

## Separation / Retirement PAR

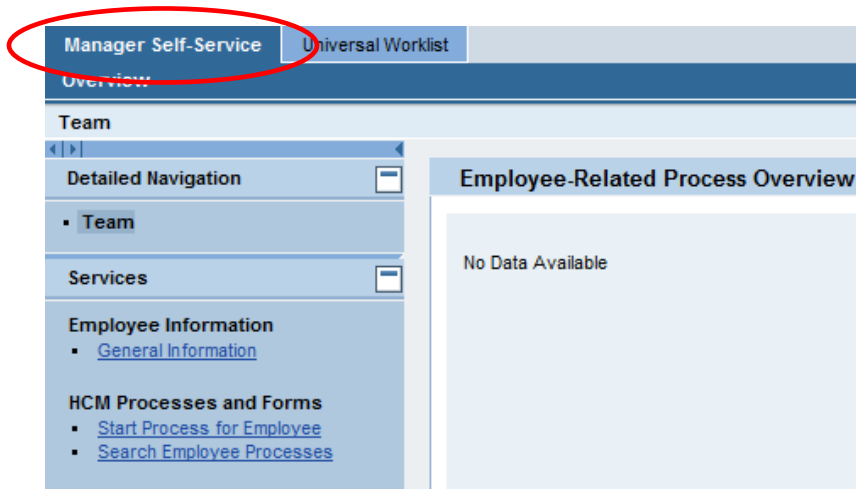
Transaction Code: N/A

### Location(s):

myNKU

**Purpose:** Use this form to create a separation or retirement action for faculty, staff, and students. All actions must be compliant with the policies and procedures outlined in the *NKU Staff Policies & Procedures Manual*, the *NKU Faculty Policies & Procedures Handbook*, the *NKU Handbook for Part-Time Faculty*, and the Student Employment Policy. Form initiators may only create actions for employees within their organizational structure. The separation/retirement date will default to the current date and should be updated appropriately. If the employee is transferring to another NKU department, please indicate new department information in the department field.

1. Log into myNKU
  - a. <https://myNKU.nku.edu/irj/portal>
2. Select the MSS tab.



3. Click Start Process for Employee.

The screenshot shows the 'Manager Self-Service' interface with the 'Universal Worklist' tab selected. The left sidebar contains a 'Detailed Navigation' menu with the following items: Team, Services, Employee Information (with sub-items: General Information), and HCM Processes and Forms (with sub-items: Start Process for Employee, and Search Employee Processes). The 'Start Process for Employee' link is highlighted in orange and circled in red. The main content area is titled 'Employee-Related Proc' and currently displays 'No Data Available'.

**Note:** A new window or tab will open, depending on your browser settings.

4. Select the employee or click Filter to search for the employee.

The screenshot shows the 'Start Processes' workflow page. At the top, a progress bar indicates five steps: 1. Select Employees (active), 2. Select Process, 3. Fill Out Form, 4. Check and Send, and 5. Completed. Below the progress bar, there are dropdown menus for 'Employee Selection - PARs' (set to 'Directly Subordinate Employees') and 'Display' (set to 'Organizational Information'). A table lists employee information with columns for Name, Personnel Number, Position, Organizational Unit, Employee Group, and Employee Subgroup. The 'Filter Settings' link in the top right corner of the table area is circled in red. At the bottom, there are 'Previous Step' and 'Select Process' buttons. The data source is noted as 'Data From: 07/25/2011 08:23:37' with a 'Refresh' link.

Name	Personnel Number	Position	Organizational Unit	Employee Group	Employee Subgroup
<a href="#">Nelli Norse</a>	00011671	Academic Coordinator	Biological Sciences	Staff	Non Exempt
<a href="#">Victoria L Hugo</a>	00004273	Administrative Secretary	Biological Sciences	Staff	Non Exempt
<a href="#">Jennifer Kremer Iulq</a>	00004810	Coordinator, Lab (Biology)	Biological Sciences	Staff	Exempt 12 months
<a href="#">Richard D Durtsche</a>	00004572	Faculty	Biological Sciences	Faculty	FT Ex Tenr-AY 10/12
<a href="#">Rebecca Lynn Kelley</a>	00002726	Faculty	Biological Sciences	Faculty	FT Ex Tenr-AY 10/12
<a href="#">Bethany Vice Bowling</a>	00003671	Faculty	Biological Sciences	Faculty	FT Ex TT AY 10/12
<a href="#">Charles A Acosta</a>	00002294	Faculty	Biological Sciences	Faculty	FT Ex Tenr-AY 10/12
<a href="#">Deborah Dempsey</a>	00002604	Faculty	Biological Sciences	Faculty	FT Ex RenewAY10/12
<a href="#">Earl David Thompson</a>	00004294	Faculty	Biological Sciences	Faculty	FT Ex TT AY 10/12
<a href="#">Gregory A Dahlem</a>	00003249	Faculty	Biological Sciences	Faculty	FT Ex RenewAY10/12

**Note:** Use wildcards (\*) to help search for an employee.

5. Select the employee.
6. Click Select Process.

### Start Processes

1 Select Employees    2 Select Process    3 Fill Out Form    4 Check and Send    5 Completed

Employee Selection - PARs:

Display:

Name	Personnel Number	Position	Organizational Unit	Employee Group	Employee Subgroup
*norse*					
<a href="#">Nelli Norse</a>	00011671	Academic Coordinator	Biological Sciences	Staff	Non Exempt
<a href="#">Nicholas Norse</a>	00011705	Faculty	Biological Sciences	Faculty	FT Ex Tenr-AY 10/12

Data From: 07/25/2011 08:23:37 [Refresh](#)

Previous Step: **Select Process**

7. Select NKU Separation / Retirement.
8. Click Edit.

### Start Processes

1 Select Employees    2 **Select Process**    3 Fill Out Form    4 Check and Send    5 Completed

View [Standard View] ▾

Process Name	Process Description
<input type="checkbox"/> NKU Separation / Retirement	NKU Separation / Retirement
<input type="checkbox"/> NKU Supplemental Payment	NKU Supplemental Payment

◀ Previous Step    **Edit** ▶

The Request for Separation or Retirement form will open in a new window or tab, depending on your browser settings.

9. Click Add Attachment for any supporting documentation.
10. Select Attachment Type.
11. Browse computer for File Name.
12. Click Upload.

▶ [Click here for help with this form](#)

**Attachments**

- Disciplinary Action Forms
- General Attachments
- Grant PI approvals for Terminations
- Letter of Resignation
- Performance Reviews

Attachment Type: Letter of Resignation File Name:  Browse... Upload Cancel

Add Attachment Delete Attachments

**Note:** The attachment type is a link to the attachment.

▶ [Click here for help with this form](#)

**Attachments**

- Disciplinary Action Forms
- General Attachments
- Grant PI approvals for Terminations
- [Letter of Resignation](#)
- Performance Reviews

Add Attachment Delete Attachments

**Note:** Use the check box to select and delete attachments if appropriate.

**Start Processes**

1 Select Employees 2 Select Process 3 Fill Out Form 4 Check and Send 5 Completed

▶ [Click here for help with this form](#)

**Attachments**

- Disciplinary Action Forms
- [General Attachments](#)
- Grant PI approvals for Terminations
- Letter of Resignation
- Performance Reviews

Add Attachment Delete Attachments

Scroll down the form to complete all required information.

**Start Processes**

1 Select Employees   2 Select Process   3 **Fill Out Form**   4 Check and Send   5 Completed

[Click here for help with this form](#)

**Attachments**

Disciplinary Action Forms  
 General Attachments  
 Grant PI approvals for Terminations  
 Letter of Resignation  
 Performance Reviews

[Add Attachment](#)   [Delete Attachments](#)

Please fill out the following form. You can save data typed into this form. [Highlight Existing Fields](#)

## Request for Separation or Retirement

*Reference Number*

**Form Information**

Use this form to create a Separation, End-of-Assignment or Retirement action for faculty, staff and students. All actions must be compliant with the policies and procedures outlined in the *NKU Staff Policies & Procedures Manual*, the *NKU Faculty Policies and Procedures Handbook*, the *NKU Handbook for Part-Time Faculty*, and the Student

[Save Draft](#)   [Previous Step](#)   [Check and Send](#)

Cost Center Override information will appear here if it applies to the selected employee; otherwise the fields will be blank.

<b>Employee</b>	Nicholas Norse (00011705)	<b>PersArea</b>	Main Campus (1000)
<b>OrgUnit</b>	Biological Sciences (11000021)	<b>PersSubArea</b>	Highland Hghts (1001)
<b>Position</b>	Faculty (30000973)	<b>CostCenter</b>	Biological Sciences (0235020001)
<b>Payroll Area</b>	NKU Monthly (M1)	<b>Fund</b>	Unrestrctd Curr Fund (0111000100)
<b>EmpGrp</b>	Faculty (A )	<b>Bus.Area</b>	Northern Kentucky University (100)
<b>EmpSubGrp</b>	FT Ex Tenr-AY 10/12 (A5)	<b>Grant</b>	NOT RELEVANT (NOT RELEVANT)

Company Cd	Cost Center	Order	Business Area	Fund	Functional Area	Grant	Percentage

[Save Draft](#)   [Previous Step](#)   [Check and Send](#)

Below is an example of cost center override information:

Company Cd	Cost Center	Order	Business Area	Fund	Functional Area	Grant	Percentage
NK01	0237001401		100	0132110460	0100	NOT RELEVANT	100.00

13. Answer the question regarding department transfer.
14. Select Action Type.
15. Select Reason.
  - a. For separations, select voluntary or involuntary (no "Reason" will appear for retirement)

Is this person transferring to another NKU dept?  Yes  No

Action Type  Separation  Retirement

Reason  Voluntary  Involuntary

Update Display

Save Draft

Previous Step Check and Send

**Note:** If you selected "Yes" for department transfer, please enter the Department to which the employee is transferring.

Is this person transferring to another NKU dept?  Yes  No

Department Athletics

Action Type  Separation  Retirement

Reason  Voluntary  Involuntary

Update Display

Save Draft

Previous Step Check and Send

16. Enter the Separation Date.
  - a. First day employee will no longer hold position
17. Enter the Last Day at Work.
  - a. Must be at least one day prior to separation date
18. Select either Normal or High priority.
19. Click Update Display.

Separation Date Oct 17, 2011

Last Day at Work Oct 14, 2011

Priority Normal

**Note:** The check box below is for HR use only.

Note: Vacation Payout eligibility for Faculty/Staff member who is separating will be indicated by Human Resources. Vacation payout for Faculty is determined by the Office of the Provost.

HR use only where vacation eligible (for pay)

**20. Enter New Comments for approvers or human resources to view. Please do not include any sensitive employee information such as medical, disciplinary, etc. Reasons for separation should be indicated in the documentation attached to the PAR.**

**Note:** Approvers should add comments if they make any changes to the PAR.

21. Click Check and Send.

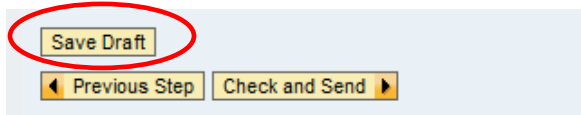
22. Click Send.

A confirmation including the reference number will appear at the top of the screen.

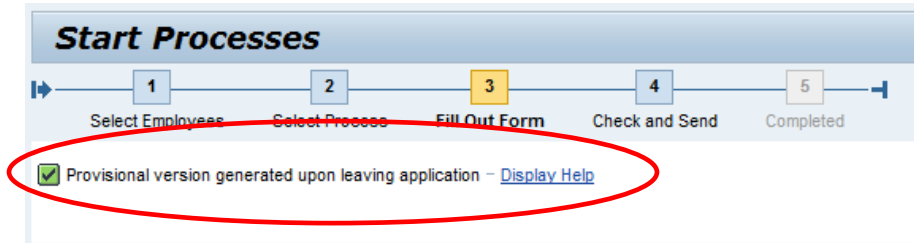


## Save Draft

1. Click Save Draft to save a provisional version of the PAR.



2. A confirmation will appear at the top of the screen, and the draft will be saved when you close the window/tab.



## Universal Worklist

1. The Tasks tab will display any Draft PARs or PARs sent back to author.
2. Select the link for the Draft or PAR to be edited, which will open in a new window or tab, depending on your browser settings.

Universal Worklist			
Tasks (2 / 2)   Notifications   Tracking			
Show: <span>New and In Progress Tasks (2 / 2)</span>   <span>Select a Subview...</span>   <span>All</span>			
Subject	!	From	Sent
<a href="#">Draft: Nelli Norse: NKU Separation / Retirement - Change Request</a>		test, Initiator1	Today
<a href="#">Edit NKU Separation / Retirement 00000003666 for Jerry Carpenter</a>		test, Initiator1	Sep 23, 2011

3. Complete the form and save draft or send for approval.

4. The People Involved in Process link will display helpful information regarding the process flow.
5. The Click here for help with this form will display helpful separation / retirement information from the Human Resources Web site.

6. The Tracking tab will display all PARs created by the Initiator.

Universal Worklist		
Tasks (2 / 2)   Notifications   Tracking (25)		
Show: <span>All</span>		
Subject	From	Sent
<a href="#">Draft</a>		Today
<a href="#">HR Process: 000000003690 for Nicholas Norse</a>	test, Initiator1	Today
<a href="#">HR Process: 000000003673 for Rebecca Lynn Kelley</a>	test, Initiator1	Sep 23, 2011
<a href="#">HR Process: 000000003671 for Deborah Dempsey</a>		Sep 23, 2011
<a href="#">HR Process: 000000003670 for Charles A Acosta</a>	test, Initiator1	Sep 23, 2011

7. Select the link for the Subject, which will open in a new window or tab, depending on your browser settings.

Subject	From	Sent	Priority	Due	Status
<a href="#">Draft</a>	test, Initiator13	Today	Normal	2	In Progress
<a href="#">HR Process: 000000003583 for Nicholas Norse</a>	test, Initiator13	Today	Normal	2	In Progress
<a href="#">HR Process: 000000003573 for Carolyn Faye Popham</a>	test, Initiator13	Jun 21, 2011	Normal	2	Completed
<a href="#">Withdraw 000000003572 for Tonya R Smiley</a>	test, Initiator13	Jun 21, 2011	Normal	1	Completed
<a href="#">HR Process: 000000003572 for Tonya R Smiley</a>	test, Initiator13	Jun 21, 2011	Normal	2	Canceled
<a href="#">Withdraw 000000003570 for Angela Diane Fulkerson</a>	test, Initiator13	Jun 21, 2011	Normal	1	Completed
<a href="#">HR Process: 000000003570 for Angela Diane Fulkerson</a>	test, Initiator13	Jun 21, 2011	Normal	2	Canceled

8. Click Display Details in SAP GUI.

Team | History

**HR Process: 000000003583 for Nicholas Norse**

Status: In Progress      Sent: Today by test, Initiator13  
 Processor: WF-BATCH      Priority: Normal

**Attachments**

Type	Title
	<a href="#">Process Object: Process Object</a>
	<a href="#">Employee: Nicholas Norse</a>

You can also:  
[Display Details in SAP GUI](#)  
[View History](#)

9. Scroll down to the bottom of the Workflow Log.
10. Click Agent.

**Workflow Log**

Menu Back Exit Cancel System Refresh List with technical details Graphical workflow log Personal workflow settings Print as list

View: WF Chronicle View: Workflow Agents View: Workflow Objects

Workflow and task	Details	Graphic	Agent	Status	Result	Date	Time
HR Process: 000000003583 TOR NICHOLAS NORSE							
▶ Import Form Field from Form Scenario ZHR_F				Completed		07/25/2011	08:36:22
▶ Import Form Field from Form Scenario ZHR_F				Completed		07/25/2011	08:36:25
▶ Import Form Field from Form Scenario ZHR_F				Completed		07/25/2011	08:36:25
▶ Import Form Field from Form Scenario ZHR_F				Completed		07/25/2011	08:36:25
▶ Import Form Field from Form Scenario ZHR_F				Completed		07/25/2011	08:36:25
▶ Import Form Field from Form Scenario ZHR_F				Completed		07/25/2011	08:36:25
▶ Instantiate EE				Completed		07/25/2011	08:36:26
▶ Get Position of USERID				Completed		07/25/2011	08:36:26
▶ Determine Approvers				Completed		07/25/2011	08:36:26
▶ Determining number of agents				Completed	Number of Agents Det	07/25/2011	08:36:30
▶ Determine Accounting Approvers				Completed		07/25/2011	08:36:31
▶ Approve NKU Supplemental Payment 000000				Ready		07/25/2011	08:36:32

11. Click Agents.

Which Agents Do You Want To Display? [X]

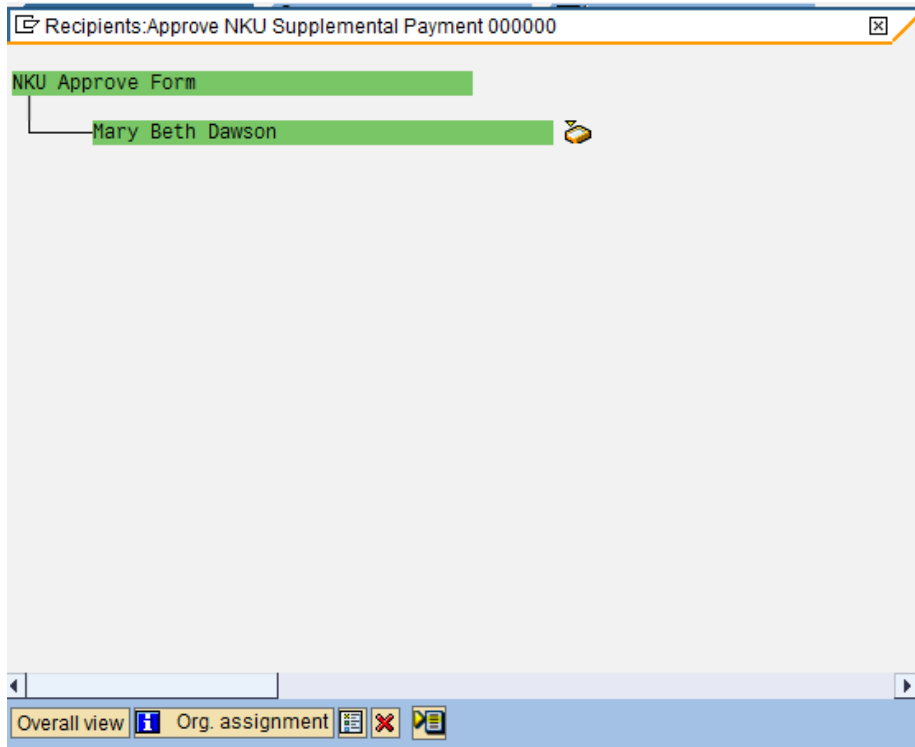
Agents

Possible agents

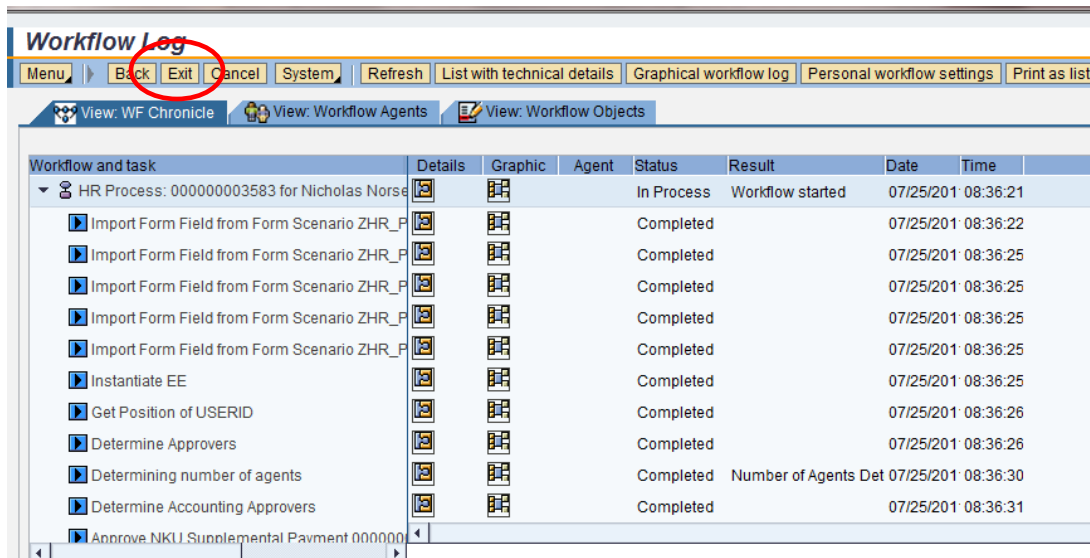
Excluded agents

[X]

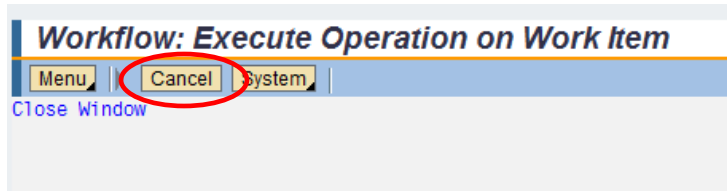
12. The current approver's inbox will display.
13. Close the window.



14. Click Exit.



15. Click Cancel.



16. Close the window.

