

# **Payroll Coordinators**

## **Manage Terminations (Including Retirement)**



## Lesson Objective(s):

Upon the completion of the Manage Terminations (Including Retirement) lesson, you will be able to:

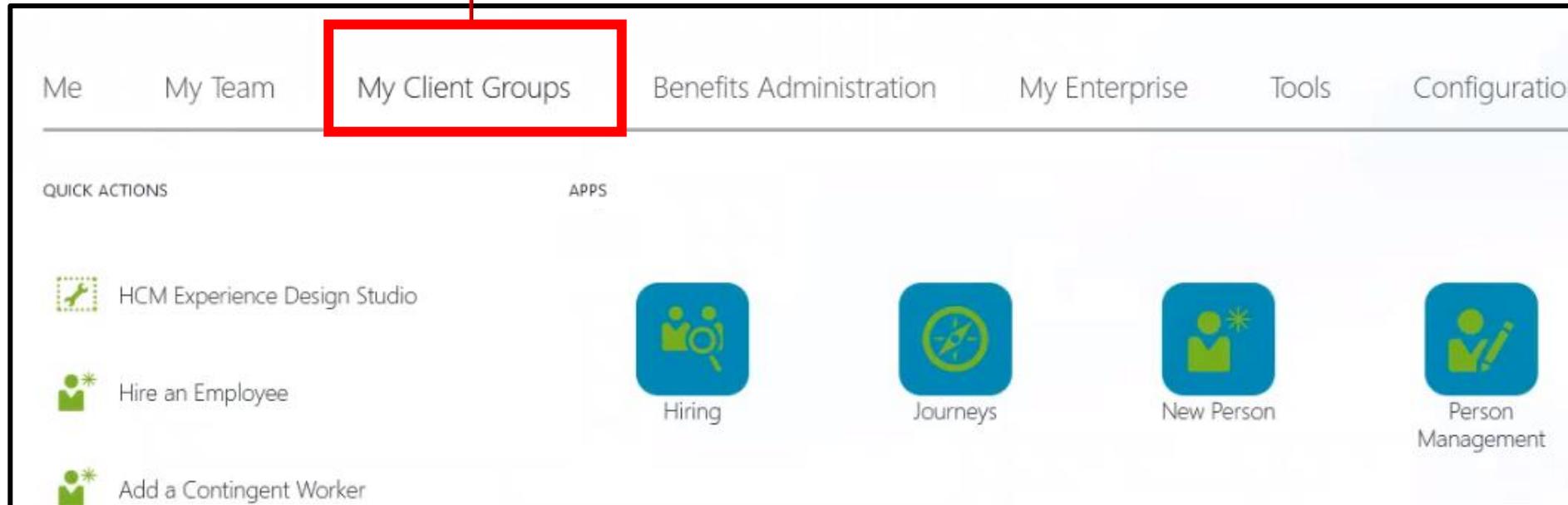
### Objectives

- Terminate an employee, including retirement

# Manage Terminations (Including Retirement)

1

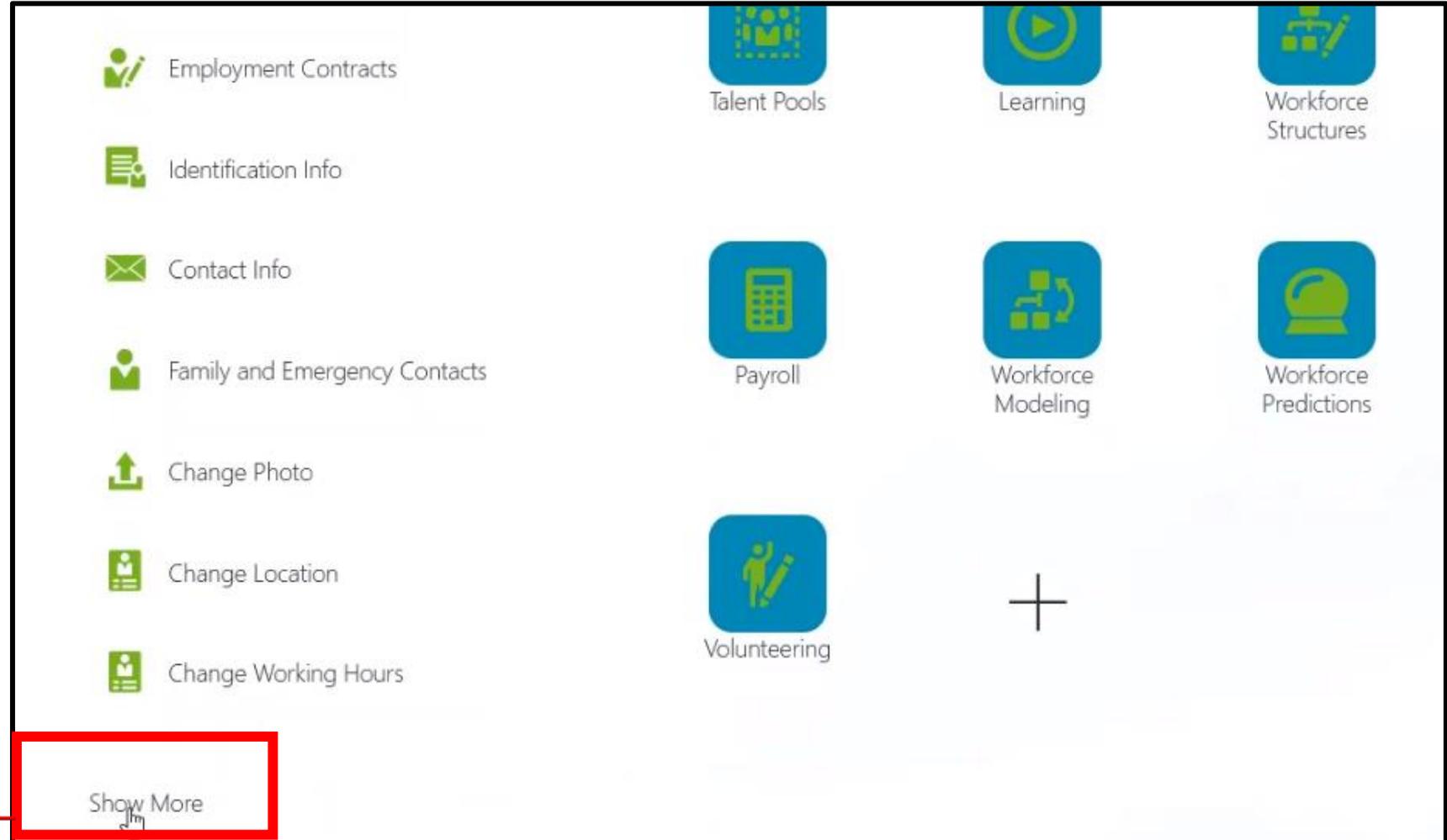
From the CV360 Home Page, select the My Client Groups tab



# Manage Terminations (Including Retirement)

2

Scroll down and select **Show More**. The link will display additional work areas and tasks that may be accessed



The screenshot displays a user interface with a list of options on the left and a grid of icons on the right. The list includes:

- Employment Contracts
- Identification Info
- Contact Info
- Family and Emergency Contacts
- Change Photo
- Change Location
- Change Working Hours

The grid of icons includes:

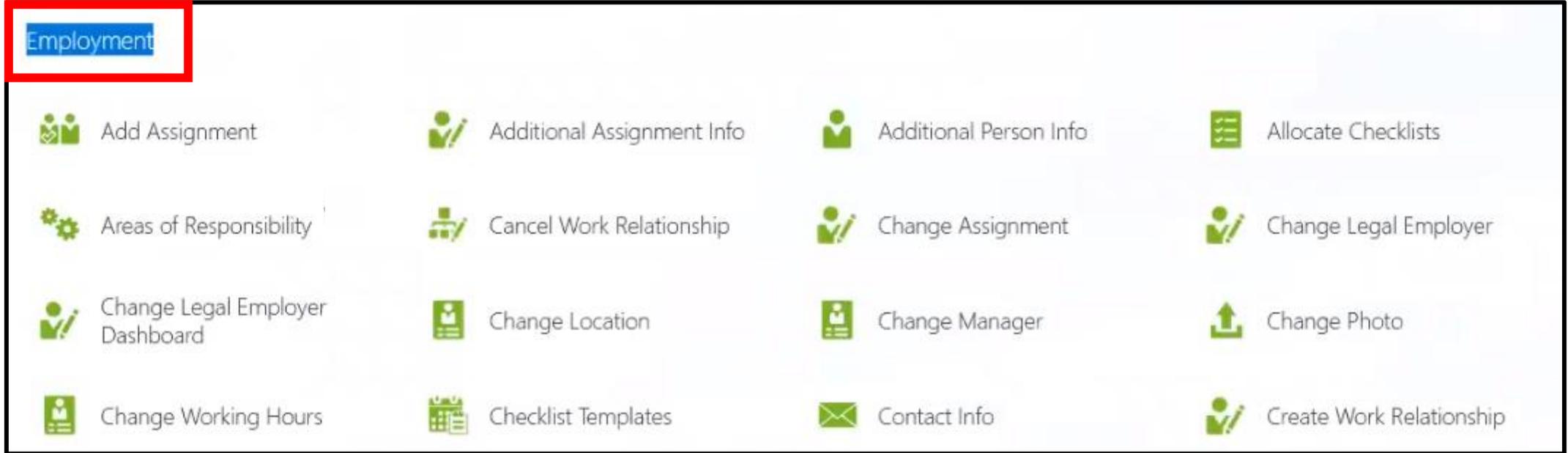
- Talent Pools
- Learning
- Workforce Structures
- Payroll
- Workforce Modeling
- Workforce Predictions
- Volunteering
- A plus sign (+) indicating more options.

A red box highlights the "Show More" link at the bottom left of the list.

# Manage Terminations (Including Retirement)

3

View the Employment section



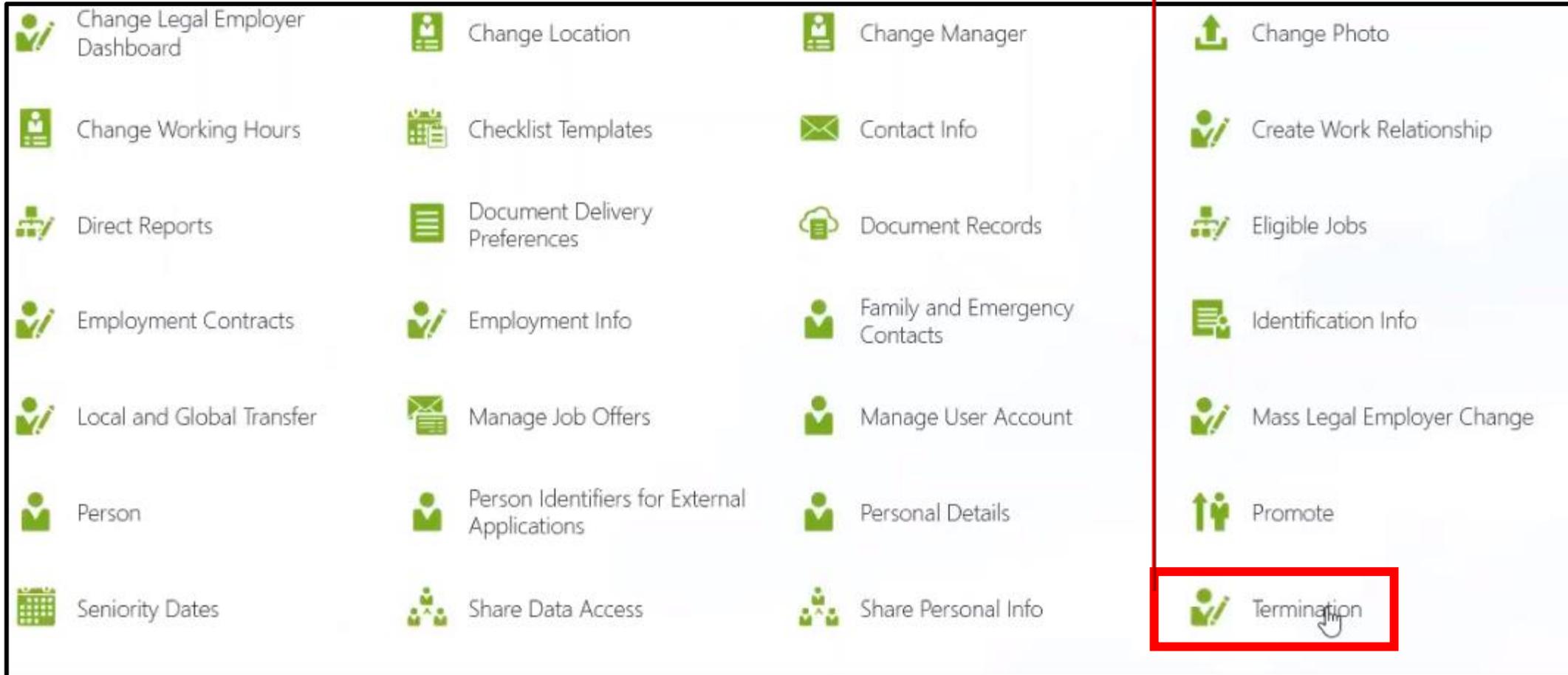
Employment

- Add Assignment
- Additional Assignment Info
- Additional Person Info
- Allocate Checklists
- Areas of Responsibility
- Cancel Work Relationship
- Change Assignment
- Change Legal Employer
- Change Legal Employer Dashboard
- Change Location
- Change Manager
- Change Photo
- Change Working Hours
- Checklist Templates
- Contact Info
- Create Work Relationship

# Manage Terminations (Including Retirement)

4

Scroll down and select Termination



|   |  |   |   |
|---|--|---|---|
|  Change Legal Employer Dashboard |  Change Location                                |  Change Manager                |  Change Photo                |
|  Change Working Hours            |  Checklist Templates                            |  Contact Info                  |  Create Work Relationship    |
|  Direct Reports                  |  Document Delivery Preferences                  |  Document Records              |  Eligible Jobs               |
|  Employment Contracts            |  Employment Info                                |  Family and Emergency Contacts |  Identification Info         |
|  Local and Global Transfer      |  Manage Job Offers                             |  Manage User Account          |  Mass Legal Employer Change |
|  Person                        |  Person Identifiers for External Applications |  Personal Details            |  Promote                   |
|  Seniority Dates               |  Share Data Access                            |  Share Personal Info         |  Termination               |

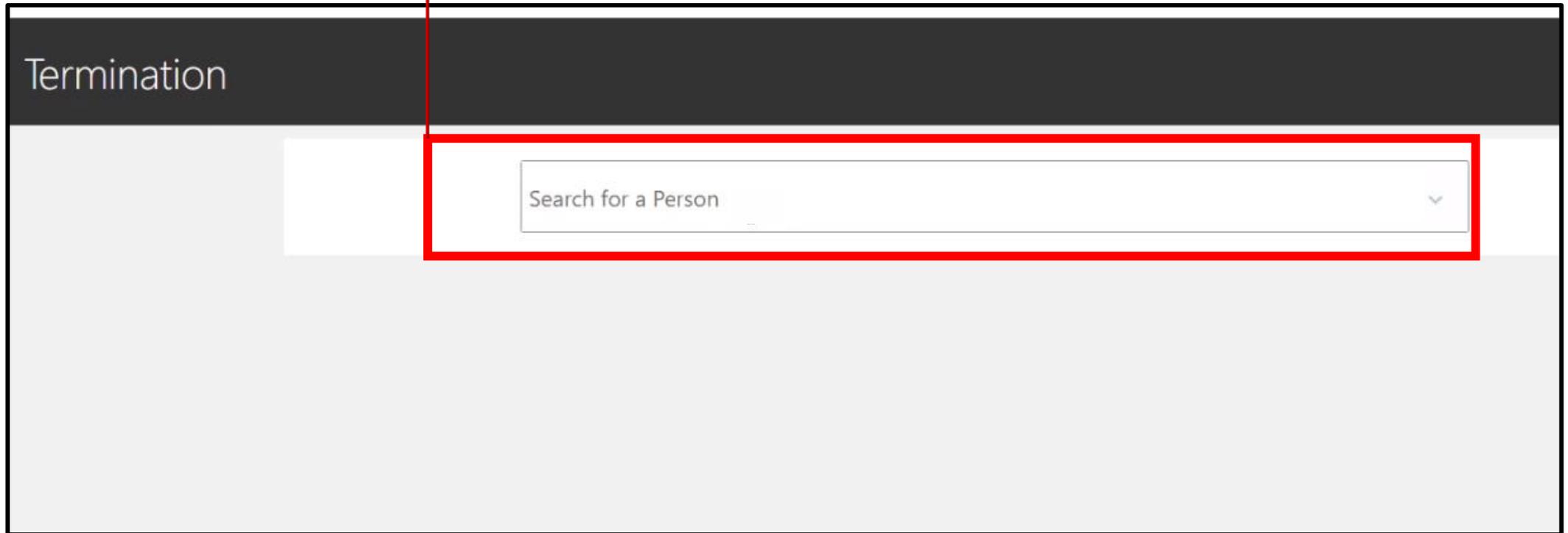
# Manage Terminations (Including Retirement)

5

Key in the appropriate information in the **Person** search field



The next actions will allow the following types of termination: **involuntary**, **voluntary**, and **retirement**



Termination

Search for a Person



Employee may be searched by **Name**, **Person Number**, or by **Keywords**

# Manage Terminations (Including Retirement)

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Select the appropriate Person Name from the Search Results

Termination

Search Person

100115

Advanced Search: 100115

| Name | Business Unit | Work Email               | Person Number |
|------|---------------|--------------------------|---------------|
| TH   | Test2 H2 Hire | 99005 - Office Assistant | 100115        |

# Manage Terminations (Including Retirement)

TH Test2 H2 Hire

## 1 When and Why

\*When is the termination notification date?  
8/27/21

\*When does the termination take effect?  
8/27/21

**What's the way to terminate the employee?**

- Resignation
- Action
- Death
- Involuntary Termination
- Retirement
- Retirement with Pay

The employee can see their termination details when the termination type is set to Involuntary Termination, Retirement, or Retirement with Pay.

Continue

7

Select the appropriate **Termination Action** from **What's the way to terminate the employee?** drop-down list

# Manage Terminations (Including Retirement)

## 1 When and Why

\*When is the termination notification date?  
8/27/21

\*When does the termination take effect?  
8/27/21

\*What's the way to terminate the employee?  
Termination

Termination Type  
Voluntary

Why are you terminating Test2 H2 Hire?

The employee can see their termination details when the termination type is voluntary.

Continue

8

Select **Termination** for the **What's the way to terminate the employee?** drop-down list

# Manage Terminations (Including Retirement)

1 When and Why

\*When is the termination notification date?  
8/27/21

\*When does the termination take effect?  
8/27/21

Enter a date on or after 8/23/21. terminate the employee?

Termination Type  
Voluntary

Why are you terminating Test2 H2 Hire?

The employee can see their termination details when the termination type is voluntary.

Continue

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Select the appropriate date and select the Continue button

# Manage Terminations (Including Retirement)

1 When and Why

\*When is the termination notification date?  
8/27/21

\*What's the way to terminate the employee?  
Termination

\*When does the termination take effect?  
8/27/21

Enter a date on or after 8/23/21.

Why are you terminating Test2 H2 Hire?

The employee can see their termination details when the termination type is voluntary.

Continue

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Select the Appropriate Date and select the Continue button



The effective date for the termination should be the same as the termination notification date

# Manage Terminations (Including Retirement)

1 When and Why

\*When is the termination notification date?  
8/27/21

\*When does the termination take effect?  
8/27/21

\*What's the way to terminate the employee?  
Termination

Termination Type  
Voluntary

Why are you terminating Test2 H2 Hire?  
Reason  
Created in error-Do not use  
DeKalb Termination Cleanup  
Did Not Start Work

The employee can see their termination details when the termination

11

Select the **Appropriate Reason**

# Manage Terminations (Including Retirement)

## 1 When and Why

\*When is the termination notification date?  
8/27/21

\*When does the termination take effect?  
8/27/21

\*What's the way to terminate the employee?  
Termination

Termination Type  
Voluntary

Why are you terminating Test2 H2 Hire?  
Family Reasons

 The employee can see their termination details when the termination type is voluntary.

**Continue**

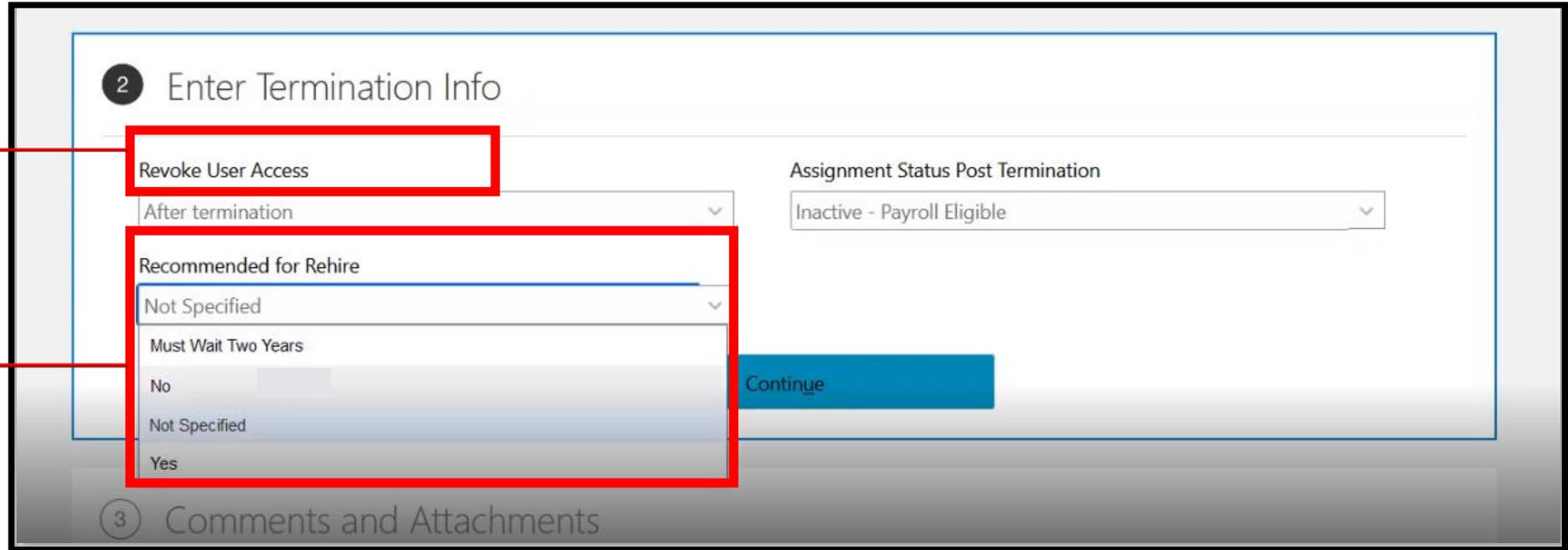
12

Select the Continue button

## Manage Terminations (Including Retirement)

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Select the **Appropriate Response** for Revoke User Access from the drop-down list



The screenshot shows a web form titled "2 Enter Termination Info". It contains several fields: "Revoke User Access" (a dropdown menu with "After termination" selected), "Assignment Status Post Termination" (a dropdown menu with "Inactive - Payroll Eligible" selected), and "Recommended for Rehire" (a dropdown menu with "Not Specified" selected). A blue "Continue" button is located to the right of the "Recommended for Rehire" dropdown. Below the form is a section titled "3 Comments and Attachments". Red boxes highlight the "Revoke User Access" dropdown and the "Recommended for Rehire" dropdown menu.

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Select the **Appropriate Value** from the Recommended for Rehire drop-down list

# Manage Terminations (Including Retirement)

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From the **Assignment Status Post Termination** drop-down list, select **Inactive-Payroll Eligible**

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Select the **Continue** button

2 Enter Termination Info

Revoke User Access  
After termination

Assignment Status Post Termination  
Inactive - Payroll Eligible

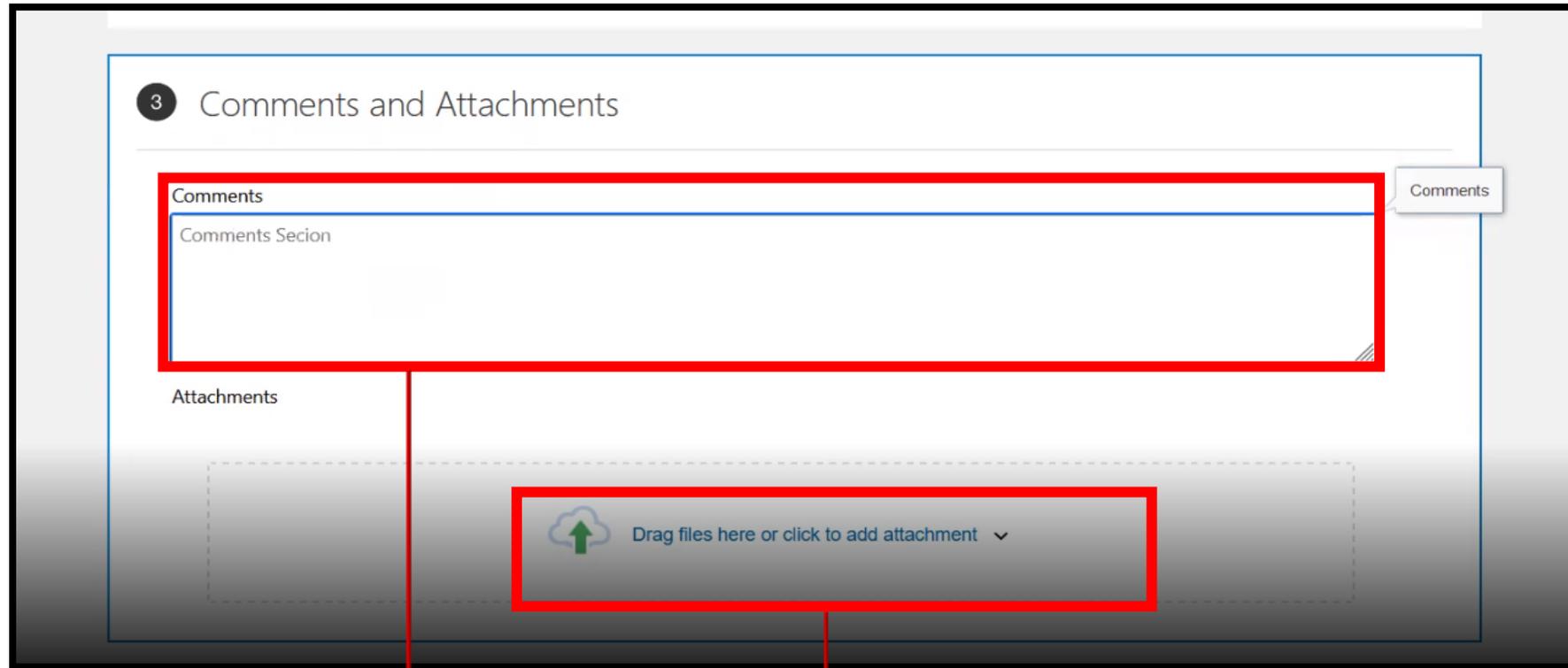
Recommended for Rehire  
Yes

Continue



Selecting **Inactive-Payroll Eligible** will allow employee to receive a final payout

# Manage Terminations (Including Retirement)



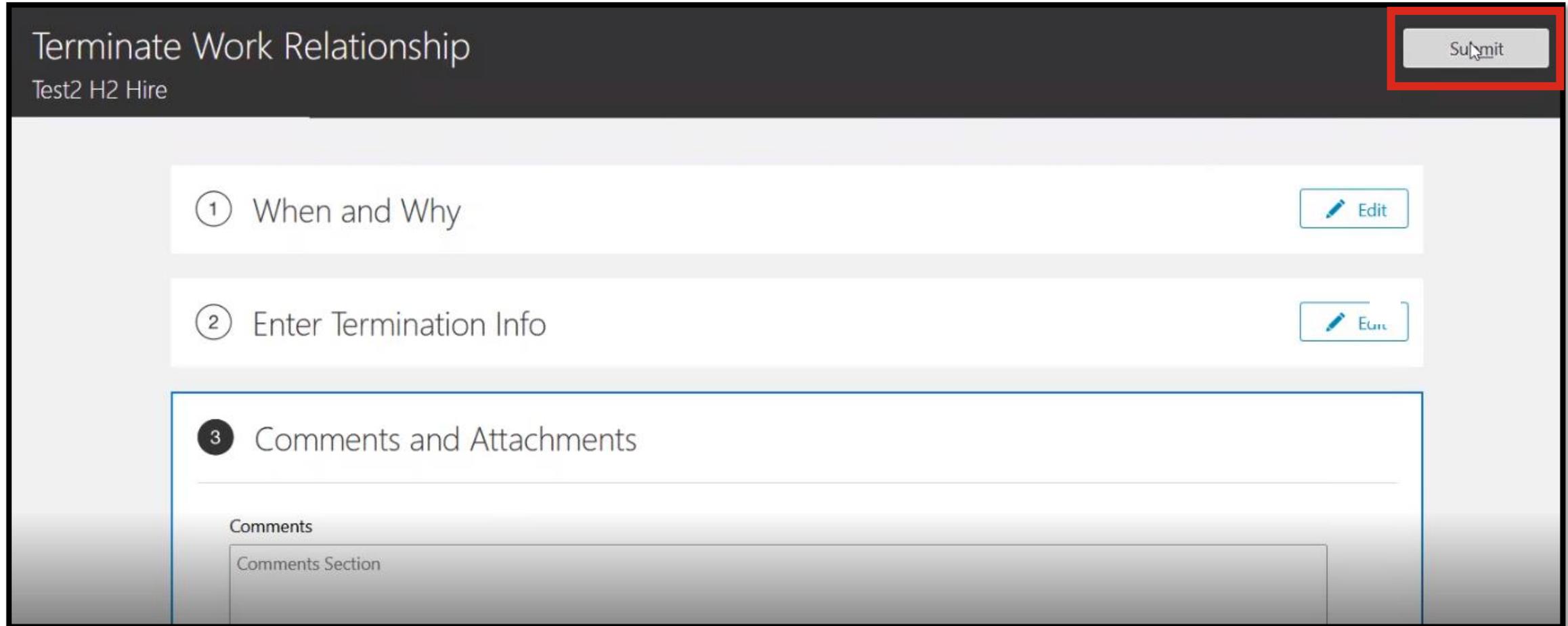
17

Use the **Comments and Attachments** section to provide comments and upload any **files or attachments** as necessary

# Manage Terminations (Including Retirement)

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Select the **Submit** button



The screenshot shows a web interface for terminating a work relationship. The title is "Terminate Work Relationship" with the subtitle "Test2 H2 Hire". In the top right corner, a "Submit" button is highlighted with a red rectangular border. The main content area consists of three steps:

- Step 1: "When and Why" with an "Edit" button.
- Step 2: "Enter Termination Info" with an "Edit" button.
- Step 3: "Comments and Attachments" with a "Comments" section containing a "Comments Section" text box.

## Manage Terminations (Including Retirement) Knowledge Check

In the **Assignment Status Post Termination** field, which option should be selected to ensure an employee receives a final paycheck?

*A. Active-Payroll Eligible*

*B. Inactive-Payroll Eligible*

*C. Active-Payroll Ineligible*

*D. Inactive-Payroll Ineligible*



## Manage Terminations (Including Retirement) Knowledge Check

In the Assignment Status Post Termination field, which option should be selected to ensure an employee receives a final paycheck?

A. Active-Payroll Eligible

**B. Inactive-Payroll Eligible**

C. Active-Payroll Ineligible

D. Inactive-Payroll Ineligible



The correct answer is **B. Inactive-Payroll Eligible** allows an employee receive a paycheck after termination.

## Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercise:

### Assignment:

- Terminate an Employee who is retiring