



EMPLOYEE SEPARATIONS & TRANSFERS

BOBJ

REPORT DESCRIPTION B0042-1 | WEB INTELLIGENCE

The purpose of this report description is to explain how to generate the Employee Separations and Transfers report.

REPORT DESCRIPTION

This report shows employee action detail and action counts for Separations and Outbound Transfers

REPORT LOCATION

PA: Turnover

REPORT USES

This report can be used to examine action details of Separations and Outbound Agency Transfers for validation of metrics on the 'B0042: Employee Turnover' report.

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How to generate this report

This report is generated after selecting values for the mandatory prompts. All mandatory prompts must have values selected before the Run Icon can be used to generate the report. Mandatory prompts can be identified as mandatory by the exclamation mark inside of the yellow-orange triangle, the square with the checkmark, or the display of (Mandatory). Detailed instructions for interaction with each prompt can be found on the OSC website at <https://www.osc.nc.gov/documents/files/web-intelligence-prompts>.

The Mandatory prompts for this report are:

- Organizational Unit
- CalMonth/Year (Single Value/Interval, Mandatory)

This report can also be further limited by utilizing the Optional prompts to further limiting the amount of data that retrieved into the body of the report. Optional prompts are indicated as optional in parentheses beside the prompt.

The Optional prompts are:

- Personnel Area(s) - (Optional)
- Job Family(s) - (Optional)
- Job Branch(s) - (Optional)
- Job(s) - (Optional)
- Position(s) - (Optional)
- Employee Group(s) - (Optional)
- Employee Subgroup(s) - (Optional)
- Employee(s) PersNo. - (Optional)

NOTE: Since we have a large number of positions in the system, using only the single wildcard character (*) can be very slow and may result in an error if the search exceeds the system limit. If this happens, you can narrow down your search by using the wildcard with specific text strings such as

Deputy*

Analyst

Admin*

If you know the position number, it is best to use the manual entry field (in step 6) to enter your selection.

Exclusion prompts exclude specified data by default while allowing customers the flexibility of changing them when necessary. Exclusion prompts are identified by the term Exclude followed by the prompt.

The Exclusion prompts are:

- Exclude Employee Group (Temps)
- Exclude Employee Subgroup (Temps)
- Exclude Action Type/Action Reason (Reorg Transfers)

NOTE: The Employee Group and the Employee Subgroup exclusions work together as a set to exclude temporary employees. If you want to clear the Temp exclusion, both exclusions (EE Group and EE Subgroup) must be cleared.

The screenshot displays a software interface with a search bar on the left and a main panel on the right. The search bar contains the text "Search" and a magnifying glass icon. Below the search bar is a list of exclusion prompts, each with a warning icon and a "Please select at least one value" message. The prompts are: "Organizational Unit", "CalMonth/Year (Single Value/Interval, Mandatory)", "Personnel Area(s) - (Optional)", "Job Family(s) - (Optional)", "Job Branch(s) - (Optional)", "Job(s) - (Optional)", "Position(s) - (Optional)", "Employee Group(s) - (Optional)", "Employee Subgroup(s) - (Optional)", "Employee(s) PersNo. - (Optional)", "Exclude Employee Group (Temps) (2)", "Exclude Employee Subgroup (Temps) (33)", and "Exclude Action Type/Action Reason (Reorg Transfers) (2)". The "Exclude Employee Group (Temps)" and "Exclude Employee Subgroup (Temps)" prompts are checked with a blue checkmark. The "Exclude Employee Subgroup (Temps)" prompt has a list of values: "15 ; 25 ; 35 ; 45 ; 55 ; 65 ; 75 ; 85 ; 95 ; 0E ; 1E ; 2E ; 3E ; 4E ; 5E ; 6E ; 7E ; Q5 ; S5 ; SI ; SO ; T5 ; U5 ; 8E ; 9E ; QE ; SE ; SL ; SR ; TE ; UE ; VE ; V5". The "Exclude Action Type/Action Reason (Reorg Transfers) (2)" prompt is also checked. At the bottom of the search bar area, there are buttons for "Mandatory (2)" and "Reset All".

The main panel on the right is titled "Prompts" and has a dropdown arrow. Below the title, there is a search bar with the text "Search" and a magnifying glass icon. Below the search bar, there is a section titled "Organizational Unit" with a search bar and a magnifying glass icon. Below that, there is a section titled "Dependencies (0/1)" with a dropdown arrow. Below the dependencies section, there is a message: "Fill the dependencies above to get the list of values". At the bottom of the main panel, there are buttons for "Run" and "Cancel".

Initial Layout

The report shows employee action details and action counts. This is a sample rendering:

B0042-1: Employee Separations & Transfers									
Calendar Month/Year: 01/2016 - 06/2016									
Org Unit	Org Unit Desc	Action Type	Action Type Desc	Action Reason	Action Reason Desc	Separation Category	Employee	Employee's Name	Compa Ratio
20009999	Communication & Training	X8	Transfer Out (BI)	01	Agency to Agency - Lateral	Transfers	12345678	DOE, JANE	1.03

Continued...

Execution Date : 11/10/16						
Original Hire Date	Effective Date	Processed Date	0 to 2 Yr EEs As of Action EffDt	2+ to 3 Yr EEs As of Actn EffDt	0 to 3 Yr EEs As of Actn EffDt	Number of Actions
7/27/92	5/15/16	5/18/16	0	0	0	1

Available Objects

This is a list of the available objects that can be added to the report, from the Document Dictionary once in the Design mode:

Dimensions

- Action Reason
- Action Type
- Age Range
- Agency hire Date
- Cal Mth
- Cal Mth/Yr
- Cal Qtr/Yr
- Cal Yr
- Effective Date
- Emp Pay Area
- Emp Pay Group
- Emp Pay Level
- Emp Pay Type
- Employee
- Employee Group
- Employee Subgroup
- Employee’s Name
- Employment Status
- Ethnic Origin
- Gender
- Job
- Job Branch
- Job Family
- Organizational Unit
- Original Hire Date
- Position
- Processed Date
- Supv Employee
- Supv position

Measures

- 0 to 2 Yr EEs
- 0 to 3 Yr EEs
- 2+ to 3 Yr EEs
- Emp Reference Salary
- FTE Annual Salary
- Job Reference Salary
- Number of Actions

Variables

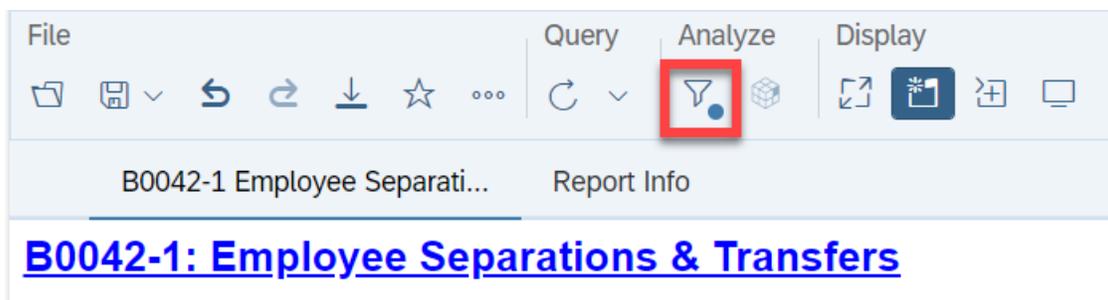
- Prompt Response Cal Month/Yr
- Prompt Response Employee Group
- Prompt Response Employee PersNo
- Prompt Response Employee Subgroup
- Prompt Response Exclude Action Type/Action Reason (reorg Transfers)
- Prompt Response Exclude Employee Group (Temps)
- Prompt Response Exclude Employee Subgroup (Temps)
- Prompt Response Job
- Prompt Response Job Branch
- Prompt Response Job Family
- Prompt Response Organizational Unit
- Prompt Response Personnel Area
- Prompt Response Position
- Separation Category
- Compa Ratio
- Emp / Job Ref Salary

<ul style="list-style-type: none"> ▼ Dimensions > ✚ Action Reason > ✚ Action Type > ✚ Age Range <ul style="list-style-type: none"> ✚ Agency Hire Date > ✚ Cal Mth > ✚ Cal Mth/Yr > ✚ Cal Qtr/Yr <ul style="list-style-type: none"> ✚ Cal Yr ✚ Effective Date > ✚ Emp Pay Area > ✚ Emp Pay Group > ✚ Emp Pay Level > ✚ Emp Pay Type > ✚ Employee > ✚ Employee Group > ✚ Employee Subgroup <ul style="list-style-type: none"> ✚ Employee's Name > ✚ Employment Status > ✚ Ethnic Origin > ✚ Gender > ✚ Job > ✚ Job Branch > ✚ Job Family > ✚ Organizational Unit <ul style="list-style-type: none"> ✚ Original Hire Date > ✚ Position <ul style="list-style-type: none"> ✚ Processed Date > ✚ Supv Employee > ✚ Supv Position 	<ul style="list-style-type: none"> ▼ Measures ✚ 0 to 2 Yr EEs ✚ 0 to 3 Yr EEs ✚ 2+ to 3 Yr EEs ✚ Emp Reference Salary ✚ FTE Annual Salary ✚ Job Reference Salary ✚ Number of Actions ▼ Variables ✚ Prompt Response Cal Month/Yr ✚ Prompt Response Employee Group ✚ Prompt Response Employee PersNo ✚ Prompt Response Employee Subgroup ✚ Prompt Response Exclude Action Type/Action Reason (reorg Transfers) ✚ Prompt Response Exclude Employee Group (Temps) ✚ Prompt Response Exclude Employee Subgroup (Temps) ✚ Prompt Response Job ✚ Prompt Response Job Branch ✚ Prompt Response Job Family ✚ Prompt Response Organizational Unit ✚ Prompt Response Personnel Area ✚ Prompt Response Position ✚ Separation Category ✚ Compa Ratio ✚ Emp / Job Ref Salary
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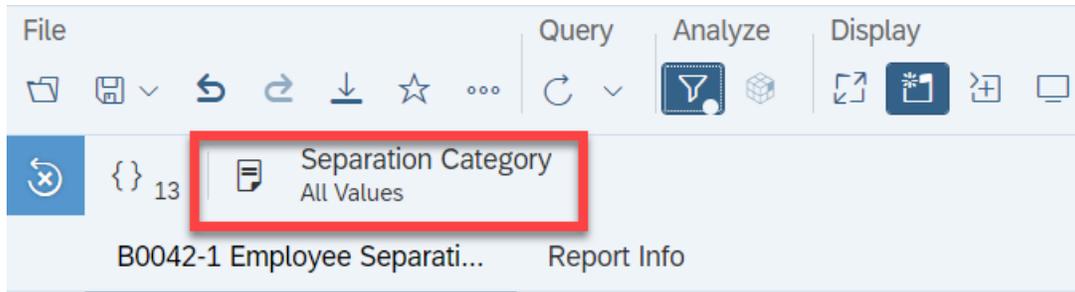
Special Report Considerations/Features

- The Compa Ratio is calculated based on the job of the employee's organizational assignment as of the effective date of the separation, except for ZF Action type separations. For ZF action types, the job of the employee's organizational assignment as of one day prior to the separation effective date is used for the Compa Ratio calculation.
- The Compa ratio is calculated by dividing the FTE annual salary as of the separation date by the employee or job reference salary. The job reference salary is used in the calculation for banded jobs, and the employee reference salary is used for non-banded jobs. The Compa Ratio will not be calculated for an employee if the employee reference salary or the job reference salary does not exist.
- ZG/04 (Separation/Did Not Report) and ZG/26 (Separation/Cancel Sep Pay Continuation) actions are excluded.
- Temporary employees are excluded by default, but this can be changed.
- Reorg Transfer actions are excluded by default, but this can be changed.
- Since the BEACON system only captures incoming Agency Transfer actions (Z8), the X8 - Transfer Out (BI) action was created (only in BI) to assist in Turnover reporting. This X8 action is a copy of the original Z8 action but is instead assigned to the Agency that lost the employee from the transfer action.
- There is an Input Control available to assist in filtering by Separation Category. This may be needed to validate the various Separation counts on the 'B0042: Employee Turnover' report. Interaction with this Input Control will alter the report detail to reflect only the categories you have selected. The yellow Total line will also reflect the totaling appropriate to your selection.

1. Click the Filter icon

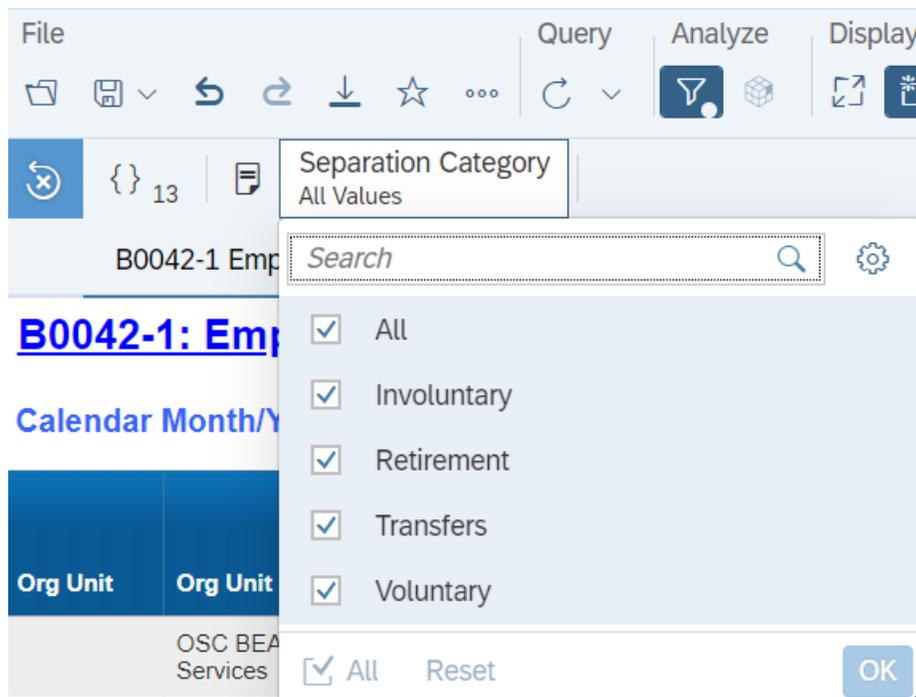


2. Click the Separation Category



B0042-1: Employee Separations & Transfers

3. Select or deselect as needed



- The following table identifies how specific Action Type/Action Reason codes are slotted to count the various Separation Categories on the 'B0042: Employee Turnover' report. The values for Separation Category used in the Input Control above are also defined based on this action table.

Action Type	Action Type Desc	Action Reason	Action Reason Desc	Separation Categories
ZF	SeparationPayContinuation(NC)	1	Retirement LEO Supplement	Retirement - Voluntary
ZF	SeparationPayContinuation(NC)	2	RIFSeverance and/or Health Ins	Involuntary
ZF	SeparationPayContinuation(NC)	4	Separation ShortTermDisability	Involuntary
ZF	SeparationPayContinuation(NC)	5	RTR-RIF	Voluntary
ZG	Separation (NC)	1	Better Employment	Voluntary
ZG	Separation (NC)	2	Personal Reasons	Voluntary
ZG	Separation (NC)	3	Involuntary Separation	Involuntary
ZG	Separation (NC)	4	Did Not Report	Exclude
ZG	Separation (NC)	5	Voluntary Resigned W/O Notice	Voluntary
ZG	Separation (NC)	6	RIF w/no Severance/Health Ins	Involuntary
ZG	Separation (NC)	7	No Reason Given	Voluntary
ZG	Separation (NC)	8	Long Term Disability	Involuntary
ZG	Separation (NC)	9	Retirement	Retirement - Voluntary
ZG	Separation (NC)	10	Retirement Disability	Retirement - Voluntary
ZG	Separation (NC)	11	Contract Ended	Involuntary

ZG	Separation (NC)	12	Time-Limited Appt Term	Involuntary
ZG	Separation (NC)	13	Supplemental Appt Term	Involuntary
ZG	Separation (NC)	14	Appointment Ended	Involuntary
ZG	Separation (NC)	15	Not Re-Elected	Involuntary
ZG	Separation (NC)	16	Dismissed-Gross Inefficiency	Involuntary
ZG	Separation (NC)	17	Dismissed-Conduct	Involuntary
ZG	Separation (NC)	18	Dismissed-Unsat Performance	Involuntary
ZG	Separation (NC)	20	Prior to achieving Perm status	Involuntary
ZG	Separation (NC)	21	Pay in lieu of notice	Involuntary
ZG	Separation (NC)	22	Death	Voluntary
ZG	Separation (NC)	23	Other	Voluntary
ZG	Separation (NC)	24	Terminate while on FMLA	Voluntary
ZG	Separation (NC)	25	Beacon to Non-Beacon Agency	Voluntary
ZG	Separation (NC)	26	Cancel Sep Pay Continuation	Exclude
ZG	Separation (NC)	27	Removal From Office - AOC Only	Involuntary
ZG	Separation(NC)	28	RIF Discontinue Service Retire	Retirement - Voluntary
ZG	Separation(NC)	29	Unavailable to Work	Involuntary
Action Type	Action Type Desc	Action Reason	Action Reason Desc	Separation Categories
ZG	Separation(NC)	40	115C Dismissal	Involuntary

ZG	Separation(NC)	50	RTR	Voluntary
ZG	Separation(NC)	52	RTR-Retire	Retirement - Voluntary
X8	Transfer Out (BI)	1	Agency to Agency - Lateral	Transfer
X8	Transfer Out (BI)	2	Agency to Agency - Reassignment	Transfer
X8	Transfer Out (BI)	5	Agency to Agency - Promotion	Transfer
X8	Transfer Out (BI)	6	Within Agency - Lateral	Transfer
X8	Transfer Out (BI)	7	Within Agency - Reassignment	Transfer
X8	Transfer Out (BI)	8	Grade-Band Transfer	Transfer
X8	Transfer Out (BI)	9	Class/Pay Plan Change	Transfer
X8	Transfer Out (BI)	10	EPA-SPA	Transfer
X8	Transfer Out (BI)	12	Temp to Perm	Transfer
X8	Transfer Out (BI)	13	Perm to Temp	Transfer
X8	Transfer Out (BI)	14	Temp to Temp	Transfer
X8	Transfer Out (BI)	60	Within Agency Reorganization	Transfer
X8	Transfer Out (BI)	61	AgencytoAgency Reorganization	Transfer

CHANGE LOG

Effective 10/7/2024

- Update to Business Objects 4.3 -K.Cox