

9.2 Termination Checklist Navigation

Purpose: Use this document as a reference to ensure that all employment termination tasks are considered and completed when terminating an employee in ctcLink.

Audience: ctcLink Human Resource, Benefits and Payroll Administrators.

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

- <please refer to each item below>

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

Termination Checklist Navigation

Administer Workforce

1. **Q:** Has the correct Action and Reason been entered into ctcLink?

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, HD HR Limited Person Job Info, ZZ HR Employee Maintenance, ZZ SS Workforce Administrator, ZZ FWL HCM Pay Process

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

2. **Q:** Has the employees' termination date been entered as the first day when the employee will no longer be an employee, *NOT* the last day worked?

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, HD HR Limited Person Job Info, ZZ HR Employee Maintenance, ZZ SS Workforce Administrator, ZZ FWL HCM Pay Process

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

3. **Q:** Has the employees mailing address been confirmed in case final payout is made via check?

Roles: ZC HR Employee Maintenance, ZZ HR Employee Maintenance, ZZ SS Workforce Administrator

Navigation: NavBar > Navigator > Workforce Administration > Personal Information > Biographical > Modify a Person - Contact Information Tab

Benefits

If continuing employment changes, review all jobs associated with a single Empl ID.

1. **Q:** Is the person still benefits eligible?

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, HD HR Limited Person Job Info, ZZ HR Employee Maintenance, ZZ SS Workforce Administrator, ZZ FWL HCM Pay Process

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

2. **Q:** If still in employment status, and benefits eligible, has another job been reset as **Primary** in the Job Indicator field to continue benefits?

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, HD HR Limited Person Job Info, ZZ HR Employee Maintenance, ZZ SS Workforce Administrator, ZZ FWL HCM Pay Process

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

3. **Q:** Does the person need to be switched to Benefit Program SB0 (No Benefits), SB1 (Full Benefits), or SB2 (Partial Benefits)?

Roles: ZC Benefits Enrollments, ZD Benefits Enrollment Inquiry

Navigation: NavBar > Navigator > Benefit s> Enroll in Benefits > Assign to Benefit Program

4. **Q:** Has the CTC_HR_Separation_Report been run after completion of termination activities to ensure that all deductions for termed employee has ceased?

Roles: ZD_DS_QUERY_VIEWER

Navigation: NavBar > Navigator > Reporting Tools > Query > Query Viewer

5. **Q:** Have all benefits (other than Health, Dental and Smoking Surcharge) been end-dated and terminated through the running of the "Auto-Enrollment" process?

Roles: ZC Payroll Data Maintenance, ZZ Payroll Data Maintenance,ZZ SS Payroll

Navigation: NavBar > Navigator > Payroll for North America > Employee Pay Data USA > Deductions > Create General Deduction Med Aid ER/EE Deduction Details

i NOTE: This process is run twice a month by the ERP Support Group in Olympia, on the evening before payroll confirmation, The effective date will be set for the 1st of the next month. Also note that the Auto-Enrollment process changes the benefit program to SBO, the program for benefit ineligible employees. This is done so that if the employee is rehired, old benefit enrollments and deductions will not automatically restart. Have the Medical Aid Employee (EE) & Employer (ER) General Deduction been end-dated in ctcLink?

6. **Q:** Have HCA Benefits been entered as ended in PAY 1 (FUZE)? Has the **Unpaid Leave Balances Report** (CTC_UNPAID_LEAVE) been run to identify all outstanding leave balances?

Roles: ZD_DS_QUERY_VIEWER

Navigation: NavBar > Navigator > Reporting Tools > Query > Query Viewer

7. **Q:** Have balances been zeroed out after running the entitlement process?

Use the "[Correcting or Reversing Leave Balances](#)" QRG.

8. **Q:** Have you checked your **Payroll Processing Errors** against future dated transactions submitted and approved prior to termination? If you see any future dated leave transactions, those transactions must be deleted from Unprocessed Payable Time.

Roles: ZD TL Admin View Time

Navigation: NavBar > Navigator > Time and Labor > View Time > Unprocessed Payable Time

9. **Q:** Has an Off Cycle **Calculate Absence and Payroll** been run for final payout of sick and vacation days (if appropriate)?

Roles: ZZ Abs Off Cycle Processing, ZZ SS ABS Administration

Navigation: NavBar > Navigator > Global Payroll & Absence Mgmt > Absence and Payroll Processing > Calculate Absence and Payroll

10. **Q:** If **Shared Leave** has been donated, have any remaining balances been returned to donation source/s, and at their correct value(s)? Use the "[Correcting or Reversing Leave Balances](#)" QRG.

Roles: ZZ Shared Leave Mngmt

Navigation: NavBar > Navigator > Global Payroll & Absence Management > CTC Custom > Shared Leave

Time and Labor

1. **Q:** Has the **Separation Report** been run to identify all Separations for the time period in question?

Roles: ZD_DS_QUERY_VIEWER

Navigation: NavBar > Navigator > Reporting Tools > Query > Query Viewer - CTC_HR_SEPARATION

Security

 **NOTE:** Colleges create their own processes for terminating employee system security.

1. **Q:** Ending system access for a terminated employee?

Roles: ZD Local Security Admin

NavBar > Navigator > PeopleTools > Security > User Profiles > Distributed User Profiles

Check the “**Account Locked Out**” box. (College Security Administrator Role Only).

2. **Q:** Changing system security access based on a change in job and/or related role?

College Security Administrator Role Only.

3. The process to review the termination checklist is now complete.
4. End of procedure.