Banner Renewal - Separation Workflow

This new method will automate the Separation Process, saving you time and work. Listed are instructions for how to navigate to the workflow, schedule a new separation, find needed information in the banner screen NBILST, and review the Worklist to find new actions.

If you’d like to learn more about other software or data applications, go to the Employee Training website and click the Technical Training link. If you have any difficulty with the concepts in this set of instructions, please call me at extension 224-3162 or email EmployeeTraining@cnm.edu. If you have a Human Resources question, email HRMAIL@cnm.edu.

Step 1:

- First, you will log into myCNM. With myCNM open, click the Employee tab.
- Then click the Separation Workflow link in the Technology for Employees channel.

  ![myCNM Screenshot](https://example.com/myCNM_screenshot.png)

- From the Banner Workflow website, you will login with your CNM username and password.
- Under the User Profile menu, select the My Processes link and click Create Schedule.
- The Start Workflow screen will appear.
Step 2:

- From here enter the **Employee ID#, Position number, and Job Suffix**.
- You can access this information by opening a new tab, logging onto Banner and entering **NBULST**.
- Be sure to key in **Ctrl + Page Down** to display the needed information.

- Next you will navigate back and forth while copying and pasting needed information.

- After all required information is entered, you will **Attach** the resignation letter file.
- It can be a scanned document, PDF, or Word document. Next, click the **Start Workflow** button and click **OK**.
Once back on the Worklist Screen, click **Worklist** from the **Home Menu**. After a few minutes, the Separation will appear.

Duplicates are sent back to your Worklist, the **Activity** is listed as **Employee Separation List**.
When you click on the **Workflow**, the title is listed as "**Check for Duplicates**".
If there are many listings for one employee, you will be prompted to choose **Continue** or **Stop** under the "Continue Processing?" section.
Lastly, click on the **Complete** button.

**Step 3:**
- The first two sections indicate employee grouping and timesheet organization which are auto filled.
- The **Date of Separation**, is the last day that the individual will hold the position at CNM. This date must match the date on the resignation letter.
Separation Types

| S1 | Resignation | Employees who left CNM voluntarily, including no call no show, failure to report to work, etc. |
| S2 | Retirement   | Employees who retire and are eligible for retirement benefits. |
| S3 | Contract Not Renewed | Executive contract position not renewed. |
| S4 | Deceased     | Employee dies while employed at CNM. |
| S5 | Discharge    | Employee is discharged for cause. |
| S6 | Inactivated  | Not actively working. (PT Instructors; pool employees, casual workers) |
| S7 | Layoff       | Employees whose position is eliminated due to reorganization or loss of funding. |
| S8 | Released     | Employees whose assignment ends, typically a limited term appointment, temporary assignment, medical or LTD leave unable to perform essential functions of position. |
| S9 | Trial Period | Employees let go during their trial period. |

- Please read through the table and select the appropriate **Separation Type**.

Employee Actions

| Transfer | Occurs when changing positions, for example a current employee accepts a new position at CNM. |
| Separate from Position | Is often selected when a faculty member holding more than one position separates from one department while keeping another teaching assignment. |
| Terminate Employment | Employee leaves employment at CNM. |
| Immediate Termination – Process Now | Is selected to communicate to all departments that immediate action must be taken. |
| Manually Processed | Inactive/Already Processed |

- **Employee Action**, is associated with how the separation is processed and it is very important that you make the right selection. Please read through the table and select the appropriate **Employee Action**.
- Under **Comments** you can enter additional information about the separation for Human Resources use. When all information is entered and checked for accuracy, click **Complete**.
• From the Worklist again, you will see all separations that may require further activity.
• Human Resources will check the separation at this point and mark it valid or invalid.
• If they mark it invalid, you will see "Correct Separation Request" under the Activity in the Worklist.
• You can click on the Workflow, correct the information and then click Complete.

![Worklist](image)

**Step 4:**

• From the Worklist, the Activity is listed as Department Admin Action.
• This indicates your final step. Click the workflow, click the accurate choice, and then click the Complete button.
• We recommend that you review the Worklist weekly. Check with your department for frequency of Separations.
• Each step is processed through Banner in several minutes unless it is marked for a later date.
• When all departments have done their part, the post separation notification email is received.

![Employee Separation Information](image)