Workday Job Aid for Managers

Termination

Use this job aid to terminate a colleague for a voluntary or involuntary reason.

Note: Use the Change Job job aid if a colleague is moving (transferring) from one RHM to another!

To learn more about Workday, find job aids and videos at the Workday Help website at workday.trinity-health.org.

For additional assistance, contact your Tier 1 resource, as noted on the Workday Help website at workday.trinity-health.org.
Termination

Business Process Steps and Roles

As a manager, you may initiate the Termination process for your team members only. You will also participate in the process as shown below in blue.

Note: Use the Change Job job aid if a colleague is moving (transferring) from one RHM to another!

<table>
<thead>
<tr>
<th>Step</th>
<th>Process Role(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Initiate Termination</td>
<td>Manager, HR Partner, or HR/HRSS Representative</td>
</tr>
<tr>
<td>☐ Involuntary Review Termination (if applicable)</td>
<td>Colleague Relations Partner</td>
</tr>
<tr>
<td>☐ Review Termination</td>
<td>HR Partner</td>
</tr>
<tr>
<td>☐ Assign Organization Roles</td>
<td>Security Partner</td>
</tr>
<tr>
<td>☐ Review Changed Role Assignments</td>
<td>Security Administrator</td>
</tr>
<tr>
<td>☐ Remove User-Based Security Group Assignments</td>
<td>Security Partner</td>
</tr>
<tr>
<td>☐ Manage Business Processes</td>
<td>Manager</td>
</tr>
<tr>
<td>☐ Offboarding Procedures</td>
<td>Manager</td>
</tr>
<tr>
<td>☐ PTO/Sick Transfer or Payout</td>
<td>Payroll Partner/Lite</td>
</tr>
<tr>
<td>☐ Request Backfill</td>
<td>Manager</td>
</tr>
</tbody>
</table>

Process roles are designated by “security role,” which do not reflect actual job titles.

When to Use

Use this process to terminate a colleague for one of the following voluntary or involuntary categories. You will also be required to choose a subtopic(s).

Voluntary:
- Assignment Ended
- Disability
- Dissatisfied with Position
- Employee Requirements
- Personal Reasons
- Retirement
- Transfer to Non Workday Affiliate
- Withdrawn

Involuntary:
- Assignment Ended
- Behavior
- Departure from Position
- Disability
- Employment Requirements
- No Show

Related Reports
- Terminations
- Exit Interview

NOTES:
- You should initiate the Termination process; however, when necessary, it may be initiated by an HR Partner, HR Representative, or HR Shared Services (HRSS) Representative.
- This process may be cancelled or rescinded in case there is a change in circumstances. See page 18.
- While adding comments where indicated may be helpful for the process, please note that comments are auditable and therefore should be appropriate for the section.
Termination

Before You Start

Ensure local policies and procedures have been followed and appropriate approvals have been received before starting a termination. This may include:

- Colleague submits resignation letter to manager (voluntary) or manager/HR determines colleague needs to be terminated (involuntary)
- Manager may contact HR Partner with questions
- Manager and HR determine if the position will be closed or refilled
- If the colleague has multiple jobs, initiator will first need to terminate the non-primary job(s) using the End Additional Job business process
- If the termination is involuntary, consider timing of processing the termination (e.g., actions may need to be taken while the colleague is being notified, such as Workday access)

Notifications
(a colleague or department should be notified outside of the Workday system)

- No notifications.

Coming in Phase 2

- Severance module will be added.

Variations

- There should be no variations to this process across the system. However, offboarding procedures and exit interviews may vary by Health Ministry.

Other Resources

- Contact your Tier 1 resource, as noted on the Workday Help website at workday.trinity-health.org.
Termination

Data Needed for Termination

The following data will be required:

- **Employee**: Name of colleague to be terminated
- **Termination Date**: Date termination is effective
- **Last Day of Work**: Last day of work for colleague
- **Pay Through Date**: This date should be the termination date plus 28 days
- **Reason**: Primary involuntary or voluntary reason for termination
- **Attachments**: Any supporting documentation for HR file (e.g., resignation letter, disciplinary information)
Termination

Process Steps

1. Log in to Workday
2. Click My Team
3. Click Terminate from the Actions column

NOTE: Before you can terminate a colleague, you must end any additional jobs that may be assigned to him/her. See the End Additional Job job aid for more information.

Alternate Starting Steps:

1. Type the colleague’s name in the search box and press Enter
2. Click the related actions icon (“brick”) that appears next to the name
3. Go to Job Change and click Terminate Employee
4. Continue with this job aid at step 6

You may also type terminate employee in the search box to start the process.
Termination

Process Steps (continued)

4. Type the name of the employee (colleague) whose employment is being terminated

![Terminate Employee](image1)

**HINT:** Click the prompt icon and then My Team to get the list of your team members.

5. Click OK

6. Click the edit icon next to Details

![Terminate Employee Details](image2)

**NOTE:** The Pay Through Date is the termination date plus 28 days.
Termination

Process Steps (continued)

7. Complete the Details form (* indicates required information)

Termination Date
Last day of work

Last Day of Work
Auto-populates from Termination Date

Pay Through Date
This date should be the termination date plus 28 days

Resignation Date
The day the colleague submitted his/her resignation (voluntary termination only)

Primary Reason
Choose from menu options (categories listed on right; must also choose a subtopic)

Secondary Reason
DO NOT USE

Notify By
Auto-populates from Termination Date

TRANSITION PHASE NOTE:
During the transition phase, if a colleague is transferring to a Trinity location that is not yet on the Workday system, choose Voluntary – Transfer to NonWorkday Affiliate from the Primary Reason choices.

Involuntary:
- Assignment Ended
- Behavior
- Departure from Position
- Disability
- Employment Requirements
- No Show

Voluntary:
- Assignment Ended
- Disability
- Dissatisfied with Position
- Employee Requirements
- Personal Reasons
- Retirement
- Transfer to NonWorkday Affiliate
- Withdrawn

Updated as of August 3, 2017
Termination

Process Steps (continued)

8. Scroll down; Regrettable, Eligibility, and Position Details are not editable (form defaults to No for each)

9. Type comments

NOTE: For Eligibility, the default is No. If you want to rehire the colleague, do not change to yes.

TRANSITION PHASE NOTE:
During the transition phase, if a colleague is transferring to a Trinity location that is not yet on the Workday system, please include the following information in comments for where colleague is transferring to:
• RHM/Organization name
• RHM/Organization location (city and state)
Termination

**Process Steps (continued)**

10. Scan and upload any supporting documentation (e.g., resignation letter, disciplinary information)

11. Click **Submit**

12. Process moves to next step; click **Done**

*HINT: Click **Upload** to add more documents*

To learn how to cancel the termination process, go to page 18.

*Updated as of August 3, 2017*
Termination

Process Steps (continued)

Process continues by the HR function as follows:

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<th>Step</th>
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To learn how to check the status of the process, go to page 19.

NOTE: The process may be returned to you if there are questions or issues.

For additional assistance, contact your Tier 1 resource, as noted on the Workday Help website at [workday.trinity-health.org](http://workday.trinity-health.org).
Termination

Process Steps (continued)

1. Log in to Workday
2. Click **Inbox**

**NOTE:** Steps will vary based on the role. This step may not be required.

3. Find the email and click to open (opens in the right pane of the screen)

**NOTE:** This step gives the manager an opportunity to clear out:
- Business processes currently assigned to the colleague,
- Business processes related to the colleague, and/or
- Delegations assigned to the colleague
This may include removing the process, reassigning the process, etc.

Updated as of August 3, 2017
Termination

Process Steps (continued)

4. Review Inbox Items Assigned to Worker and make any changes

5. Click Business Processes about the Worker, review, and make any changes
Process Steps (continued)

6. Click Delegations to the Worker, review, and make any changes

7. Click Submit

8. Process continues, click To Do

HINT: If you click Done instead of To Do, you can access the next step from your Inbox.
Termination

Process Steps (continued)

1. Read Instructions and act; type comments

2. Click Submit

3. Process moves to next step; click Done

NOTE: Do not click submit until all applicable offboarding activities are completed.

Updated as of August 3, 2017
# Termination

## Process Steps (continued)

Process continues by the HR function as follows:

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<td>Time Off Partner</td>
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</tbody>
</table>

To learn how to check the status of the process, go to page 19.

For additional assistance, contact your Tier 1 resource, as noted on the Workday Help website at [workday.trinity-health.org](http://workday.trinity-health.org).
Termination

Process Steps (continued)

1. Log in to Workday
2. Click Inbox
3. Find the email and click to open (opens in the right pane of the screen)
4. Type comments and click Submit
5. Process is complete; click Done

NOTE: Add any comments for the recruiter in regard to backfilling the position. For example:
• Goal is to fill by August 1
• Can replace with two part-time
End of Process: Next Steps

WHEN TERMINATION PROCESS IS COMPLETE

- Manager contacts HR Partner to begin backfill process, if applicable
- Colleague automatically receives exit interview documentation from outside partner
- Workday automatically submits colleague health enrollment to COBRA administrator for processing
Quick Tip: To Cancel a Process

How to Cancel a Process

1. Log in to Workday
2. From Inbox, click the Archive tab
3. Find the item you wish to view and click to open (opens in the right pane of the screen)
4. Click Cancel at the bottom of the screen
5. Scroll down and type comments (required)
6. Click Submit
7. Process cancelled, click Done

NOTE: If canceling is not an option, the process may have already been completed. In this case, please contact your HR Partner to rescind the process.
Quick Tip: Check the Status of a Process

How to Check the Status of a Process

1. Log in to Workday
2. From Inbox, click the Archive tab
3. Find the item you wish to view and click to open (opens in the right pane of the screen)
4. Click Process