

End Employment: Termination Process Guide for Managers

TERMINATION PROCESSES IN WORKDAY

The process for terminating an employee in Workday is typically prompted by the employee submitting their resignation through the system, but can also be initiated manually by the manager or HR Partner. Managers should expect to receive two to three transactions associated with an employee's termination of employment: a resignation transaction (if the employee submits their resignation in the system); a termination transaction; and a separate transaction to reassign tasks, as required, that remain in the separating employee's Workday inbox.

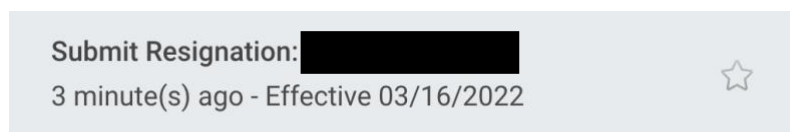
The steps below outline this process.

Terminating an Employee from Resignation Process

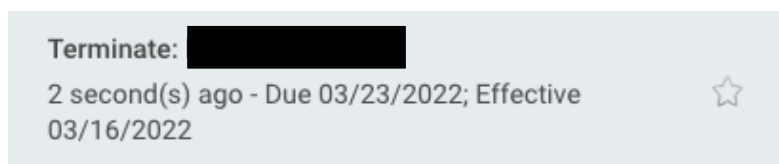
- 1- Click the 'Inbox' icon in the top-right corner of the Workday homepage.



- 2- Click the "Submit Resignation: <Employee Name>" task in your Workday inbox.

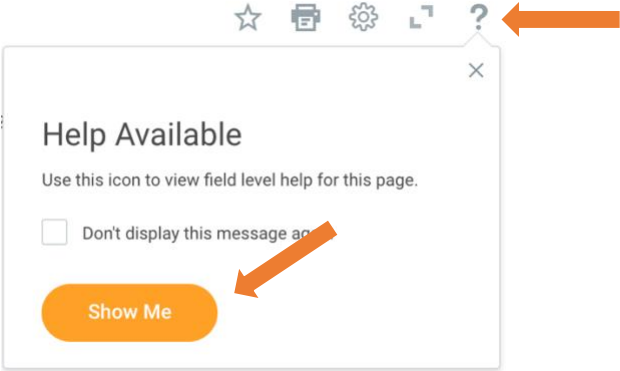


- 3- Review the listed information and click:
 - *Approve* – moves this task forward to the 'Termination' process
 - *Send Back* – send the task back to the resigning employee for more information
 - *Cancel* – closes the task and will require further action
- 4- Upon clicking 'Approve' a "Termination: <Employee Name>" task will populate in your Workday inbox.

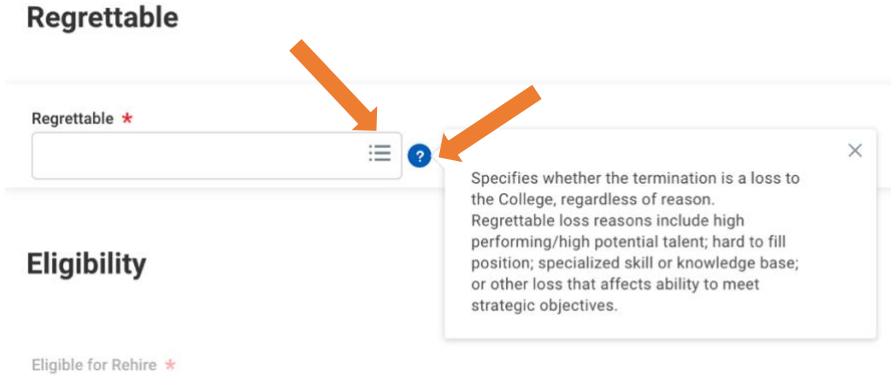


When you click into the inbox task, a box will appear that shows that Help Text is available on this screen. The Help Text prompt can be accessed at any time

by clicking the question mark in the upper-right corner of the task screen, and provides definitions for the *Regrettable* and *Eligible for rehire* fields that required for this task. *Help Text is only enabled by clicking the “Show Me” button.*



If help text was enabled, a question mark will appear to the right of the *Regrettable* and *Eligible for Rehire* sections to provide additional information. Click on the question mark to see the definition. Click prompt (three stacked lines) to select from available response options (*Yes or No.*)



- 5- Determine whether the position should be closed and complete as applicable. If you intend to replace the position, leave it open. Overlap allows for the position to be occupied by more than one individual at the same time. This is useful if the new hire is being trained by the separating employee.

Position Details

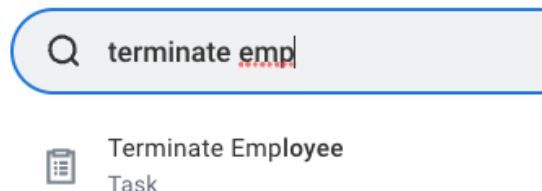
Close Position

Is this position available for overlap?


- 6- Click Submit once complete. The process will then route to the department's HR Partner, Benefits Partner, and other HR/Security Admins to perform required tasks such as reviewing the termination, COBRA eligibility, available time off, security, and more. Notifications will also route to the employee to engage in an exit survey and to provide additional information related to the transition of benefits.

Terminating an Employee from Workday Homepage (No Resignation Submitted)

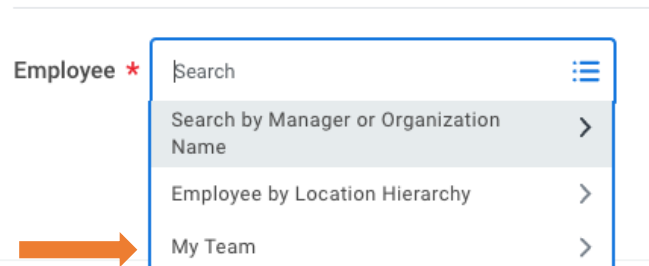
- 1- Type "Terminate Employee" in the search field; select option from menu.



A search bar with a magnifying glass icon on the left and the text "terminate emp" inside. Below the search bar, a dropdown menu is open, showing a calendar icon and the text "Terminate Employee Task".


- 2- Type the name of the employee you wish to terminate in the corresponding field, or click prompt  to select from your team list.

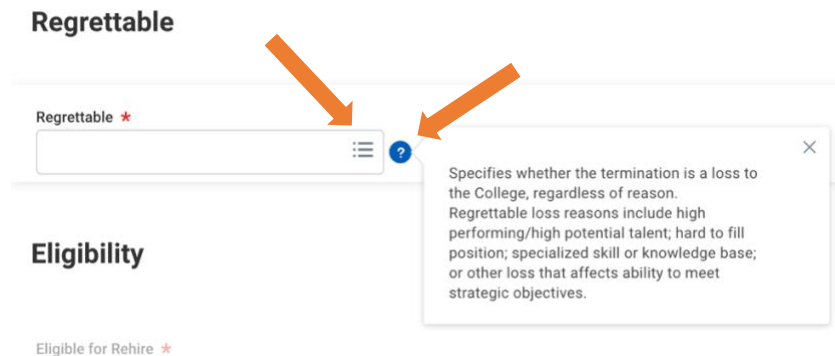
Terminate Employee



The "Terminate Employee" form is shown. The "Employee" field is highlighted with a red asterisk. A dropdown menu is open, showing a search bar and three options: "Search by Manager or Organization Name", "Employee by Location Hierarchy", and "My Team". An orange arrow points to the "My Team" option.

- 3- Complete all required fields including reason(s), which should reflect what was submitted in the employee's resignation, details related to termination dates, and other information.

If help text was enabled, a question mark will appear to the right of the *Regrettable* and *Eligible for Rehire* sections to provide additional information. Click on the question mark to see the definition. Click prompt  to select from available response options (*Yes or No.*)



Regrettable

Regrettable *

Eligibility

Eligible for Rehire *

Specifies whether the termination is a loss to the College, regardless of reason. Regrettable loss reasons include high performing/high potential talent; hard to fill position; specialized skill or knowledge base; or other loss that affects ability to meet strategic objectives.

- 4- Determine whether the position should be closed and complete as applicable. If you intend to replace the position, leave it open. Overlap allows for the position to be occupied by more than one individual at the same time. This is useful if the new hire is being trained by the separating employee.

Position Details

Close Position

Is this position available for overlap?

- 5- Click Submit once complete. The process will then route to the department's HR Partner, Benefits Partner, and other HR/Security Admins to perform required tasks such as reviewing the termination, COBRA eligibility, available time off, security, and more. Notifications will also route to the employee to engage in an exit survey and to provide additional information related to the transition of benefits.