Staff Separations - Paper Adjustment Vouchers (PAV)

Emily Kirkman
University HR - Records

April 1, 2015
UHR Contact Information

General contact - recben@iu.edu

Staff Biweekly PAV/eDoc Processor – IUB
Emily Kirkman, ekirkman@iu.edu

Staff Monthly PAV/eDoc Processor – IUB
Tanya Stacy, tjstacy@iu.edu

Staff Biweekly/Monthly PAV Processor - Other Campuses
Stacy Lady, slady@iu.edu
Online Resources

• CATS website:
  o Links page, under Payroll - www.indiana.edu/~cats

• FMS website:
  o Payroll for Processors - fms.iu.edu/payroll
     ➢ Standard Operating Procedures (12.0 is your PAV guide related to terms)
     ➢ Payroll Earn Codes

• UHR website:
  o eDoc/PAV deadlines – hr.iu.edu/hrms/deadlines.html
  o Policies – hr.iu.edu/policies/appointed/separation_pay.html
Purpose of PAV

To pay out last regular pay and/or any separation pay due to the following employment transactions:

- Separation from the University
- Death
- Transfer to an Academic, benefits eligible position
- Transfer to a Temporary with Retirement position
Separation Pay
Support & Service Staff

• Policy: http://www.hr.iu.edu/policies/staff/separation_pay.html

• Unused holidays that are still available for use within the specific time allowed

• All accrued compensatory time off

• Vacation time
  - An employee must have six months of university service to be eligible for a payout
  - Maximum hours payable based on years of service
Separation Pay
Support & Service Staff (continued)

• Separations with IU Retiree Status or because of Death*

• Income protection time (sick time) accruals. Eligible employees enrolled in PERF or the Retirement & Savings Plan receive separation pay for unused income protection accruals in excess of 152 hours
  
  o 0% of accumulated hours up to 152.0 hours
  
  o 25% of accumulated hours in excess of 152.0 through 312.0, and
  
  o 50% of accumulated hours in excess of 312.0

*The death of an employee at any age and with any years of service receives this benefit.
Separation Pay
Professional Staff

- Policy: [http://www.hr.iu.edu/policies/staff/separation_pay.html](http://www.hr.iu.edu/policies/staff/separation_pay.html)

- Unused holidays that are still available for use within the specific time allowed
- All accrued compensatory time off for PAO staff
- Accrued PTO balance
- Accrued honorary vacation up to the max allowed (480 hours)
  - Applies to current PB or previously designated PB employees only
Separation Pay
Professional Staff (continued)

- **Separations with IU Retiree Status or because of Death**
  - Eligible employees enrolled in PERF or the IU Retirement 11.25% Plan receive separation pay for their unused sick bank accruals *in excess of 152 hours*
    - 0% of accumulated hours up to 152.0 hours
    - 25% of accumulated hours in excess of 152.0 through 312.0, and
    - 50% of accumulated hours in excess of 312.0

- Staff enrolled in the IU Retirement 10%, 12%, or 15% Plans do not receive separation pay for their sick bank with the exception noted within the policy.
Separation Pay

- Additional Exceptions
  - PB employees
  - Employees with interest in both PERF and IU Retirement

Contact a UHR PAV Processor for assistance in calculating payout
Indiana University Payroll Adjustment Voucher
(Only one employee per adjustment voucher, please)

Print neatly:
Chart-Dept: ____________________________
Work Area: ____________________________
Name: ____________________________
Emp ID: ____________________________

Adjustment Actions: (check below)
- Pay Adjustment
- Termination
- Attendance Adjustment
- Overpayment

Processing Requested: (check one)
- Next available On-Cycle (Regular) Payroll (No charge)
- Next available Off-cycle Payroll (charge)
- Online Check Request (Charge)

<table>
<thead>
<tr>
<th>EMPL RCD NBR</th>
<th>PAY GROUP</th>
<th>WK 1 or 2</th>
<th>EARNINGS Begin Date (mm/dd/yyyy)</th>
<th>EARNINGS End Date (mm/dd/yyyy)</th>
<th>EARN CODE</th>
<th>SEQ NBR</th>
<th>Account/ Subaccount</th>
<th>Object Code</th>
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<th>$/ Hour</th>
<th>Hourly Rate</th>
<th>Period Amount</th>
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</tbody>
</table>

Page Totals/Grand Totals:

Explanation: ____________________________

Prepared by: ____________________________ Phone: ____________________________ Date: ____________________________

CERTIFICATE: I hereby certify that I have examined the time record of each employee listed on this payroll; that each employee has performed the services for which the salaries or compensation is paid; that to the best of my knowledge and belief no part of the salary or compensation of any employee listed herein is being divided or passed to any other person on account of or by reason of their employment; that the gross pay listed opposite the name of each employee is based upon either statutory or regulatory authority and is justly due each employee; that this payroll is correct and has been approved.

Authorized Signature ____________________________ Title: ____________________________

FOR PAYROLL OFFICE USE ONLY
ADJENTERED BY: ____________________________ DATE: ____________________________ PAY RUN ID: ____________________________ PAGE NBR: ____________________________ PAYROLL COPY

INDIANA UNIVERSITY
Common Errors on Biweekly and Monthly PAVs

- Job record # - Missing or the incorrect one
- Earnings End Date - Last day employed *not* term eDoc date
- Split accounts – Hours/pay should match the division of accounts found on the job record. If differing from this please mark as such in the notes section of the PAV.
- Allowances/Additional pays – Must be added including the sequence number and pay amount should be prorated based on separation date.
- Last day of employment - Using PTO, Vacation, Holiday, or Comp time is not allowed without prior UHR approval (or Campus HR). Refer to UHR separation policy about appropriate use of accrual time on the employee’s last day of employment.
Common Errors on Biweekly PAVs

- RGN/RBP should be hours *available* to work, NOT just hours worked.
  - Example: Last 40 hour work week, Ima Hoosier worked 36 hours, which included working only 4 hours of of her last day.
    - RGN 40 ▶ fill in “Period Amount” column
    - ABS 4 ▶ fill in “Period Amount” column, -$0.00 or ($0.00)
  
- Use of accruals should still be listed but NOT for pay. Only accrual purpose.
# Biweekly PAV EXAMPLE

<table>
<thead>
<tr>
<th>EMPLOYER RCD NBR</th>
<th>PAY GROUP **</th>
<th>Week 1 or 2</th>
<th>EARNINGS BEGIN DATE</th>
<th>EARNINGS END DATE</th>
<th>EARN CODE **</th>
<th>SEQ NBR</th>
<th>ACCOUNT/ SUB ACCOUNT</th>
<th>OBJ CODE</th>
<th>HOURS</th>
<th>+/-</th>
<th>HOURLY RATE</th>
<th>PERIOD AMOUNT</th>
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<td>BW1</td>
<td>1</td>
<td>5/24/2015</td>
<td>5/30/2015</td>
<td>RGN</td>
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<td>0000000</td>
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<td>40.00</td>
<td>+</td>
<td>$20.38</td>
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<td>-</td>
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<td></td>
<td>2.64</td>
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<td>$53.80</td>
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</table>

Emma Hoosier

Hourly Rate: 20.38

- 06/03: Termination eDoc date
- 80: # of available work hours in pay period
- 56: # of available work hours based on term date
- 48.88: # of hours in pay status based on term date
- 32: Hours worked
- 8.88: Vacation 05/26, 05/27 (partial)
- 8: Memorial Day holiday
- 7.12: Absent w/o pay - May 27th (NO ACCRUALS LEFT TO USE!)

Terminal pay out calculation, accrues 4.31 hours per pay period
4.31/80 = accrual rate per hour x 48.88 = 2.64 hours to be paid out
Common Errors on Monthly PAVs

- PTO/HOL/SCK listed. - REG should be hours available to work, NOT hours and/or time in pay status. Hours in NO-PAY status would be the only other earn code listed (ABE). Any accrual usage is managed in ePTO.

- Hourly rate is calculated differently for regular pay versus terminal pay.
  - Regular pay is based on the hours available in the month in which they separate – example March 2015 has 176 hours (based on FT EE). Monthly pay rate divided by 176 = hourly rate for REG/ABE
  - Terminal pay is based on the hours available to work in the calendar year. – example, based on FT, 12 mos employee = 2,080 hours divided by annual salary = hourly rate for Terminal pay.
### PAE PAV EXAMPLE

<table>
<thead>
<tr>
<th>EMPLOYEE</th>
<th>PAY GROUP</th>
<th>Week 1 or 2</th>
<th>EARNINGS BEGIN DATE</th>
<th>EARNINGS END DATE</th>
<th>EARN CODE</th>
<th>SEQ NBR</th>
<th>ACCOUNT SUB ACCOUNT</th>
<th>OBJ CODE</th>
<th>HOURS</th>
<th>+/-</th>
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<th>PERIOD AMOUNT</th>
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**Page Totals/Grand Totals**

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**Ernie Hoosier** 07/18: Termination eDoc date

- Monthly Salary: $3,750
- Annual Salary: $45,000

#### July 2015 (184)

<table>
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<tr>
<th>Sun</th>
<th>Mon</th>
<th>Tue</th>
<th>Wed</th>
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</table>

- 72: Hours worked
- 16: PTO (July 1 - 2)
- 8: July 4th holiday

- 184: # of Avail work hours in July
- 104: # of Avail work hours based on term date
- 104: # of hours in pay status based on term date

Cell Allowance = $50 per month

\[
\frac{50}{184} \times 0.0272 \times 104 \text{ hrs} = \$28.288
\]

Terminal pay out calculation, accrues 24 hours per month

\[
\frac{24}{184} \times \text{accrual rate per hour} \times 104 = 13.624 \text{ hours to be paid out}
\]

Last regular pay - hourly rate calculation

Monthly rate / # of avail hours in month = per hour rate

\[
\frac{3,750}{184} = \$20.38
\]

Terminal pay - hourly rate calculation

Annual rate / # of avail hours in a year = per hour rate

\[
\frac{45,000}{2,080} = \$21.64
\]
When to submit your PAV

The PAV should be submitted no later than two days prior to the job flag for the pay period in which the separation occurs.

After the voucher closes, any late notification of separations and/or PAVs will be processed on the next available off cycle payroll.

Exception: Transfer to Academic or a Temporary with Retirement position
• PAVs will be marked for the off cycle payroll AFTER their last regular pay period in a staff position. PAV should have ONLY term pay.

Reference: eDoc/PAV deadlines – hr.iu.edu/hrms/deadlines.html
How to submit your PAV

• Email – UHR PAV processor or recben@iu.edu
• Fax (812) 855-3409, Attn: UHR Records
• Campus Mail (UHR/Records, Poplars 165)

~WE DO NOT NEED THE ORIGINAL PAV~
Questions?