A work force management system that utilizes an organization computer network to analyze and process employee exit requirements. Using maintained employee information including status, in-house and out-sourced benefits, bonuses, amenities, and employee compensation information, as well as state and federal regulations regarding employee termination, the system provides an integrated set of solutions for managing workforce requirements, including various separation events.
FIG. 3
FIG. 8

Login

Username:
Password:

☐ Want to Change Your Password? Check this box and login with your existing password.

By logging in, you agree to the Terms of Service.

» First Time Here?
You will need the following information to register (see Privacy Statement):
- Social Security Number
- Date of Birth

» Forgot Your Password?
## FIG. 10

### Event Search

| Name: | 
| --- | --- |
| Status: | 
| Date: | 
| Coordinator: | 

### Notification Data

<p>| Name |
| --- | --- |</p>
<table>
<thead>
<tr>
<th>Identification Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Third Quarter Off-Bill Project to Reduce Workforce</td>
<td>Active</td>
</tr>
<tr>
<td>ABC Division Acquisition</td>
<td>Pending</td>
</tr>
<tr>
<td>Customer Service Recalibration</td>
<td>Inactive</td>
</tr>
<tr>
<td>Voluntary Retirement Program</td>
<td>Certified</td>
</tr>
</tbody>
</table>

### Actions

- Add New Page of 60
- Next

## FIG. 11

### Event: Third Quarter Off-Bill Project to Reduce Workforce

| Name: | Third Quarter Off-Bill Project to Reduce Workforce |
| Description: | Phase 1 of implementing plan |
| Organization: | Universal, Inc. |
| Separation Type: | Voluntary |
| Notification Date: | 09/01/2003 |
| Separation Date: | 12/01/2003 |
| Status: | Active |
| Notes: | 

### Actions

- Add New Page of 60
- Next
FIG. 15

Event: Third Quarter Off-Site Project to Reduce Workforce
Population > Customer Service Representatives

<table>
<thead>
<tr>
<th>Population</th>
<th>Factors</th>
<th>Skills</th>
<th>Assessor</th>
<th>Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Name: Customer Service Representative
*Status: Select One
*Assessor Level: Select One

Add Members

FIG. 16

Event: Third Quarter Off-Site Project to Reduce Workforce
Population > Customer Service Representatives

<table>
<thead>
<tr>
<th>Population</th>
<th>Factors</th>
<th>Skills</th>
<th>Assessor</th>
<th>Decision</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Name: Customer Service Representative
*Decision: Select One
*Reason: Select One

Add Members
FIG. 20

Determination > Individual Search

- Left Name:
- ID Number:
- Organization:

Job Function:
- Customer Service Representative
- Customer Service Manager
- Customer Service Representative
- Customer Service Representative
- Customer Service Representative

FIG. 21

Event > Third Quarter Off-Roll Project to Reduce Workforce

Possibilities > Customer Service Representatives

Assessor Numbers > Phoebe Ackerman

Members
- Skills Performance

Assessor Phoebe Ackerman
- Exception Status

Consideration: Skills rank order

Decisions:
- 27 Retained
- 63 Terminated

Name
- Determination Status

- John
- Brown, Michael
- Lee, Ming
- Wolf, Peter
- Williams, Max
- Shaddy, Mary

Reason
- Terminated
- Retained
- Terminated
- Terminated
- Terminated
- Terminated

- Lower performance and skills
- Function not affected
- Lower performance and skills
- Lower performance and skills
- Lower performance and skills
- Lower performance and skills

- Notified
- Not notified
- To be notified
- Not notified
- Not notified
- Notified
FIG. 30

Exception Status > Changed to Retained

Exception

Name: 

*Required

Separation Type: 

Select One

Notification Data

Change to Zero: Yes No

Requires New: Yes No

Separation Date

Change to Zero: Yes No

Requires New: Yes No

Requires Effective Date: Yes No

Status: Active Inactive

FIG. 31

Individual > Doe, John J.

Individual Account

User Name: Username

PIN: 12345678912

*Registration method: Employee ID and last four digits of SSN or PIN

Account Status: Active Locked

Relation Type(s): Administrator Certifier

*Temporary Password: 

*Retype Password: 

Record
**FIG. 34**

Add Relation

<table>
<thead>
<tr>
<th>Organization:</th>
<th>Customer Call Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relation Type:</td>
<td>Administrator</td>
</tr>
<tr>
<td>ID Number:</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

Add new...

Close Window

**FIG. 35**

Administration > Skills Library

<table>
<thead>
<tr>
<th>Skill Type:</th>
<th>Select One</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

Add Name

<table>
<thead>
<tr>
<th>Name</th>
<th>Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comm</td>
<td>COM</td>
</tr>
<tr>
<td>Lead</td>
<td>LEAD</td>
</tr>
<tr>
<td>Tech</td>
<td>TECH</td>
</tr>
</tbody>
</table>

Add Name
FIG. 40

Planning and Budget > 2004 Restructuring Charge

<table>
<thead>
<tr>
<th>Event Name</th>
<th>Actual Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Third Quarter Off-Roll Project to Reduce Workforce</td>
<td>$2,500,00 USD</td>
</tr>
<tr>
<td>ABC Division Acquisition</td>
<td>$32,370,00 USD</td>
</tr>
<tr>
<td>Customer Service Reorganization</td>
<td>$17,350,00 USD</td>
</tr>
<tr>
<td>Voluntary Retirement Program</td>
<td>$41,350,00 USD</td>
</tr>
</tbody>
</table>

FIG. 41

Offer > Search

Name:
Add New
FIG. 44

Option > Search

Name: [Text]

Add new

Accept Separation
Accept Separation with Recall
Accept Separation with Security Options

Page 5 of 60

FIG. 45

Option > Add New Option

Option Type: Select One

Name:

Description:

Narrative:

255 Characters
WORK FORCE MANAGEMENT APPLICATION

CROSS-REFERENCE TO RELATED APPLICATIONS


FIELD OF THE INVENTION

[0002] The present invention relates to a workforce management method and system. In particular, the system and method relate to events which require management and integration of several resources of an organization in order to assure efficient management of workforce management events.

BACKGROUND

[0003] Organizations experience various workforce events, for example, separation from employment, compensation review or forecasting to name a few, that require management by the organization. In managing workforce events that arise, organizations currently must gather resources and information related to a particular event from various areas inside and outside the organization in order to manage the event. Many of the resources are located in separate files or databases and must be compiled and analyzed manually. This method of event management can be time-consuming and if the immediate management of the event is crucial, other relevant issues such as forecasting, alumni tracking, future organization and budget planning may not be performed at the time of the event.

[0004] For example, in the case of a separation event, where an employee or group of employees leaves the organization whether voluntarily or involuntarily, the organization must consult various internal and external resources to manage the event. As the more immediate concerns related to separation events are addressed, other important events that could be related to the separation event, such as forecasting, may not be addressed due to time and efficiency constraints.

[0005] Employees exit an organization generally by one of three paths: attrition, which includes individual retirement, termination, and resignation; voluntary retirement, where incentives for early retirement are offered to groups of employees in order to reduce workforce size; and involuntary termination, such as reductions in force or transfer of a department.

[0006] Issues to be considered in a separation event may include status, in-house and out-sourced benefits, bonuses, amenities, employee compensation information, employee access to information, termination of privileges and recovery of security devices, as well as state and federal regulations regarding employee termination requirements such as notification, medical insurance, and compensation. Further issues arise when a separation event affects a large group of employees. Additional time is required to process a separation event which affects a large group of employees. The amount of time required to process a large group, in addition to costs incurred and likelihood of processing errors, makes current methods of managing large separation events inefficient.

[0007] Aside from the additional time required to process a large separation event, an organization must address issues such as continuing benefits (e.g., COBRA), retirement benefits, timing related to a payroll cycle, proper notification, demographic information on terminated and remaining employees and early retirement offers and acceptances.

[0008] The above-mentioned management problems associated with separation or other events are related to the lack of integration of event management resources. A system is needed which integrates all resources required for event management in an organization.

SUMMARY

[0009] The present invention relates to work force management systems and methods. In particular, the system and method relate to events which require management and integration of several resources of an organization in order to assure efficient management of a particular event.

[0010] More specifically, the invention relates to a system that utilizes an organization's computer network to analyze and process the event of employee separation. The system manages exit requirements using maintained employee information including status, in-house and out-sourced benefits, bonuses, amenities, and employee compensation information, as well as state and federal regulations regarding employee termination.

[0011] The invention provides an integrated system for managing work force, particularly work force reductions. The system handles each type of exit path including attrition, retirement, and reduction in workforce (RIF) and allows the organization to address several exit path requirements, some of which are shared by all three paths, and some of which are unique to each path. In addition, other events or management goals can be integrated with the separation event, such as budget management and forecasting, compensation, alumni tracking, and performance review.

[0012] The exit path requirements to be considered generally include payroll and benefits, employment amenities, and state and federal regulations. More specifically, the system includes processes that allow the organization to calculate and deliver final paychecks for salary, commissions, bonuses, and vacation time pay; determine and report continuing benefit coverages, such as COBRA; terminate benefits that do not carry over after termination; recover security devices, such as keys and keycards; retrieve organization assets such as pagers, cell phones, lap-top computers, and company cars; terminate privileges such as credit cards, memberships, and rental cars; and comply with state and federal regulations regarding timing of payments, and notice and reporting requirements, for example.

[0013] Additional considerations are handled when an organization is planning to terminate a large group of people. The system provides tools to plan and implement termination, which could be voluntary, through an early retirement program for example, or involuntary, such as reductions in force. In either case, the system allows management to select a target group, calculate costs savings in salaries, benefits, etc., as well as the costs of providing severance, pension, COBRA, and other post-termination benefits, and provides the framework to allow this information to be distributed to management for decisions and modification.
siderations of the termination with respect to the payroll cycle, for example, and proper notification, also are included. Also, organizations can establish and retain official documentation of the age, gender, and other characteristic data on terminated and remaining employees. In addition, it generates and maintains information and makes it available over the Internet, for example, to employees and others after termination regarding pension, severance, COBRA, and other benefits.

[0014] In voluntary termination situations, once the target group has been determined and the costs have been calculated using the present invention, the system allows employees to participate in the termination decision by accepting or rejecting an early retirement offer, for example. Groups of employees are given a choice of whether or not to accept a separation offer. Management can track the number of acceptances in order to determine if goals of the early retirement program have been met.

[0015] The system provides the tools necessary to design cost-effective offers, as well as provide employees with access to the separation offers. The system allows employees to analyze, verify, and accept the offer by way of a secure transaction that properly validates the acceptance.

[0016] The invention provides an integrated system for exit processing. Consequently, exiting employees receive the correct processing, and substantial amounts of time, money, and resources are saved in carrying out the exit process and avoiding processing errors. In addition, the invention provides a centralized system whereby employees are able to access personal information regarding severance, pension, COBRA, and other benefits.

[0017] Additional features of the present invention will be apparent from the following detailed description and drawings which illustrate exemplary embodiments of the invention.

DESCRIPTION OF THE DRAWINGS

[0018] FIG. 1 is an illustration of a workforce management system according to an exemplary embodiment of the invention;

[0019] FIG. 2 is a flow chart depicting an exemplary embodiment of the invention;

[0020] FIG. 3 is a conceptual process model for an embodiment according to the invention;

[0021] FIG. 4 is a flow chart depicting an exemplary embodiment of a separation management platform according to the invention;

[0022] FIG. 5 is a flow chart depicting an embodiment of management of a separation event according to the invention;

[0023] FIG. 6 is a flow chart depicting an embodiment of management of a separation event by organization members according to the invention;

[0024] FIG. 7 a flow chart depicting an embodiment of management of a separation event according to the invention;

[0025] FIG. 8 shows a user interface for accessing a separation manager according to an embodiment of the invention;

[0026] FIGS. 9 and 9a are conceptual data models for separation event management according to an embodiment of the invention;

[0027] FIG. 10 shows a user interface for initiation of a search according to an embodiment of the invention;

[0028] FIG. 11 shows a user interface for accessing search results of FIG. 10, according to an embodiment of the invention;

[0029] FIG. 12 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

[0030] FIG. 13 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

[0031] FIG. 14 is a conceptual data model of populations of a separation event management system according to an embodiment of the invention;

[0032] FIG. 15 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

[0033] FIG. 16 shows a user interface accessing separation event management systems according to an embodiment of the invention;

[0034] FIG. 17 shows a user interface accessing separation event management systems according to an embodiment of the invention;

[0035] FIG. 18 is a conceptual data model of determinations of a separation event management system according to an embodiment of the invention;

[0036] FIG. 19 is a conceptual data model of determinations of a separation event management system according to an embodiment of the invention;

[0037] FIG. 20 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

[0038] FIG. 21 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

[0039] FIG. 22 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

[0040] FIG. 23 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

[0041] FIG. 24 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

[0042] FIG. 25 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

[0043] FIG. 26 shows a user interface for accessing separation event management systems according to an embodiment of the invention;
FIG. 27 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 28 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 29 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 30 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 31 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 32 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 33 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 34 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 35 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 36 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 37 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 38 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 39 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 40 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 41 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 42 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 43 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 44 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 45 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 46 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 47 shows a user interface for accessing separation event management systems according to an embodiment of the invention;

FIG. 48 is an illustration of the network architecture of a preferred embodiment of the present invention.

DETAILED DESCRIPTION OF THE INVENTION

In the following detailed description, reference is made to the accompanying drawings, which form a part hereof and show by way of illustration specific embodiments in which the invention may be practiced. These embodiments are described in sufficient detail to enable those skilled in the art to practice the invention, and it is to be understood that other embodiments may be utilized, and that structural, logical, and electrical changes may be made without departing from the spirit and scope of the present invention. The progression of processing steps described is exemplary of embodiments of the invention; however, the sequence of steps is not limited to that set forth herein and may be changed as is known in the art, with the exception of steps necessarily occurring in a certain order.

An embodiment of a workforce management system according to the invention is illustrated in FIG. 1. Resources required for workforce management are integrated in the system and method of the present invention. Various situations or "events" may arise during the operation of an organization. An event may include business activities that require a decision. In addition, events have a specific beginning and end and have been established for a specific purpose, for example, reductions in work force, separation, performance reviews, compensation reviews, or a work requirements forecast.

An exemplary workforce management system as shown in FIG. 1 may include application program products 31 for managing various events, which may include organization and budget modeling and planning events 13, forecast review events 15, performance and skills review events 19, compensation review events 21, separation events 55 and alumni managing events 23. Each event can be processed through a different module or combination of modules. Exemplary modules 33 may include event maintenance, position maintenance, item value maintenance, options maintenance, checklist maintenance, data collection maintenance or performance and skills ranking tools.

FIG. 2 is an exemplary flow chart showing an embodiment of the workforce management system and the interrelationships between products and events. Specifically, FIG. 2 shows an example of how other products interact with the separation manager 55. Beginning at step 10, the organization and budget modeler and planning product 10 (shown above), sends an event request 11 to event maintenance in step 12. The event maintenance module determines the input from the organization and budget modeler 10 as a
performance event at step 14 and inputs this data to start a review of performance and skills 16.

[0070] Performance data at step 18 is input back to the organization and budget modeler at step 20, which in turn is input as an event request 22 to the event maintenance module 24 and budget data 34 is sent to the compensation review product 28 to perform compensation review. The event maintenance module 24 also sends compensation event data 26 to the compensation review product at step 28. The results of the compensation review 30 are sent to the payroll system 32. Another branch from step 16 sends performance data about low performers 17 to the separation manager 55, the results of which are sent to the payroll system 32 and the alumni manager 58 upon separation of the low performers.

[0071] Another exemplary path for a forecasting event begins at the organization and budget modeler 10 which sends an event request 35 to the event maintenance module 36. A forecast event 38 is sent to the forecast workforce requirements product 40 from the event maintenance module 36. Forecast data 42 is sent from the forecast review product back to the organization and budget modeler at step 44. Data regarding surplus workforce 46 is sent to the separation manager 55 and re-organization requests 48 are sent to business operations 50 and shared with other systems 56. The separation manager in turn sends results 54 to the payroll system 52 and alumni manager 58.

[0072] Input may also come from other sources as shown in steps 27 and steps 52 which show data regarding separation events and attrition coming from an event maintenance module and business operations, respectively. The workforce management system may also follow other paths or combinations not shown in FIG. 2 and are not limited to those described above in relation to FIG. 2.

[0073] FIG. 3 is an exemplary conceptual process model showing the types of data which move between modules of products in the system. Each line and arrow represents data moving between the process in the box. For example, configuration data 100 is input from the administrator 98 to administration 102, further configured at step 104 and input into the workforce manager 106 (WF). The separation management platform 112 (SMP) inputs or receives data from the WF 106 in order to process reduction in force (RIF) or other population decisions. Data also can be input or output from the WF 106 to other areas such as Reporting and Analysis 110, Forecasting 130, Reorganization 128, Skills Assessment 125 or Import/Export 116.

[0074] Another embodiment of the present invention is represented as the method illustrated in FIG. 4 to show an example of processes of the separation manager 55 shown in FIGS. 1-3 above. Inputs 330 are input into the separation manager 55 and are output as models, reports or data to a plurality of output resources 332.

[0075] The separation manager 55 is shown in FIG. 5 as a method and system to manage separations from an organization. At step 60, a workforce alignment business driver receives input regarding various triggering events. Examples of triggering events may include attrition, elimination of poor performers, use of technology, changes in business mission, outsourcing of processes, market conditions, mergers and acquisitions and divestitures, among others. When separation management is initiated after the triggering event, the separation manager 55 at step 62 integrates the workforce alignment business drivers (step 60) with data input from internal systems, organizational planning goals, and external systems 64 into the separation manager 55. Input data may include payroll, benefits and other data relating to an employee from within the organization. Organizational planning goals may include any organizational strategies or goals relevant to the event. External data may include data such as applicable laws and regulations, among other data.

[0076] At step 66, the separation manager 55 determines whether the separation is through means such as attrition 66 or separation events 68 requiring further analysis at step 68a of modeling eligible populations and separation event management 68b where maintaining populations is a variable. Next, the data is moved to steps at level 70 including assessment, determination and exceptions 70a; data collection 70b; compensation and severance calculations 70c; and separation document printing 70d. After steps 70a-d, the data may be further processed at step 72 for various exit requirements which may include transactions, direct deposit, vendor notification and security and network access. Subsequent to completion of steps 60-72, the data is output back to internal systems, organizational planning and external systems at step 74. Navigation/communications 76 and tracking/reporting/analysis/extracts 78 are available to the user throughout the separation management process 62.

[0077] In the course of an event, for example a separation event, members from different departments of the organization may need to input or access data related to the event in order to manage the event. FIG. 6 shows an exemplary flow chart of member interaction in the management of a separation event using the separation management system according to an embodiment of the invention. Administrators at step 80 may perform inputs such as creation of an event in the system, model populations and creating and assessing the populations based on the event which leads to specification of factors for consideration. Next, at step 82, assessors receive the data and factors for consideration input from the administrators at step 80 and evaluate individuals based on this information. The assessors will have ongoing duties to monitor progress and indicate status and decision after step 82. At step 84, reviewers review compliance and effectiveness from the information received after analysis performed at step 82. Based on this information, the assessors may again analyze the information after step 84 to indicate status and decision or the process may continue to step 86 where supervisors notify employees and collect data, produce separation documents and distribute termination data.

[0078] Another view of steps 80-86 shown in FIG. 6 is depicted in FIG. 7. In this example, the business plan of the organization, step 88, branches into events at step 90. The event is analyzed based on the type, approach, targets, financial tracking, time frames and responsibilities. If the event is a separation event, the groupings of affected employees are divided into populations (step 92) based on individuals, groupings assessment criteria or assessment level. Assessors at step 94 make assessments shown in step 82 above, whereby these assessments are passed on to the affected individual at step 96.

[0079] FIGS. 8 to 47 show user interfaces and conceptual data models of an exemplary separation management system
and method according to the invention. Although shown in an exemplary order, any of the user interfaces or data resources may be accessed in any order and in relation to other programs in the workforce management system discussed in relation to FIG. 1. The user interfaces shown are for illustrative purposes only.

[0080] The system is secure and therefore requires a user to log in with a username and password or PIN (personal identification number) at the user interface shown in FIG. 8 in order to access the repository of separation management data. After a successful login, the user may choose an option from a menu 132 shown on the left side of the user interface shown in FIG. 10. Although the options in this embodiment may include options such as “Administration,” “Planning and Budget,” “Offer and Options,” “Event,” “Population,” “Determination,” and “Reporting and Analysis,” the separation manager may include other menus as well. Moreover, other application program products of the workforce management system, described above, may include different options and menus.

[0081] A user may initiate a search for a separation event after a successful login. A Separation Subject Area defines a Work Force Separation Event. A Separation Event 154 shown in FIG. 9 organizes a Population of Individual(s) in order for an employment Determination to be accomplished. Significant business objects of interest may include: Separation, Separation Type, Separation Status, Approval Step, Goal, Goal Type or Separation Characteristic. Separation manager 154 of the conceptual data model, shown in FIG. 9, may receive or send data along exemplary paths 155, 156, 158, 168, 170, 172, 175.

[0082] Exemplary business rules for Separation events are illustrated in the conceptual data model of FIG. 9 and describe the relationships between data in the system. For example, a Separation Event 154 may be one and only one Separation Type 161 (e.g., voluntary, involuntary or attrition). A Separation Event 154 may be one or many Enterprise relationship management (ERM) Relation Types 163. An ERM type is a data structure that uniquely ties a particular person’s information to their current relationship with the organization. Another example is that a separation event 154 may have one or many dates, but one date 169 may only be associated with one separation event 154. A Separation Event 154 may be related to one or more other Separation Event(s) and may have one or more Separation Characteristic(s) 166. A Separation Event may have one and only one Goal 176 and a Separation Goal is of one and only one Goal Type 178.

[0083] Further examples are shown in FIG. 9a. A separation event 154 may be related to one or more Exception Status(s) 400 (FIG. 9a) or a Separation Type 161 may also be associated with one or more Decision(s) 401 and Reason(s) 402 (FIG. 9a). For example, an involuntary separation (Separation type 161) may be related to one or more decisions regarding the separation. These are but a few examples of relationships between data shown in FIGS. 9 and 9a and other relationships may be discerned from FIGS. 9 and 9a.

[0084] As an example, once a user selects “Event” then “Search” from the left side of the screen on menu 132 of FIG. 10, a search user interface under the separation manager appears as shown on screen 134. At the user interface (UI) 134 shown in FIG. 10, a user may input various data to obtain information regarding one separation event or a plurality of separation events. The purpose of the Event Search Page is to provide a list of Event(s) based upon the supplied search criteria. Search criteria may be entered under “name,” “status,” “date,” or “coordinator.” A pop-up calendar function 136 may also be included to select an Event by date. New Events may be added by either clicking on the “Add New Event” option under the “Event” menu on the left toolbar or selecting “Add New” 138 from the Event Search page depicted on FIG. 9. A Result list 140 will be displayed and shows recently developed projects search results in descending notification date order by event name, displays those events that have an active status, and allows the user to click on a particular event from the Result list to obtain more detail about the selected event.

[0085] FIG. 11 shows an exemplary user interface when a specific event is chosen from the Result list 140 of FIG. 10. In addition to the Event tab 142, the user may also access Rules 144, Populations 146, Package 148 and Reports 150 tabs from the user interface 300 shown in FIG. 11. The purpose of the Edit Event Roles Page tab (tag 144) is to provide the ability to add and/or edit Event Roles, among other options. The Event Population List Page (tag 146) provides a list of Populations for an Event. FIG. 12 shows an exemplary user interface 301 that could be displayed if the tab 146 for Populations is chosen. The Event Package List Page (tag 148) provides a list of Documents that comprise the Separation Package for Individuals associated with this Event. Options related to the tab “Package” may include various packages that may be offered to exiting employees, letter templates, demographic information or an exit check-list.

[0086] The Event Reports List Page (tag 150) provides a list of Reports and other options for an Event. An example of a report that could be generated is an Adverse Impact report to analyze Separation information for potential impact to EEO compliance and requirements. The Adverse Impact report will display Member information, including 80% Rule and Standard Deviation, for the selected Event. Other reports that can be generated include age distribution, banding, event extracts, event progress, financial and skills extract reports, to name a few. Any required report may be generated from the system.

[0087] FIG. 13 shows a user interface 302 of a search screen under “Population” from menu 132. The user interface shown in FIG. 13 allows a user to search based on a population. The Population Subject Area defines Population(s) within a Work Force Separation Event. A Population defines a group of Individual(s) for whom there will be an employment Determination. In addition, a Population defines the organizational level at which a Determination will be made, Factor(s) to be considered and Payment options. Significant business objects of interest may include: population, population parameter, population status, or factors for consideration. Event management can be initiated from the Population, Search commands to obtain data on an event based on a particular population.

[0088] Exemplary business rules and data relationships for Populations are illustrated in the conceptual data model shown in FIG. 14. A population is an individual or group that have data associated with them regarding a separation or
other event. A Population may be comprised of one or more Individual(s). A Population may be modeled based upon one or more ERM Characteristic(s). As stated above, many relationships may be discerned from FIG. 14, however a few examples may include but are not limited the following. A Population 181 may be associated with one or more Date(s) 214. A Population may have one or more Population Status(s) 220, each with a Date 214. A Population may have one or more Factors for Consideration(s) 193 and a Factor for Consideration may be related to one or more Skill Type(s) 199. For example, in a separation event, population status (e.g., involuntary or voluntary separation, attrition or other status definitions) may have one or more factors for consideration, which relate to one or more skill types of that population, taken into account for a Decision.

[0089] FIG. 15 shows a user interface 303 that appears when an event is selected from the Populations “Search” user interface shown in FIG. 13. After selection of a population, a screen 303 shown in FIG. 15 is presented to the user and the user can select options under tabs 405, Factors 406, Skills 407, Assessor 408, or Decisions 409. Further options may include preparation of Determinations and Reports related to groups or individuals. FIG. 16 depicts user interface 334 when the “Decision” tab 409 is selected from FIG. 15. User interface 334 allows a user to make a decision regarding a population of employees.

[0090] FIG. 17 shows a user interface 304 for the selection of “Determination” from menu 132. The Determination Subject Area 304 manages employment Determination(s) for a Population within a Work Force Separation Event. For each Individual, a Determination will include Decision, Reason and applicable Statuses. Significant business objects of interest include: Determination, Decision, Reason, Determination Status, Exception Status or Separation Status.

[0091] Exemplary business rules for determinations are illustrated in the conceptual data model shown in FIGS. 18 and 19. The Determination subject area manages employment decisions for a population within a workforce separation event. For each individual, a determination will include decision, reason and applicable status. A Determination 222 (FIG. 18) may be for one and only one Individual 241 (employee) in a specific Population, a Determination 222 may be assigned to one and only one Individual 241 (e.g., an assessor) and a Determination is made by one and only one Individual (e.g., an assessor). A Determination must have one or more Decision(s) 232 which may include accept, declined, retained or involuntarily separated; each with a specific Reason 233 (e.g., higher or lower performance) and a Date 230. A Determination 232 may be related to content or may be based upon one or more performance rating(s). A Determination 246 (FIG. 19) may be associated with one and only one Separation Type (e.g., voluntary, involuntary or attrition). A Determination may trigger one or more Transactions 249, for example, payment or account transactions. A Determination must have one or more Determination Status(s) 265, one or more Exception Status(s) 254 or one or more Separation Status(s) 261, each with a Date 257.

[0092] FIGS. 20 to 28 depict exemplary user interfaces related to the selection of a particular individual and options related to event management regarding this individual by an individual Assessor. FIG. 20 shows an Individual Search user interface 305 under “Determination” from menu 132. FIG. 21 shows an individual assessor user interface 306 for members 410 which also shows tabs for skills 411, performance 412 and decision 413. FIG. 22 depicts a user interface 335 (skills tab 411) for an assessor to determine or enter skill levels for individuals and the user interface 336 of FIG. 23 displays results and decisions selections based on skills assessments. The user interface 337 illustrated in FIG. 24 further assesses an individual on performance (tab 412) and displays results/ranks based on performance.

[0093] FIG. 25 shows an individual assessor user interface 338 for the “Decision” tab 413 (FIG. 21) related to a group and FIG. 26 shows an individual assessor user interface 307 for an individual. Other tabs shown in FIG. 26 include Exception 452, Vacation 453, Package 454, and Reports 455 related to the Individual selected. FIG. 27 shows the “Vacation” tab 453 user interface 308 selected from the user interface shown in FIG. 26. Events and options shown in FIG. 28 (user interface 309) may include reasons for separation for an individual, for example the tables marked Attribution 457, Employment Status 458, Checklist 459, Vacation time 460, Events 461 and Reports 462 tabs. The “Checklist” tab 459 allows a user to determine whether all applicable requirements concerning notification, compliance with regulations and other termination requirements have been performed. As discussed above, reports may also be generated from the “Reports” tab 462 relating to demographic factors, adverse impact, age distribution, banding, event extracts, event progress, financial and skills extract reports, to name a few.

[0094] FIGS. 29 to 36 illustrate options available, as an example, under the “Administration” option from menu 132. Options under this menu may include a plurality of administrative functions related to an event, in this case, a separation event. Exceptions, account information, data about the individual, skill assessments, editing functions, references, building access, relations, skills library transactions and email accounts are but a few examples of information that may be accessed from the “Administration” menu and exemplary user interfaces of these options are shown in FIGS. 29 to 36. FIG. 29 shows an “Exception Status” user interface 310 and FIG. 30 shows user interface 311 for “Exception Status Changed to Retain.” FIG. 31 is an exemplary user interface 312 for “Individual” administration and FIG. 32 shows a user interface 313 for “Organization skills.” FIG. 33 shows an exemplary “Reference” user interface 314 and FIG. 34 shows an exemplary “Relation Type” user interface 315. FIG. 35 depicts an exemplary user interface 316 for “Skills Library” under Administration and FIG. 36 depicts an exemplary user interface 317 for “Transaction Type.”

[0095] Another example, depicted in FIGS. 37 to 40, allows a user to access “Planning and Budget” tools from menu 132. Access to planning and budget management tools allows a user to integrate other resources into the separation manager (or other event manager) in order to perform analysis based on a wider selection of data than separation management alone. Determination of how planning and budget will be affected by a separation event are important to the overall functioning of an organization. FIG. 37 shows an exemplary user interface 318 for “Budget Search” to search for a particular budget or budgets. FIGS. 38-40 show
results user interfaces 319, 320 and 321 respectively when a budget is chosen from user interface 318 (FIG. 37).

[0096] FIGS. 41 to 45 illustrate options available to a user under the “Offer and Options” option from menu 132. Examples of data accessible under this menu are offers (FIGS. 41-43), information and options (FIGS. 44-45) available to departing employees. Employees may access these user interfaces in order to make selections related to offers and options.

[0097] FIG. 46 is an example of a user interface tailored to the needs of an individual assessor. FIG. 47 shows an exemplary user interface chosen from the user interface shown in FIG. 46. The information shown in FIG. 47 pertains to an individual employee and is tailored to the needs of the user-assessor. Employees and others may also access some portions of the system after termination for information regarding pension, severance, COBRA, and other benefits.

[0098] The system and method described above may be part of a network shown in FIG. 48, a system 200 for a people business network. The people business network provides an example of a framework for implementing the exit processing application of the present invention. System 200 comprises a web server 202 and relational database 204. The web server is connected to network backbone 220 to communicate with end user clients 210, 212 and human resources client 208. In addition, vendor client(s) 206 are connected to the network backbone 220 to access relational database 204. In operation, an employee may access all pertinent personal employee information through end user clients 210, 212. Manager and human resource (HR) professionals may access information on a plurality of employees through human resource client 208. Vendor client 206 may access information pertaining to vendor specific data, i.e., current return on a particular mutual fund. In actually, the different clients are differentiated only by a difference in login name and password to web server 202. All client may access, view, modify, or change data which they have privileges to view, modify or change.

[0099] The processes and devices described above illustrate preferred methods and typical devices of many that could be used and produced. The above description and drawings illustrate embodiments, which achieve the objects, features, and advantages of the present invention. However, it is not intended that the present invention be strictly limited to the above described and illustrated embodiments. Any modifications, though presently unforeseeable, of the present invention that come within the spirit and scope of the following claims should be considered part of the present invention.

What is claimed as new and desired to be protected by Letters Patent of the United States is:

1. A system for work force management, the system comprising:
   at least one database, the at least one database storing employee specific information for a plurality of employees employed by at least one company;
   at least one server, the at least one server communicating with the database over a network backbone;
   at least one application program product running on the server that provides an interface by which a user manages at least one workforce event by accessing data stored in said plurality of databases related to said workforce event; and
   at least one module that interacts with said at least one application program product and performs tasks related to said workforce event.

2. The system of claim 1 wherein said application program product is selected from at least one of an organization/budget modeler and planner, forecast review, performance and skills review, compensation review, separation manager and alumni manager.

3. The system of claim 1 wherein said at least one module includes at least one of event maintenance, position maintenance, item value maintenance, options maintenance, checklist maintenance, data collection maintenance, and performance and skills ranking tools.

4. The system of claim 1, wherein said application program product comprises a separation manager to manage employee separation from workforce events.

5. The system of claim 4, wherein said separation manager accesses data, internal and external to said at least one company, for determining requirements for a particular employee separation scenario indicated by said user.

6. A system for separation event management comprising:
   a computer network;
   a database connected to said computer network; and
   at least one application program product having access to said computer network that allows a user to input parameters related to proposed employee separation scenarios;

wherein said application program product interacts with said data based on an employee separation scenario selected by the user to generate a model of results of said employee separation scenario.

7. The system of claim 6 wherein said separation manager interacts with other application program products of a workforce management system.

8. The system of claim 6 wherein said application program product performs at least one of event maintenance, position maintenance, item value maintenance, options maintenance, checklist maintenance, data collection maintenance and performance and skills ranking tools.

9. The system of claim 6 wherein said parameters include organizational goals and planning.

10. The system of claim 6 wherein said parameters include external data.

11. The system of claim 10 wherein said external data includes at least one of applicable regulations and laws.

12. The system of claim 6 wherein said parameters include employee specific information.

13. The system of claim 6 wherein said parameters include data related to populations of employees.

14. The system of claim 6 wherein said proposed employee separation scenarios include at least one of attrition, involuntary termination and voluntary retirement.

15. The system of claim 6 wherein said model is a report.

16. The system of claim 15 wherein said report includes at least one of demographic information, adverse impact, banding, event extracts, event progress, financial and skills extract reports.
17. The system of claim 6 wherein said model is an offer for employee early retirement.

18. The system of claim 6 wherein said model is at least one option for an employee to select.

19. A software application program for separation management comprising:

   at least one application program product runs on a computer network and accesses internal and external databases related to employment management, the application program product providing a user interface that allows a user to input parameters related to proposed employee separation scenarios including voluntary and involuntary termination and attrition;

   wherein said application program product generates a model of results of said separation scenario.

20. The program according to claim 19 wherein said separation management program interacts with other application program products of a workforce management system.

21. The program according to claim 19 wherein said application program product performs at least one of event maintenance, position maintenance, item value maintenance, options maintenance, checklist maintenance, data collection maintenance and performance and skills ranking tools.

22. The program according to claim 19 wherein said parameters include organizational goals and planning.

23. The program according to claim 19 wherein said parameters include external data.

24. The program according to claim 23 wherein said external data includes at least one of applicable regulations and laws.

25. The program according to claim 19 wherein said parameters include employee specific information.

26. The program according to claim 19 wherein said parameters include data related to populations of employees.

27. The program according to claim 19 wherein said model is a report.

28. The program according to claim 19 wherein said report includes at least one of demographic information, adverse impact, banding, event extracts, event progress, financial and skills extract reports.

29. The program according to claim 19 wherein said model is at least one of an offer and option for employee early retirement.

30. A software application program for separation management comprising:

   at least one application program product that allows a user to input parameters related to proposed separation scenarios;

   wherein said application program product generates a model of results of said separation scenario; and

   wherein said model includes at least one of a population selection, a decision and a report.

31. The program of claim 30 wherein said decision is based on at least one of skills and performance parameters.

32. The program of claim 30 wherein said population selection is at least one of an individual or a plurality of individuals.

33. The program of claim 30 wherein said report includes at least one of demographic information, adverse impact, banding, event extracts, event progress, financial and skills extract reports.

34. A method of managing a separation event, the method comprising:

   uploading employee specific information into databases of one global computer network from internal and external data sources;

   providing access to the employee specific information through clients accessing secured web servers connected to the databases;

   accessing data from said databases using at least one application program product that allows a user to input data related to a proposed employee separation scenario;

   analyzing said data and employee separation scenario selected by the user using said at least one application program product; and

   generating a model of results of said employee separation scenario.

35. The method of claim 34 wherein said application program product interacts with other products of a workforce management system.

36. The method of claim 34 wherein said parameters include organizational goals and planning.

37. The method of claim 34 wherein said parameters include external data.

38. The method of claim 37 wherein said external data includes at least one of applicable regulations and laws.

39. The method of claim 34 wherein said parameters include employee specific information.

40. The method of claim 34 wherein said parameters include data related to populations of employees.

41. The method of claim 34 wherein said separation scenarios include at least one of attrition, involuntary termination and voluntary retirement.

42. The method of claim 34 wherein said model is a report.

43. The method of claim 42 wherein said report includes at least one of demographic information, adverse impact, banding, event extracts, event progress, financial and skills extract reports.

44. The method of claim 34 wherein said model is at least one of an offer and option related to voluntary retirement.