
808.36 SUBJECT: PERSONNEL TRANSACTION AND SEPARATION FORMS

:1 OBJECTIVE:

Provide a uniform procedure for the preparation and processing of employee Personnel Transactions.

:2 AUTHORITY:

This procedure amended by City Council September 15, 2003.

:3 DIRECTION:

Human Resources Division Manager, as an appointed official, serves at the pleasure of the Mayor, and receives direction through the General Administration Department Director.

:4 METHOD OF OPERATION:

A. Personnel Transaction

1. This document is utilized to record and process an employee's employment/personal status change, such as:
 - a) Promotional Transfer.
 - b) Demotion.
 - c) Address Change.
 - d) Salary Change.
 - e) Name Change.
 - f) Reclassification.
 - g) Leave of Absence.
 - h) Suspension.
2. The Personnel Transaction Form will be prepared in triplicate by the originating Department. The original (canary) and 1st copy (pink) will be forwarded to the Human Resources Division for processing; the 2nd copy (green) will be retained by the originator. The form must be signed by the authorized person.

Section 1.

This section must always be completed on all Personnel Transactions. It is used to identify the employee's current employment status.

Section 2.

This section is utilized to identify the type of Personnel Transaction, such as a transfer, promotion, demotion, reclassification. It is also used to identify appropriate related changes, such as position title, position code, grade, hourly rate, and program number.

Demotion: When demotion results in pay reduction, employee must sign initials indicating acknowledgement of new pay rate.

Reclassification The Human Resources Division will complete the Personnel Transaction Form and submit appropriate copies to the affected Office/Division.

NOTE: Indicate the following on the form when applicable:

Shift Differential - Employee is being placed into a differential position or removed from a differential position.

Rotating Shift - Employee is being placed on rotating shift or is being removed from rotating shift and placed in a non-rotating status.

Tool Allowance - Employee is being placed into a position which receives tool allowance or removed from a position which receives tool allowance.

Civil Service: This subsection under Section 2 provides for transactions that are unique to these employees.

Section 3.

This section is used to record salary changes not addressed in Policy & Procedure 808.5. It is used to identify special salary changes, other than promotion, merit, reclassification that require the approval of the Budget Review Committee.

Section 4.

This section is used to identify the appropriate personal changes (i.e., address, telephone, name). The employee must complete this section, sign and date the form. The original (canary) and first copy (pink) must be submitted to the Human Resources Division for processing.. For name changes, a copy of the new social security card must be submitted; and the green copy is submitted to the immediate supervisor.

Section 5.

This is the signature, which must be completed in order to validate the transaction. It must be signed by the Office Head, Division Manager, Department Director or authorized designee. When an employee is transferred, the losing Office/Division/Department will prepare the Personnel Transaction Form, sign it and send it to the gaining Office/Division/Department for completion and signature. The gaining Office/Division/Department will forward the form to the Human Resources Division one week prior to the effective date.

B. Separation Form

1. This document is utilized to record and process an employee's termination of employment with the City for any reason, to include:
 - a) Resignation.
 - b) Retirement.
 - c) Quit Without Notice.

- d) Dismissal.
- e) Death.
- f) Long Term Disability.
- g) Lay off.
- h) End of Temporary Assignment.
- i) End of Seasonal Program.

*Letter of resignation or letter of dismissal must be attached.

2. The Separation Form must be completed in triplicate by the originating Department. The original (pink) and 1st copy (blue) will be forwarded to the Human Resources Division for processing; the 2nd copy (green) will be retained by the originator.

Section 1.

This section must always be completed on all terminations. It is used to identify the employee's current employment status.

Section 2.

This section must be completed, reason for termination identified, and signed by the authorized signatory. In the case of dismissal or resignation, the letter of resignation or letter of dismissal must be attached.

Section 3.

This section must be completed as outlined in Policy & Procedure 808.33 - Clearance of Employee Leaving City Service.

Section 4.

This section is for informational purposes only. Its purpose is to advise that this form, along with the final Payroll Time Sheet must be submitted to the Employee Benefits Section no later than noon on the preceding Monday in order for an employee to receive a final check on Friday.

C. Effective Date of Change

1. When feasible, personnel changes should be effective the beginning of a pay period. However, all changes *must be* effective at the beginning of a workweek. The workweek begins on Sunday at 12:01 a.m. and ends Saturday at 12:00 midnight; therefore, transfers, promotions, demotions, etc., must be effective on Sunday. The effective date will be determined by whether the employee is paid on a weekly or bi-weekly basis.
2. The effective date of retirement for employees retiring under the City's Pension Plan will be the first day of the month.
3. If an employee is not in the Pension Plan, but is retiring under Social Security, the effective date of resignation, for this purpose, may be any day in the month; however, it should be noted on the Personnel Transaction Form that the resignation is for this purpose.

4. The effective date for placement on Long Term Disability (LTD) will be the day following completion of the qualifying period (six months from date employee is determined to be disabled). In most cases, it will be four (4) months from the last day the employee worked.

:5 FORMS:

Personnel Transaction (Rev. 11/86)

:6 COMMITTEE RESPONSIBILITIES:

None.

:7 REFERENCE:

Procedure approved by City Council December 16, 1974, Item 27. Performance Evaluation of City Employees, Policy and Procedures Manual, Section 708.22. Procedure amended September 22, 1975, Item 25; amended May 16, 1977, Item 6; amended by City Council November 28, 1977, Item 4; amended by City Council January 25, 1982, Item 7 (T); amended by City Council December 28, 1987, Item 14, A-23; amended June 21, 1993; amended March 24, 1997, Item 3BB; amended April 3, 2000, Item 2PPP; amended September 15, 2003; re-formatted only April 2004.

:8 EFFECTIVE:

This procedure effective September 15, 2003.