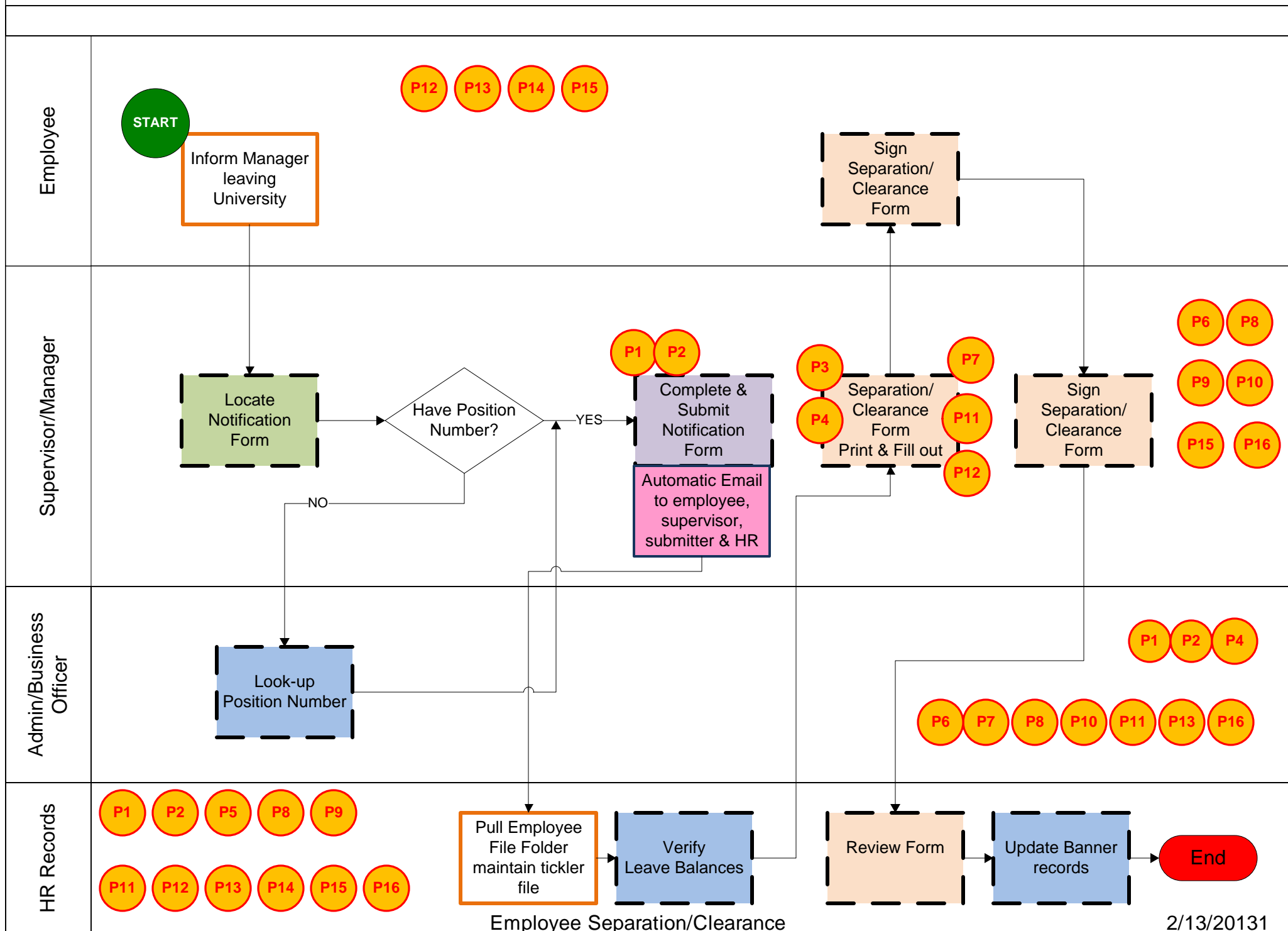


# Employee Separation & Clearance – AS IS



## Pains & Issues:

### Please Read First:

The issues and pain points identified during the As Is Process Mapping workshop and the Analysis workshop are noted below. The Issue is numbered and its Root Cause Analysis is in red text, preceded by **RCA** prefix.

1. Notification form does not pull any Banner data, in PDF format

**RCA: Not web based form**

2. Supervisor/Manager do not know employee position number needed for the notification form

**RCA: Not easy to find**

3. Separation clearance form is not identified with a title, therefore when printed form not easily identified

**RCA: Form missing a title**

4. Separation/Clearance form has to be printed and filled out

**RCA: In PDF format**

5. Supervisors/Managers don't always remember to complete the Separation Clearance form at a later date.

**RCA: There isn't a mechanism or process in place to email reminders, Web page instructions are not clear when to complete this step**

6. Separation Clearance form has too many links to the same form

**RCA: Idea was to give all options for all employee types – over simplification. This is not needed**

7. Instructions are not clear on all the information you need to gather before you begin filling out the Separation Clearance form.

**RCA: Supervisors/Managers need training and online instructions need to be clearer**

8. Supervisors/Managers are unaware of the process

**RCA: There isn't any training specific for managers that includes the process**

9. Separation/Clearance webpage – timing of display is not conducive to when the form should be completed – is displayed at time Notification form is submitted.

**RCA: Web page is automatically displayed at time Notification form is submitted – form cannot be completed until closer to last day employee works**

10. Cannot access the Separation/Clearance webpage for future reference

**RCA: There are no direct links to this webpage. You have to know to locate the form from the B&F forms web page**

## Pains & Issues con't:

11. Determining the final leave portion on clearance form is confusing to Managers, exactly how to determine leave balance

RCA: This is an HR Records procedure that should not be on the form

12. Confusion with statement on form to collect the University property the last day the employee is on campus when form needs to be in HR Records earlier

RCA: Form does not specify the date it needs to be in HR (15<sup>th</sup> of month), therefore form needs to be signed prior to last day employee on campus

13. Special checks created because process is not followed by due dates

RCA: Departments do not process form in timely manner

14. Letter of indebtedness have to be created if employee is over paid leave balance, then Bursar office has to collect after employee is no longer employed

RCA: Employee will take annual leave after the separation clearance form has been processed

15. Employees do not complete their leave sheets and have approved by 25<sup>th</sup> of the month, prior to payroll processing begins

RCA: Managers are not following up that they have approved employee leave timely

16. University policy UM1382 states separation form is due in HR Records no later than the day prior to the employee last day to work

RCA: Policy and clearance form have not been compared in several years

# Legends

