

## *Administrative Process Improvement Project*

### *Quick Hits/ Recommendations*

### *Employee Separation/Clearance*

The team met to review current separation and clearance process for all categories of employees (excluding retirement, death and involuntary separations). Team's focus was to design and implement a process that would include the pilot Shared Services Center, utilizing existing technology; identify and implement quick hits. Included was the review of the current notification and separation forms, TBR and UofM policies relating to annual leave.

After the teams analysis of the AS IS and identified improvements to Notification and Clearance forms, including the timing of submission, it was determined there is not a benefit to involving the Shared Services Center in the process. Managers would have to gather all the required information to create a helpdesk ticket in order to complete the separation form, which would then be returned to the manager for signatures.

#### **Combine and Improve Notification and Clearance Process:**

- One form will serve the purpose of the notification and clearance forms, which currently is a two-step process
- Eliminates the burden of managers to remember to complete the actual clearance form at a later date
- Reduces time spent making phone calls, emailing and maintaining tickler system to remind managers to complete and submit the separation form
- Using email as the key to the form will populate employee and manager information, reducing errors
- Transfer responsibility from manager to HR Records to determine leave balances. Managers are not trained to calculate leave balances correctly
- Adding due date to the clearance form will assist in receiving documents to HR Records earlier

#### **Review UofM Policies relating to Termination and Annual Leave:**

- UM Policy 1382 will be changed to reflect when Clearance form is due in HR Records, currently states due: No later than one workday prior to the employee's departure
- Director of HR Records and Asst. VP Human Resource Chief HR Officer will continue to review annual leave policies

#### **Improved Locating Clearance Forms:**

- Added additional form links to various HR webpages

### **Recommendations:**

#### **Training for Managers and Office Personnel:**

- Recommend that HR Manager of Training and Professional Development provide this training periodically

#### **Annual Leave – Lump Sum Paid following Month for Monthly Employees:**

- Recommend if Separation Clearance forms are not in HR Records office by 15<sup>th</sup> of month, then employees annual leave balance is paid the following month.
  - Reduces processing for extra payroll checks
  - Time savings for HR Records and Payroll Department
  - Reduces letters of indebtedness, time savings for Bursar Office and HR Records

#### **Create On-line Process with Electronic signatures:**

- Database created to store historical records
- Electronic signatures will eliminate need to print forms by departments
- Reduces process turnaround time