

Title	PEATMVF – Termination Verification Process Whitepaper
Version	1
Date	03/12/2010
Created by	Nicole Ogan, Training & Development Manager, SDBOR
Copyright	South Dakota Board of Regents
Process Owner	Janice Minder, Director – Human Resources, SDBOR
Dept/Division	Human Resources/Shared Payroll Center
Processes	PEATMVF

Termination Verification Process Form (PEATMVF)

Records for terminated employees may not always be run through the final payroll process and need to be updated to the employee status *terminated* on PEAEMPL. The Termination Verification Process Form (PEATMVF) lists terminated employees whose PEAEMPL form contains an employee status other than T (Terminated). The process PEATMVF was developed to list all employees who are in this condition and move them to terminated when the save function is performed.

This process is run by the Shared Payroll Center after each payroll.

Background Information

When the termination date and termination reason are established for an employee on PEAEMPL and the employee's job assignments have been properly terminated on the Employee Jobs Form (NBAJOBS), the Payroll Update Process (PHPUPDT) updates the employee's current employee status to *Terminated* during the final payroll process. Records for properly terminated employees, however, may not always be run through a final payroll process. This occurs, for example, if an hourly employee does not turn in a time sheet for his/her final pay period or if an employee is terminated after the end of a pay period. If a terminated employee's records do not go through a final payroll process, his/her employee status is not automatically updated and remains active or on leave. PEATMVF was developed to list employees in this condition.

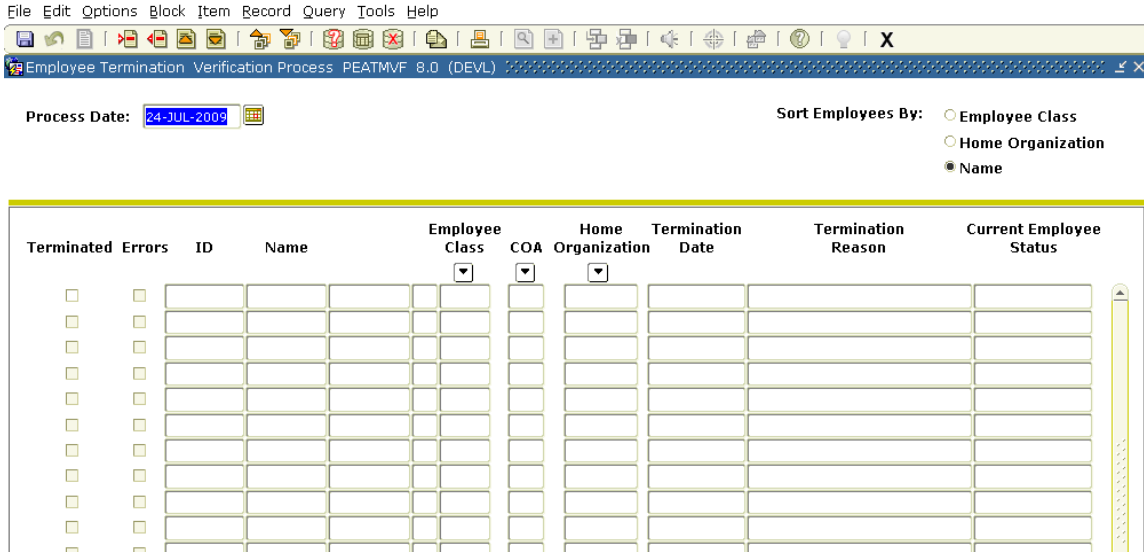
PEATMVF Process

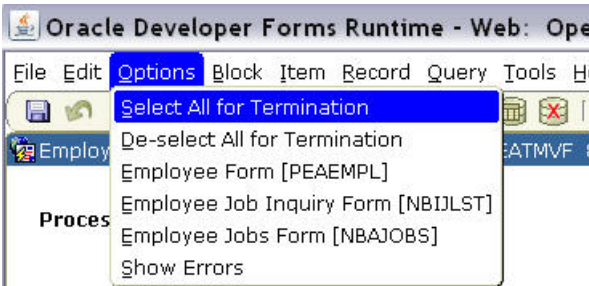

The terminated employees whose employee status was not changed to *Terminated* are listed in the detail information block of PEATMVF. Flag the employees whose status is to be changed to *Terminated* by checking the **Terminated** check box on the form. When you perform the Save function, the form verifies that the job assignments have been terminated for the identified employees and changes the Employee Status on the Employee Form (PEAEMPL) for each of these employees is changed to *Terminated*.

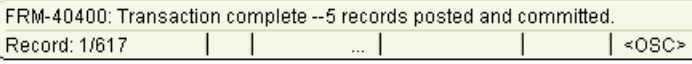
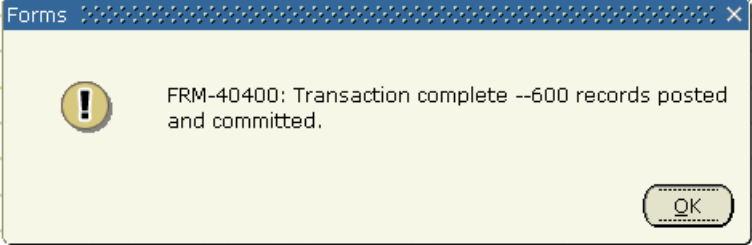
If PEATMVF detects that a job is still active, it enables the **Errors** check box. You can then view a window identifying the active job by selecting *Show Errors* in the Options menu. The window contains the ID and name of the employee holding the active job, the position number and suffix of the job, the employee's current employee status, and an error message describing the problem. At this point, you can correct the error by either terminating the job on NBAJOBS or removing the termination date on PEAEMPL. You can access the required form by selecting *Employee Jobs Form* or *Employee Form* from the Options menu.

You can control the number of status changes performed by PEATMVF as follows:

- The form queries for all employees whose termination date on PEAEMPL falls on or before the date in the **Process Date** field and who have an employee status other than *Terminated*. The default value for the **Process Date** field is the current system date. You can enter an earlier date in this field. However, to protect the employee record for future processes, the form prevents you from entering a future date.
- You can either manually select the employees whose status is to be updated to *Terminated* by checking the **Terminated** check box in the detail information block of the form or you can update the employee status for each listed employee by selecting the *Select All for Termination* option in the Options menu.
- You can refresh the form at any time by selecting *De-Select All for Termination* in the Options menu.
- You can narrow the selection criteria in the detail information block of the form after the initial extract has been performed. To do this you can make queries by Name, Employee Class, COA, and/or Home Organization by using the Enter or Execute Query function. This capability enables you to perform the termination status change on a selected group of employees.



Step	Action
1	Open Banner and bring up the PEATMVF form, shown above.
2	Enter the process date. The default value is the system date. The date can be changed to the date the information is to be listed, but it must be earlier than the system date.
3	Choose how you would like to sort the employees. Employee Class, Home Org. or Name (see top-right corner, above).
4	Hit Next Block
5	If needed, you can limit the list to Employee Class, COA, or Home Org. by running a query on that section.
6	Select the employees who need to be moved to terminated. This can be done by checking the Terminated check box for each employee, or you can move them all by selecting Select All for Termination from the "Options" menu, as shown below. 
7	Click the Save button. 
8	The process will run. Once it is complete you will receive a message

	<p>stating the transaction is complete, similar to the one below.</p>  <p>OR</p> 
9	Exit the form.

Notes:

If you get errors: If PEATMVF detects that a job is still active, it will enable the errors check box for those employees. This will allow you to view a window identifying the active job by selecting **Show Errors** in the “Options” menu. The Show Errors screen will describe the problem for you. You can correct the error by either terminating the job on NBAJOBS or removing the termination date on PEAEMPL.

*If you receive this error – please take a screen shot and forward to the Trainer so that it can be highlighted more completely in this quick guide. Thank You!

If a terminated employee has more than one non-terminated job, PEATMVF will identify the job with the earliest begin date. If they have the same begin date, the first job listed on NBIJLST will be identified. To determine if the employee has any other non-terminated jobs, look to NBIJLST and if needed, change the job status. To display this form, select *Employee Job Inquiry Form* from the Options menu.

Termination Logic – Behind the Process

The following is performed on each employee while the process runs:

1. The form verifies the Termination Date and Reason fields on PEAEMPL have been completed.
2. The form verifies the Employee Status field on PEAEMPL is not equal to “T”.
3. The form then verifies that each of the latest effective dated jobs have a status of “T”.
4. The form updates the employee status to “T” on PEAEMPL.
5. The form writes a history record reflecting the status change.