Action Type ___

Reason ___

17. Click the **Back (F3)** button.

18. The Initiation of the Separation Action is complete.

     After Workflow Approvals have been received, proceed with the complete Separation action process.

Instructions for Completing the Action

Access Transaction:

Via Menu Path: SAP menu ==> Office ==> SBWP – Workplace

Via Transaction Code: SBWP, PA40
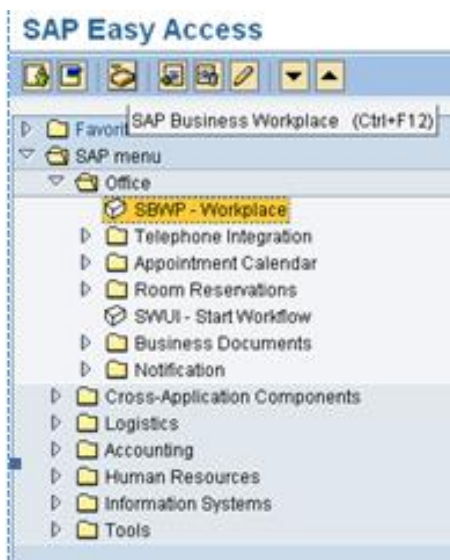
19. Click the **SAP Business Workplace (Ctrl+F12)** button.

     These instructions assume you have initiated the Separation Personnel Change Request (PCR) in workflow already, and you have an approved PCR ready to be processed as a Separation in the system.
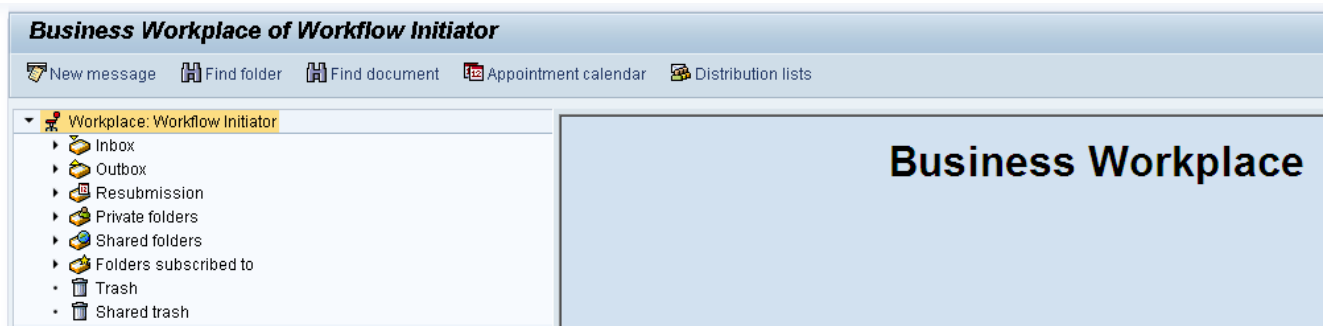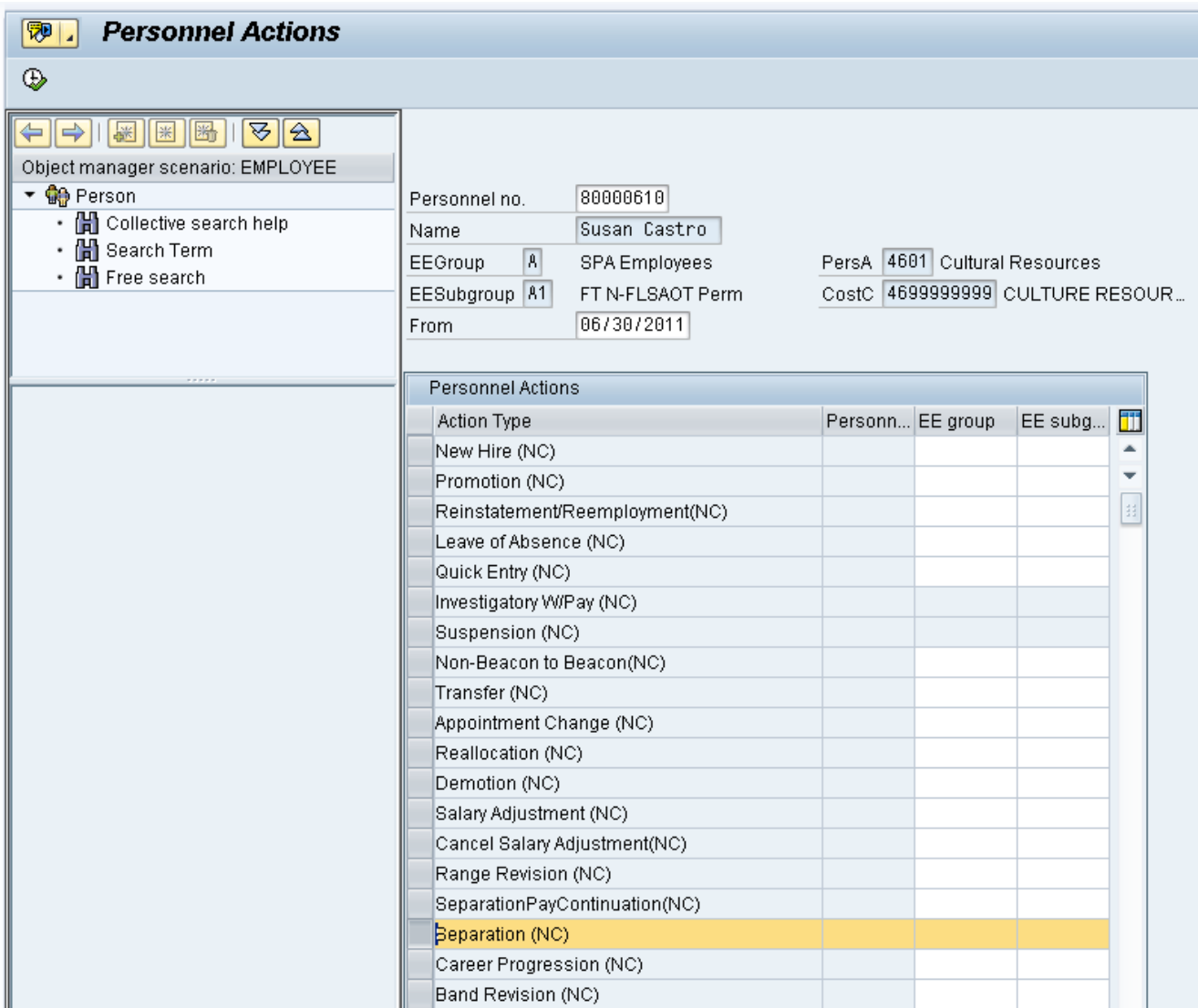
20. Select **Inbox >> Workflow**.

   Process using step 22 or step 23.
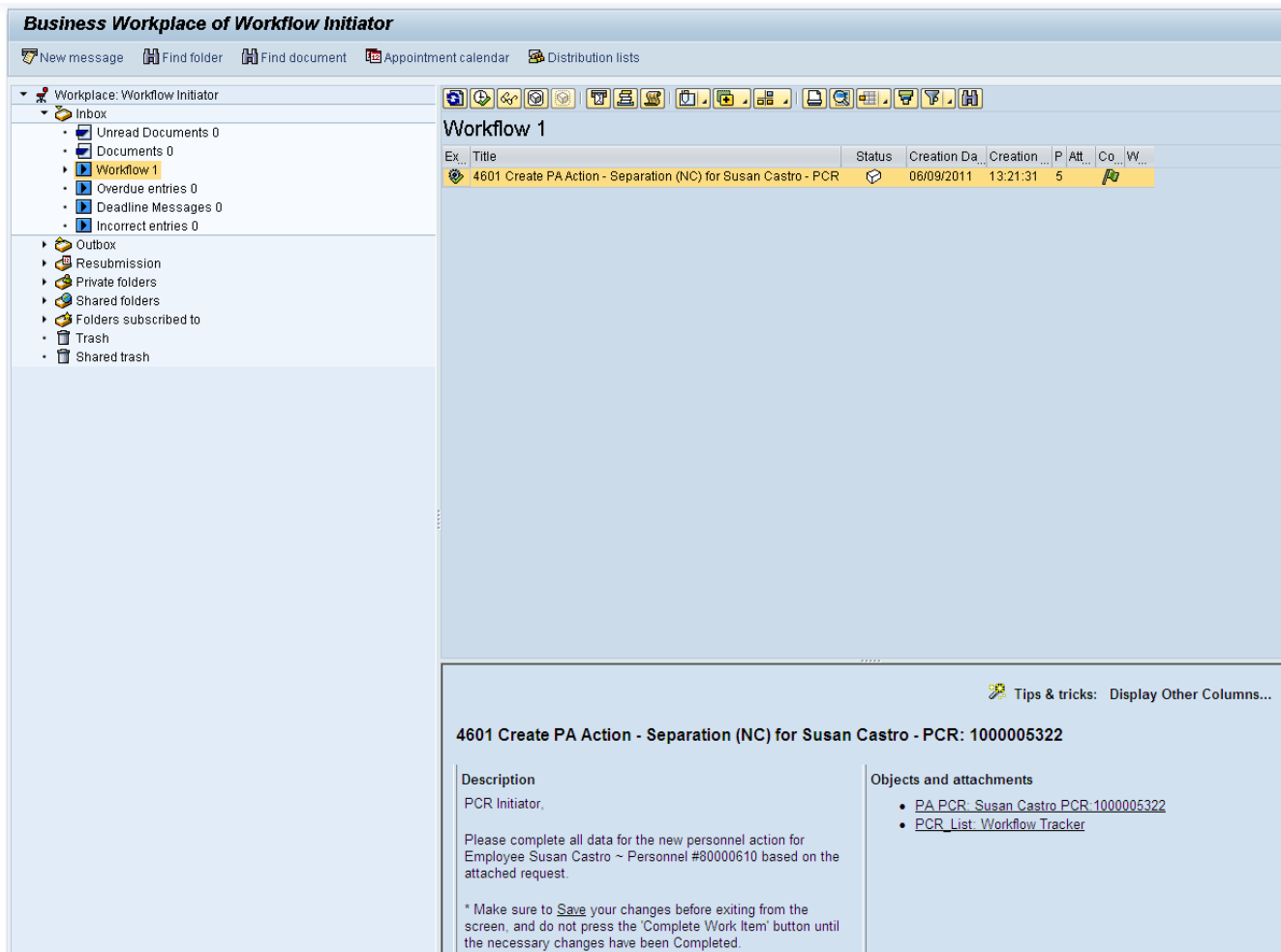
21. Select the **PCR** 4601 Create PA Action - Separation (NC) for Susan Castro - PCR: 1000005322 row.
   Double Click on row

   A list of your approved (or rejected) PCRs are listed on the right side of the screen. You can view the PCR details and/or Workflow Tracker details prior to executing the PCR if desired. After the PCR is executed the Separation action will be launched.

22. Click the **Execute (F8)** ⏱ button.

23. Update the following field:

Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From. **Example**: 06/30/2011

24. Highlight the **Separation NC** action type.

25. Click the **Execute (F8)** ⏱ button.

The effective date is the last day worked. The SAP system will automatically add a day to your date. For example: Employee is separating 6/30/2011. This is the date you enter. The system will add the one day to make it 7/01/2011.

When you have received approval to process the action, you will enter the effective date on the first Personnel Actions screen. The next screen, IT0000 defaults one day after. This date should not be changed except for IT0416 (Time Quota Compensation), which should be changed to effective date of the action (06/30/2011 on this example). If the date is changed for any other infotype, the employee will not receive the last day of pay.

Employment status should always be withdrawn.

Notice at the top of this screen the title includes the word "Copy." This action takes the original action and makes a copy of it, delimiting the previous record and saving the new record. The word "Create" in the title indicates that this infotype is being created on this person's record for the first time.

Best practice is to review all data and click Enter to allow the system to validate the data.
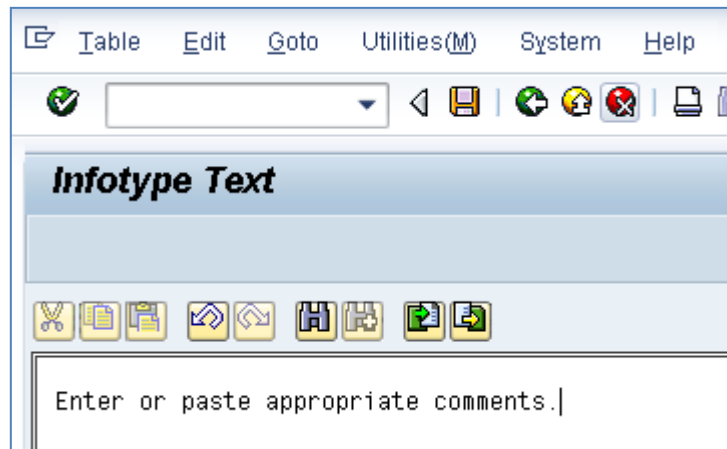
26. Click **Edit, >> Maintain text**.

    To add your comment based on agency or OSHR Policy/Guidelines. Remember you can cut and paste from the PCR.

27. Click the **Enter** ✅ button.

28. Click the **Save (Ctrl+S)** 💾 button.

29. Click the **Enter** ✅ button.

30. Click the **Save (Ctrl+S)** 💾 button.
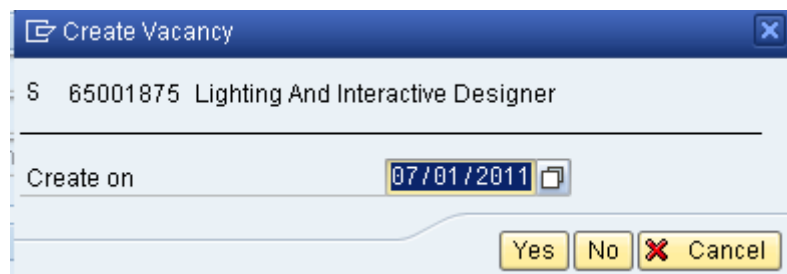
31. Click the **Yes** Yes button.

    This will open the position as vacant when the Separation action is complete.

32. Click the **Enter** button.

    Notice that the Position number will change to all 9s.

33. Click the **Save (Ctrl+S)** button.

    The system will provide a yellow warning message informing you the existing record will be delimited. Click **Save** to go past this warning message.

Copy Date Specifications (0041)

Personnel No 80000610   Name   Susan Castro
EEGroup   A   SPA Employees   PersA 4601 Cultural Resources
EESubgroup A1   FT N-FLSAOT Perm   Statu   Withdrawn
Start   07/01/2011 to   12/31/9999

Date Specifications

Date type	Date	Date type	Date
01 Original Hire Date	01/01/2008	02 Agency Hire Date	01/01/2008
		03 Last Day Worked	06/30/2011

34. Click the **Enter** ✅ button.

35. Click the **Save (Ctrl+S)** 💾 button.

    The Last Day Worked field should fill in by default. If not, enter the type **03** for the **Last Day Worked** and enter the date of the last day worked.

    Information   ✕

    ⓘ   Please verify last day worked

                                                    ✔ ❓

36. Click the **Enter** ✅ button.

Create Cost Distribution (0027)

Org. Management info

Personnel No	80000610	Name	Susan Castro
EEGroup	A	SPA Employees	PersA 4601 Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu Withdrawn
Start	07/01/2011 To	12/31/9999	

Distrib. 01 Wage/salary
Master cost center 4699999999 CULTURE RESOURCES

Cost distribution

Co...	Cost ctr	Order	WBS element	Name	Pct.	Name of
NC01	4611000000	100000005437		DIRECTOR'S OFFICE	100.00	4601150

New entries   Entry   1 / 1

37. Click the **Enter** button.

38. Click the **Save (Ctrl+S)** button.

✖ **CRITICAL!**	It is critical to save this infotype.

This information is copied from IT1018 automatically. No entry is required here.

39. Select the **Vacation Payout** code in the list box.

40. Click the **(Enter)** ✅ button.

Choose the appropriate type of leave to be paid out.

41. Update the following field:

Field Name	Description	Values
No. to compensate	The number of hours to compensate.	Enter value in No. to compensate. **Example**: 240
Start	Effective date of action	Enter value **Example:** 06/30/2011

42. Click the **Enter** ✅ button

43. Click the **Save (Ctrl+S)** 💾 button.

    The system will show you the number of hours per quota type available for compensation. Enter the total number of hours to be paid out for the quota type chosen here.

44. Click the **Next record (Shift+F7)** 📄 button.

    If the balances are not ready to payout, skip and create by using transaction code PA30.

    Notes:

    You will need to change the date to the effective date of separation, otherwise the system will not pay out the vacation since the person is no longer active.

    Time evaluation is run nightly, so the balances should be current each day.

    The balances are current based on the time the Time Administrator or Supervisor has approved.

    If employee has vacation, bonus or eligible for overtime payout you will prepare one payout here and when action is completed you will need to prepare the others using transaction code PA30, infotype 0416.

    Longevity is calculated by a rule in Time in the background and submitted to Payroll for payout.

ℹ️ **Information**	**Important!** Notify your Agency Leave Administrator of the Separation to create any needed IT2013s with the appropriate time types. When you use the separation reason Beacon to Non-Beacon, the Integrated HR-Payroll System automatically stops pro-rated longevity by running the Time Transfer Specifications (IT 2012) in the background. After you separate an employee using this reason, use PA20 to view the IT 2012.

The list of Objects on Loan will display. Highlight all items to be delimited (creates an end date on the record) and click Delimit. Verify the supervisor has collected the items prior to delimiting.

Skip items that have not been collected yet. Use transaction PA30 infotype 0040 to delimit the objects on loan when they have been collected.

45. Highlight and click the **01/01/2008** row.

46. Click the **Delimit (Shift+F1)** button.

47. Delimit Related Experience (IT9822) will display. Highlight the correct row.

48. Click the **Delimit (Shift+F1)** button.

49. Click the **Back (F3)** button.

50. Click the **Complete Item** [✔ Complete Work Item] button.

   Only once all of the infotype screens within the action have been processed and the system has returned you to the main screen will this Complete button be visible. Now you can complete the PCR in workflow.

   Only choose **Complete Work Item** if you have completed all steps of the Separation process, including additional payout types if appropriate. This will mark the Separation PCR as complete.
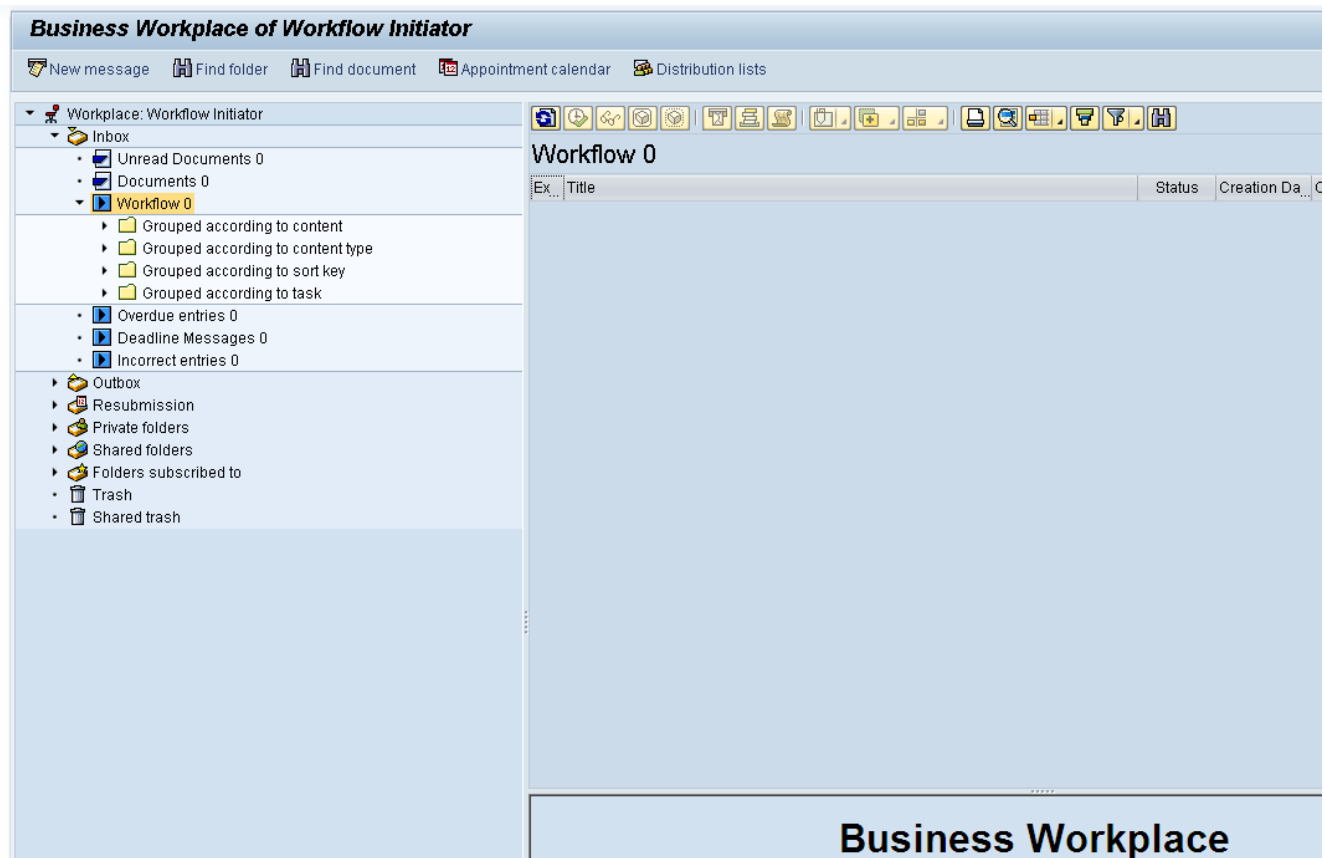
51. Click the **Back (F3)** button.

    You can remain in this SAP Business Workplace and process additional PCRs, or click **Back** to return to the main SAP screen.

52. The Separation action is complete, but we recommend reviewing via PA20 all infotypes that have been processed.

Additional Resources

Training HELP website: https://www.osc.nc.gov/state-agency-resources/training/training_help_documents

Change Record

Change Date: 3/13/24 – Changed by D. Parrish
Changes: Updated for screenshots and clarity.