

HRMS

Separation Action (PA40)

Use this procedure to separate an employee from state service.

Prerequisites: The Time and Attendance Processor has already:

- Deleted any future-dated time, compensation, and leave entries beyond the employee's separation date from CATS, the Employee Remuneration Info (2010) infotype, and the Absences (2001) infotype.
- Manually generated leave accruals if the employee has earned leave but is separating from the agency before the system generates their last accruals. Refer to the user procedure *Quota Generate Accruals Manually* located in the [OLQR](#).
- Executed ZT60 and ZCAT6 to ensure the employee has accurate leave accruals with correct end dates.

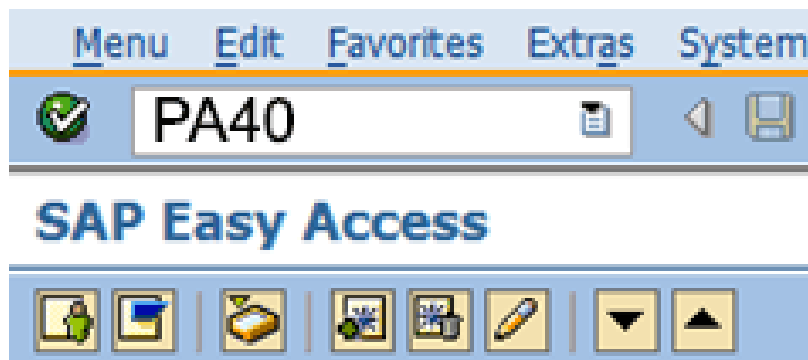
The Personnel Administration Processor should confirm with the Time and Attendance Processor that all these items are complete before starting the Separation Action (PA40).

Roles: *Personnel Administration Processor, Payroll Processor, and Benefits Processor.*

Note: *Field definitions can be accessed within HRMS by pressing the "F1" key on the keyboard, or via [On Line Quick Reference \(OLQR\)](#), [HRMS Data Definitions Resource Guide](#), and [Glossary](#).*

Separation Action (PA40) (cont.)

1. Enter transaction code **PA40** in the command field and click the **Enter** (✓) button or press **Enter** on the keyboard.



Tips

- If the employee has separated from state service prior to the completion of six continuous months and has accrued vacation leave, the accrued amount will need to be removed so it is not accessible to the employee if they return to state service at a later date. Refer to the user procedure *Quota- Removing Accrued Leave* located in the [OLQR](#).
- This procedure may require hand-offs to other roles (payroll processor, benefits processor, and time & attendance processor) depending on the structure of your agency and your role at your agency.

Separation Action (PA40) (cont.)

2. Complete the following fields:

For Personnel Administration Processors, the following fields are mandatory:

- **Personnel no.**
- **From**

For Payroll Processors, skip to **step 22** in this procedure.

For Benefits Processors, skip to **step 48** in this procedure.

3. Click the box to the left of **Separation**.

4. Click the **Enter** button or press **Enter** on the keyboard.


5. Click the **Execute** button to begin the transaction.

Tips (Con't)

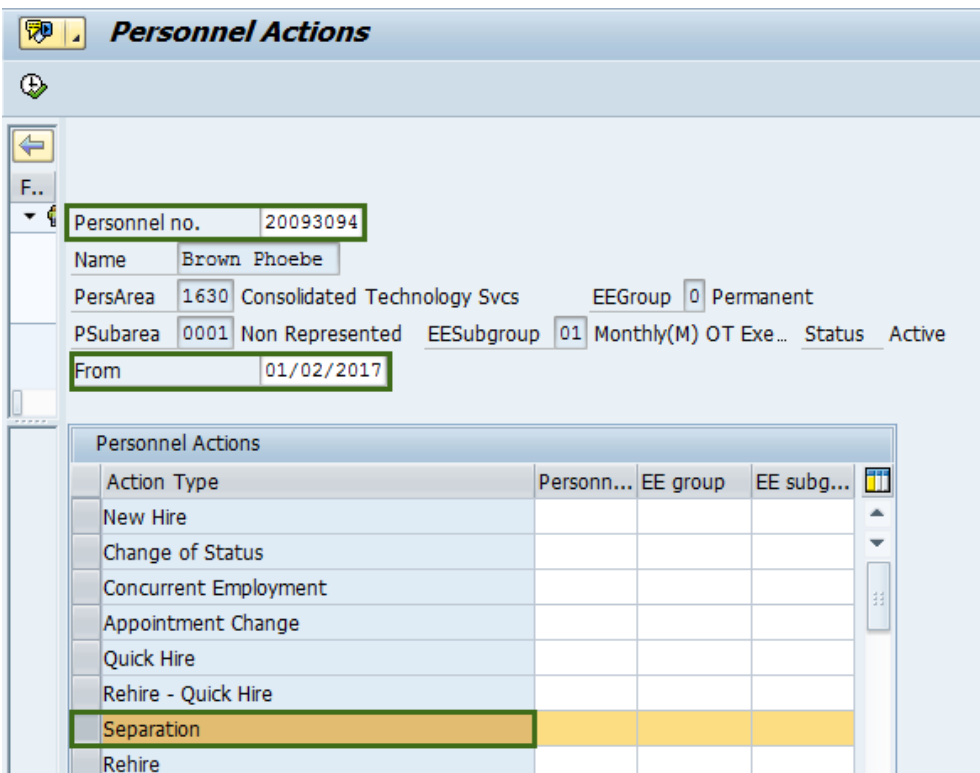
- If the Separation is a result of a layoff, the employee has the option of deferring the payment of their annual leave buyout for 30 working days. If they elect to do that, the Payroll Status will need to be changed to continue running payroll for that employee until the date of the deferred buyout. Refer to your agency business process to determine whether the Personnel Administration Processor or the Payroll Processor will make this update.

Caution

- Future-dated leave and time entries must be removed prior to the Personnel Administration Processor starting this action. The following example message will appear if that has not been completed:

 Employee 40000058 has 4 future CATS entries, Please Delete

- The **Quota Correction (2013)** infotype and ZT60 execution will need to be completed before the Separation action can begin. If this is not done, the employee will have incorrect end dates for their last month's accruals.



Personnel Actions

Personnel no. 20093094
 Name Brown Phoebe
 PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent
 PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active
 From 01/02/2017

Action Type	Personn...	EE group	EE subg...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			

Stop

- **From:** (the effective date of the action) - For a separation action, enter the employee's **last** day of employment. The **Actions (0000)** infotype will change the start date to the **first** day the employee is separated from state service.
- Only enter the From date if you are the **Personnel Administration Processor** initiating the appointment change action.

Separation Action (PA40) (cont.)

6. Complete the **Copy Actions (0000)** infotype.

The following field is mandatory:

- **Reason for Action**

7. Click the **Enter** (✓) button or press **Enter** on the keyboard.

8. Click the **Save** (💾) button.

9. If a **Create Vacancy** window appears, select the appropriate option for your agency's position.

Copy Actions (0000)

Execute info group | Change info group

Pers.No. 20093094
Name Brown Phoebe
PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent
PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active
Start 01/03/2017 to 12/31/9999

Personnel action
Action Type Separation
Reason for Action 21 Resign

Status
Employment Withdrawn

Organizational assignment
Position 71024983 IT SPECIALIST 3
Personnel area 1630 Consolidated Technology Svcs
Employee group 0 Permanent
Employee subgroup 01 Monthly(M) OT Exempt

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
------------	------	-------------	------	-------------------

Tips

- The **Reason for Action** field stores the reason an action has been performed. Refer to the [HRMS Data Definitions Resource Guide](#) or press **F1** in this field for **Reason for Action** definitions.

Create Vacancy

S 71024983 IT SPECIALIST 3

Create on 01/03/2017

Yes No Cancel

Tips

- If you click **Yes**, make sure the 'Create on' date is the date of the separation.

Separation Action (PA40) (cont.)

10. If an **Information** window appears, click the **Continue** (✓) button.



Tips

- This Information window will appear if the employee had a **Cost Distribution (0027)** infotype set up.

11. Complete the **Delimit Duty Station Address (9105)** infotype.

Delimit Duty Station Address (9105)

Personnel No. Name
 PersArea Consolidated Technology Svcs EEGroup Permanent
 PSubarea Non Represented EESubgroup Monthly(M) OT Exe... Status Active
 Choose To SIy. Delimit.Date

Start Date	End Date	UFI	L.	Address 1
10/21/2016	12/31/9999	A00386		1110 CAPITOL WAY S

Tips

- The **Delimit Duty Station Address (9105)** infotype will appear if the employee had a **Duty Station Address (9105)** infotype set up.

12. Click the box to the left of the record(s) to delimit.

13. Click the **Delimit** (🗑️) button.

14. Complete the **Delimit Telework/ Flex Work (Employee) (9106)** infotype.

Delimit Telework/Flex Work (Employee) (9106)

Personnel No. Name
 PersArea Consolidated Technology Svcs EEGroup Permanent
 PSubarea Non Represented EESubgroup Monthly(M) OT Exe... Status Active
 Choose To SIy. Delimit.Date

Start Date	End Date	Tele...	Flextime	START ...	END TIME	Compre...	Lock indicator
07/01/2016	12/31/9999	NP	EP	00:00:00	00:00:00	NP	


15. Click the box to the left of the record(s) to delimit.


16. Click the **Delimit** (🗑️) button.

Separation Action (PA40) (cont.)


17. Complete the **Delimit Communication (0105)** infotype.

18. Click the box to the left of the record(s) to delimit.


19. Click the **Delimit** () button.

20. Click the **Exit** () button to exit the action.

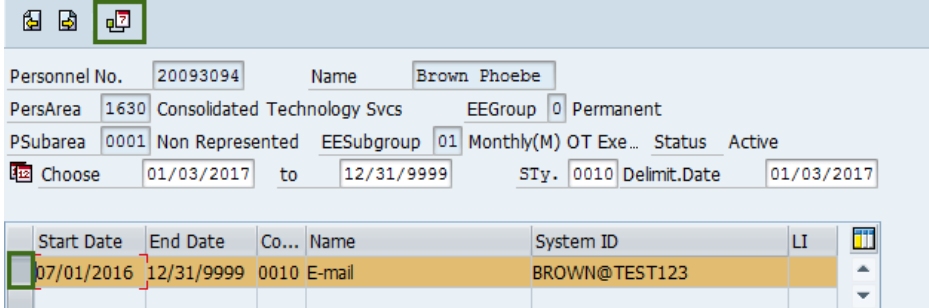
21. The **Payroll Processor** will continue the Separation action from this point on. They will start the transaction using the menu path or the transaction code **PA40**.

22. Enter the employee's Personnel Number in the **Personnel no.** field and click the **Enter** () button or press **Enter** on the keyboard.

23. Click the box to the left of **Separation**.


24. Click the **Execute** () button to begin transaction.

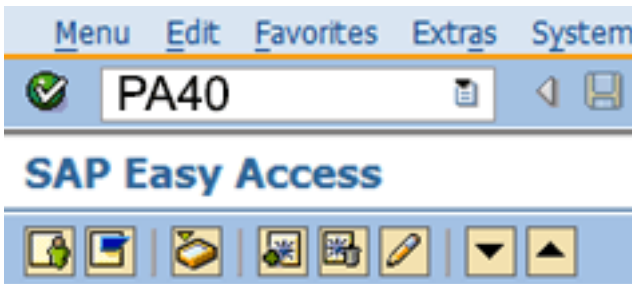
Delimit Communication (0105)



Start Date	End Date	Co...	Name	System ID	LI
07/01/2016	12/31/9999	0010	E-mail	BROWN@TEST123	

Caution

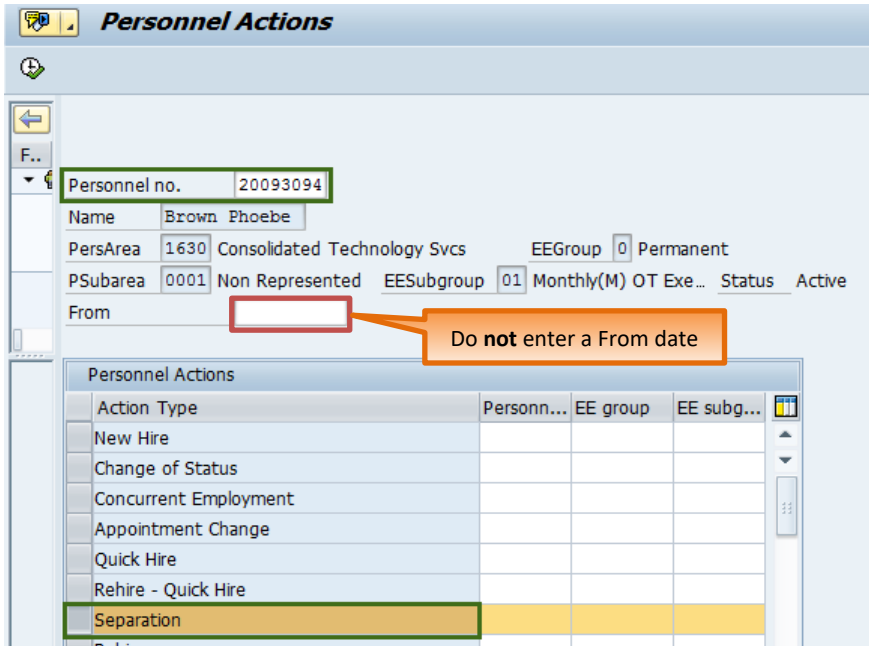
- For the **Personnel Administration Processor**, this will mark the end of the Separation action. After saving, click the exit () button and transfer the Separation Information Packet to the **Payroll Processor** who will continue the action.



Menu Edit Favorites Extras System

PA40

SAP Easy Access



Personnel Actions

Personnel no. 20093094

Name Brown Phoebe

PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active

From

Do not enter a From date

Action Type	Personn...	EE group	EE subg...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			

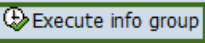
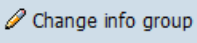
Stop

- Payroll Processor** –Do not put a “From” date in the field prior to executing the transaction.

Separation Action (PA40) (cont.)

25. Click **Execute info group** button on the **Copy Actions (0000)** infotype.

Copy Actions (0000)

Pers.No. 20093094
Name Brown Phoebe
PersArea 1630 Consolidated Technology Svcs EGroup 0 Permanent
PSubarea 0001 Non Represented ESubgroup 01 Monthly(M) OT Exe... Status Active
Start 01/03/2017 to 12/31/9999

Personnel action

Action Type Separation
Reason for Action 21 Resign

Status

Employment Withdrawn

Organizational assignment


Position 99999999 Integration: default posi
Personnel area 1630 Consolidated Technology Svcs
Employee group 0 Permanent
Employee subgroup 01 Monthly(M) OT Exempt



Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
01/03/2017	U5	Separation	21	Resign

26. An information window will appear. Click the **Continue** (✔) button.


Information

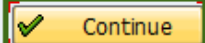
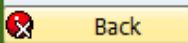
 This entry deletes a record

27. Click **Continue** in the **Execute info group** dialog box.

Execute info group

 Warning: Personnel action infotype not saved with 'execute info group' function!

28. Continue to click the **Next Record** (📄) button until you reach the **Delimit Recurring Payments/Deductions (0014)** infotype.

Tips

- This infotype was already saved and it is okay to continue.

Separation Action (PA40) (cont.)

29. Complete the **Delimit Recurring Payments/Deductions (0014)** infotype.

Complete the following field:

- **Delimit date**

30. Click the box(es) to the left of the payment(s) or deduction(s) you are delimiting.

31. Click the **Delimit** (🗑️) button.

32. Click the **Next Record** (👉) button until you reach **Subtypes for infotype Time Quota Compensation**.

33. Select the appropriate Compensation method.

34. Click **Copy** (📄) to accept.

Delimit Recurring Payments/Deductions (0014)

Personnel No. 20093094 Name Brown Phoebe

PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active

Choose 01/03/2017 to 12/31/9999 STy. Delimit.Date 01/16/2017

Wage type	Wage Type Long Text	From	To	O	Amount	Crcy
<input checked="" type="checkbox"/>	2800 Pretax JL Zoned Prkg	07/01/2016	12/31/9999	A	12.50	USD

⚠️ Caution

- The **Delimit Date** allows you to set an end date for a record establishing when it will no longer be valid. Delimited records are retained as a historical record.
- Verify the **Delimit Date**. The wage type record(s) should end on the last day of the pay period (the 15th or the last day of the month). The system will end date the record one day before the delimit date. Example: if you want the record to end on 1/15/2017, enter a delimit date of 1/16/2017.

📘 Tips

- You can select more than one record to delimit.

Subtypes for infotype "Time Quota Compensation" (1) 27 Entries...

Restrictions

ESG	PSGpg	Comp.meth.	Description
2	15	8007	Sick Leave Buyout - VEBA
2	15	8008	Comp Tm Buyout WSF-NoRet
2	15	8009	Holiday Credit Buyout WSP
2	15	8010	Settl LV Buyout WSP-NoRet
2	15	8011	Settl Lv Buyout WSP-Ret
2	15	8012	Hol. Cr. Buyout WSP-NoRet
2	15	9000	EVA removal
2	15	9001	Sick Leave Buyout - Tax
2	15	9002	Sick Leave Buyout -No Tax
2	15	9003	Annl Leave Buyout-Ret
2	15	9004	Annl Leave Buyout -No Ret
2	15	9005	Sick Leave Buyout-Annual

📘 Tips

- Leave buyout information to PERS Plan 1, TRS Plan 1, and WSPRS Plan 1 members commissioned prior to July 1, 2001 should be reported to DRS up to 240 hours. The remaining hours are not reportable to DRS. The compensation method **9003 (Annl Leave Buyout- Ret)** should be used for Plan 1 employees.
- In creating the **Time Quota Compensation (0416)** infotype leave buyout for Plan 2 and Plan 3 employees, the compensation method **9004 (Annl Leave Buyout - No Ret)** should be used.
- If an incorrect infotype is created, the buyout will be reported to DRS and will need to be deleted.

Separation Action (PA40) (cont.)

35. Complete the **Create Time Quota Compensation (0416)** infotype.

The following fields are mandatory:

- **Start**
- **No. to compensate**

36. Click the box to the left of the record(s) quota to compensate.

37. Click the **Enter** (✓) button or press **Enter** on the keyboard.

38. Click the **Save** (💾) button.

39. Click the **Exit** (🚪) button to exit the action.

Create Time Quota Compensation (0416)

Compensate

Personnel No. 20093094 Name Brown Phoebe

PersArea 1630 Consolidated Technology Svcs EGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 01/02/2017

Comp. method 9004 Annl Leave Buyout -No Ret

Compensation specifications

Time quota type 00

Compensation rule 031 Annual Holiday/Vacation

No. to compensate 30.70

Do not account

Absence quotas

A Ty	Quota text	Entitl.	Unit	Comp.	Rem.	WT	Amn
<input checked="" type="checkbox"/>	31 Vacation Leave	80.00000	Hours	0.00000	80.00000		

⚠ Caution

- When reducing hours for the employee's Personal Holiday, use quota compensation type 1000 and check the **Do not account** box. This will reduce the balance and will not compensate them for the hours.

ℹ Tips

- The **Start** date is the last day of employment. This will ensure the employee will be paid on their last day.
- **No. to compensate:** enter the number of hours or days of a quota type to be paid out to an employee.
- Prior to activating the VEBA buyout, verify the employee's eligibility.
- To remove accrued vacation leave when an employee separates from state services prior to completing six continuous months of employment, follow *Quota – Removing Accrued Leave* user procedure located in the [OLQR](#).
- If required, correct the leave buyout codes and report to the Department of Retirement Systems (See Leave Buyout Tip on page 7).

⚠ Caution

- For the **Payroll Processor**, this will mark the end of the Separation action using **PA40**. After saving, click the exit (🚪) button and transfer the Separation Information Packet to the **Benefits Processor** who will continue the action.
- Only one buyout can be processed during the Separation Action (PA40). If there are additional quota types to buyout, go to **step 41** or follow the *Quota – Time Quota Compensation (Buyout)* user procedure located in the [OLQR](#) prior to transferring the Separation Information Packet.

Separation Action (PA40) (cont.)

40. Enter **/nPA30** in the command field and click the **Enter** (✓) button or press **Enter** on the keyboard.

41. In the **Time Reporting** tab, click the box to the left of **Time Quota Compensation**.

Complete the following fields:

- **Infotype**
- **STy**

42. Click the **Enter** (✓) button or press **Enter** on the keyboard.

43. Click the **Create** (📄) button.

The screenshot shows the SAP Easy Access interface. At the top, there is a menu bar with 'Menu', 'Edit', 'Favorites', 'Extras', and 'System'. Below the menu bar is a search field containing '/nPA30'. The main area is titled 'SAP Easy Access' and contains several icons. The primary window is 'Maintain HR Master Data' for personnel number 20093094, name Brown Phoebe. The 'Time Recording' tab is selected. In the 'Time Recording' tab, the 'Time Quota Compensation' infotype is selected and checked. The 'Direct selection' section shows 'Infotype' as 'Time Quota Compensation' and 'STy' as '9007 Sick Leave Buyout - VEBA'. The 'Period' section has a 'Choose' button.

Tips

- **Infotype:** enter **0416** or **Time Quota Compensation** in this field.
- **STy:** select the appropriate subtype to compensate in the STy field.

Separation Action (PA40) (cont.)

44. Complete the **Create Time Quota Compensation (0416)** infotype.

The following fields are mandatory:

- **Start**
- **No. to compensate**

45. Click the **Enter** (✓) button or press **Enter** on the keyboard.

46. Click the **Save** (💾) button.

Create Time Quota Compensation (0416)

Compensate

Personnel No. 20093094 Name Brown Phoebe

F.. PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 1/02/2017

Comp. method 9007 Sick Leave Buyout - VEBA

Compensation specifications

Time quota type 30 Sick Leave

Compensation rule 000

No. to compensate 14.0

Do not account

Absence quotas

ATy	Quota text	Entitl.	Unit	Comp.	Rem.	WT	Amount
30	Sick Leave	50.00000	Hours	0.00000	50.00000		
31	Vacation Leave	80.00000	Hours	0.00000	49.30000		

Caution

- When reducing hours for the employee's Personal Holiday, use quota compensation type 1000 and check the **Do not account** box. This will reduce the balance and will not compensate them for the hours.

Tips

- The **Start** date is the last day of employment. This will ensure the employee will be paid on their last day.
- **No. to compensate:** enter the number of hours or days of a quota type to be paid out to an employee.
- Prior to activating the VEBA buyout, verify the employee's eligibility.
- Repeat **steps 41** and **47** if you need to compensate additional quota types.
- To remove accrued vacation leave when an employee separates from state services prior to completing six continuous months of employment, follow *Quota - Removing Accrued Leave* user procedure located in the [OLQR](#).
- If required, correct the leave buyout codes and report to the Department of Retirement Systems (See Leave Buyout Tip on page 7).

Separation Action (PA40) (cont.)

47. The *Benefits*

Processor will continue the Separation action from this point on. They will start the transaction using the menu path or the transaction code **PA40**.

48. Enter the employee's personnel number in the **Personnel no.** field and press the **Enter** (✓) button or press **Enter** on the keyboard.

49. Click the box to the left of **Separation**.

50. Click the **Execute** (⏏) button to begin transaction.

The screenshot shows the SAP Easy Access interface for transaction PA40. The top bar includes 'Menu Edit Favorites Extras System' and a search field containing 'PA40'. Below this is the 'SAP Easy Access' header with various icons. The main content area is titled 'Personnel Actions' and contains a form for entering employee details. The 'Personnel no.' field is highlighted with a green box and contains the value '20093094'. Other fields include 'Name' (Brown Phoebe), 'PersArea' (1630 Consolidated Technology Svcs), 'EEGroup' (0 Permanent), 'PSubarea' (0001 Non Represented), and 'EESubgroup' (01 Monthly(M) OT Exe...). The 'From' field is empty and highlighted with a red box, with an orange callout box pointing to it that says 'Do not enter a From date'. Below the form is a table of 'Personnel Actions' with columns for 'Action Type', 'Personn...', 'EE group', and 'EE subg...'. The 'Separation' row is highlighted with a green box.

Action Type	Personn...	EE group	EE subg...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			



Stop

- **Benefits Processor** –Do not put a **From** date in the field prior to executing the transaction.

Separation Action (PA40) (cont.)

51. Click **Execute info group** button on the **Copy Actions (0000)** infotype.

Copy Actions (0000)

Execute info group Change info group

Pers.No. 20093094
Name Brown, Phoebe
PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent
PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active
Start 01/03/2017 to 12/31/9999

Personnel action

Action Type Separation
Reason for Action 21 Resign

Status

Employment Withdrawn

Organizational assignment

Position 99999999 Integration: default posi
Personnel area 1630 Consolidated Technology Svcs
Employee group 0 Permanent
Employee subgroup 01 Monthly(M) OT Exempt

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
01/03/2017	U5	Separation	21	Resign

52. An information window will appear. Click the **Continue** (✓) button.

Information

[This entry deletes a record]

✓ ?

53. Click **Continue** in the **Execute info group** dialog box.

Execute info group

Warning: Personnel action infotype not saved with 'execute info group' function!

Continue Back

54. Continue to click the **Next Record** (📄) button until you reach the **Delimit Savings Plan (0169)** infotype.

Tips

- This infotype was already saved and it is okay to continue.

Separation Action (PA40) (cont.)

55. Complete the **Delimit General Benefits Information (0171)** infotype

Complete the following field:

- **Delimit Date**

56. Click the box to the left of the record(s) to delimit.

57. Click the **Delimit** () button.

58. Complete the **Delimit Savings Plans (0169)** infotype.

Complete the following field:

- **Delimit Date**

59. Click the box to the left of the record(s) to delimit.

60. Click the **Delimit** () button.

61. Click the **Enter** () button or press **Enter** on the keyboard.

62. Click the **Save** () button.

Delimit General Benefits Information (0171)

Personnel No. 20093094 Name Brown Phoebe
PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent
PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active
Choose 01/03/2017 to 12/31/9999 STy. Delimit.Date 01/26/2017

Start Date	End Date	BenArea	Description	1st PGrpg	2nd PGrpg	Lock
07/01/2016	12/31/9999	US	USA	ELIG	01	

Caution

- Verify the **Delimit Date**. The record(s) should end on the date of the employee's last check. The system will end date the record one day before the delimit date. Example: if you want the record to end on 1/25/2017, enter a delimit date of 1/26/2017.

Delimit Savings Plans (0169)

Personnel No. 20093094 Name Brown Phoebe
PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent
PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active
Choose 01/03/2017 to 12/31/9999 STy. Delimit.Date 1/16/2017

Start Date	End Date	Type	Text	Plan	Text	L
07/01/2016	12/31/9999	401A	401(a)	P2	PERS 2	

Caution

- Verify the **Delimit Date**. The record(s) should end on the last day of the pay period (the 15th or the last day of the month). The system will end date the record one day before the delimit date. Example: if you want the record to end on 1/15/2017, enter a delimit date of 1/16/2017.

Tips

- You can select more than one record to delimit.

Caution


- The following are leave buyout codes reported to DRS. Follow *Separation Action – Correct Leave Buyout Reporting to DRS* user procedure located in the [OLQR](#). For additional questions on this process contact DRS.
 - HRMS only sends status codes “A” and “B” to DRS. Annual leave buyouts should be reported as status codes “N” for non-retirees or “T” (up to 240 hours) for retirees.
 - Excess Vacation leave cash buyouts for retirees should be reported using the status code “U”.
 - After the information is sent to DRS, you will have to go to the DRS web-based Services to logon, create and submit a report via the Web-based Employer Transmittal (WBET) application. Change the status code on the leave buyouts to “N”, “T”, or “U”.
- This will mark the end of the Separation action using PA40. Additional steps are needed to delimit the employee's Health Insurance Plans. Follow **steps 61-67**.

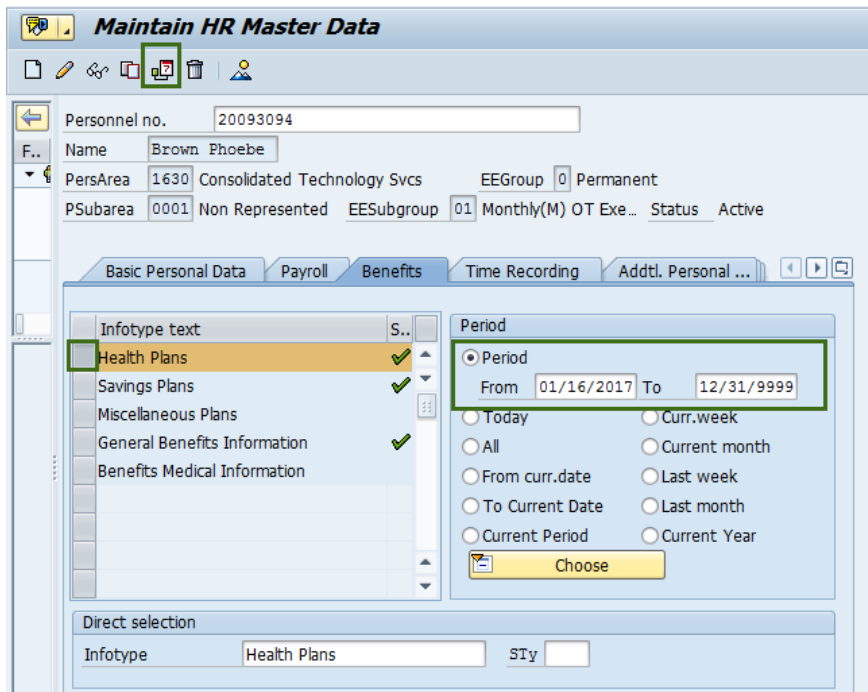
Separation Action (PA40) (cont.)

64. In the **Benefits** tab, click the box to the left of **Health Plans**.

Complete the following fields:

- **Period**
- **From**
- **To**

65. Click the **Delimit** () button.



Maintain HR Master Data

Personnel no. 20093094

Name Brown, Phoebe

PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active

Basic Personal Data Payroll **Benefits** Time Recording Addtl. Personal ...

Infotype text S..

Health Plans ✓

Savings Plans ✓

Miscellaneous Plans

General Benefits Information ✓

Benefits Medical Information

Period

Period

From 01/16/2017 To 12/31/9999

Today Curr.week

All Current month

From curr.date Last week

To Current Date Last month

Current Period Current Year


Choose

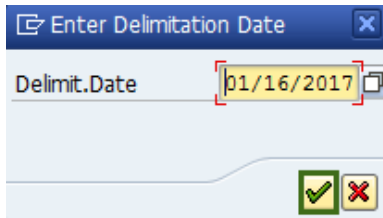
Direct selection

Infotype Health Plans SIy

Tips

- **From:** enter the From date as the delimit date of the **Health Plans (0167)** infotype.

66. An **Enter Delimitation Date** dialog box will appear. Click the **Continue** () button.

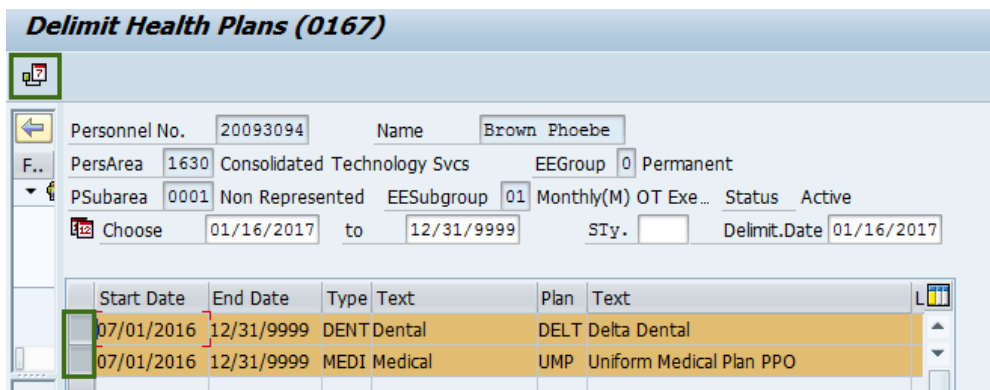


Enter Delimitation Date

Delimit.Date 01/16/2017

67. Complete the **Delimit Health Plans (0167)** infotype.

68. Click the box to the left of the record(s) to delimit.



Delimit Health Plans (0167)

Personnel No. 20093094 Name Brown, Phoebe


PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active

Choose 01/16/2017 to 12/31/9999 SIy. Delimit.Date 01/16/2017

Start Date	End Date	Type	Text	Plan	Text
07/01/2016	12/31/9999	DENT	Dental	DELTA	Delta Dental
07/01/2016	12/31/9999	MEDI	Medical	UMP	Uniform Medical Plan PPO

Separation Action (PA40) (cont.)

69. Click the **Delimit** () button.

70. You have successfully completed the **Separation Action** procedure.

Caution

- The **Delimit Date** allows you to set an end date for a record establishing when it will no longer be valid. Delimited records are retained as a historical record.
- Verify the **Delimit Date**. The record(s) should end on the last day of the pay period (the 15th or the last day of the month). The system will end date the record one day before the delimit date. Example: if you want the record to end on 1/15/2017, enter a delimit date of 1/16/2017.

Tips

- You can select more than one record to delimit.


Stop

- Health Insurance will need to be terminated in the PAY1 system. Use the A.41 screen and enter an 'N' in the ELIG CODE field and in the ELIG EFF DATE field enter the last day of the month in which the employee last had eight hours of pay status. Press F10 to update.
- PAY1 will update HRMS with the delimit date.


Overview Health Plans (0167)

Personnel No.	20093094	Name	Brown Phoebe		
F.. PersArea	1630 Consolidated Technology Svcs	EEGroup	0 Permanent		
PSubarea	0001 Non Represented	EESubgroup	01 Monthly(M) OT Exe... Status Withdrawn		
Choose	01/01/1800	to	12/31/9999 STy. <input type="text"/>		
Start Date	End Date	Type	Text	Plan	Text
07/01/2016	01/15/2017	DENT	Dental	DELT	Delta Dental
07/01/2016	01/15/2017	MEDI	Medical	UMP	Uniform Medical Plan PPO

Tips

- To view the **List Health Plan (0167)** infotype, select the  (Overview) button from the Master Data screen.
- Health Insurance Premiums are collected each pay period.

Caution

- If the employee had a Life Insurance or Long Term Disability plan, you will also need to delimit those records. Select **Miscellaneous Plans** in the **Benefits** tab.
- For the **Benefits Processor**, this will mark the end of the Separation action. After saving, click () to exit the action.