USER GUIDE

SEPARATION

SAID/WiTS
Updated 9/29/2014

When to Use the Separation Form and Creating the Action

The **Separation** workflow is used to track the processing of actions that separate employees from the NIH. These actions include resignations, terminations, expirations of appointment, etc.

WiTS Tip: Enter the Separation action into WiTS as soon as you are informed that the employee is leaving. Do not wait until the "pick-up" SF-50/52 is received for 'Termination Appt-In' actions. Entering the action immediately will ensure reports are up-to-date.

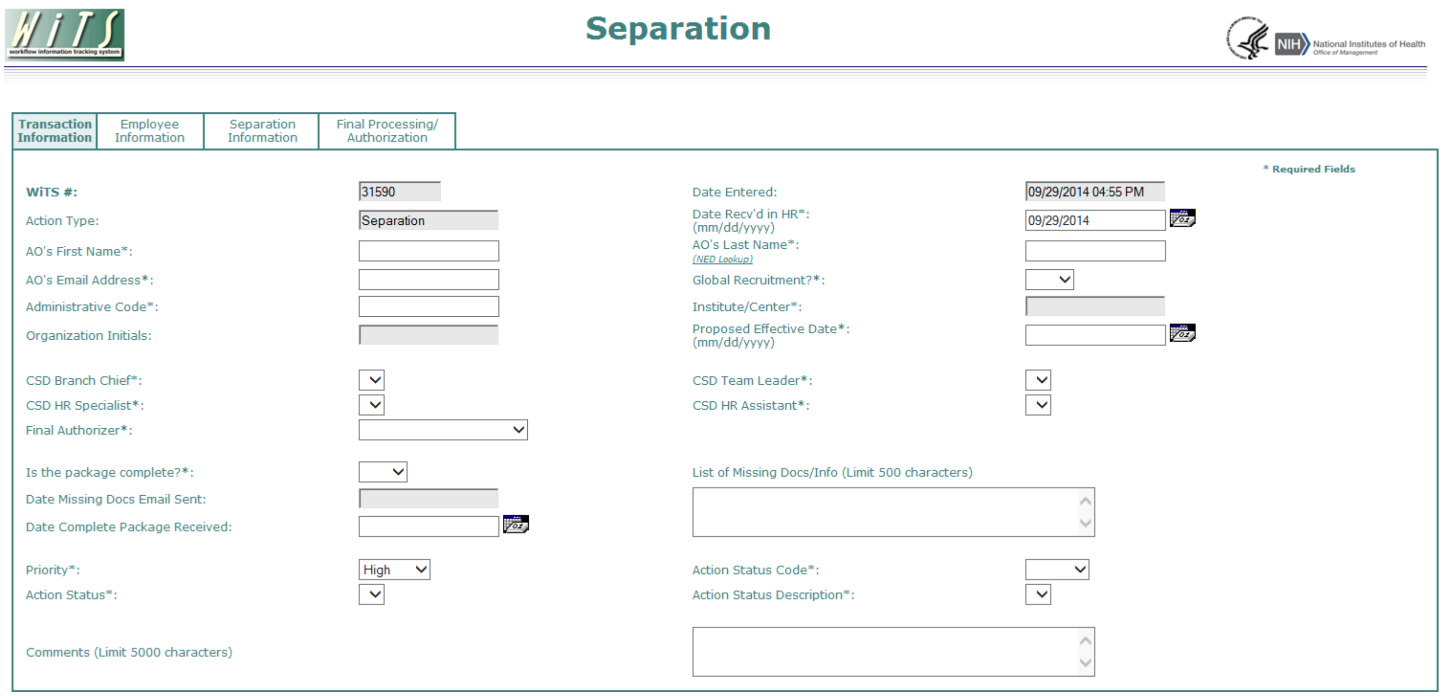
If the employee's record in Capital HR is no longer active, you will not be able to search for the individual using the Capital HR Lookup.

Either the HR Specialist or Assistant initiates a Separation action by choosing the Separation process from the WiTS Action Initiation bizcove:

WiTS Action Initiation

	Name	Description
☐	Appointment	Process for appointing (hiring) new employees and moving existing employees into new positions as a result of recruitment/competition.
☐	Award	Process for award actions including Special Act/Service, QSI, Time off as an Incentive, etc.
☐	Career Change	Process for moving employees into and out of positions (Promotions, Reassignments, Changes to Lower Grade, etc.) when the change is NOT made as a result of recruitment.
☐	Change in Work Schedule / Hours	Process for actions that change either the schedule or the hours that employees are obligated to work.
☐	Classification	Process for classification actions, which define and establish the occupational series, title, grade of Federal positions.
☐	Leave Without Pay	Process for placing employees in Leave Without Pay status.
☐	Recruitment	Process for initiating recruitment actions
☐	Request for HR Systems Access (and User Profile Changes/Deletions)	Process for WiTS Super Users, Branch Chiefs, Deputy Division Directors and Division Directors to request new, modified or deleted access to HRSS supported systems (Capital HR, eOPF, WiTS, HHS Careers, Classification, etc.).
☐	Request for HR Systems Support	Process for initiating support requests for HHS Careers, Classification, Portal, WiTS, Capital HR (CHR), etc. Initiate a separate request per system.
☐	Request for Job Code / Position Number	Process for submitting requests for the creation, modification, activation or deactivation of Job Codes and/or Position Numbers.
☐	Return to Duty	Process for returning employees to duty (placing them back in pay status after LWOP).
☑	Separation	Initiating Action Process for Separation actions

The first tab to be completed is the *Transaction Information* tab:



- ***WiTS#, Date Entered:*** System-generated.
- ***Date Rec'd in HR:*** Enter the date that the Separation package was received.
- ***AO First Name, Last Name, Email address***: The *NED Lookup* feature may be used to locate the information for the Administrative Officer or other IC contact if it is unknown.
- ***Global Recruitment?:*** Select yes if this action will be handled by the CSD's Global Recruitment Unit. Otherwise, select no.
- ***Administrative Code, Institute/Center, Organization Initials***: Enter the Admin Code associated with the employee who is separating.
- ***Proposed Effective Date***: Enter the Proposed Effective Date.
- ***CSD Branch Chief, CSD Team Leader, CSD HR Specialist, CSD HR Assistant, Final Authorizer:*** Select the appropriate participants.
- ***Date Complete Package Received?:*** Indicate whether or not the separation package is complete (you have all required documents/information needed to process the separation).
- ***Internal Comments:*** Enter any comments related to the action. Note that these comments are shared with the IC community on various reports.

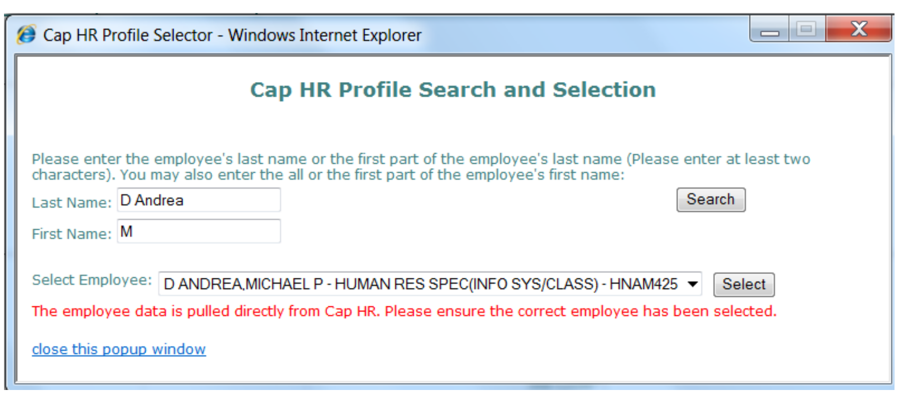
The next tab to be completed is the *Employee Information* tab:

Using the Cap HR Lookup Feature to auto-populate the employee information tab

1. *Click* on the *Cap HR Lookup* link under the 'Employee Last Name' field.

2. Type in part or all of the employee's last name and then *click* the 'Search' button. *To further narrow the list of names returned, you can also add the employee's first name.*

3. Locate the employee in the 'Select User' field and then *click* the 'Select' button. *The employee's title and administrative code will be displayed to assist you with your selection.*



***WiTS Tip:*** Use the Cap HR Lookup feature. It is the only way to generate the ‘Employee ID.’ WiTS uses the ‘Employee ID’ to relate other WiTS actions to a specific employee. If you cannot locate the employee using the Cap HR Lookup, please try again using the employee's legal last name (as listed in Capital HR). If you still encounter issues, please contact HR Systems Support.

Important Information about the data from Capital HR

- The WiTS Team downloads processed job, position, employee, and pay data from Capital HR on a bi-weekly basis at the beginning of each pay period.

- The WiTS Team downloads employee information from NED (e.g., email address) on a bi-weekly basis at the beginning of each pay period.

- The WiTS Team downloads the data as-is from Capital HR and NED. Questions regarding the authenticity or integrity of the data should be directed toward the appropriate division or branch in the Office of Human Resources. Questions regarding the employee’s email address should be directed to the Administrative Officer.

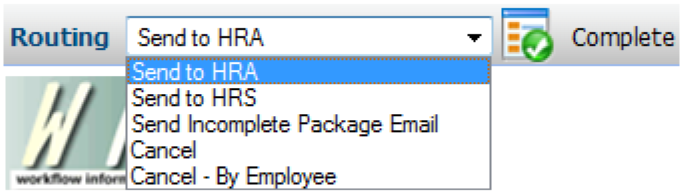
Description of fields on the Employee Information Tab

Data Fields	Auto-populated?	Data Source	Description
First Name, MI, Last Name	✔	**Capital HR**	**Employee's legal name in Capital HR.**
Employee ID	✔	**Capital HR**	**Employee's identification number (ID) in Capital HR.**
Employee Email Address *(Not mandatory for Separation actions)*	✔	**NIH Enterprise Directory (NED)**	**Employee's email address in NED.**
Position Title, Pay Plan, Series, Grade, and Step	✔	**Capital HR**	**Employee's classified or official position information and Step in Capital HR.**
Job Code and Position Number	✔	**Capital HR**	**The Job Code (job grouping category) associated to the employee's official position. The unique Position Number associated to the Job Code.**
CAN	✔	**Capital HR**	**The Common Accounting Number (accounting code) used to determine the source of funds to compensate the employee.**
Pay Basis	✔	**Capital HR**	**The duration for which the employee's pay is quoted.**
Basic Pay	✔	**Capital HR**	**The employee's pay before any locality or special rate adjustment. This is the same pay as block 12A on the employee's SF-50.**
Adjusted Basic Pay	✔	**Capital HR**	**The employee's pay after the locality and special rate adjustment. This does not represent the employee's Total Compensation, which can include additional allowances or incentives. This is the same pay as block 12C on the employee's SF-50.**
Pay Band*	✘	**N/A**	***Only applicable for Pay Plans AD, RF, or RG.* The Employee's Pay Band associated with their Category on the Title 42 Pay Model.**
Pay Tier*	✘	**N/A**	***Only applicable for Pay Plans AD, RF, or RG.* The Employee's Pay Tier associated with their Pay Band on the Title 42 Pay Model.**
Category*	✘	**N/A**	***Only applicable for Pay Plans AD, RF, or RG.* The Employee's Category on the Title 42 Pay Model.**

**For more information, reference the Title 42 Pay Model on the Title 42 webpage on the OHR Intranet.*

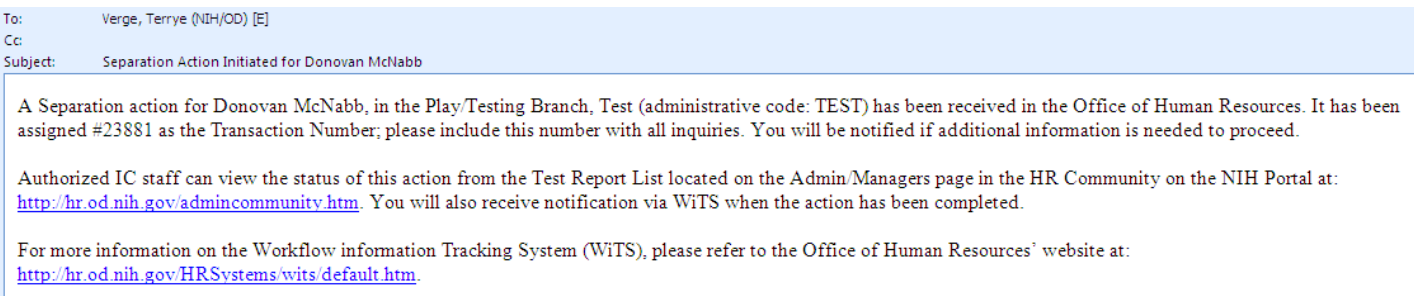
Routing the Action

After the Employee Information tab is complete, the HR Rep then either selects “Send to HRA” (to begin the process), “Send to HRS” (to send the action to the HR Specialist for review), “Send Incomplete Package Email (to send a email to the AO advising them that the Separation package is incomplete), “Cancel” (to cancel an action that was initiated in error), or “Cancel – By Employee” (to cancel an action at the employee’s request).



and clicks on to route the action further.

- As soon as the action is sent to either the HRA or the HRS, an automatic email notice that the Separation has been received in HR is sent to the addressee(s) entered in the AO’s Email Address field on the form:

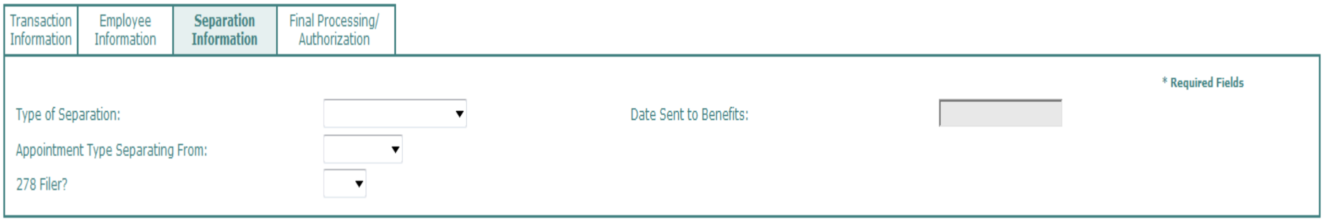

To: Verge, Terrye (NIH/OD) [E]
Cc:
Subject: Separation Action Initiated for Donovan McNabb

A Separation action for Donovan McNabb, in the Play/Testing Branch, Test (administrative code: TEST) has been received in the Office of Human Resources. It has been assigned #23881 as the Transaction Number; please include this number with all inquiries. You will be notified if additional information is needed to proceed.

Authorized IC staff can view the status of this action from the Test Report List located on the Admin/Managers page in the HR Community on the NIH Portal at: http://hr.od.nih.gov/admincommunity.htm. You will also receive notification via WiTS when the action has been completed.

For more information on the Workflow information Tracking System (WiTS), please refer to the Office of Human Resources’ website at: http://hr.od.nih.gov/HRSystems/wits/default.htm.

The next tab to be completed is the *Separation Information* tab:



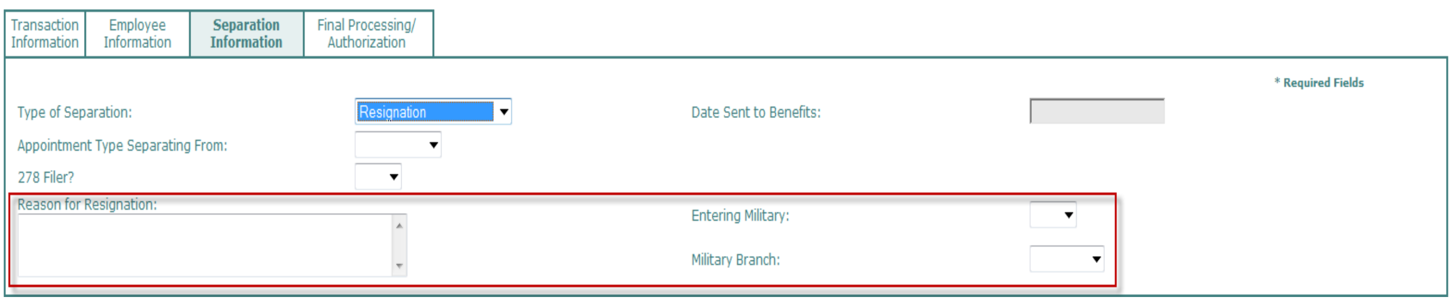
***Date Sent to Benefits:** This indicates the date that a separate action was created and sent to BPLB. Date is system generated.

- ***Appointment Type Separating From:*** Select Excepted, Permanent, Temporary or Term.

- ***Type of Separation:*** Indicate the type of separation being processed for the employee. Note: your selection of the separation type will drive the remainder of the fields that are displayed on this tab.

- ***278 Filer?***: Indicate whether or not the separating employee's position was subject to 278 (Ethics) filing.

For Resignation Actions:

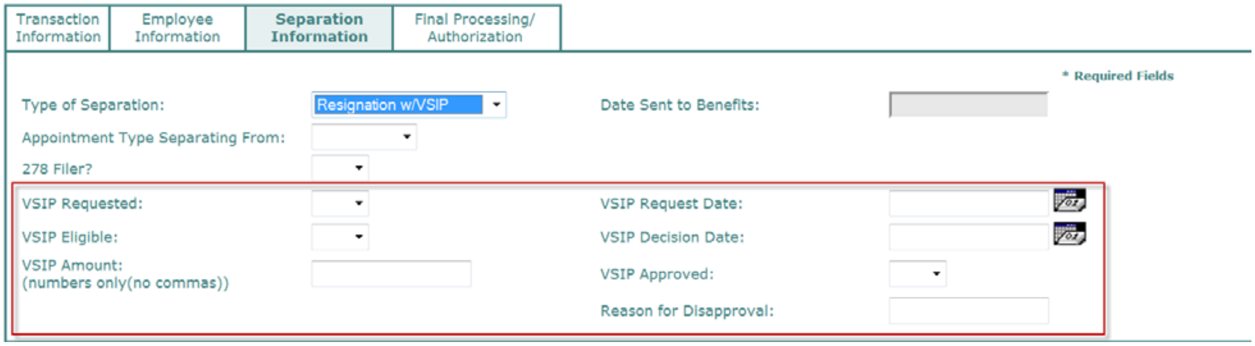


- ***Reason for Resignation***: Enter the reason that the employee gave for the resignation.

- ***Entering Military***: Indicate whether or not the employee is entering the military.

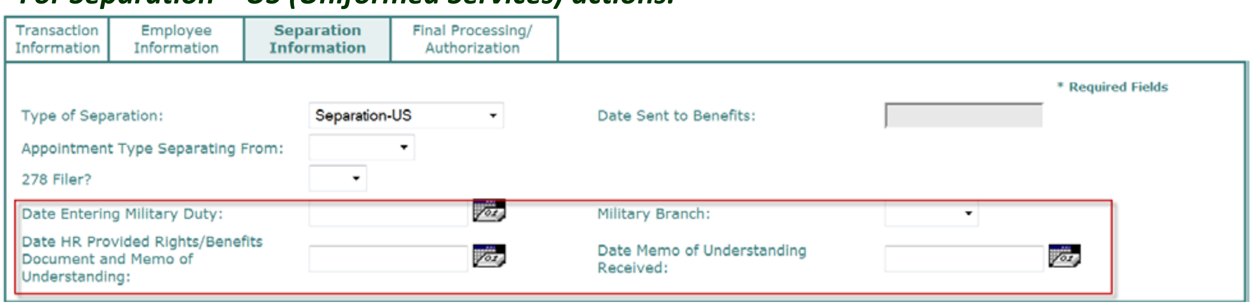
- ***Military Branch***: If the employee is entering the military, select the branch (Air Force, Amy, Coast Guard, Marines, Navy, PHS)

For Resignation w/VSIP (Voluntary Separation Incentive Payment) actions:



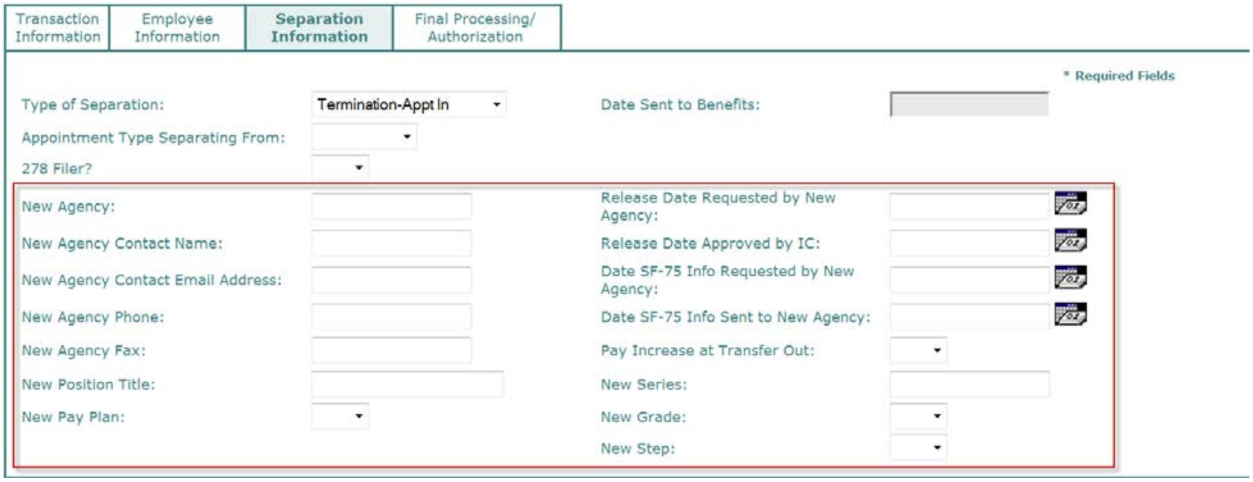
- ***VSIP Requested***: Indicate whether or not VSIP was requested.
- ***VSIP Request Date***: Enter the date that the VSIP was requested
- ***VSIP Eligible***: Indicate whether or not the employee is eligible for VSIP.
- ***VSIP Amount:*** Enter the VSIP amount.
- ***VSIP Decision Date*****:** Enter the date of the VSIP determination.
- ***VSIP Approved***: Indicate whether or not the VSIP was approved.
- ***Reason for Disapproval***: If the VSIP was not approved, enter the reason.

For Separation – US (Uniformed Services) actions:



- ***Date Entering Military Duty***: Enter the date that the employee will be entering military duty.
- ***Military Branch:*** Select the branch (Air Force, Amy, Coast Guard, Marines, Navy, PHS)
- ***Date HR Provided Rights/Benefits Document and Memo of Understanding***: Enter the date that these documents were provided to the employee.
- ***Date Memo of Understanding Received:*** Enter the date this document was received from the employee.

For Termination – Appt In actions:



- ***New Agency / New Agency Contact Name, Email Address, Phone and Fax***: Enter the employee's new agency and the contact's information at the new agency.
- ***Release Date Requested by New Agency:*** Enter the release date that was requested by the new agency.
- ***Release Date Approved by IC:*** Enter the release date that was approved by the IC.
- ***Date SF-75 Info Requested by New Agency:*** Enter the date that the new agency requested SF-75 information.
- ***Date SF-75 Info Sent to New Agency:*** Enter the date that the SF-75 information was sent to the new agency.
- ***Pay Increase at Transfer Out:*** Indicate whether or not the employee will be receiving a pay increase in the new position.
- ***New Position Title / Pay Plan / Series / Grade / Step:*** Enter the information related to the employee's new position.

For Termination – Exp of Appt actions:

- ***Employee's NTE Date:*** Enter the not-to-exceed date of the appointment that is being terminated.

The last tab to be completed is the *Final Processing/Authorization* tab:

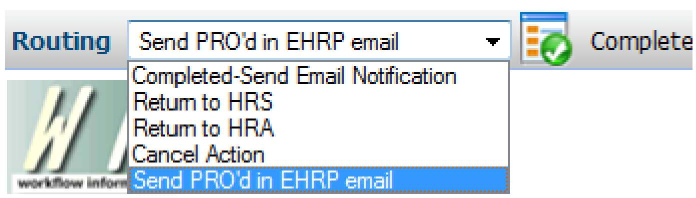
The Final Authorizer reviews the information on all tabs and enters the *Effective Date* and the *Date Pro'd in Capital HR*.

- ***Effective Date***: Enter the effective date of the separation action.

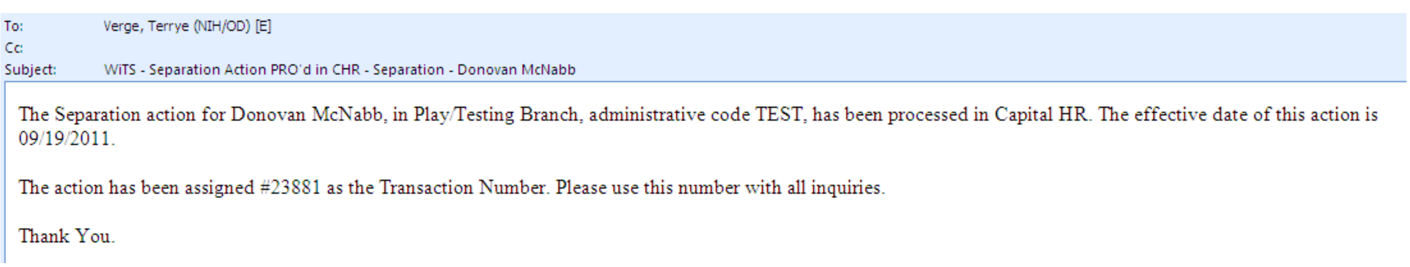
- ***Date Pro'd in Capital HR***: Enter the date that the action was 'pro'd' in Cap HR.

Completion Workflow Emails

After the action is completed in Capital HR, the Final Authorizer selects "Send PRO'd in EHRP email:



This sends an email to BPLB advising them that the action has been completed in Capital HR:

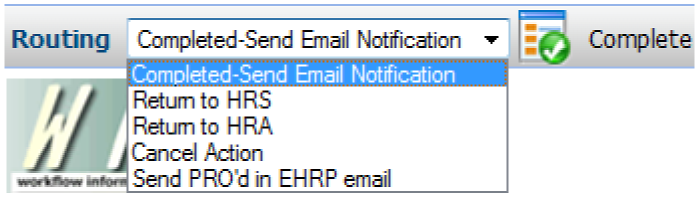

To: Verge, Terrye (NIH/OD) [E]
Cc:
Subject: WiTS - Separation Action PRO'd in CHR - Separation - Donovan McNabb

The Separation action for Donovan McNabb, in Play/Testing Branch, administrative code TEST, has been processed in Capital HR. The effective date of this action is 09/19/2011.

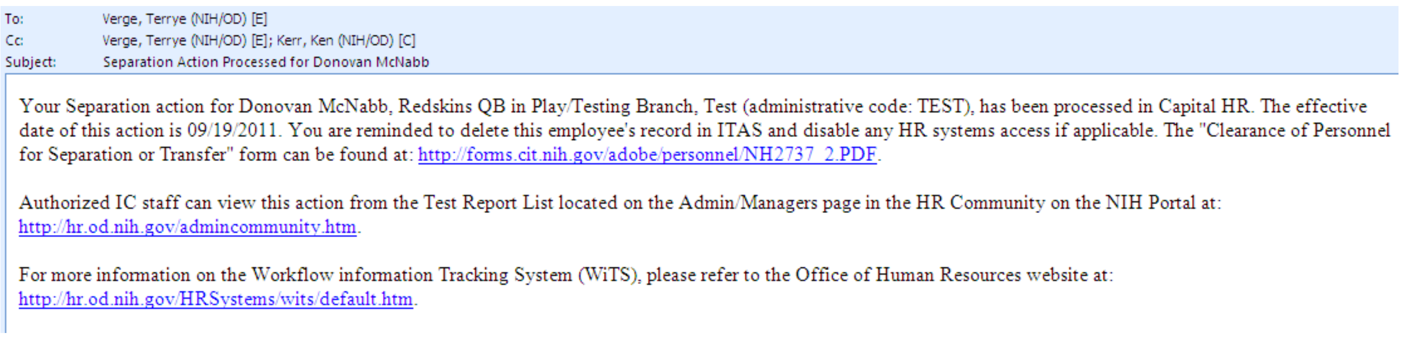
The action has been assigned #23881 as the Transaction Number. Please use this number with all inquiries.

Thank You.

The Final Authorizer then returns to the action, and selects "Completed – Send Email Notification," and clicks on the Complete icon to complete the WiTS action.



An email notice that the Separation action has been processed by HR is sent to the addressee(s) entered in the AO's Email Address field on the form.



To: Verge, Terrye (NIH/OD) [E]
Cc: Verge, Terrye (NIH/OD) [E]; Kerr, Ken (NIH/OD) [C]
Subject: Separation Action Processed for Donovan McNabb

Your Separation action for Donovan McNabb, Redskins QB in Play/Testing Branch, Test (administrative code: TEST), has been processed in Capital HR. The effective date of this action is 09/19/2011. You are reminded to delete this employee's record in ITAS and disable any HR systems access if applicable. The "Clearance of Personnel for Separation or Transfer" form can be found at: http://forms.cit.nih.gov/adobe/personnel/NH2737_2.PDF.

Authorized IC staff can view this action from the Test Report List located on the Admin/Managers page in the HR Community on the NIH Portal at: http://hr.od.nih.gov/admincommunity.htm.

For more information on the Workflow information Tracking System (WiTS), please refer to the Office of Human Resources website at: http://hr.od.nih.gov/HRSystems/wits/default.htm.

In addition, for actions where 'Yes' was selected for the *278 Filer* field on the *Separation Information Tab*, the following informational email is sent to the NIH Ethics Office with a cc to the CSD Branch Chief, Team Leader and HR Specialist:

From: Verge, Terrye (NIH/OD) [E] Sent: Fri 1/6/2012 1:4
To: Verge, Terrye (NIH/OD) [E]
Cc: Kerr, Ken (NIH/OD) [C]; Verge, Terrye (NIH/OD) [E]
Subject: Separation Action Processed for 278 person/position

Donvan McNabb, Redskins QB, has separated from the Test, effective 01/06/2012. This position has been identified as subject to 278. A Recruitment / Appointment action may be initiated in the future to fill the vacant position.

The action is then sent to the Benefits and Payroll Liaison Branch (BPLB) for further processing.

Reminder Emails

Exit Survey – Separation Actions

WiTS sends the following notification to the employee who is nearing Separation. The email is sent no earlier than 30 days prior to the employee's Proposed Effective Date on the separation action. The email is not sent for Council or Advisory Board members.

From: SAID Survey Team (NIH/OD)
To: Murphy, Kevin (NIH/OD) [E]
Cc:
Subject: NIH Invites you to participate in the Exit Survey
Sent: Fri 8/29/2014 12:15 PM

Dear Kevin,

The NIH invites you to participate in a survey for staff who are separating or retiring from the organization. We ask you to take a few minutes to complete the NIH Exit Survey online, located at the following address: http://exitsurvey.nih.gov.

Your participation is voluntary and confidential. All responses will be combined into aggregate reports by Office of Human Resources Survey Team.

Your perspective will help NIH Management identify employee concerns to better address the needs of the organization. Thank you in advance for your candid feedback on the Exit Survey and best wishes in your future endeavors.

If you have difficulty accessing the NIH Exit Survey, or you believe you have received this email in error, please contact HR Systems Support at hrsystemssuport@mail.nih.gov for assistance.

Thank you.