

9.2 Terminating an Employee's Benefits

Purpose: Use this document as a reference for terminating an employee's benefits in ctcLink.

Audience: Benefits Administrators and HR Administrators.

 You must have at least one of these local college managed security roles:

- ZC HR Employee Maintenance
- ZD FWL HCM View Pay
- ZD HR Central Config VW
- ZD HR Admin View Job Data
- ZD Benefits Employee Data Inq
- ZD HR Employee Maintenance VW
- ZD HR Limited Person Job Info
- ZZ HR Employee Maintenance
- ZZ SS Workforce Administrator
- ZZ FWL HCM Pay Process

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Terminate Employee Benefits

Confirm Termination Date in Job Data

Navigation: NavBar > Navigator > Workforce Administration > Job Information > Job Data

1. The **Job Data** search page displays.
2. Enter the **name** or **Empl ID** of the employee being terminated.
3. Select the **Search** button.

Job Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

Empl ID

Empl Record

Name

Last Name

Second Last Name

Alternate Character Name

Middle Name

☐ Include History ☐ Correct History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

4. The **Job Data** page displays.
5. From the **Work Location** tab, confirm the employee's termination date:
 - a. If the termination date is 1st-15th, then deductions that must come out in the second half of the month for benefits must be considered in this paycheck (should monitor and confirm this).
 - b. If the termination date is 16th-end of month, then all deductions for the month should come out of the paycheck normally (but, should still be monitored and confirmed).

Manager Self Service Job Data

[Work Location](#) [Job Information](#) [Job Labor](#) [Payroll](#) [Salary Plan](#) [Compensation](#) [CTC Job Data](#) [CTC Earnings Distribution](#)

Employee Empl ID 2000000001
Empl Record 0

Work Location Details 1 of 1

*Effective Date

Effective Sequence

HR Status

Payroll Status

*Action

Reason

*Job Indicator

- ! At the time of termination, the row to make the employee benefits ineligible can also be entered in **Benefits Program Participation**, this should be the first of the following month. This can also be entered later in **Assign to Benefit Program** (if entry was not done at the time **Job Data** termination line was created, or if it was done prior to **Job Data** termination line).

NOTE: Termination dates in **Job Data** are NON INCLUSIVE (i.e., a termination for 12/1/2015 means the last day of work for that employee was 11/30/2015, which means the benefits termination date could also be considered 12/1/2015 depending on when other entry is completed).

If a termination date is for any day other than the first of the month, then benefits should be set to SB0 for the first of the following month. This is **not** terminating the benefits or stopping the deductions, this is merely telling the system the date of ineligibility (which then blocks system entry and allows the E-188 process to recognize that it needs to examine the benefits entries).

If a termination has been entered but SB0 has not been chosen and benefits have not been terminated, the EW-188 process (that is run after Payroll confirm by SBCTC) provides benefit termination logic (sets the employee to SB0 for the first of the next month, and terminates various benefits for the first of the next month) but this is intended as a backup in case entries are missed and validation of recent terminations is always important.

Benefit Program Participation Details ?		1 of 1		View All	
*Effective Date	07/01/2017	Currency Code	USD	+	-
*Benefit Program	SB0	403b/457 retire/tax dfer cont			

Assign to Benefit Program

Assign to Benefit Program

Employee
ID
Benefit Record Number 170

Benefit Program Participation

| < << >> > | 1-1 of 1 | View All

*Effective Date 07/01/2017

*Benefit Program SB0 403b/457 retire/tax dfer cont

+
-

Save
Return to Search
Notify
Update/Display
Include History
Correct History

6. The process to confirmation termination date is now complete.

Confirm Termination of HCA Owned Data

You must have at least one of these local college managed security roles:

- ZC Benefits Enrollments
- ZD Benefits Enrollment Inquiry

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: NavBar > Navigator > Benefits > Enroll in Benefits > (various)

1. Select the applicable benefit type from the navigation menu, i.e.:

- **Simple Benefits**
- **Health Benefits**
- **Life and ADD Benefits**

HCA/Pay1 is the system of record for Health, Tobacco Surcharge, and Life (until 1/1/2017, at which time it becomes a Payroll deduction), so for those benefits termination

should be entered in Pay1 so the overnight change file can insert a record in PeopleSoft.

Insertion can be done in PeopleSoft immediately if there is time sensitive deduction issues, but any entry done in Pay1 will overwrite the PeopleSoft entry (should they be different, if they are the same then nothing will change in PeopleSoft).

2. Once Pay1 has been finished, and the overnight process has been run, enter the **name** or **Empl ID** of the employee being terminated.
3. Select the **Search** button.
4. Confirm the employee's benefits termination date. If the employee was not originally enrolled in a specific plan, no data will show and as a result, no termination date needs to be entered.

The screenshot shows the 'Simple Benefits' form in a web application. At the top, there are fields for 'Employee' (with a blurred name), 'ID' (with a blurred number), and 'Benefit Record Number' (170). Below this is a 'Plan Type' section with a search bar and a '1 of 1' indicator. The 'Coverage' section includes 'Coverage Begin Date' and '*Deduction Begin Date' fields, each with a calendar icon and a refresh button. The 'Coverage Election' section has radio buttons for 'Elect' (selected), 'Waive', and 'Terminate', along with an '*Election Date' field set to '06/06/2019'. Below this, the 'Benefit Program' is 'SB0' and the 'Benefit Plan' is '403b/457 retire/tax dfer cont'. At the bottom, there are several buttons: 'Save' (green), 'Return to Search', 'Notify', 'Refresh', 'Update/Display', 'Include History', and 'Correct History'.

Health Benefits

Employee ID: [REDACTED] Benefit Record Number: 170

Plan Type [REDACTED] [1 of 1] [View All]

*Plan Type [REDACTED] [Search] [Add] [Remove]

Coverage [REDACTED] [1 of 1] [View All]

*Coverage Begin Date [REDACTED] [Calendar] [Refresh] *Deduction Begin Date [REDACTED] [Calendar] [Refresh] [Add] [Remove]

Coverage Election

☐ Elect ☐ Waive ☒ Terminate [Refresh] *Election Date: 07/01/2017 [Calendar]

Life and AD/D Benefits

Employee ID: [REDACTED] Benefit Record Number: 170

Plan Type [REDACTED] [1 of 1] [View All]

*Plan Type [REDACTED] [Search] [Add] [Remove]

Coverage [REDACTED] [1 of 1] [View All]

*Coverage Begin Date [REDACTED] [Calendar] [Refresh] *Deduction Begin Date [REDACTED] [Calendar] [Refresh] [Add] [Remove]

Coverage Election

☐ Elect ☐ Waive ☒ Terminate [Refresh] *Election Date: 07/01/2017 [Calendar]

5. The process to confirm termination of HCA owned data is now complete.

Confirm Termination of ctcLink Owned Data

Navigation: NavBar > Navigator > Benefits > Enroll in Benefits > (various)

- Select the applicable benefit type from the navigation menu:
 - **Retirement Plans**
 - **Disability Benefits**
 - **Savings Plans**
 - **Spending Accounts**
- Enter the **name** or **Empl ID** of the employee being terminated.
- Select the **Search** button.
- Enter the **employee's benefits termination date** where ctcLink is the system of record (Savings, Spending [HSA, DCA, FSA], Retirement and Disability). If the employee was not enrolled, there is no need to enter termination information.
- If the termination date is 1st-15th Or in "A" Payroll:
 - Health premiums and surcharges should be taken as normal.

- Take the full monthly premium for optional long-term disability.
- Optional LTD premiums are lagged, meaning they are paid on the 25th of current and 10th of the following month. Example: September optional LTD premiums are paid with deductions taken on the 9/25 and 10/10 paychecks.
- If the termination date is 16th end of month.
- Do not take health premiums or surcharges on final check unless in arrears.
- Optional long-term disability premiums should be taken as normal.

Retirement Plans

Employee ID Benefit Record Number 170

Plan Type 1 of 1 [View All](#)

*Plan Type

Coverage 1 of 1 [View All](#)

*Deduction Begin Date

Participation Election ☐ Elect ☐ Waive ☒ Terminate

*Election Date 07/01/2017

Benefit Program 403b/457 retire/tax dfer cont

Payroll Status Terminated

Benefit Plan

Option Code

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Update/Display](#) [Include History](#) [Correct History](#)

Disability Benefits

Employee ID Benefit Record Number 170

Plan Type 1 of 1 [View All](#)

*Plan Type

Coverage 1 of 1 [View All](#)

*Coverage Begin Date

*Deduction Begin Date

Coverage Election ☐ Elect ☐ Waive ☒ Terminate

*Election Date 07/01/2017

Benefit Program SB0 403b/457 retire/tax dfer cont

Benefit Plan

Option Code

Payroll Status Terminated

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Update/Display](#) [Include History](#) [Correct History](#)

← Disability Benefits Savings Plans

Savings Plans

Employee ID Benefit Record Number 170

☐ Highly Compensated

Plan Type 1 of 1 View All

*Plan Type

Coverage 1 of 1 View All

*Coverage Begin Date *Deduction Begin Date

Coverage Election

☒ Elect ☐ Waive ☐ Terminate

*Election Date 06/06/2019

Spending Accounts

Employee ID Benefit Record Number 170

Plan Type 1 of 1 View All

*Plan Type

Coverage 1 of 1 View All

*Coverage Begin Date *Deduction Begin Date

Coverage Election ☒ Elect ☐ Waive ☐ Terminate

*Election Date 06/06/2019

Benefit Program 403b/457 retire/tax dfer cont

Benefit Plan

Option Code

Contribution Level

Annual Pledge \$0.00

Credit Rollover Included In Pledge

Employee Contribution Override

Account Information

FSA Account Status Active

Contributions YTD \$0.00

Employee Status Terminated

Flat Deduction Amount Override - Optional

Deduction Amount

Save Return to Search Notify Refresh Update/Display Include History Correct History

6. The process to confirm termination of ctcLink owned data is now complete.

How to Enter a Termination Line in ctcLink

Navigation: NavBar > Navigator > Benefits > Enroll in Benefits > (various)

1. Enter the **name** or **Empl ID** of the employee being terminated.
2. Select the **Search** button.
3. Add a row to the Coverage by selecting the plus sign (+). ****Do Not add a row to Plan Type, located above Coverage plus and minus signs.**

4. **Coverage Begin Date** (in this case the first date this Benefit does not exist) and **Deduction Begin Date** (in this case it is truly the first date deductions will not be taken) must be entered, typically they will be the same date.
5. Select the **Terminate** radio button (under Coverage Election). *****At this time the Election Date will populate the system date in which you are completing entry, no changes need to be made to this date.***
6. Select **Save**.
7. The process to enter a termination line is now complete.

For Employees with SB0

Navigation: NavBar > Navigator > Benefits > Enroll in Benefits > Savings Plans

1. Employees with SB0 (not eligible for standard benefits) could still have a 457 or 403(b) Savings Plan.
2. All employees must be checked for a current Savings Plan regardless of Benefit Program as any employee of the colleges can elect a Savings Plan.
3. The process to update employees with 457 or 403(b) Savings Plans is now complete.
4. End of procedure.