Quick Reference Guide: Termination

Keep in mind:

- A resignation letter or equivalent (i.e., layoff letter) is required to initiate the termination process in Workday.
- If the employee will be receiving severance pay, the Pay through Date must be equal to or greater than the last payment date.
- Biweekly employees: Use the last day of the pay period as the Pay Through Date.

Information Needed:

- Employee name
- Termination date
- Resignation letter or equivalent.

Steps:

1. From the Employee’s Record, click on the Related Actions Icon to display the menu of Available Actions. Hover over Job Change and click on Terminate Employee.
2. Use the Calendar Icon to enter the Termination Date. Alternatively, the date can be typed in using MM/DD/YYYY format. Use the Prompt Icon to select the Reason.

3. Select the Box next to Close Position to close the position held by the employee being terminated.

   Closing a position is a permanent action. The position will not be available to be back-filled if closed.

4. Select the Box next to Is this position available for overlap? to mark the position available for overlap.

5. The Last Day of Work, Pay through Date and Notify By date will populate automatically after the Termination Date has been entered.
If the employee will be receiving severance, a One-Time Payment should be requested outside of the termination process. If Pay through Date is different than the Termination Date, edit accordingly. If Pay through Date is not equal to the Termination Date, the process will route to HR Operations for additional approval and to ensure reason for continued payment of the employee is included in the documentation uploaded (i.e. a severance document).

6. The Regrettable box is an optional field. You may choose to check this box; however it does not carry any functionality.

7. Use the Plus Icon to upload the employee’s resignation letter under Worker Documents. Select the appropriate Document Category.

A resignation letter or equivalent document is required when processing a termination for a benefits eligible staff employee.

When warranted, indicate in the comments section if an unemployment claim for the terminated employee should be contested and upload any supporting documentation.

8. Click on the Submit Icon to submit this task.

9. If the employee is bi-weekly, the business process will be routed to the Payroll Administrator for review.
10. If this employee holds any roles in Workday, the next task is to assign roles to Worker. Click the \textbf{Open Icon} to open the task.

11. Review the role assignments, reassign the role of the employee being terminated if appropriate and click on the \textbf{Submit Icon} to submit this task. This task is routed to the \textbf{Security Administrator} for review and approval.

12. The next step is \textbf{To Do: Upload UC Time Accrual Forecast}. For any employee that has time accruals to be paid out upon termination, the HR Partner must upload a copy of the UChicago Time Accrual Forecast. Click on \textbf{Maintain Worker Documents}, and attach the UChicago Time Accrual Forecast. Once attached, navigate back to your inbox, to submit the step.
**To Do** steps instruct you to take care of an item outside of the business process. **REMEMBER**: after completing the To Do task, you must navigate back to your inbox and click **Submit** on the To Do task before the business process will route to the next step.

If the employee is faculty or academic, the process will be sent to the Academic Administrator to end the academic appointment(s) for the employee.

If the employee is faculty and the termination reason is retirement, a **To Do** step with a reminder to create an Emeritus position and rehire the employee will be sent to the Academic HR Partner.

13. The business process will route to the Payroll Administrator, and if applicable, the Benefits Partner for approval.

At the completion of the termination process, the employee will be sent a notification to update their forwarding address via the **Change Contact Information** business process in Workday. Employees will continue to have limited access to Workday up until the end of the January following their termination.