## Workday Job Aid

### HR: Termination

**Description**

This process allows for the voluntary or involuntary termination of a colleague.

**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.

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

**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- Withdrawn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

*Updated as of August 3, 2017*
Business Process Steps and Roles

Process roles are designated by “security role,” which do not reflect actual job titles. **People may have multiple roles.**

- **Initiate Termination:** Manager, HR Partner, HR Representative, or HR Shared Services (HRSS) Representative
- **Involuntary Review Termination:** Colleague Relations Partner
- **Review Termination:** HR Representative or HRSS Representative
- **Process Termination** (table below):

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**NOTE:** This process may be canceled (rescinded) in case there is a change in circumstances. See page 28 “SPECIAL NOTE: How to Cancel This Process” for instructions.
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 follows offboarding procedures
- 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.
**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
- **Reasons**: Primary/secondary involuntary or voluntary reason for termination
- **Not Eligible for Rehire**: Know if colleague is eligible for rehire
- **Close Position**: Know if the position will be closed or refilled
- **Attachments**: Any supporting documentation for HR file (e.g., resignation letter, disciplinary information)

**Assign Organization Roles**

- **Assigned To**: Name of colleague who will assume terminating colleague’s Workday roles
**Process Steps**

1. Log in to Workday

2. Type **terminate employee** in the search box and press **Enter**

3. Click **Terminate Employee** from the search results

**NOTE:** Before you can terminate a colleague, you must end any additional jobs that may be assigned to him/her.

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

**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

**HR: Termination**

**Which role(s) can do this step?**
- Manager
- HR Partner
- HR Representative
- HRSS Representative

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Process Steps (continued)

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

5. Click **OK**

6. Click the **edit icon** next to Details
Process Steps (continued)

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

**WHAT IS THIS?**

- **Termination Date**
  Date termination is effective

- **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 their resignation (voluntary termination only)

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

- **Secondary Reason**
  Same list as Primary Reason; use if there is more than one reason for termination

- **Notify By**
  Auto-populates from Termination Date;

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

**TERMINATION REASON CATEGORIES**

- **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

**SCREEN INSTRUCTIONS**
CONTINUE ON NEXT PAGE
**Process Steps (continued)**

8. Scroll down and review the Regrettable, Eligibility, and Position Details; click the **edit icon** to make any changes *(form defaults to No for each)*

8a. Click the box to change answer to **Yes**

8b. Click the checkmark icon to accept changes

**WHAT IS THIS?**

- *Regrettable*
  - Not editable
- *Eligibility*
  - Not Eligible for Rehire
  - Not editable
- *Position Details*
  - Close Position
    - No
  - Is this position available for overlap?
    - No

**Updated as of August 3, 2017**

9. Type **comments**, add attachments *(if applicable)*, and click **Submit**
10. If initiated by **HR/HRSS Representative AND voluntary termination**, process continues; click **Review**

If initiated by **Manager/HR Partner AND voluntary termination**, process moves to next step; click **Done**

If **involuntary termination**, process moves to next step; click **Done**

**HINT:** If you click **Done** instead of **Open**, you can access the next step from your Inbox.
Process Steps (continued)

Which role can do this step?
• Colleague Relations Partner

1. Log in to Workday

2. Click **Inbox**

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

**NOTE:** This step will be skipped if the termination is voluntary.

Updated as of August 3, 2017
Process Steps (continued)

4. Review and type comments

5. Click Approve or Send Back with instructions

6. Process moves to next step; click Done
Process Steps (continued)

Which role can do this step?
- HR Representative
- HRSS Representative

1. Log in to Workday
2. Click **Inbox**
3. Find the email and click to open (opens in the right pane of the screen)
Process Steps (continued)

4. Review and type comments

5. Click Approve or Send Back with instructions

6. Process moves to next step; click Done

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

HINT: To cancel this process, click Deny.
**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)

**Which role(s) can do this step?**
- Security Partner

**NOTE:** This step will be skipped if the colleague does not have any Workday security roles.

Updated as of August 3, 2017
Process Steps (continued)

4. Click the **Assigned To** box

5. Click the **X** to delete the terminating colleague’s name, and type the name of the colleague who will assume the role

6. Type **comments** and click **Submit**

7. The next step is dependent on the change; click **To Do** or **Done** (as appropriate)
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 Approve
5. Process moves to next step; click Done

NOTE: This step will be skipped if the colleague does not have any Workday security roles.

Which role(s) can do this step?
- Security Administrator
**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)

**Which role(s) can do this step?**
- Security Partner

**NOTE:** This step will be skipped if the colleague does not have any Workday security roles.

*Updated as of August 3, 2017*
Process Steps (continued)

4. Click **Assign User-Based Security Groups for Person**

5. Type **the name of the colleague who is being terminated**

6. Choose the **appropriate name**

7. Click **OK**

**IMPORTANT:** Workday shows various iterations of a colleague. Choose the one that includes an employee number.
Process Steps (continued)

8. Click the X next to all User-Based Groups to remove them from the terminating colleague

9. Click OK

10. Click Done

11. Click Submit

12. Process moves to next step, click Done
Process Steps (continued)

Which role(s) can do this step?
• Manager

1. Log in to Workday
2. Click Inbox

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

Which role(s) can do this step?
• Manager

1. Read Instructions and act; type comments

2. Click Submit

3. Process moves to next step; click Done

NOTE: This gives the Manager the opportunity to confirm all offboarding procedures for the terminated colleague.
**Process Steps (continued)**

**Which role(s) can do this step?**
- Payroll Partner
- Payroll Partner Lite

**Payroll completes PTO/Sick Transfer or Payout**

**WHAT IS THIS?**
PTO/Sick Transfer or Payout
Payroll reviews the colleague’s remaining PTO/Sick and processes the payout.
**Process Steps (continued)**

Which role(s) can do this step?
- Manager

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:** This gives the manager an opportunity to add any comments for the recruiter in regard to backfilling the position. For example:
- Goal is to fill by April 1
- Can replace with two part-time
**End of Process: Next Steps**

**WHEN TERMINATION PROCESS IS COMPLETE**

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

Which role(s) can do this step?
• HR Representative
• HRSS Representative

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

Alternate:
1. Click related actions icon (“brick”)
2. Click Business Process
3. Choose from Correct, Rescind, or View Remaining Process