

9.2 Termination (Offboarding) Checklist Details

Purpose: Use this document as a reference to process termination of employment in ctCLink.

Audience: HR/Benefits, Absence/Time & Labor and Payroll Administrators.

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

- ZC HR Employee Maintenance
- 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.

The steps and actions needed will depend upon the type of employee being terminated, such as:

- **Classified**
- **Exempt**
- **Hourly**
- **Faculty**
- **Part-Time Faculty**
- **Student**

Each type of employee will have different aspects associated with their employment that may or may not affect all the areas addressed below. It is our advice that each area is reviewed for any needed actions.

Termination can occur from several different Action/Reasons. Each Action/Reason needs to be reviewed to determine which of the processes are relevant. Below are the most common Actions/Reasons for a termination.

Below are the most common Actions/Reasons for a termination:

1. **Layoff**

- Season Closure
- Staff Reduction
- Temporary Closure

2. **Termination**

- Death
- Discharge
- Elimination of Position
- Resignation

3. **Termination with Pay**

4. **Termination with Benefits**

5. **Retirement**

- Compulsory Retirement
- Normal Retirement
- Volunteer Retirement

6. **Retirement with Pay**

7. **Transfer**

- Transfer to State Agency

! PLEASE NOTE: When offboarding an employee, the security role of ZZ PeopleSoft User will need to be removed. The security role ZZ Former Employee will be added dynamically if the employee is fully terminated across all institutions. If the offboarded employee transfers to a different SBCTC institution, the ZZ PeopleSoft User role should be retained, and the local security administrator should work with the local security administrator at the institution to which the employee transferred.

It is important to make sure the proper roles are attached to a former employee so the employee can still access tax information, etc. Please refer to the QRG [9.2 Offboarding - Security Procedure](#).

Contact your college Security Staff with any questions, or submit a Help Desk Ticket to SBCTC

Termination Checklist Details

HR Core

 Review the Quick Reference Guide (QRG) titled: [Entering Terminations and Retirements.](#)

Navigation: Menu > Workforce Administration > Job Information > Job Data

1. The **Job Data** search page displays.
2. Enter the **Empl ID**.
3. Select the **Search** button.
4. The **Search Results** display.
5. Select the applicable **Empl Record**.

IMPORTANT:

The **Effective Date** of a termination shows the first day of an employee termination status, **NOT** the last day worked. The **Last Day Worked** field populates with the date prior to the effective date. The **Override Last Day Worked** checkbox can be selected to enter the last date the employee actually worked.

Termination of part-time and/or moonlight faculty job data records needs to be completed after faculty's final pay line has been extracted from Faculty Workload to Paysheet Holding Update page in HCM. Termination of faculty's job data record prior to FWL pay line extraction will result in unprocessed wages.

6. The **Job Data** page displays.
7. From the **Work Location** tab, select the **[+]** icon to add a new row.
8. appropriate action from the **Action** drop-down menu, i.e., **Retirement** or **Termination**.
9. Select the appropriate reason from the **Reason** drop-down menu.
10. Select the **Job Indicator** from the drop-down menu.
11. Select the **Employment Data** hyperlink.

See the **Time and Labor** section below for steps following the **Employment Data** link selection.

! Do not proceed to termination of employee benefits if the employee has additional Job Indicator for benefit eligible job classification.

The HR Core process is now complete.

Time and Labor

! IMPORTANT: Do not inactivate the employee in Time and Labor until data has been processed through Absence, Time & Labor and Payroll. Coordinate with your local Payroll Team.

Navigation: Menu > Workforce Administration > Job Information > Job Data

1. The **Job Data** search page displays.
2. Select the **Employment Data** link near bottom of page.
3. The **Employment Data** pagelet displays.
4. From the Organizational Assignment Data section, select the **Time Reporter Data** link.
5. The **Time Reporter Data** pagelet displays.
6. Add a new row. Enter the **Effective Date**. Change the employee **Time Reporter Data** status to **Inactive**.
7. Select the **OK** button.

The screenshot displays the 'Time and Labor Data' window for employee Ashley Koga (Empl ID: 201000482). The 'Time Reporter Data' section includes fields for Effective Date (09/27/2016), Status (Inactive), Time Reporter Type (Punch Time Reporter), Elapsed Time Template, Punch Time Template (CTC_PUNCH), Time Period ID, Workgroup (170MHOURLY), Taskgroup (CTCTSKGRPH), and various other identifiers. The 'Payroll' section has a checked 'Send Time to Payroll' option, and the 'Commitment Accounting' section has unchecked options for 'For Taskgroup' and 'For Department'. A red box highlights the 'Inactive' status dropdown, and a red arrow points to it. Another red box highlights the '+' and '-' buttons next to the status field.

 **Security Access Note:** Follow your local procedures to end system access for terminated employees. A solid line of communication between Human Resources staff and Security staff is essential for a successful off boarding process.

8. Compensatory Time Payouts:

- Review the employee's timesheet for comp time earned in the current pay period.
- Since comp time earned in the current pay period is available in the following pay period - Change the CTE time reporting code to appropriate overtime reporting code for payment (OVT).
- It is suggested that the comp time payout process originates in Time & Labor system and **NOT** directly in Payroll system because comp time balance must be reduced to 0. See QRG titled: [Compensatory Time Payoff - End of Fiscal Year](#) for more details.

The Time and Labor process is now complete.

Benefits

 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.

 Review the Quick Reference Guide (QRG) titled: [Terminating an Employee's Benefits](#).

 Determine date of job termination and what day Benefits should be terminated.

- SB0 - No Benefits
- SB1 - Full Benefits
- SB2 - Partial Benefits

If the termination date is the 1st - 15th, **or** in "A" Payroll:

1. Health premiums and surcharges should be taken as normal.
2. Take the full monthly premium for optional long-term disability.
3. Optional LTD premiums are lagged, meaning they are paid on the 25th of current and 10th of the following month.
 - a. 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.

Update/Confirm data that HCA is the system of record.

HCA/Pay1 is the system of record for Health, Tobacco Surcharge, and Life insurance. Thus, for benefit eligible employees, terminations need to be entered in Pay1, so the nightly inbound file load could automatically create the termination row in ctclink.

- Manual data entry can be done in ctclink immediately, if there is time sensitive deduction issues. However, the nightly data load from Pay1 will override that manual entry, if data is different.

Navigation: Menu > Benefits > Enroll in Benefits

1. The **Health Benefits** search page displays.
2. Enter **Search Criteria** and select the **Search** button.
3. The **Enroll in Benefits** page displays.
4. Update/Confirm Benefits Termination in ctcLink.
5. Add a row to the **Coverage** by selecting the plus sign [+]. (**DO NOT** add a row to Plan Type located above the Coverage plus and minus signs).
6. **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.
7. Select the **Terminate** radio button (located under **Coverage Election**). **NOTE:** 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.
8. Select the **Save** button.

The screenshot displays the 'Health Benefits' enrollment interface. At the top, there are navigation tabs for 'Benefit Program Participation' and 'Health Benefits'. Below this, the 'Health Benefits' section includes fields for Employee ID and Benefit Record Number (170). The main form area is divided into several sections: 'Plan Type' with a search field and a red 'X' over the plus/minus controls; 'Coverage' with 'Coverage Begin Date' and 'Deduction Begin Date' fields, both highlighted with red boxes, and a plus/minus control on the right; 'Coverage Election' with radio buttons for 'Elect', 'Waive', and 'Terminate' (the latter is selected and highlighted with a red box), and an 'Election Date' field set to '07/27/2019' (also highlighted with a red box); 'Benefit Program' set to 'SAV only'; 'Benefit Plan' and 'Coverage Code' search fields; 'Option Code' field; 'Health Provider ID' field with a 'Previously Seen' checkbox; and 'Employee Status' set to 'Active'. An 'Enroll All Dependents' button is located below these fields. The 'Dependent/Beneficiaries' section features a table with columns: *ID, Name, Relationship to Employee, Health Provider ID, Prev Seen, Covered Person Type, and Age Limit Fig. The table is currently empty. At the bottom of the form, there are several buttons: 'Save' (highlighted with a red box), 'Return to Search', 'Notify', 'Refresh', 'Update/Display', 'Include History', and 'Correct History'.

Employees with SB0 (not eligible for full or partial benefits)

Navigation: Menu > Benefits > Enroll in Benefits > Savings Plans

1. The **Savings Plans** search page displays.
2. Enter **Search Criteria** and select the **Search** button.
3. The **Savings Plans** page displays.
4. Employees with SB0 (not eligible for standard benefits) could still have a 457 or 403(b) Savings Plan.
5. All employees need to be checked for a current Savings Plan regardless of Benefit Program as any employee of the colleges can elect a Savings Plan.
6. Other items to check and confirm:

7. Have all benefits (other than Health, Dental and Smoking Surcharge) been end-dated and terminated through the running of the "Auto-Enrollment" process?
8. Have HCA Benefits been entered as ended in PAY1 (FUZED)?

 **NOTE:** *The termination process triggers the "Auto-Enrollment" process, which will add a benefit termination row for all benefits the employee is currently enrolled in with the effective date of the first of the next month. The Auto-Enrollment process also 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 be restarted accidentally. In addition, certain General Deductions that are related to Benefits are ended with the same effective date.*

The Benefits process review is now complete.

Absence Management

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

- ZC HR Employee Maintenance
- 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.

Navigation: Menu > Workforce Administration > Job Information > Job Data

1. The **Job Data** search page displays.
2. Enter **Search Criteria** if needed.
3. Select **Search**.
4. The Job Data page displays.
5. Select the Payroll tab.
6. The Payroll page displays.

7. Make sure **Job Data Absence System** has been changed from **Absence Management** to **Other** on the **Payroll** tab.
 - **This must be entered on the line**, which corresponds to the **Termination** date. Moving an employee into **Other** will be inclusively, effective on the effective dated row in Job Data (i.e. if you put an employee in other for 3/21/2017, then the last date they can take an absence is 3/20/2017).

Confirm Absences

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

- ZD Absence Calc Results
- ZZ Abs Events and Adjs
- ZZ SS ABS Administration

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

Navigation: Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Absence Event

10. The **Absence Event** search page displays.
11. Enter the **Search Criteria** and select the **Search** button.
12. The **Absence Event** page displays.
13. Check date ranges of submissions. Any absence dates that correspond with dates **after** the last eligible date needs to be deleted from the **Absence Event** screen.
14. If absences are processed after, someone is taken out of Absence Management - **this can cause errors in both Absence Management and Time and Labor** (which usually ends up "erroring out" when offices try to process Payroll).
15. Confirm unprocessed submissions to consider them for balance payouts.
 7. Based on absences left, there are usually one Take and one Entitlement that still need to be processed.
 8. If the balance payout is performed prior to the Take run, make sure the payout does not include the balances needed to offset the reported but not yet processed absences.
 9. The final Entitlement always needs to run at the end of the month.
 8. Confirm payout needed for absence balances on last check through payroll.
 9. Must take into account unprocessed absences as noted above.
10. Enter these balancing entries to be processed in the next Take if needed to offset the payroll payout.
11. When last Absence Take/Entitlement is run, confirm that all leave was processed correctly.

 **NOTE:** If not following the normal process for termination, then the following Quick Reference Guide (QRG) may be needed to process leave entitlement and adjustments.

[Clearing Balances on Terminated Employees Using Advance Off Cycle & Balance Adjustment](#)

The Absence Management process is now complete.

Payroll

1. Follow standard Termination process for terminating or closing activities in Job Data, Benefits, Absence Management and Time & Labor.
2. Refer to [OFM Chapter 25 for Payroll Policies](#) to determine required payouts and debt collection procedures as applicable.
3. **Leave Buyouts**
 - Confirm absence management processing is complete for current month entitlement and all leave balances are zero.
(Leave Balance Adjustment may be required after the final check is processed.)
 - Review time and labor for vacation leave used in the current pay period and reduce the employee's vacation leave balance by the number of hours taken. Follow the QRG to process vacation leave buyout: [Entering Vacation Leave Pay Out at Termination](#).
 - Sick leave buyout at termination is limited to retirement and death.
 - Follow the QRG to process sick leave buyout: [Entering Sick Leave Buyout](#).
 - -If the employee participates in VEBA, follow the QRG to process sick leave buyout to VEBA: [Processing Sick Leave Payout to VEBA](#).
4. Determine if the employee has outstanding garnishments and/or over payments
 - Take deductions in this order up to the allowable amounts: child support, other garnishments, and overpayment.
 - Complete and return the DSHS child support termination notification as appropriate.

For a deceased employee, follow the QRG to process payment to beneficiary or estate: [Deceased Employee Payout Process for Payroll](#)

The payroll process is now complete.

Miscellaneous

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

- ZC HR Employee Maintenance
- ZZ HR Employee Maintenance
- ZZ SS Workforce Administrator

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

1. Confirm the employee mailing address for final payout check. Follow the navigation below:

Menu > Workforce Administration > Personal Information > Biographical > Modify a Person

2. Remind the employee this will be the address that the current years W2 will be mailed.
3. Confirm the employee has no outstanding checks that need to be processed (cashed or re-issued).
4. The process to review the termination checklist details is now complete.

End of procedure.

Video Tutorial

The video below demonstrates the process actions described in steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial via Panopto

View the external link to [Termination \(Offboarding\) Checklist Details](#). This link will open in a new tab/window.