HR Oracle Responsibilities
Termination Process
An Overview for Staff
Learning Objectives

This presentation is not all inclusive and contains only general information as of Spring 2015. This summary should not be considered as a replacement for the more detailed information set forth in the certificates of coverage or master plan documents of benefit providers or information contained in the Faculty Manual or the State Personnel Board Rules. In the event of any discrepancies between the information in this document and in such other documents, the official documents will govern.
Collaborative HR Campus Accomplishments

Why is the employee leaving?

Who is terminating?

Oracle Actions
• Payroll Calendar (Deadlines)
• Department Payroll Cycle
• Entry of Oracle Actions
• Oracle Approvals

Department Payroll Review
• Email Notifications
• Generating Reports

Reminders
Collaborative HR campus accomplishments

Working together in 2014:

- Created 19,000 W-2s
- Enacted pay advices for employees located in 33 states
- Accomplished functional payroll responsibilities for $500 million in gross payroll
- 2,188 ‘quick pays and direct deposits’ processed outside of the normal payroll cycle to timely pay employees
Why is the Employee leaving?

- Resignation
- Retirement
- Position Elimination
- Involuntary Termination
- Death

Advanced Notice - Allows for smoother processing

Immediate Action Required - Contact payroll by phone/email

Timing of termination vs. payroll processing must be reviewed to determine urgency of processing

Dates:
- Last date of physical work?
- Date of termination notification?
- Current date?
Who is terminating

Faculty - Admin Pro:
- 12 Month Regular
- 9 Month Regular
- 9/12 Month Regular
- Special
- Temporary

Post Doctoral Fellows
Clinical Psychology Interns
Veterinary Interns

State Classified:
Salary
Hourly

12 Month Regular & Special –
Eligible for insurance benefits (CSU)
Eligible for annual leave payout
May be eligible for sick leave payout

9 month & 9/12 month regular -
Eligible for insurance benefits
May be eligible for sick leave payout

Temporary (less than 1 year)
Ineligible for insurance & leave benefits

Eligible for insurance benefits

Eligible for insurance benefits (State)
Eligible for annual leave payout
May be eligible for sick leave payout
Who is terminating (continued)

- Fellowship Grant Trainees
- Graduate Research Assistant
- Graduate Teaching Assistant
- Graduate Student Assistant
- Non-Student Hourly (temporary)
- Student Hourly

FGT
GRA
GTA
GSA

Ineligible for Insurance & leave benefits

Non-Student Hourly (temporary)
Student Hourly

Ineligible for Insurance & leave benefits
Oracle Actions
Proactivity with Oracle termination actions
  ◦ Avoids overpayments
  ◦ Provides smooth retirement transitions
  ◦ Ensures insurance coverage is timely terminated
    • Benefit plans require premiums to be paid when coverage is not terminated timely (departmental responsibility).
When is the latest acceptable date to enter a late monthly action?

Appropriate Unavoidable Hiring Circumstances
- Employees hired under special conditions after the 10th of the month
- Inadvertent delays in the entry for LWOP (to avoid overpayment)
- Mid-month or prior month termination (to avoid overpayment)

Utilizing the Latest Acceptable Deadline
- Action must route through the approval hierarchy
- Department should monitor the progression of the action through to final approval to expedite timing
- Oracle actions not entered by the latest acceptable deadline may make create untimely pay circumstances for your employee
Campus Departments Payroll Cycle

Pre-Payroll Processing

Data Entry into Oracle:
- Enter New Hires
- Enter Terminations
- Update LWOP
- Enter Hours
- Setup/Update labor scheduling

Submit:
- Paperwork
- Records
- Payroll

Review Oracle approvals:
- Validate status of changes
- Follow-up on outstanding items required for processing
- Contact HRS/Payroll with any concerns about deadlines
Terminations are created at the department level in Oracle and are approved electronically. Approvals route through the hierarchy designated by the department.

- **Faculty and Admin Professional**: Department Head/Director $\rightarrow$ Dean $\rightarrow$ Academic VP/Provost $\rightarrow$ Human Resources
- **State Classified and Other Salaried**: Department Head or Director $\rightarrow$ Dean $\rightarrow$ Human Resources
- **Non-Student Hourly**: Department Head or Director $\rightarrow$ Human Resources
- **Graduate Assistant**: Department Head or Director $\rightarrow$ Dean $\rightarrow$ Graduate School $\rightarrow$ Human Resources
- **Student Hourly**: Department Head or Director
- **Work Study**: Department Head or Director $\rightarrow$ Student Employment
Review of Actions – Terminations

Prior to HR approval the following steps are completed:

**Records**
- Review the new action or changes
- Verify required forms are received, accurate and complete

**Payroll**
- Confirms the action is complete (salary information and appointment type)
- Action is Approved
Campus Department Payroll Review
# Payroll Calendar

<table>
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<tr>
<th>MONDAY</th>
<th>TUESDAY</th>
<th>WEDNESDAY</th>
<th>THURSDAY</th>
<th>FRIDAY</th>
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<td>New Year’s Day</td>
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<td>Deadline for receiving term paperwork for State Classified</td>
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<td></td>
<td>Martin Luther King Jr Day</td>
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<td>Monthly Pay Day</td>
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</tbody>
</table>
Campus Department Payroll Review

**Receive** Oracle automated email notification of completion of payroll processing

**Generate** the Monthly Expense Distribution, Account Summary, and Employee Summary reports from Oracle.

**Review Information:**
- Validate new employees, terminating employee, hours posted are paid correctly
- Validate all employees charged belong to your dept.
- Validate any LWOPs are for the correct amount/account number
- Generate any PPDAs if necessary.
- If another department has made the error, contact them to generate the redistribution

**Create Reminders:**
Verify requested updates are completed for next payroll processing
Campus Department Payroll Review

Email Notification

-----Original Message-----
From: owner-oracle_hrms_users@colostate.edu [mailto:owner-oracle_hrms_users@colostate.edu] On Behalf Of jobprd@mailer.is.colostate.edu
Sent: Tuesday, December 23, 2014 1:08 AM
To: HRMS User Listserv
Subject: Salary Payroll

All,

December salaried payroll processing is complete.

If applicable, you may run the monthly Certification Reports and Expense Distribution using
- Start Date: 22-NOV-2014
- End Date: 22-DEC-2014

The Employee Summary and Account Summary reports for December will be available in the VistaPlus Report Archive on 01-JAN-2015. An email will announce when the reports are ready to be viewed.

For assistance, contact:
hrs_data_systems@mail.colostate.edu or hrs_records@mail.colostate.edu
Campus Department Payroll Review

Post payroll reports are available after each hourly and salaried processing cycle and department validate entry accuracy.

Generate Reports

- **Monthly Expense Distribution**
  - Shows all hours, salaried and hourly dollars, and fringe costs that are charged to an account for that pay period

- **Account Summary**
  - Reports all employees paid from any account owned by the department. The report lists expended prior and current month dollars, projected encumbrances, and totals for all employees for the fiscal year

- **Employee Summary**
  - Includes employees in the department. It is different from the Account Summary report in that it lists employees’ pay and encumbrances by month for the fiscal year. It also has columns to show roll-ins and roll-outs for roll-forward accounts
Helpful Tips
Terminations

✓ Does contact need to be made with Payroll?
  • Involuntary resignation, checks need to be issued within three business days of final day worked
  • Is the employee in the current payroll – overpayment?
  • Death

✓ Submit any final additional hours
  • Overtime/ Excess Hours/ Shift / On-Call

✓ Validate address in HR system is current

✓ AF/AP and State Classified employees enrolled in benefits (time sensitive)

✓ COBRA terminations are required to be provided timely

✓ Final payment issued through direct deposit
Terminations

✓ Leave calculations
  • Faculty/AP Leave – compensated for accrued leave minus the number of days of annual leave taken during the last 30 working days prior to date of separation (24 days max)
    • [http://www.facultycouncil.colostate.edu/files/manual/sectionf.htm#F.3.1.4](http://www.facultycouncil.colostate.edu/files/manual/sectionf.htm#F.3.1.4)
  • State Classified – compensated for leave earned through the last date of employment
    • [http://www.hrs.colostate.edu/pdfs/hrs-manual-3-state-classified.pdf](http://www.hrs.colostate.edu/pdfs/hrs-manual-3-state-classified.pdf)
  • Sick – retirement only
    • [http://www.facultycouncil.colostate.edu/files/manual/sectionf.htm#F.3.2.3](http://www.facultycouncil.colostate.edu/files/manual/sectionf.htm#F.3.2.3)
    • [http://www.hrs.colostate.edu/pdfs/hrs-manual-3-state-classified.pdf](http://www.hrs.colostate.edu/pdfs/hrs-manual-3-state-classified.pdf)

✓ Pension deductions
  • Will post to the carrier in the month of final payment
  • University will send final termination notices to PERA to coincide with final payment documentation to the carrier
Human Resources

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Fort Collins, CO 80523
(970) 491-MyHR (6947)
www.hrs.colostate.edu