



# **Unicorn HRO**

## **Separation Process**

The Separation Process is used when an employee is leaving active employment with the company. This could be the result of, for example, a termination or leave of absence. Different employment statuses will trigger different activities as part of the separation process. To set up the default activities based on status, access the Employment Status function. The available options that relate to separation are:

**Activate Separation Process:** Within the Separation Process window, you will only be allowed to change an employee's status to those statuses which have this checkbox set to Yes.

**Eligible For COBRA:** by indicating Yes in this checkbox, if an employee was enrolled in benefits during employment, the Enroll COBRA checkbox will be set to Yes. You will be brought to the Add COBRA Information window. See the following discussion on COBRA for full instructions on this function.

**Vacate Position:** by indicating Yes in this checkbox, the Vacate Position checkbox will be set to Yes if the employee was assigned to a position. This will cause he or she to be automatically removed from that position, and Work History will be written.

**Suspend Benefits:** if this checkbox is Yes, the Suspend Benefits checkbox will be set to Yes in the Separation Process if the employee is enrolled in benefits. You are brought to the Benefit Information window, where enrolled benefits appear (add window capture). You may suspend any or all of the employee's benefits at this time. The employee's benefit statuses will be changed from Active to Suspended, and Benefit History will be written. This might be done for a temporary leave situation, where benefit coverage will not be in effect, but will resume when the employee begins work.

**Terminate Benefits:** if this checkbox is Yes, the Terminate Benefits checkbox on the Separation Process window will be set to Yes if the employee is enrolled in benefits. You are brought to the Benefit Information window, where any or all benefits can be terminated (deleted). This would be done if the employee was leaving the company, and is not expected to return. Benefit enrollment records are deleted, and Benefit History will be written.

**Schedule Exit Interview:** if this checkbox is Yes, the Exit Interview checkbox in the Separation Process will be set to Yes. You will be brought to the Exit Interview Schedule window, where dates and times for exit interviews can be entered, and a schedule printed for the employee or interviewers. Results of interviews can be entered and printed.

**Active:** for any definition that represents a non-working status, whether it be a termination or a temporary leave of absence, this checkbox should be set to No. By doing so, the employee with this status will not appear on reports that show currently employed persons.

The other fields of Employment Status, "In Transit", "Accrue Entitlements" and "Temporary" are used in conjunction with active statuses.

Additional options within the Separation Process, beside the checkboxes noted above, include:

**Return Property** checkbox: If the employee has been given company property that must be returned upon termination, this checkbox will be set to Yes. (The system checks the Employee Property function for this feature, for any items where the Return On Termination is set to Yes.) You will be brought to the Employee Property function, where the system will display the property that must be returned. At this point you may enter the Date Returned if the employee has in fact returned this property, such as office keys, company ID card, etc. If the employee has not returned the property, this will act as a reminder to you. The Date Returned can be entered at a later time if necessary. Refer to the section on Employee Property for a complete explanation of this function.

**Employee Entitlement Plans** button: This button will be active if the employee has accrued entitlement balances. By clicking this button, you will be brought to the Employee Entitlement Plans window (add window capture). This displays the employee's entitlements along with the number of hours accrued, hours taken, and the balance for each entitlement. Any absence detail that is linked to an entitlement may also be viewed. In the case where an employee is entitled to payment of unused balances, this function can be used to determine the remaining number of hours for each plan.

The checkboxes on the Separation Process window are automatically set based on the set-up of the Employment Status you have selected. However, these checkboxes on the right hand portion of the window may be changed before processing begins.

COD Tables used in the Separation Process:

- **Status Reason:** used to record the reason for the employee's separation. This is stored in Employment Status Assignment, along with the new status and status change date.
- **Reason For Position:** If the employee was assigned to a position, and you vacate his/her position as part of the separation process, Work History will be written with this reason, with the Position Date.

**Exit Interview Schedule** function: The employee number who will interview the exiting employee, the date and time of the interview, and the date the employee was notified of the interview can be entered in this function. The Print Schedule button will access the word processor that has been set up in the Word Processor Path of the Directory Defaults function. It will create a document in the library that has been set up in the Word Processor File path of the Directory Defaults function. This can be given to the employee who is leaving the company and/or the interviewers. After the interview has occurred, the results can be recorded by selecting the interviewer and clicking on the Exit Interview button. This function stores the actual interview date, the person who this employee reported to, the reason for job separation, and any comments. After this information has been entered, click on the Print button to access your word processor and create a document to print the interview results.

**Enroll COBRA** checkbox: If this is set to Yes, you will be brought to the Add COBRA Information window. When adding a COBRA record, if the employee's COBRA Election Choice is Yes, you will be brought to the COBRA Benefits window.

**Payroll Status** checkbox: If this is set to Yes, you will be brought to the Employee Payroll Status function. At that time you may change the payroll status.

**Taxable Life Creation** checkbox: If this is set to Yes, you will be brought to the Taxable Life Process function. In the Selection window, enter the employee number you are terminating. Select the employee's last pay date. The process will create a lump sum earning for the value of group term taxable life insurance over \$50,000. This lump sum earning will be included with the employee's last paycheck.

When the Separation Process for an employee is complete, a message will appear. If you try to terminate an employee whose status is defined as inactive in the Employment Status table, you will receive a message to this effect, and you asked if you want to continue. If you do, you may update any of the separation-related items on this window.