

JOB AID

HRMS Create and Maintain Payroll Master Data

Separation Action

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HRMS Create and Maintain Payroll Master Data

Separation Action

Use this procedure to separate an employee with a known separation date from Washington State Service.

Considerations:

- Is the employee entitled to an accrual?
- Has leave been taken for the pay period?
- Run a ZT60 and ZCAT6 on the employee to ensure the employee has the correct leave balance.
- Ensure reports to DRS contain correct status codes for Leave buyouts. Refer to [http://hr.wa.gov/SiteCollectionDocuments/Payroll/HRMSSupport/TrainingAndOLQR/Use rProcedures/sa_correct_leave_buyout_reporting_drs.doc](http://hr.wa.gov/SiteCollectionDocuments/Payroll/HRMSSupport/TrainingAndOLQR/Use%20rProcedures/sa_correct_leave_buyout_reporting_drs.doc) for instruction.

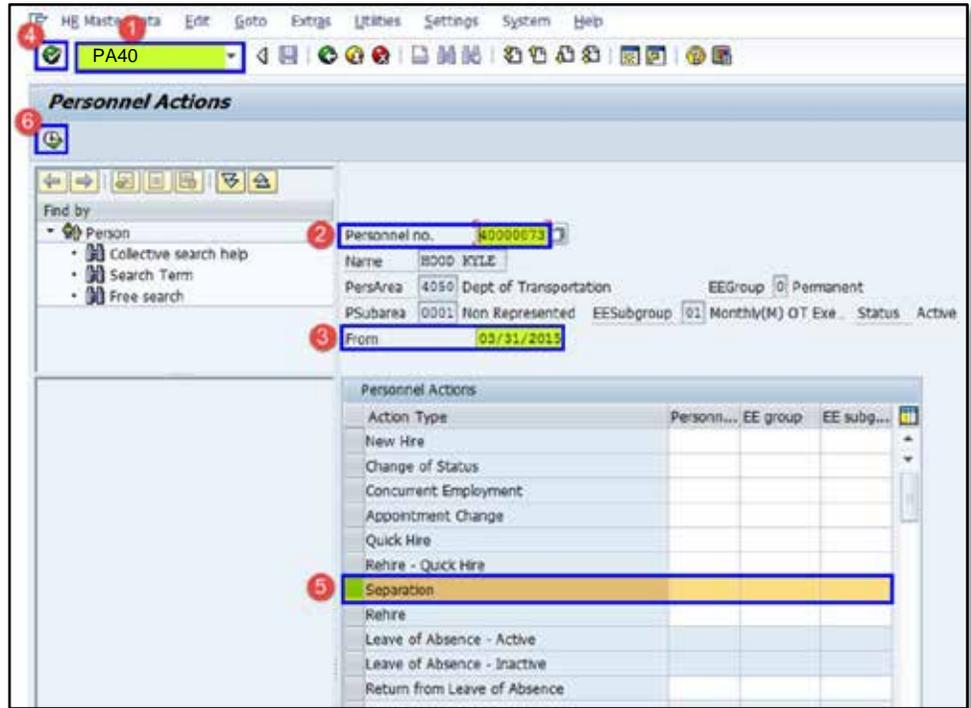
Important note: *If the separation is a result of a Reduction in Force (RIF), the employee has the option to defer their annual leave buyout payment for 30 days. If they take this option, you will need to change the Payroll Status to continue running payroll for that employee until the date of the deferred buyout.*

Section 1–For Personnel Administration (PA) Processor

IMPORTANT

The actions in this section are completed by the **Personnel Administration (PA) Processor**. If you are the **Payroll Processor**, skip to *Section 2–For Payroll Processor*.

1. Enter Transaction Code **PA40** in the Command Field and press the **Enter** key.
2. Enter the employee's **Personnel no.**
3. In the **From** field, type the last date the employee worked. *Only enter the From date if you are the PA Processor initiating the appointment change.*
4. Click the **Enter** button.
5. Click the box to the left of **Separation**.
6. Click **Execute**.



The screenshot shows the 'Personnel Actions' window. At the top, the command field contains 'PA40'. Below it, search criteria are entered: Personnel no. 40000673, Name BOOD KYLE, PersArea 4050, Dept of Transportation, EESubgroup 01, Monthly(M) OT Exe, Status Active. The 'From' date is 03/31/2015. A table of 'Personnel Actions' is displayed below, with 'Separation' highlighted in yellow. The table has columns for Action Type, Person..., EE group, and EE subg....

Action Type	Person...	EE group	EE subg...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

Section 1–For Personnel Administration Processor (cont.)

ACTION: Copy Actions (0000)

1. Click the match code button inside the **Reason for Action** field and select the correct Reason for Action.

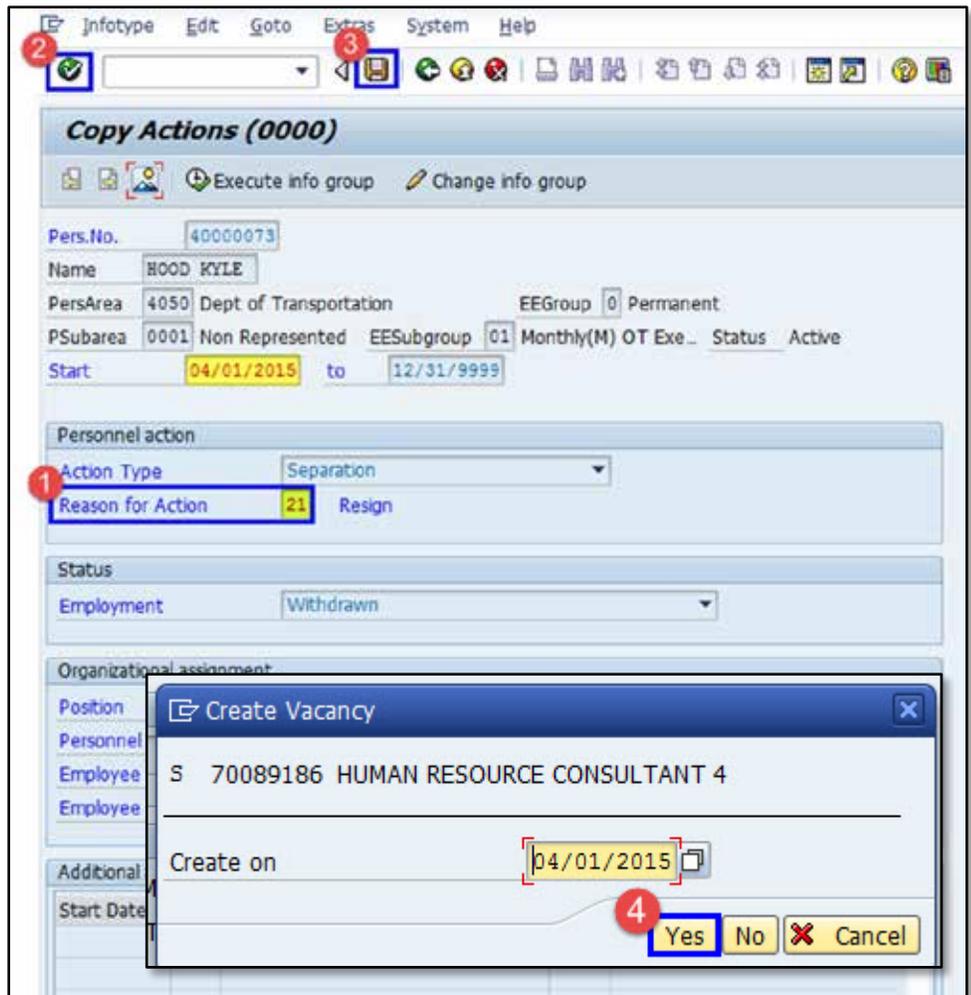
Example: 21–Resign

2. Click the **Enter** key. A message will appear at the bottom of the screen that states “Record valid from 07/01/2008 to 12/31/9999 delimited at end.” This indicates that the prior record on file for the employee is being delimited (assigned an end date).

3. Click **Save**.

4. The *Create Vacancy* box will appear. If you are creating a vacancy, click **Yes**. Otherwise, click No.

Note: If an information screen appears relating to Cost Distribution, click the **Enter** button to proceed.



Infotype Edit Goto Extras System Help

Copy Actions (0000)

Execute info group Change info group

Pers.No. 40000073
 Name BOOD KYLE
 PersArea 4050 Dept of Transportation EEGroup 0 Permanent
 PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active
 Start 04/01/2015 to 12/31/9999

Personnel action

Action Type Separation
 Reason for Action 21 Resign

Status

Employment Withdrawn

Organizational assignment

Position 5 70089186 HUMAN RESOURCE CONSULTANT 4

Additional

Start Date

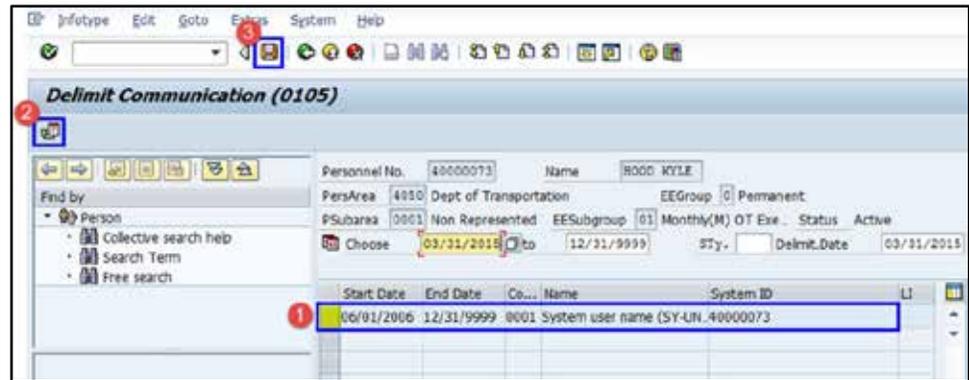
Create on 04/01/2015

Yes No Cancel

Section 1–For Personnel Administration Processor (cont.)

ACTION: Delimit Communication (0105)

1. Click the box to the left of where the employee's email address appears.
2. Click **Delimit**.
3. Click **Save**.



For the *Personnel Administration Processor*, this marks the end of the *Separation* action. After saving, click **Exit** and give the packet to the *Payroll Processor* who will continue the action.

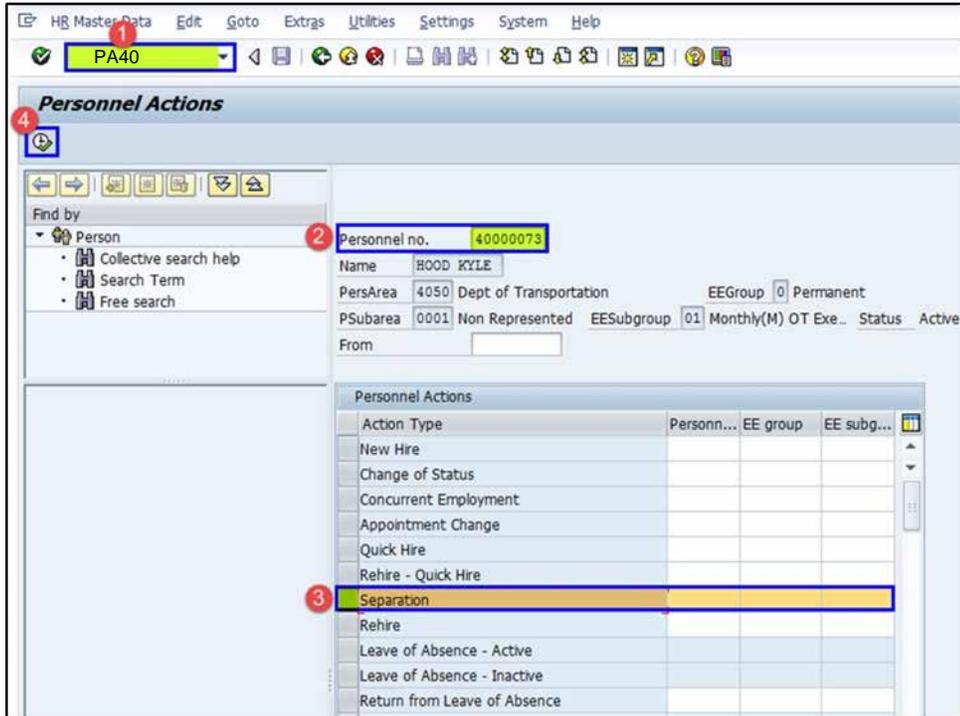
Section 2–For Payroll Processor



IMPORTANT

The actions in this section are completed by the **Payroll Processor**. If you are the **Benefits Processor**, skip to *Section 3–For Benefits Processor*.

1. Enter Transaction Code **PA40** in the Command Field and press the **Enter** key.
2. Enter the employee's **Personnel no.**
3. Click the box to the left of *Separation*.
4. Click **Execute**.



HR Master Data Edit Goto Extras Utilities Settings System Help

PA40

Personnel Actions

Find by Person

- Collective search help
- Search Term
- Free search

Personnel no. 40000073

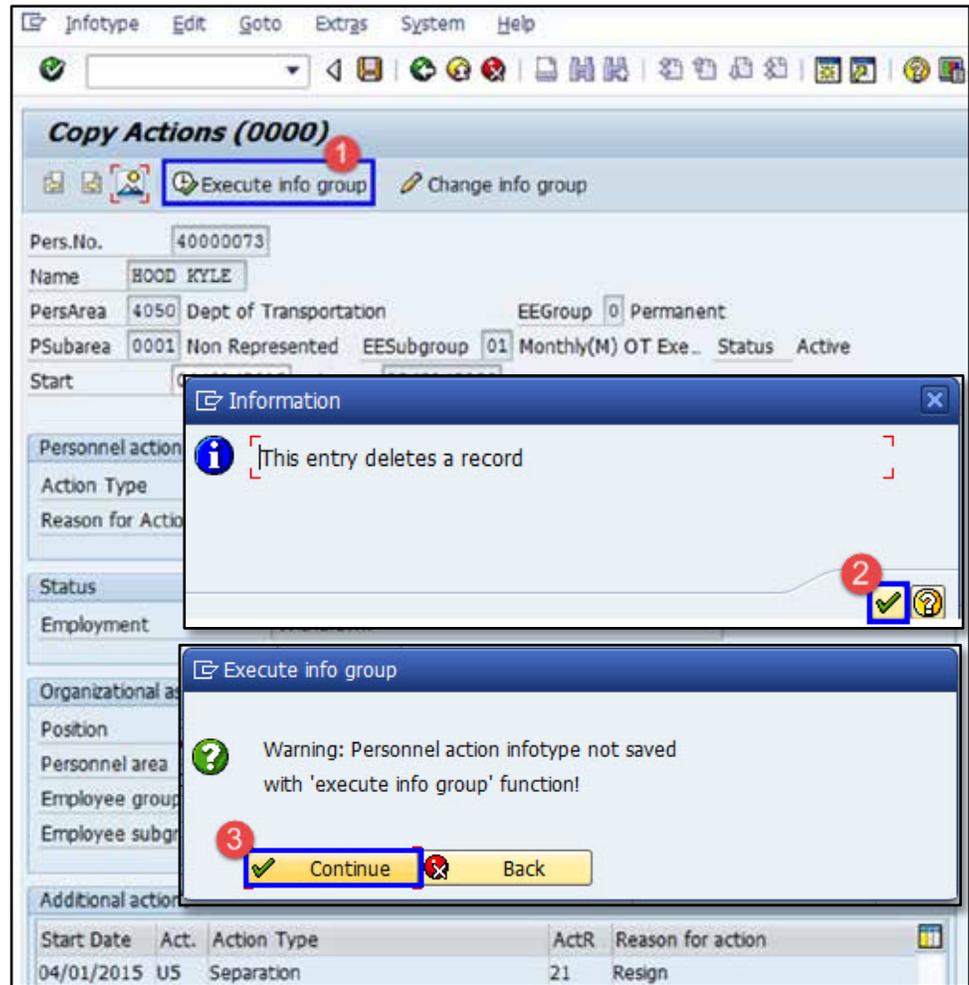
Name HOOD, KYLE
 PersArea 4050 Dept of Transportation EEGroup 0 Permanent
 PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active
 From

Action Type	Personn...	EE group	EE subg...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

Section 2–For Payroll Processor (cont.)

ACTION: Copy Actions (0000)

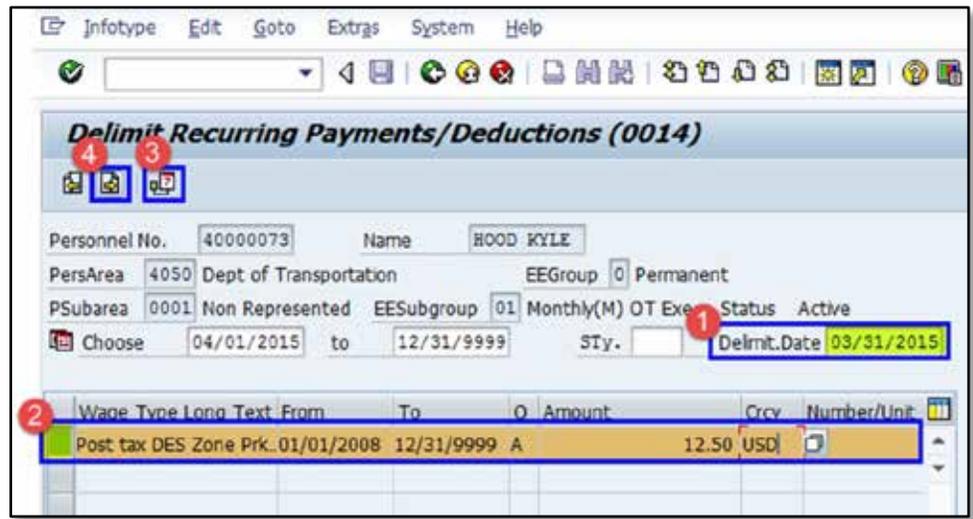
1. Click on **Execute info group**.
2. An Information box will appear stating “This entry deletes a record.” Click the **Enter** button.
3. A Warning box will appear since the action infotype was already saved. Click **Continue**.



Section 2–For Payroll Processor (cont.)

ACTION: Delimit Recurring Payments/Deductions (0014)

1. Verify the *Delimit Date*, which should be the last day of the pay period (15th or last day of the month).
2. Click the box to the left of the payment/ deduction to delimit.
3. Click **Delimit**.
4. If the employee has additional infotypes to delimit, repeat steps 1-4. Otherwise, click on **Next Record** until you reach the *Subtypes for infotype Time Quota Compensation* box.



Delimit Recurring Payments/Deductions (0014)

Personnel No. 40000073 Name HOOD KYLE
 PersArea 4050 Dept of Transportation EEGroup 0 Permanent
 PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe Status Active
 Choose 04/01/2015 to 12/31/9999 STy. Delimit.Date 03/31/2015

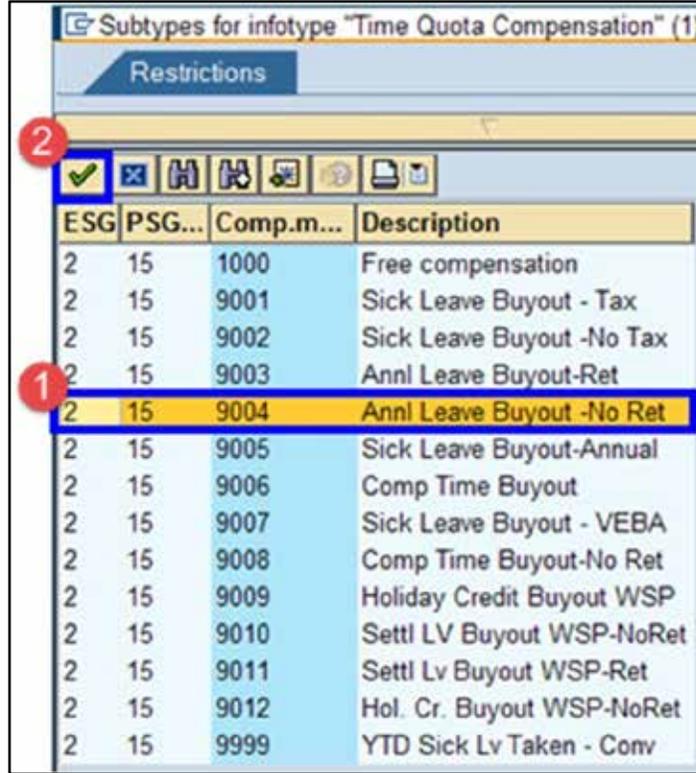
Wage Type	Long Text	From	To	O	Amount	Crv	Number/Unit
Post tax	DES Zone Prk.	01/01/2008	12/31/9999	A	12.50	USD	

Section 2–For Payroll Processor (cont.)

1. Click on the correct *Compensation Method* in the list.

*Example: 9004 Annl
Leave Buyout-No Ret*

2. Click the **Enter** button.



Subtypes for infotype "Time Quota Compensation" (1)

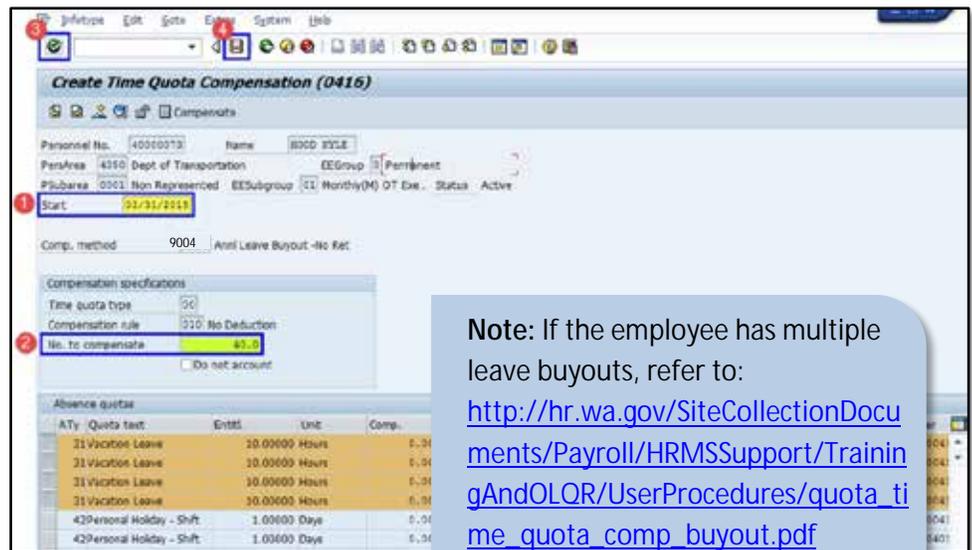
Restrictions

ESG	PSG...	Comp.m...	Description
2	15	1000	Free compensation
2	15	9001	Sick Leave Buyout - Tax
2	15	9002	Sick Leave Buyout -No Tax
2	15	9003	Annl Leave Buyout-Ret
2	15	9004	Annl Leave Buyout -No Ret
2	15	9005	Sick Leave Buyout-Annual
2	15	9006	Comp Time Buyout
2	15	9007	Sick Leave Buyout - VEBA
2	15	9008	Comp Time Buyout-No Ret
2	15	9009	Holiday Credit Buyout WSP
2	15	9010	Settl LV Buyout WSP-NoRet
2	15	9011	Settl Lv Buyout WSP-Ret
2	15	9012	Hol. Cr. Buyout WSP-NoRet
2	15	9999	YTD Sick Lv Taken - Conv

Section 2–For Payroll Processor (cont.)

ACTION: Create Time Quota Compensation (0416)

1. Verify the employee's eligibility. *Start* date should be the last day of employment.
2. In the *No. to compensate* field, enter the number of hours or days of quota type to be compensated.
3. Click the **Enter** icon.
4. Click **Save**.



Note: If the employee has multiple leave buyouts, refer to: http://hr.wa.gov/SiteCollectionDocuments/Payroll/HRMSSupport/Trainin gAndOLQR/UserProcedures/quota_ti me_quota_comp_buyout.pdf

ATy	Quota text	Enttl	UNIT	Comp.
31	Vacation Leave	10.00000	Hours	0.30
31	Vacation Leave	10.00000	Hours	0.30
31	Vacation Leave	10.00000	Hours	0.30
42	Personal Holiday - Shift	1.00000	Days	0.30
42	Personal Holiday - Shift	1.00000	Days	0.30

NOTE: This marks the end of the Separation action for the *Payroll Processor*. After saving, click **Exit** and give the packet to the *Benefits Processor* who will continue the action.

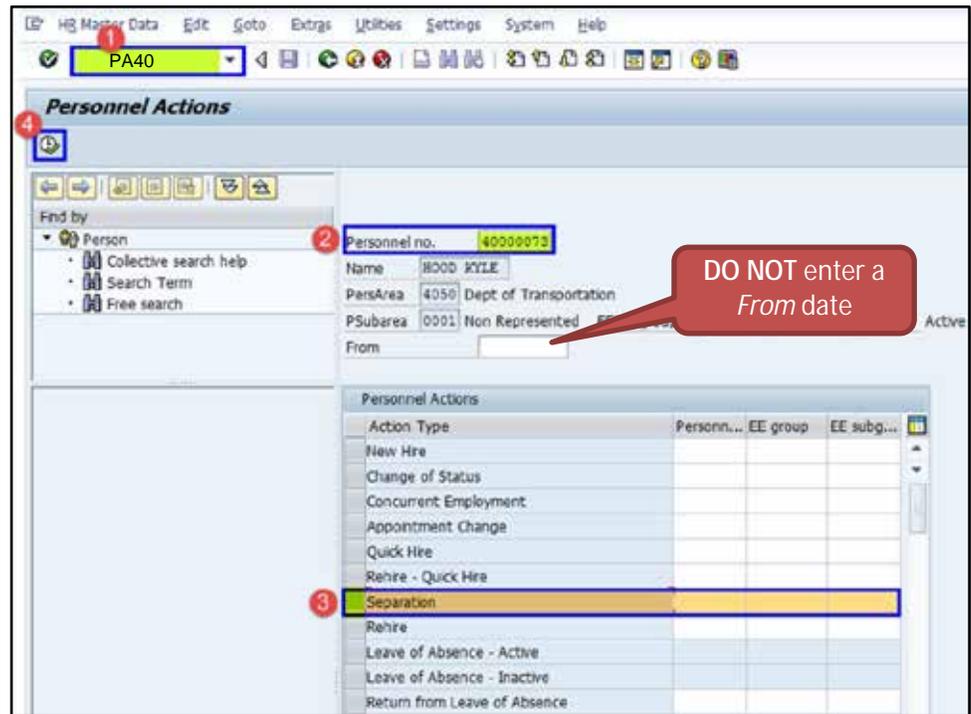
Section 3–For Benefits Processor



IMPORTANT!

The actions in this section are completed by the **Benefits Processor**. If you are the **Payroll Processor** also performing the Benefits Processor function, **skip to the Delimit Savings Plan** screen.

1. Enter Transaction Code **PA40** in the *Command* field and press the **Enter** key.
2. Enter the employee's **Personnel no.**
3. Click the box to the left of *Separation*.
4. Click **Execute**.

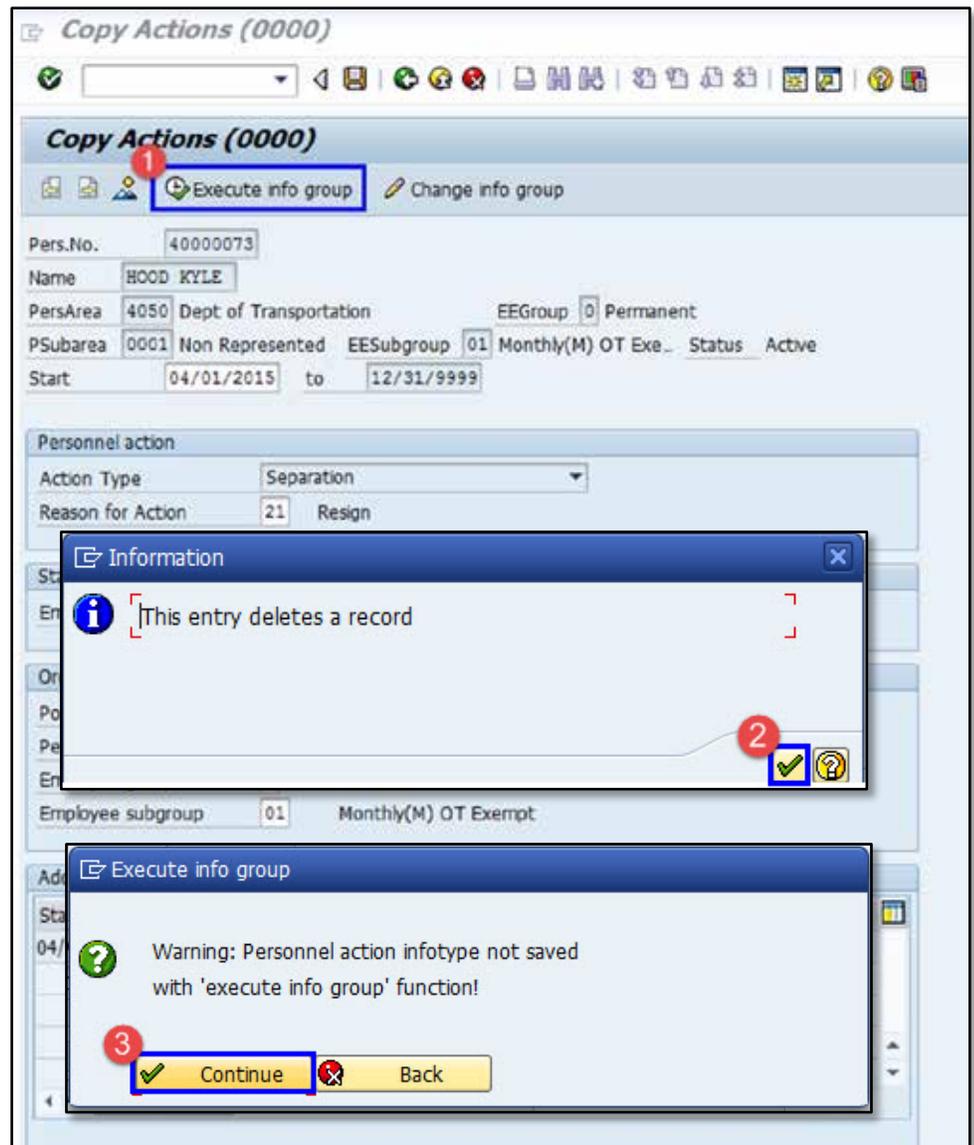


The screenshot shows the 'Personnel Actions' window. At the top, the 'Command' field is set to 'PA40'. Below it, the 'Personnel no.' field is populated with '40000073'. The 'Name' field shows 'BROOD KYLIE'. The 'PersArea' is '4050' and 'Dept of Transportation'. The 'PSubarea' is '0001' and 'Non Represented'. The 'From' date field is empty. A red callout box with a white border points to the 'From' field, containing the text 'DO NOT enter a From date'. In the 'Personnel Actions' list, the 'Separation' row is highlighted in yellow. The list includes: New Hire, Change of Status, Concurrent Employment, Appointment Change, Quick Hire, Rehire - Quick Hire, Separation, Rehire, Leave of Absence - Active, Leave of Absence - Inactive, and Return from Leave of Absence.

Section 3–For Benefits Processor (cont.)

ACTION: Copy Actions (0000)

1. Click **Execute info group**.
2. An information window will appear stating, “This entry deletes a record.” Click the **Enter** button.
3. An *Execute info group* Warning window will appear since this infotype has already been saved. Click **Continue**.

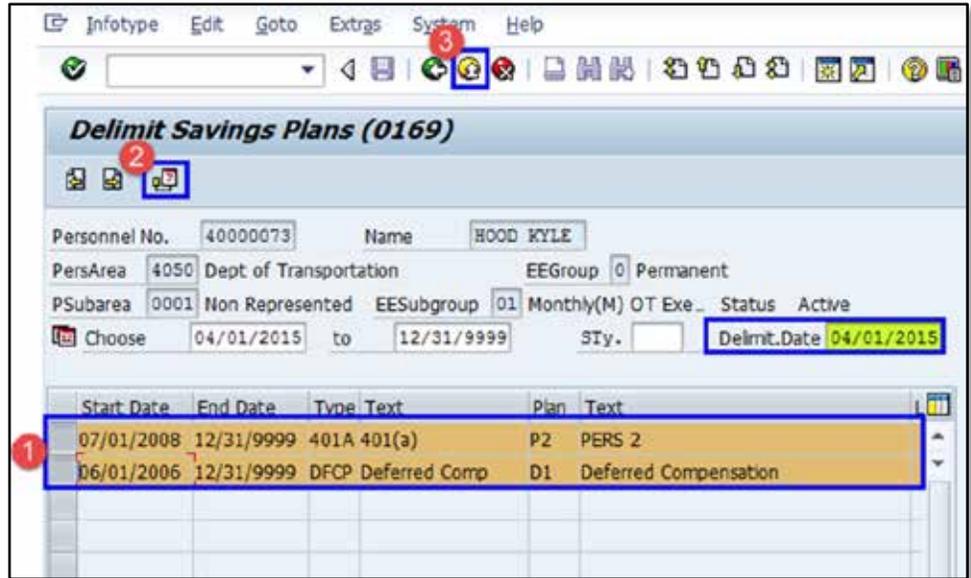


Section 3–For Benefits Processor (cont.)

ACTION: Delimit Savings Plan (0169)

Verify the **Delimit. Date**, which should be the 1st or 16th of the month.

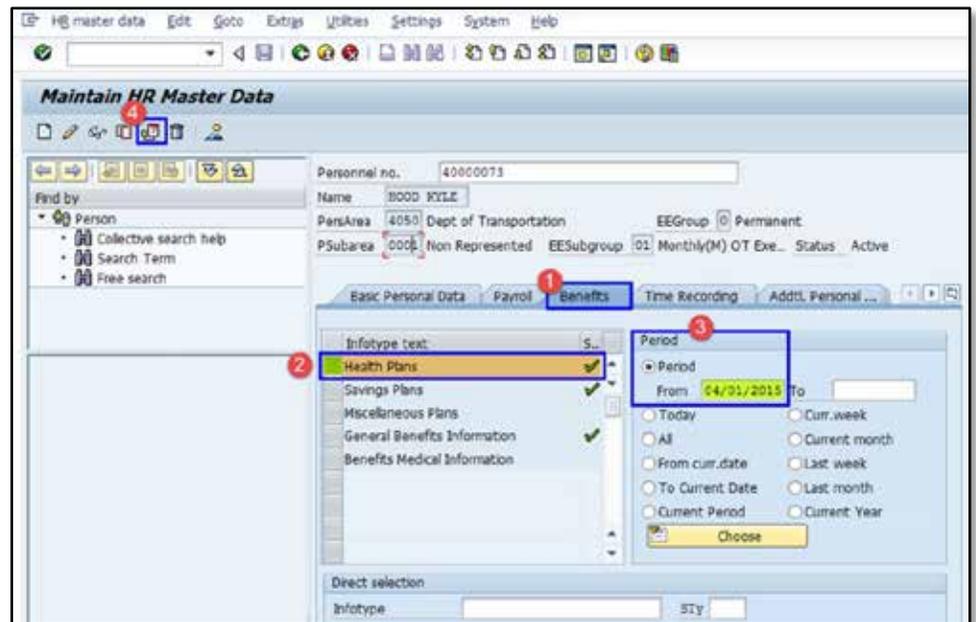
1. Click the box to the left of the Savings Plan(s) to delimit. **Note:** You can select more than one record to delimit.
2. Click **Delimit**.
3. Click **Exit**.



NOTE: This marks the end of the *Separation* action using **PA40**. The next step is to delimit the employee's Health Insurance plans. Click **Exit** to return to the *Personnel Actions* screen. Type Transaction Code **/nPA30** in the *Command* field and press the **Enter** key to access the *Maintain HR Master Data* screen.

Section 3–For Benefits Processor (cont.)

1. Click the *Benefits* tab.
2. Click the box to the left of *Health Plans*.
3. In the *Period* section, click the button next to **Period** and enter the **From** date as the delimit date of the Health Plans.
4. Click **Delimit**.



Section 3–For Benefits Processor (cont.)

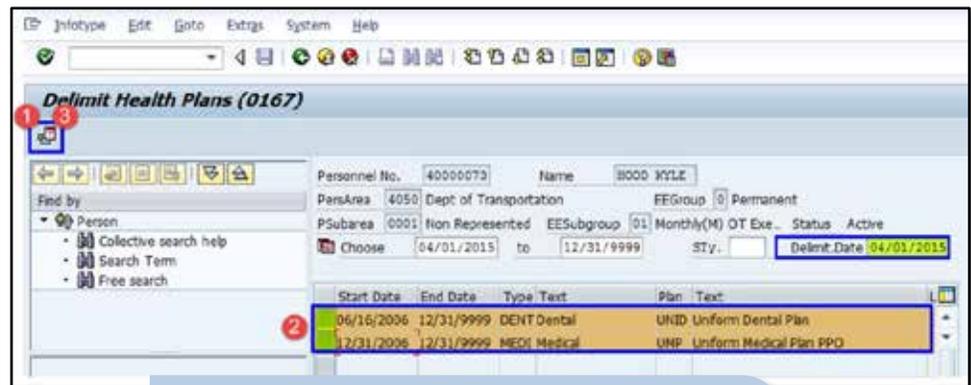
ACTION: Delimit Health Plans (0167)

1. Click **Delimit**.

Verify you have entered the correct Delimit Date.

2. Click the box to the left of the Health Plan(s) to delimit. **Note:** You can select more than one record to delimit.

3. Click **Delimit** again to assign an end date to the record.



Note: The Delimit Health Plans (0167) infotype should have an end date of the last day of the month. When the records have been delimited, the system will subtract a day. For example, the date of 04/01/2015 will create an end date of 03/31/2015.

This completes the Separation action.