EMPLOYEE EXIT PROCESS FROM SOUPS TO NUTS

Felisha Brown
Labor and Employee Relations
Types of Employee Exits from the University?

Voluntary
Involuntary
Voluntary Resignation

- Employee resigns to his/her immediate supervisor by means of handing them a letter or possibly in the form of an email.
What should happen once the department receives the resignation?

- Once the employee resigns the department should forward the letter or email to Labor and employee relations (Felisha Brown) by email or by attaching the document to the termination when submitting the EPAF.
- The department needs to gather the all Temple property. Phones, keys, computer etc…
- Remind the employee to do an Exit Interview
  - By Fax (Employee will go to www.temple.edu/hr website under form, print then fax the exit interview to Employee Relations)
  - Via TuPortal (The exit interview will be located under the MY Portal tab in the personal announcements section.)
IN VOLUNTARY

Types:

- Layoff
  - An employee who is being laid off normally receives a letter outlining when their last day will be, the reason why they are being laid off and if they are eligible, any severance pay they will receive.

- Termination
  - An employee who is being terminated for cause will be issued a discipline (bargaining) or a memo (non-bargaining) stating why they were terminated and the work rule that was violated.
  - Failed probation, no discipline or memo is necessary
WHAT SHOULD BE DONE IN THE CASE OF A LAYOFF?

- When issuing the layoff the department should make sure to follow the Termination Checklist.
- After the layoff letter is submitted to the employee a copy of the letter should be forwarded to ER/LR.
TEMPLE UNIVERSITY TERMINATION CHECK LIST

Please complete checklist with employee and provide clarification where appropriate. Send completed Termination Checklist, along with the Termination Form, and employee’s resignation letter (if applicable), to Human Resources, Labor/Employee Relations, TASB (683-47).

Reasons for Resignation (Check all that apply)
If this is a resignation, please check all that apply as the reason for the resignation

☐ Career Development  ☐ Military Service  ☐ Marriage, Divorce, Death in family
☐ Working Conditions  ☐ Commute  ☐ Retire
☐ Difficult Co-Workers  ☐ Compensation  ☐ Job Security
☐ Personal Health  ☐ Supervision  ☐ Job Eliminated
☐ Relocation  ☐ Maternity
☐ Other (please explain) ____________________________________________

☐ Verify address for mailing of W-2 form via TuPortal.
☐ Purchasing Card and Petty Cash (if applicable) is returned.
☐ If employee is webmaster for the department, then contact Media Development to disable access to dept web page.
☐ All Temple equipment and property (keys, wireless phones laptop/personal computers) is returned.
☐ Complete procedures for final paycheck (including unused/accrued vacation and/or severance if applicable)
☐ Notification made to Payroll Office regarding any payroll deductions or dockings
☐ Staff Identification cards is returned.
☐ Contact Telephone Services to discontinue voice mail.
☐ Direct employee to Exit Interview Form found at the following online address:
   http://webserv.admin.vctemple.edu/EmployeeForms/Forms/HumanResources/ExitInterview093004.doc. (Exit Interview Form is to be filled out by employee only.) Employee can also schedule an exit interview by calling Labor/Employee Relations at 7-2298 or 215-926-2298.
☐ Explanations of employment references have employee contact the work number at 800-367-3690 or www.theworknumber.com.

Supervisor’s Signature: ______________________________ Date: ________________

I acknowledge that all personal data has been removed from my computer and that my supervisor may have access to the hard drive and my email for business purposes.

Employee’s Signature: ______________________________ Date: ________________

Employee’s Name (Print): ______________________________
WHAT SHOULD BE DONE IN THE CASE OF A TERMINATION?

- After the discipline is issued a copy should be forwarded to Employee/Labor Relations
- Follow the termination checklist
- Make sure to get all Temple property from the employee
- If computer access needs to be terminated immediately please send the request to Deirdre Walton the Director of Employee Relations
UNEMPLOYMENT COMPENSATION
ELIGIBILITY

- Employees who have separated from the University due to no fault of their own.
HOW DOES THE PROCESS WORK?

- First the employee files a claim with the state.
- The state contacts Temple University for separation information.
- Once the state receives our information they will render a decision after review of all submitted information.
There are two types of appeals:
- Employer Appeal
- Employee or Claimant Appeal
UNEMPLOYMENT HEARINGS

Any person within the department that can testify to an employee resigning or being discharged for willful misconduct will be expected to attend an unemployment hearing.
Review of the Termination EPAF Process
HOW TO ACCESS EPAFs...

- From bottom of www.temple.edu, click on TU Portal
- Log into TU Portal
- Go to Banner Tab
- Find the EPAF Channel, click on Electronic Personnel Action Form
- The EPAF Menu will be displayed
HOW TO ACCESS THE EPAF

- Alternative, if you do not see EPAF Channel
  - From bottom of www.temple.edu, click on TU Portal
  - Log into TU Portal
  - Under TU Applications, click on Self-Service Banner
  - Click on Employee
  - Click on Electronic Personnel Action Form
  - The EPAF Menu will be displayed
HOW TO CREATE A NEW EPAF...

1. Click on New EPAF
   The EPAF form will open.
Important Tip – It is very helpful if you already have the TUID of the employee that is terminating. However, if you do not have it, you can search Banner for the TUID by clicking on the magnifying glass.
- **Query Date** = this date will default to today’s date. You MUST update it to reflect the date you want the termination to be effective.
  - Must be greater than the employee’s Last Paid Date.
- **Approval Category** = select the appropriate Approval Category from list.
- Click “Go”.
New EPAF Person Selection

- Enter a TUid or select the magnifying glass to search for a TUid by name. Enter the Query Date and select the Approval Category. Select Go.

* - indicates a required field.

**ID:** 905173584

**Tanya M. Bryant**

**Query Date:** 01/23/2013

**Termination Date**

**Approval Category:** Finance/HR Separation from Employment, FTERM

[Go button]

EPAF Approver Summary | EPAF Originator Summary

Return to EPAF Menu
HOW TO SELECT THE POSITION/JOB TO BE TERMINATED...

- Confirm the correct employee is being processed.
- Select the job/position that you wish to change status to Terminated.
  - You can only update one job at a time.
  - Each job (position/suffix) will need a separate transaction created.
- Click “Go”.
### New EPAF Job Selection

Select the job to process and then select Go.

<table>
<thead>
<tr>
<th>ID:</th>
<th>Lorie D. Bernardi,</th>
</tr>
</thead>
<tbody>
<tr>
<td>QUERY DATE:</td>
<td>Jan 01, 2013</td>
</tr>
<tr>
<td>APPROVAL CATEGORY:</td>
<td>HR Exp Distrib Change, HREDCF</td>
</tr>
</tbody>
</table>

**Expense Distribution Change, LABOR**

<table>
<thead>
<tr>
<th>SEARCH</th>
<th>TYPE</th>
<th>POSITION</th>
<th>SUFFIX</th>
<th>TITLE</th>
<th>TIME SHEET ORGANIZATION</th>
<th>START DATE</th>
<th>END DATE</th>
<th>LAST PAID DATE</th>
<th>STATUS</th>
<th>SELECT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary</td>
<td></td>
<td>005809</td>
<td>00</td>
<td>Lead Software Developer</td>
<td>77130, Application Support Services</td>
<td>Jul 01, 2009</td>
<td>Jan 31, 2013</td>
<td></td>
<td>Active</td>
<td></td>
</tr>
</tbody>
</table>

New EPAF

Return to EPAF Menu
In the “Current Value” column – the current Banner values will default into the form if you have HR Security (eclass/org) access.

### Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Organization</td>
<td>(Not Enterable) 77130, Application Support Services</td>
<td></td>
</tr>
<tr>
<td>Employee Class Code</td>
<td>(Not Enterable) 02. Admin T26 and above</td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td>(Not Enterable) HRS Lead Software Developer</td>
<td></td>
</tr>
<tr>
<td>Payroll Id</td>
<td>(Not Enterable) M1</td>
<td></td>
</tr>
<tr>
<td>Last Work Date</td>
<td>MM/DD/YYYY*</td>
<td>01/22/2013</td>
</tr>
<tr>
<td>Jobs Effective Date</td>
<td>MM/DD/YYYY*</td>
<td>01/22/2013</td>
</tr>
<tr>
<td>Job Change Reason</td>
<td>*(Not Enterable) JU1</td>
<td>T00</td>
</tr>
<tr>
<td>Job Status</td>
<td>*(Not Enterable) Active</td>
<td>T</td>
</tr>
</tbody>
</table>

Approval Types | Routing Queue | TRANSACTION HISTORY

* - indicates a required field.

Separation from Employment, 005809-00 HRS Lead Software Developer  Last Paid Date: Jun 30, 2012

Not necessary to complete these fields
Verify that the Last Work date and Jobs Effective Date is the Termination Date.

If incorrect, click in the field and correct it.
HOW TO FILL OUT THE ROUTING QUEUE..

- This step will determine who will approve and apply the EPAF transaction. If you set up your Default Routing Queue (see page 4) these values will be pre-populated for you. All approval levels listed on the EPAF must have a User Name and Required Action.

- Select the magnifying lens to select your department approver from the list.
  - The Approval Level 99 ‘EPAF APPLY’ User Name must equal BANWORX.
  - Do not add any other Approval Levels
  - Do not change the Required Action

- Click “Save and add New Rows”. 
## Routing Queue

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>User Name</th>
<th>Required Action</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 - (HR2) HR EDCF Approvers</td>
<td>NOGAMI</td>
<td></td>
<td></td>
</tr>
<tr>
<td>99 - (APPLY) EPAF Apply Appworx</td>
<td>BANWORX</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not Selected</td>
<td></td>
<td></td>
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<td>Not Selected</td>
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<tr>
<td>Not Selected</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Save and Add New Rows]
If you need to update (add or delete) to your list of Originators or Approvers contact Felisha Brown at fmbrown@temple.edu.
How to Enter Comments...

- Comments can be entered at any point for EPAFs during the Electronic Approvals process, provided you have been defined in the approval queue. As an originator you can enter comments for an EPAF until you submit the EPAF to the approval queue. Once you submit the EPAF to the approval queue, you can then enter additional comments only from the EPAF preview page or the EPAF Originator Summary Page.
In the *Optional* Comment Section, as appropriate enter comments for the approver.

- Your department approver and HR Labor Relations will see comments entered.
- Do *not* copy the resignation letter into this section. The resignation letter should be attached by the approver in the workflow task.
15. Click on “Save” at the bottom or the top of the form. Return to the top of the form (if not already there). You should see the message – “Your change was saved successfully.”

16. Click on “Submit”. If error occurs, fix the errors, Save and Submit again.

Go to page 17, for help with trouble shooting errors. Once all errors are corrected, the status changes from Waiting to Pending.
17. This is the final step to the initiation of the EPAF. When you answer these final questions and click “Submit for Approval”, the EPAF will go to your Approver in the form of a Workflow task.

18. To enter another EPAF transaction; click on “New EPAF”.
YOUR EPAF IS COMPLETE

If you have any questions please feel free to contact:
Felisha Brown 215-926-2298 or
Deirdre Culbreath-Walton 215-926-2296
Exit Interview

Once the EPAF has been approved by Human Resources the employee separating from the University will receive an email asking them to complete an exit interview. This can now be completed either electronically or in paper form and can be found on Temple’s HR website under forms.

https://prd-challenger.erp.temple.edu/EmployeeForms/HumanResources.htm
Electronic Exit Interview

As a result of your recent employment separation, Temple would appreciate your feedback by completing an Employee Exit Interview. Click here to learn about your 'My Announcement' channel.
Questions???

Sorry!! If you have any questions please use the index cards provided to jot them down. Your questions will be addressed at the roundtable. Thank you!