TEXAS A&M **INTERNATIONAL** UNIVERSITY

Standard Administrative Procedure (SAP)

33.99.99.L0.01 Separations of Employment

First Approved:	**June 16, 2011**
Revised:	**April 12, 2019**
Next Scheduled Review:	**April 12, 2024**

Procedure Statement and Reason for Procedure

The purpose of this SAP is to establish procedures for separations of employment at Texas A&M International University (TAMIU).

Procedures and Responsibilities

1. RESPONSIBILITIES OF SUPERVISOR AND DEPARTMENT HEAD

1.1 **Involuntary Separation** – If the employee's separation is involuntary (i.e, termination), the supervisor must first contact the Director of Human Resources (HR) to ensure the appropriate steps are taken **before** terminating the employee. The Director of HR will provide the supervisor with the termination letter to be used to notify the employee of their termination. Once the supervisor has met with the Director of HR and provided the termination letter to the employee, the supervisor must complete steps b. through e. in Section 1.2 below.

1.2 **Voluntary Separation** – If the separation is voluntary (i.e., resignation/retirement), immediately upon first knowledge of separation by an employee, the following steps must be taken by the supervisor.

a. Obtain a resignation letter from the employee which states their separation date. For voluntary separations, the separation date is the employee's last day physically worked.

b. Create and submit a "Termination" process via Workday and upload the employee's resignation/termination letter or hand-delivered it to the HR Office. If the separation is involuntary and the employee will receive two weeks of suspension with pay per Section 2.1, the separation date is the final day of the employee's suspension. Once the HR Partner reviews and provides the first approval of the submitted process, the Department Head receives the action and reviews/approves when it arrives at their Workday inbox.

c. Prior to the employee's last day physically at work, the supervisor must ensure the employee reports to the HR Office to complete the exit and clearance process (insurance, leave, timesheet, keys, ID, etc.)

d. During the employee's notice period, and in accordance with System Regulation 31.03.02, *Sick Leave*, the use of sick leave will require a doctor's certificate or other written statement of the facts concerning the condition for absence. The President has named the Director of HR as designee with the authority to request the written documentation supporting the request for sick leave during the notice period.

e. If separation is from student employment, the supervisor must contact the Office of Financial Aid upon first knowledge of separation.

f. Once the "Termination" process is completed **and** the employee's end date has passed, the supervisor may review the position restrictions (or job duties) of the vacated position, edit the restrictions if necessary by submitting an "Edit Position Restrictions" process in Workday, and get the HR Office's final approval on the changes. Once the "Edit Position Restrictions" are approved, the department may submit a "Job Requisition" process in Workday to request posting of the vacancy.

   i. If the position restrictions do not require editing, the supervisor may request that the vacancy be posted before the employee's last working day; however, the "Termination" process in Workday must be completed before the vacancy can be posted.

   ii. If the position restrictions require editing, *and* the employee gives notice 30 days or more in advance of their separation date, *and* the supervisor has a business need to post the vacancy before the employee's last working day, the supervisor must inform the HR Office of this so that a temporary position can be created by the HR Office for the current employee to be transferred into until their last working day. In this situation, an approval memo is not required to create the temporary position. Once the transfer is complete, the vacated position's restrictions can be edited by the supervisor by submitting an "Edit Position Restrictions" process in Workday, and once approved by an HR Partner or Recruiting Partner, a "Job Requisition" process to post the vacancy before the employee's last working day.

   iii. Additional information on how to post and fill a vacated position once a "Termination" or "Transfer" process is completed in Workday is available in TAMIU SAP 33.99.01.L1.01, *Hiring Procedures for Non-Faculty Positions*.

2. RESPONSIBILITIES OF THE OFFICE OF HUMAN RESOURCES (GENERAL)

Upon first knowledge of separation by an employee, the following steps must be taken by the HR Office.

2.1 **Involuntary Separation** – If the employee's separation is involuntary (i.e, termination), the Director of HR must be notified by the supervisor before the employee is terminated. The Director of HR will provide the supervisor with the termination letter to be used to notify the employee of their termination. Under rare circumstances, upon recommendation by the Director of HR and with the approval of the President, a minimum of two weeks' notice may be given to the employee unless the employee is in a wage position, in accordance with System Regulation 32.02.02, *Discipline ad Dismissal of Nonfaculty Employees*. In this case, the employee will be placed on suspension with pay until the effective date of the dismissal. For bi-weekly employees, the HR Absence Partner will manually add the "Time Off – Suspension with Pay" to the employee's timesheet in Workday. For monthly employees, the employee's termination date and pay through date will be recorded as the final day of the employee's suspension. Severance pay for time not worked or earned will not be authorized. Once the Director of HR provides the termination letter to the supervisor and/or employee, the HR Office will complete the steps outlined in Sections 3 – 5.

2.2 **Voluntary Separation** – If the separation is voluntary (i.e., resignation/retirement), immediately upon first knowledge of separation by an employee, the HR Office will complete the steps outlined in Sections 3 – 5.

3. RESPONSIBILITIES OF THE HUMAN RESOURCES OFFICE (EMPLOYMENT AREA)

3.1 The HR Office receives the "Termination" process via Workday with resignation/termination letter attached or hand-delivered, if applicable. If the letter is attached to the Workday process, a copy of the letter is still kept in the employee HR file. The HR Office checks the "Termination" process for accuracy, including dates and termination reason code. Updates are made if necessary and the process is approved.

3.2 If the separation is for a monthly employee, the HR Office immediately sends an email to the Payroll Office to ensure the employee is not overpaid.

3.3 If the separation date is a future date, the HR Office places a calendar reminder on the employee's last physical date at work to verify submission of final timesheet on that date. If the separation date is past or current, the HR Office verifies submission of the final timesheet and approves the "Termination" process.

3.4 The HR Office then begins routing the appropriate "PROCESS OUT" checklist and completes checklist items that pertain to the employment area. The checklist is then passed on to the HR absence area.

3.5 Upon confirmation of a separation, the HR Office schedules the deactivation of the employee's account via the HR Termination Application. The application will disable the separating employee's accesses (email, computer login, UConnect, VPN, wireless internet, Web Focus, Banner, etc.) at 11:59 pm (the default time) on the separation date and will automatically send email notifications to other key departments (Physical Plant, Killam Library, Business Office, etc.) to disable accesses to other TAMIU systems.

In the event of an involuntary separation, the HR Termination Application can disable the separating employee's access immediately by adjusting the default time to the time of the termination. When immediate deactivation is warranted, an email is also sent to ITSecurity@tamiu.edu to alert the Office of Information Technology (OIT) that immediate attention is needed for deactivation of select accesses.

4. RESPONSIBILITIES OF THE HUMAN RESOURCES OFFICE (ABSENCE AREA)

4.1 Once the "Termination" process arrives at the Workday inbox for the HR Absence Partner, the HR Office completes checklist items that pertain to the absence area. Time off requests are reviewed and finalized, if necessary. If the employee's separation is involuntary, and the employee is paid bi-weekly, the HR Absence Partner manually adds the "Time Off – Suspension with Pay" to the employee's timesheet in Workday, if authorized as outlined in Section 2.1.

4.2 The Absence Partner will coordinate with the Director of HR for verification and required documentation for the use of sick leave during the notice period as per the guidelines in Section 1.2.d. If written documentation is not provided, the time off will be designated a Leave Without Pay and may require a change to the employee's separation date.

4.3 If the employee has leave balances that must be paid out upon separation, the HR Office will create a memorandum detailing the number of hours to be paid out. in accordance with System Regulation 31.03.01, *Vacation*, and will forward the memo to the Payroll Office to request lump sum payment on the next available pay date following the employee's final paycheck per the same pay frequency (bi-weekly or monthly) as the employee's regular payroll. The checklist is then passed to the benefits area and the Workday "Termination" process is approved by the Absence Partner.

5. RESPONSIBILITIES OF THE HUMAN RESOURCES OFFICE (BENEFITS AREA)

5.1 Once the "Termination" process for a voluntary separation arrives at the Workday inbox for the HR Benefits Partner, the HR Office calls the employee and schedules an exit/clearance meeting. During the exit/clearance meeting, the HR Office reviews with the separating employee their benefits, retirement, Exit Processing Form, Clearance Form, and Employee Exit Questionnaire, and gives instructions for completion. If applicable, leave balances, sick leave pool contribution, final leave requests, and final timesheet are also discussed with the employee during the exit/clearance meeting. Once the exit/clearance meeting is completed, the HR Office completes the checklist items that pertain to the benefits area and the Workday "Termination" process is approved by Benefits Partner.

In the case of an involuntary separation, the employee will be informed in the termination letter/meeting that they will need to contact the benefits representative who will either schedule an appointment or review over the phone the benefits, retirement, leave payout, COBRA options, and the Employee Exit Questionnaire. The employee's supervisor will be requested to handle the Clearance form. The employee's keys, computer, and any TAMIU-provided credit cards, cell phone, and other equipment or documentation will be collected at the time of termination. The employee will be notified to schedule a time with the supervisor to return to campus to collect their personal belongs from their office.

5.2 After the employee's final paycheck has been paid, the benefits area will review the employee's last payroll and complete the rest of the pending checklist items.

5.3 If necessary, the benefits area forwards the employee HR file and checklist to any other area (employment, absence, immigration) that still shows pending items on the checklist. After all checklist items are completed, the employee HR file is placed in the queue for scanning into Laserfiche.

6. RESPONSIBILITIES OF THE PAYROLL OFFICE

Upon first knowledge of separation by an employee, the following steps must be taken by the Payroll Office.

6.1 If the employee is paid monthly, the HR Office will notify the Payroll Office via email of the employee's separation. The Payroll Office reviews the separation date of the employee to ensure the employee is not overpaid. If the employee has been overpaid, the Payroll Office contacts the employee to inform them of the overpayment, collects the overpaid funds via the Bursar's Office, and processes a payroll correction as necessary.

6.2 If the employee is paid bi-weekly, the Workday "Termination" process will arrive at the inbox for the Payroll Timekeeper. The Payroll Office verifies submission of the final timesheet and approves the "Termination" process. If the employee's separation is involuntary and the employee is paid bi-weekly, the Payroll Office reviews the termination letter to verify if suspension with pay has been authorized per Section 2.1 of this SAP. If so, the Payroll Office verifies that two weeks of suspension with pay is reflected on the employee's final timesheet. If not, the Payroll Office contacts the HR Office so the suspension with pay can be manually added as necessary.

6.3 The Payroll Office processes the employee's final paycheck on the employee's last regular pay cycle. If the Payroll Office receives a memo from the HR Office requesting the payout of leave for the employee, the lump sum payout is paid on the next available pay date following the employee's last regular paycheck and will follow the same pay frequency (bi-weekly or monthly) as their regular payroll. Lump sum payouts are considered supplemental wages and are subject to Social Security and Medicare taxes, plus federal income tax withheld at the IRS supplemental wage tax rate.

Related Statutes, Policies, Regulations, or Rules

System Policy Section 33.99, *General Employment*
TAMIU SAP 33.99.01.L1.01, *Hiring Procedures for Non-Faculty Positions*
System Regulation 31.03.01, *Vacation*
System Regulation 31.03.02, *Sick Leave*
System Regulation 32.02.02, *Discipline and Dismissal of Nonfaculty Employees*

Definitions

Employee HR File – For the purpose of this SAP, the term "employee HR file" refers to employee records/documents in the HR Office and could be either hard copy (paper) or electronic (imaged on Laserfiche).

Termination/Separation – A termination/separation occurs when an employee will no longer be working for any System institution. If the employee will be transferring from one department to another or from one System institution to another, with no break in service, the employee should not be terminated via Workday. Instead, a "Transfer" process should be submitted in Workday by the new department where the employee will be working.

Separation Date – The employee's last physical day worked (duty day). Days reported as comp time, vacation time, or sick leave do not qualify as physical days worked.

Contact Office

Office of Human Resources, 956-326-2365