NC STATE UNIVERSITY

9.1 Start Employment User Guide for Retiring SPA Employees

Denise Jimenez
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Introduction
An SPA separation occurs when a University employee is dismissed, resigns, transfers, retires, dies, and/or separated due to unavailability when leave is exhausted, or is subject to a reduction in force.

Separation Scenario
In this scenario we process a retirement action for a permanent 12-month SPA employee.
Job Data
To process a separation action for an employee you will need to locate the employee in Job Data. To navigate to this screen follow the path below.

Once you click on the Job Data Link, the screen below will appear. Type in the employee’s ID number or name and click Search.

Hint: To search by NAME type in the full first and last name then click Search.
Once the employee’s information has been located in Job Data you can now proceed with processing the action.

To process the action click on the plus sign in the right hand corner of the Work Location screen. Update the effective date of the separation. Please note that the effective dates of retirement are required to be on the first of the month in PeopleSoft.
It is a best business practice to record the final leave balances of an employee separating from the university. To do so go to the Appointment Info tab and record the leave amounts under the Vacation/Sick Leave Balances section. Once this is complete click .

The retirement action has been saved and is now in PeopleSoft. The next step is to scan and email the appropriate paperwork to your designated HRIM Specialist.

**Separation Paperwork Check-List**

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<tbody>
<tr>
<td>1.</td>
<td>Resignation / Separation Letter</td>
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<tr>
<td>2.</td>
<td>Annual Leave &amp; Bonus Payment Authorization Form (EPA &amp; SPA)</td>
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<tr>
<td>3.</td>
<td>Signed Final Leave Balances</td>
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<td>4.</td>
<td>EPA-Non Faculty / Post-Doc / SPA last 5 years of Monthly Breakdown Reports (or all annual leave records if employed less than 5 years)</td>
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<td>5.</td>
<td>SPA performance Appraisals (or all annual appraisals if employed less than 5 years)</td>
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**Reminders:**

- Pay-out penalty applies to EPA employees who have been employed an aggregate of 24 months or less (See PRR 8.2.4.2 Payout of Accrued Annual Leave)
- Post Doc’s are not paid out for their annual leave

**Edited by EM**