[**Terminating an Employee**](http://ctclinkreferencecenter.ctclink.us/m/79718/l/928130-9-2-entering-terminations-and-retirements) **– Exempt**

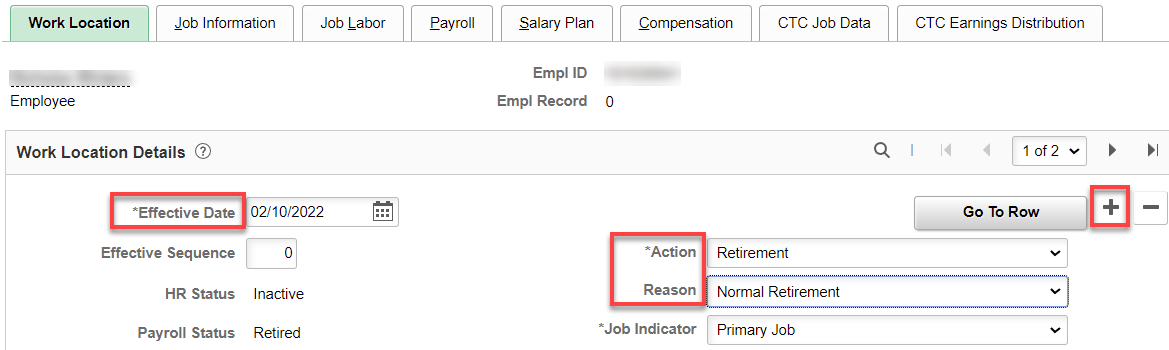
<http://ctclinkreferencecenter.ctclink.us/m/79718/l/1011431-9-2-termination-offboarding-checklist-details>

Go to **Job Data** for the correct Empl Record

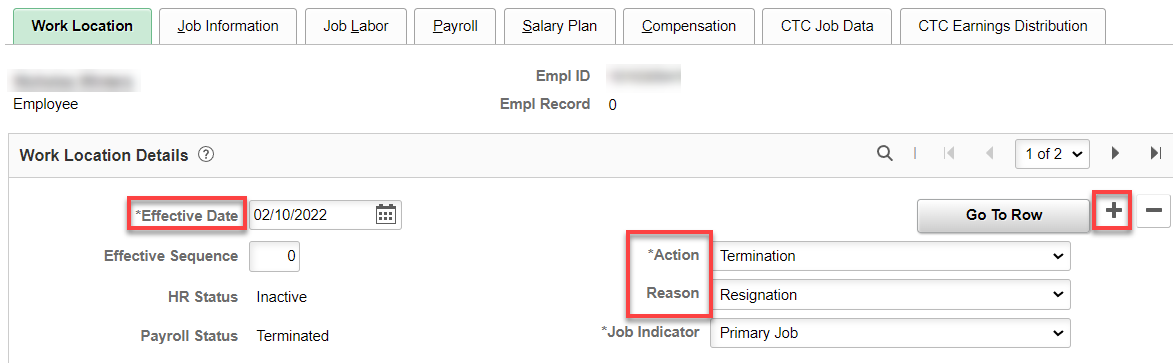
**Work Location tab:** Add a row (+), change the effective date (put one day after actual last day worked (e.g., 6/1 for last day of 5/31), add an Action, Reason, change job indicator if needed.

Put in Last Day Worked and check the Override Last Day Worked box (if different).

**For Retirement**

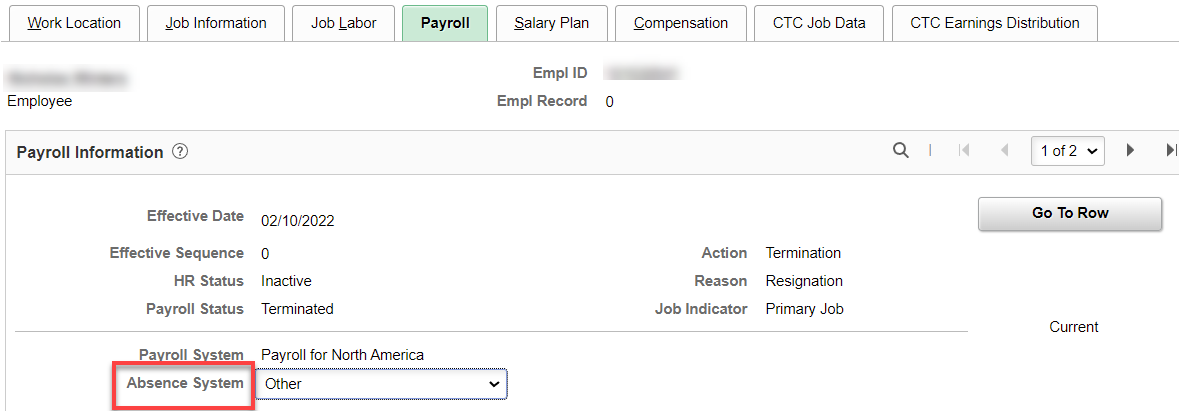


**For Resignation**



**Nothing for Job Information or Job Labor tabs.**

**Payroll Tab:** change Absence System to Other.

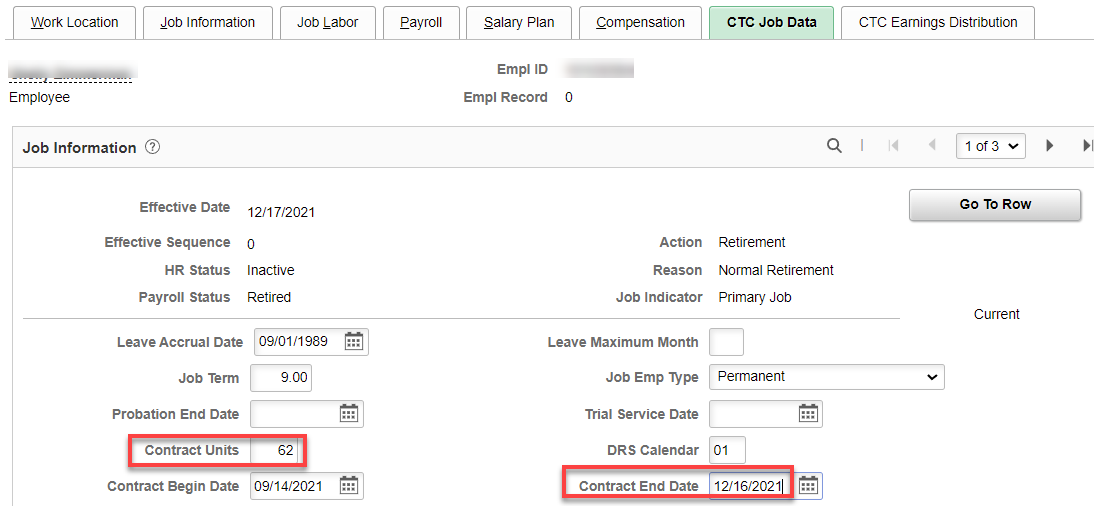


**Salary Plan tab:** nothing to do.

**Compensation tab:** ctcLink is SUPPOSED to be able to calculate the correct salary. I suggest calculating the correct rate of pay and having payroll correct the payline if needed.

**If less than a full pay period:** ctcLink should calculate the daily rate correctly, however, it is a good idea to calculate the daily rate x the number of days in the last pay period and let payroll know so they can correct the Payline if there is a difference. Calculation is: Annual salary/261 x # of days worked in pay period.

**CTC Job Data tab:** I’m not sure it matters but I changed the Contract Units and Contract End Date.



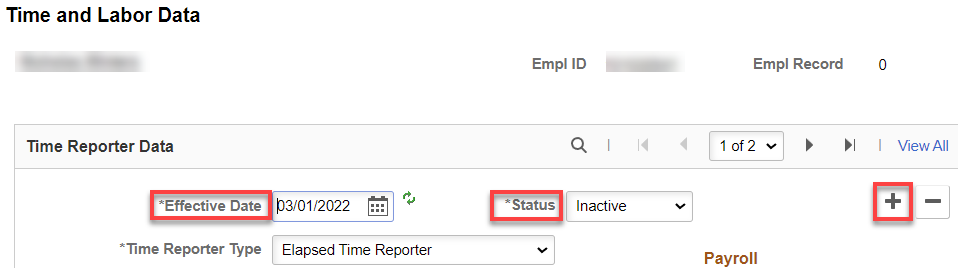
**No Other Tabs Need Changed/Updated**

Select **Employment Data hyperlink –** [QRG Maintaining Time Reporter Data](http://ctclinkreferencecenter.ctclink.us/m/79733/l/928745-9-2-maintaining-time-reporter-data)

Select Time Reporter Data hyperlink

Add a row (+)

Add effective date and change status from Active to Inactive –For **exempt** employees (because they have pre-loaded payable time in the next pay period) put the date **after** the next pay period (e.g., 7/16 for a 6/30 last day.) Select Ok

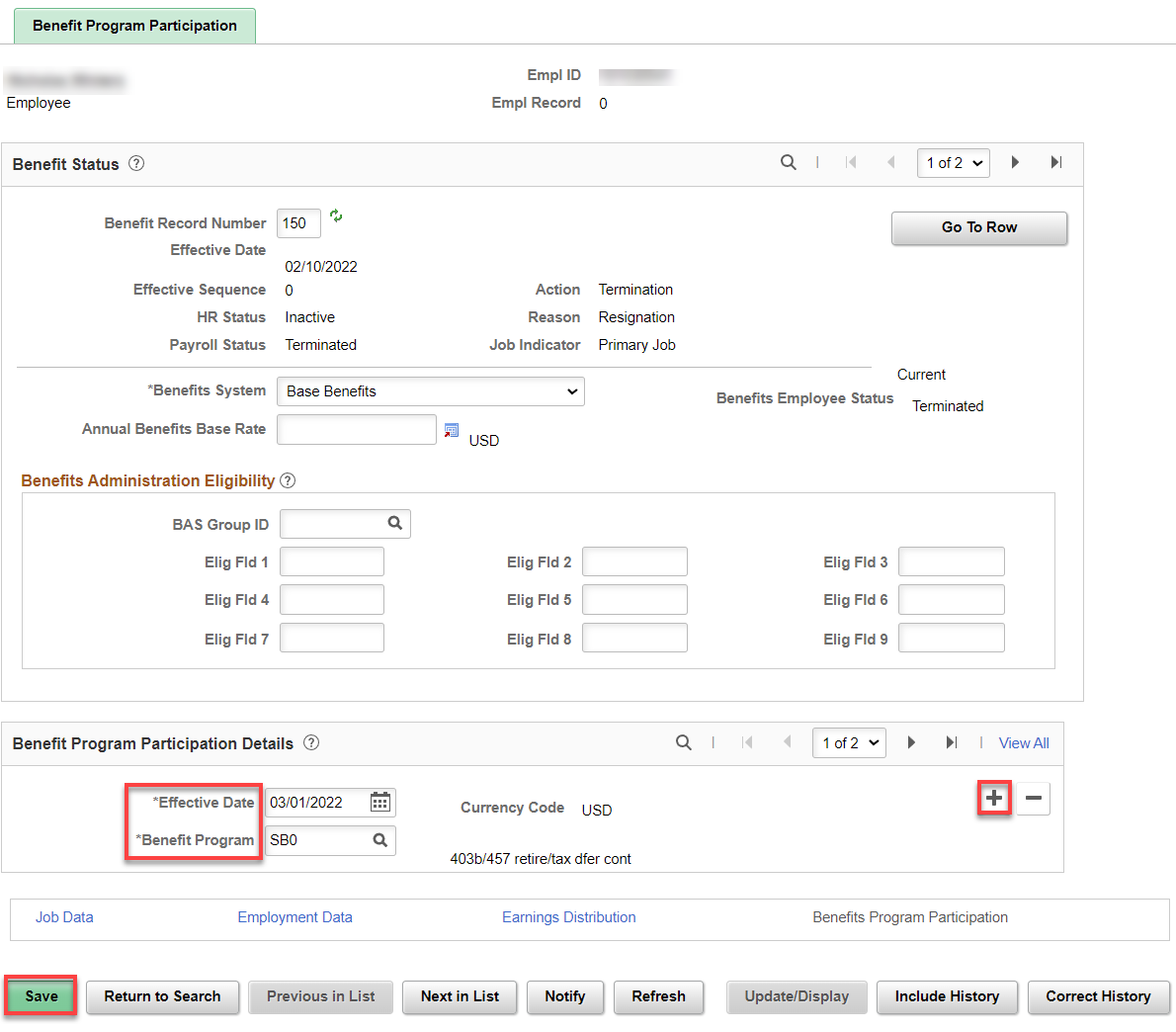


Select **Benefits Program Participation** hyperlink

Add a row (+) to Benefit Program Participation Details

Put the effective date (1st of the next month). Change Benefit Program to SB0

Save



**[Terminating Benefits](http://ctclinkreferencecenter.ctclink.us/m/79717/l/1011382-9-2-terminating-an-employee-s-benefits)**

**Use the 1st of the following month for the effective date for all benefits (except Health & Simple Benefits and Spending Accounts).**

Update PAY1: this will populate screens for medical, dental and simple benefits (spousal and/or tobacco surcharges).

**Nav/Workforce Administrator>Benefits Admin tile** (start at the top and work down)



**Assign to a Benefit Program** (should be already filled out if changed in Job Data (above)



1. The following screens will be updated by PAY1 (overnight process):

* **Simple Benefits (surcharges)**
* **Health Benefits**

**Pay1 is the system of record for Health and Tobacco & Spousal Surcharge**, 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 ctcLink immediately if there are time sensitive deduction issues, but any entry done in Pay1 will overwrite the ctcLink entry (should they be different, if they are the same then nothing will change in ctcLink).**

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.

[Update ACA Status](http://ctclinkreferencecenter.ctclink.us/m/79717/l/1057523-9-2-e-190-aca-employee-status)

**Nav/Benefits/CTC Custom/Assign ACA Status OR Workforce Administration>Benefits Admin tile**

This value can be corrected, added or changed via + row

**If less than 130 hours have been worked, use any date after last day worked, save.**

**If more than 130 hours worked in the month, use the 1st of the next month as the Effective Date, save.**



**IF YOU NEED TO TERMINATE HEALTH & DENTAL BEFORE PAY1**

Add + a row for Medical and terminate…Add + a row for dental **USE THE END OF THE MONTH NOT the next day** after like the rest of ctcLink. **DO THE SAME FOR SIMPLE BENEFITS (surcharges)**



**Terminate ctcLink Owned Data**

**Nav/Workforce Administrator>Benefits Admin tile OR Nav>Benefits>enroll in Benefits**

1. Select the applicable benefit type from the navigation menu:

* **Disability Benefits** (add a + row under Coverage)
* **Savings Plans**
* **Spending Accounts**
* **Retirement Plans**
* **Retirement Fields**

2. Enter the name or Empl ID of the employee being terminated.

3. Select the Search button.

4. 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.

5. 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 (optional disability must be taken out by payroll – extra deduction)

**Disability Benefits – TERMINATED BOTH BASIC AND OPTIONAL**

Add + a row to Coverage, put in the termination date (first of the following month), click Terminate and **Refresh**. The screen will update. Save.



**Savings Plans**

Add + a row in Coverage, put in the termination date (first of the next month), click on Terminate and Refresh . The screen will update. Save.



**Savings Management** (Nothing to do there as far as I know 😊)

**Spending Accounts (FSA, HSA)**

Add + a row to Coverage, put in the termination date **(You can’t put the 1st  of the next month because the benefit plan is SBO)** and Refresh. The screen will update. Save. IF NO PLAN IS SELECTED, NO NEED TO DO ANYTHING.



**Retirement (read below first)**

**TIAA:** **If already SBO**, add + a row, put in date after pay period (6/1 for a 5/31 last day) for all three dates, click Terminate, Refresh. The screen will update. Save. **If SB1**, add + a row, put in Deduction Begin Date and Election Date the 1st of the next month (match the end date of medical benefits), click Terminate, Refresh, Save. **OR WAIT** until after the last payroll runs.

**DRS:** If already SBO, add + a row, put in date after pay period (6/1 for a 5/31 last day) for both dates, click Terminate, Refresh, Save. **OR WAIT** until after the last payroll runs\*.

\*Enter the Termination Deduction Begin Date after the payroll confirms and before the DRS Data Load from Payroll is run.



**Nav/Workforce Administrator>Benefits Admin tile OR Nav>Benefits>CTC Custom>Retirement Fields**

Nothing to do with Retirement Fields. As you can see, once the retirement plan is terminated, this screens Current Retirement Plan is blank. IT WILL CHANGE AFTER THE EFFECTIVE DATE.



**DRS Transaction**

Nav>Benefits>CTC Custom>DRS Transaction

Payroll takes care of this page…thank goodness.

How do the retirement plans get updated for the different ages? It’s an automatic process, E-188, that is run by Central Payroll each pay cycle.

To check and adjust leave balances, see documentation Absence-Checking-Adjusting Leave Balances f Termed Employees.

That’s it! 😊