Separation: Employee Terminations (Voluntary, Involuntary, Other)

This guide is for individuals who need to terminate an employee in Workday. This business process is used for Voluntary, Involuntary, and Other termination categories. The reason selected within the category for the termination will drive the business process and approval routing.

Terminations must be completed when an employee submits a resignation. The resignation itself is not a termination. Once the resignation is approved, the process proceeds to the manager's inbox for Next Steps.

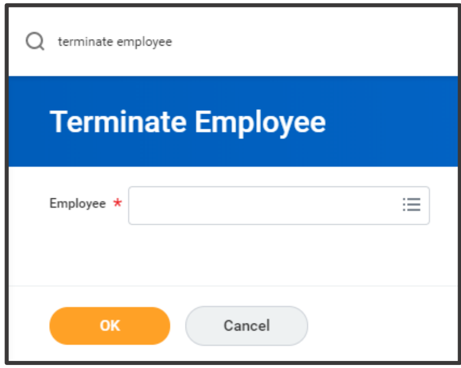
Managers should consult with HR for terminations. As part of the review and approval process step, HR Partners will indicate the Eligibility for Rehire in Workday. Employee Relations will oversee the termination process for certain involuntary and ineligible for rehire submissions.

Security Roles involved in initiating terminations include: Manager, Employment Coordinator, HR Partner, and Employee Relations

TERMINATE AN EMPLOYEE

From the Home page:

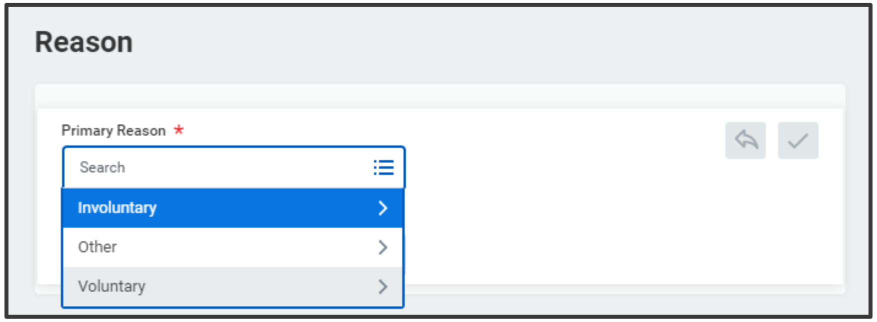
1. Enter '**Terminate Employee'** into the search bar.
2. Select **Terminate Employee** – Task.



The *employee detail screen* displays.

3. Enter the **Employee** to terminate.
4. Click **OK**.

The *Terminate Employee screen* displays. Click the Edit icons at the top right of each section to complete the fields.



5. Enter **Primary Reason**.

> Note: Click the Drop-Down menu to reveal the Involuntary, Other, and Voluntary category options. Each option will give you a full list of the termination reasons available (e.g., Involuntary > For Cause, Other > Retirement, Voluntary >Resigned, etc.)

6. Complete the Details section (see next page).

> Note: Termination Date is the last day the worker will be an employee with your institution before their status is changed to terminated. Workday will populate the Last Day Worked and the Pay Through Date with the same date, but the dates can be changed.

7. Enter **Termination Date**.
8. Enter **Last Day of Work**.
9. Enter **Pay Through Date**.
10. Close Position? If you check this box, the position will no longer be available. It is closed permanently.
11. Is the position available for overlap? If the termination is future dated, this check box feature will become visible and available for selection. There can be two workers in the position for training purposes for up to two weeks.
12. Click **Submit**.

NEXT STEPS

After you click submit, the request will be sent for the necessary approvals.

In addition to approvals, there are many roles and responsibilities when it comes to terminating an employee.

These are dependent on the primary reason selected for the termination. Use the Process tab on the submitted transactions to know who and why other security roles are involved for the specific termination you may be processing.

Lets review some of the security roles and how they may be involved when completing a termination. This listing roughly follows the termination business process steps.

Manager

The employee's manager may have tasks related to receiving a resignation or terminating an employee based on involuntary category reasons. Their tasks will include Managing Business Processes for the Worker.

Managing Business Processes for the Worker is where the manager looks at the tasks and assignments initially given to the departing worker and re-assigns them or cancels them.

HR Partner

The HR Partner can initiate the Termination, but they also can be the initial approver. As such, they have the opportunity to mark the terminating employee as "Not Eligible for Re-Hire". This means the employee is not eligible at any UA System institution. Selecting this option routes the process to an additional review and approver security role, Employee Relations. Towards the end of the termination process, the HR Partner will also review the exit interview questionnaire completed by the employee. Information from the completed questionnaire is to be used as feedback on improving the employee experience.

Employee Relations

Employee Relations becomes involved as reviewer and approver when the "Not Eligible for Rehire" selection is made by the HR Partner. Employee Relations is also involved during the termination process following a resignation with the reason for "Involuntary" Remember, the termination process is just that – it is a process by which workers are no longer employed in any position.

Graduate Assistant Partner

The Graduate Assistant Partner is involved early in the termination process if the employee leaving is a Graduate Assistant. Their task is to review and approve the termination and assess any outstanding graduate school items need to be addressed.

Security Partners

Security Partners have several tasks. Initially, they are to review if there are security role assignments to the worker's position that may need to be adjusted.

Compensation Partner

The Compensation Partner is involved if there are Period Activity Pay Assignments outstanding for the terminated worker. There may be instances where the worker has payments after the stated Pay Through Date. Their task is to verify payments and make any necessary adjustments.

Retiree Partner

The Retiree Partner becomes involved with the termination process if the employee meets the criteria for Retiree status within the institution. Retiree status in Workday should align with retirement eligibility requirement in Board Policy. This status is when the reason for termination is retirement, and the worker is not already in retiree status.

Benefits Partner

The Benefits Partner is involved if the termination has an effect on the employee's benefits. The Benefits Partner may also oversee the eligibility of COBRA benefits.

Academic Faculty Partner

The Academic Faculty Partner will need to end the current faculty appointments for the worker. Workday does not automatically end those appointments. Some faculty may retain their academic appointments post termination, in this event the academic appointment relationship to the employment positions will need to be removed or a new appointment created instead.

Employee as Self

The employee has many tasks to complete during the termination process, specifically if the termination is voluntary. The employee will receive an Offboarding Checklist that will provide the employee with reminders of tasks to be completed, including accounting for distributed assets, completing an exit interview, catastrophic leave donation form, and other tasks. If the employee needs to view payslips, make changes to payment elections or tax elections, etc. after their termination date, they will need to work with their Payroll Partner to make those changes on their behalf, as they will no longer have access to Workday.

Absence Partner

The Absence Partner will be involved with the Catastrophic Leave Donation from the departing employee, if applicable.

Payroll Partner

If the termination date is a retroactive date, possibly identifying an overpayment for the position, the Payroll Partner will receive an inbox item to review for overpayment and approve.

If a terminated employee needs to make changes to payment elections or tax elections, or receive a copy of their payslip, the Payroll Partner will need to assist the employee outside of Workday and make those changes on their behalf.

Finance Roles

The Accounts Payable Settlement Specialist, the Procurement Data Entry Specialist, and the Credit Card Administrator will all have tasks related to the collection and ending of expense related items for the departing worker.

Once the termination process is completed in Workday, the worker's access to Workday may revoked entirely upon the effective date of the termination. This will be an automated process within Workday. The termination date will also drive the removal of access to downstream systems.