

Employee Separation & Clearance – AS IS

P1 May 13,2015

Employee

START

Inform Manager
leaving
University

P6 P7 P8

Sign
Separation/
Clearance
Form

Hand Offs

Originator

Locate
Notification
Form

Have Position
Number?

YES

Complete &
Submit
Notification
Form

Automatic Email
to originator,
employee,
supervisor, HR

Hand Offs
Complete
Separation/
Clearance
Form/Print

Sign
Separation/
Clearance
Form
Hand Offs

P1 P2 P3 P5
P6 P8 P9

NO

Look-up
Position
Number

Pull Employee
File Folder
maintain tickler
file

Verify
Leave Balances

Review Form

Update Banner
records

End

HR Records

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Pains & Issues:

Please Read First:

The issues and pain points identified during the As Is Process Mapping workshop and the Analysis workshop are noted below. The Issue is numbered and its Root Cause Analysis is in red text, preceded by **RCA** prefix.

1. Notification form does not pull any Banner data allowing for data errors and it in PDF format

RCA: Not web based form

2. Originator/Supervisors/Managers do not know the employee's position number and Banner ID required for the notification form, data errors occur.

RCA: Have to look up in Banner

3. Separation/Clearance form has to be printed and filled out and handed off.

RCA: In PDF format

4. Originator/Supervisors/Managers don't always remember to complete the Separation Clearance form at a later date.

RCA: There isn't a mechanism or process in place to email reminders, Web page instructions are not clear when to complete this step

5. Some Supervisors/Managers are unaware of the process

RCA: There isn't any training specific for managers that includes the process

6. Special checks created because process is not followed by due dates

RCA: Departments do not process form in timely manner

7. Letter of indebtedness have to be created if employee is over paid leave balance, then Bursar office has to collect after employee is no longer employed

RCA: Employee will take annual leave after the separation clearance form has been processed

8. Employees do not complete their leave sheets and have approved by 25th of the month, prior to payroll processing begins

RCA: Managers are not following up that they have approved employee leave timely

9. University policy UM1382 states separation form is due in HR Records no later than the day prior to the employee last day to work

RCA: Policy and clearance form have not been compared in several years

Legends

