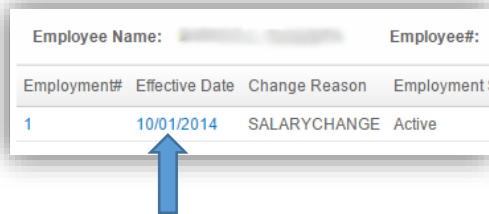



## How To Terminate an Employee

1. Click the “**Effective Date**” link to open the Employment Change form. Note: this date is when the last employment change was completed for the employee.



Employee Name:	Employee#:		
Employment#	Effective Date	Change Reason	Employment Status
1	<a href="#">10/01/2014</a>	SALARYCHANGE	Active

2. Click the **blue “Initiate Terminate”** button in the upper left side of the form.



Employment Change

Acting As.  Supervisor

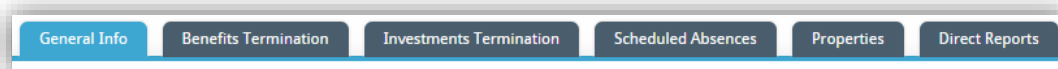
> Comments

Employee Name:  Employee#:

**Initiate Terminate**

Employment Change Situation Salary


3. You will see multiple tabs after clicking the initiate terminate button. The tabs you need to review/complete are: **General Info, Benefits Termination and Properties**. If a supervisor is being terminated, the **Direct Reports** tab can be edited as well.



4. **General Info** tab: you must edit all the information with arrows noted below.

# How To Terminate an Employee



The screenshot shows a web form for terminating an employee. The fields and their values are: Employee#: (redacted), Employment#: 1, Change Reason: Terminated (Terminated), Employment Status: Terminated, Termination Date: 02/09/2015 9:15:33 am, Last Paid Date: (empty), COBRA Status: (empty), Separation Comments: (empty text area), Delete Future Dated Benefits: , Delete Future Dated Investments: , Delete Future Dated Property: , Eligible For Rehire?: , Transfer Pending Authorizations To: (empty), and Proxy Start Date: 02/09/2015. Blue arrows point to the Change Reason, Termination Date, Separation Comments, and Eligible For Rehire? fields.

- Select the “Change Reason” from the drop down (do NOT click  for the change reason!). **You MUST select a specific termination reason; do not leave “Terminated” as the termination reason!**

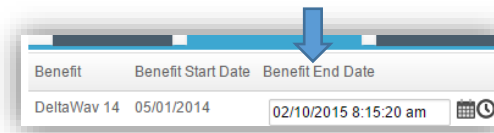
The screenshot shows a dropdown menu for the Change Reason field. The menu is open, showing a list of options: LAYOFF (Lay off), RES (Resignation), RETIRED (Retired), TATTIS (T-Attendance Issues), TermDeceased (Term (Deceased)), Terminated (Terminated), TermInvolun (Term (Involuntary)), TermVoluntary (Term (Voluntary)), TFAIL (T-Failure Comply/Policy), TJOBPER (T-Job Performance), TNCNS (T-No Call/No Show), and TNEO (T-New Empl. Orient/Training). The option 'RES (Resignation)' is highlighted in blue, and a blue arrow points to it.

- Input the correct “**Termination Date**”!
- You must add “**Separation Comments**” to further explain the termination (e.g. leave comments explaining why you mark someone as not eligible for rehire).
- If employee has future dated benefits (if they are enrolled in benefits with an effective date after the termination date), check “**Delete Future Dated Benefits**”. To confirm if they are enrolled in benefits, check the Benefits Termination tab.
- If the employee has future dated property (if they are assigned property with an effective date after the termination date), check “**Delete Future Dated Property**”. To confirm if they have future dated property, check the Properties tab.
- Check/Uncheck if they are “**Eligible for Rehire**” (checked means they are eligible).

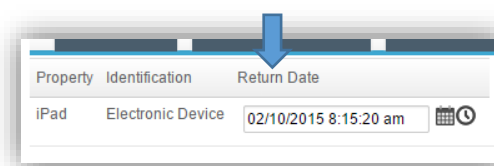
## How To Terminate an Employee

- f. If you are terminating a supervisor, you can “**Transfer Pending Authorizations**”. Click  next to the field”. Fill in any of the search fields, and click  in the upper right toolbar. Select the employee by clicking on their “Employee#”. Then enter the “**Proxy Start Date**”.

5. **Click the Benefits Info** tab –
- Review the benefits here. If they have any future dated benefits, make sure to check “Delete Future Dated Benefits” on the General Info tab.
  - Input the “**Benefit End Date**” for all benefits.





6. **Click Properties** tab –
- Review their Clearbrook property here. Make sure that they have returned all property here.
  - Input the “**Return Date**” for all property.





7. **Click the Direct Reports** tab (only if terminating a supervisor) –
- The list of employees who report to the supervisor directly appear in the list.  
**NOTE:** The list only appears when the employee is a supervisor AND the direct reports of the employee are not yet transferred to new supervisor.

**Employees** 🔧 ? ↔

Supervisor#:      Change Reason:     Effective Date:  

Show Assign Status:     Select/Clear All:      Select/Clear All:

Employee Name	Employment#	Employee#	Current Effective Date	Assign	Transfer Effective Date	Change Reason	Transfer to Supervisor	Transfer
AMBER PULLIAM	1	35302	08/19/2014	<input type="checkbox"/>				<input type="checkbox"/>
AMBERE NICHOLSON	1	35221	07/01/2014 9:37:55 am	<input type="checkbox"/>				<input type="checkbox"/>
AUBREY HAYES	1	35638	09/12/2014	<input type="checkbox"/>				<input type="checkbox"/>
CHRISTINE GALLAGHER - TRONZA	1	35987	11/01/2011 10:01:00 am	<input type="checkbox"/>				<input type="checkbox"/>

- To select the NEW supervisor, click  next to the “**Supervisor#**”. Fill in any of the search fields, and click  in the upper right toolbar. Select the new supervisor by clicking on their “Employee#”. **NOTE:** If you need to transfer

## How To Terminate an Employee

employees to multiple supervisors, follow these steps for one supervisor/employee(s) transfer at a time.



Supervisor#:

- c. Select the appropriate **“Change Reason”** (e.g., New Supervisor) from the drop down and input the new supervisor **“Effective Date”**.



Change Reason:  Effective Date:

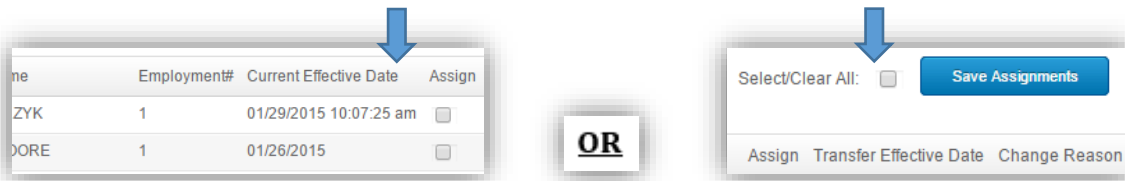
- d. Use the **“Show Assign Status”** dropdown, if you want to change the display to only employees who are assigned, unassigned or both. **NOTE:** It defaults to display both.

- e. **First, you must ASSIGN employees to the new supervisor.**

- Check the checkbox under **“Assign”** for all the employees you want to assign to the new supervisor.

- **OR** -

- If you want to assign all the listed employees to the new supervisor selected, check the checkbox for **“Select/Clear All”** next to the blue **“Save Assignments”** button.



Employee Name	Employment#	Current Effective Date	Assign
ZYK	1	01/29/2015 10:07:25 am	<input type="checkbox"/>
DORE	1	01/26/2015	<input type="checkbox"/>

**OR**

Select/Clear All:

Assign Transfer Effective Date Change Reason

- Click the blue **“Save Assignments”** button, to save the assignments. Click **OK** to confirm.

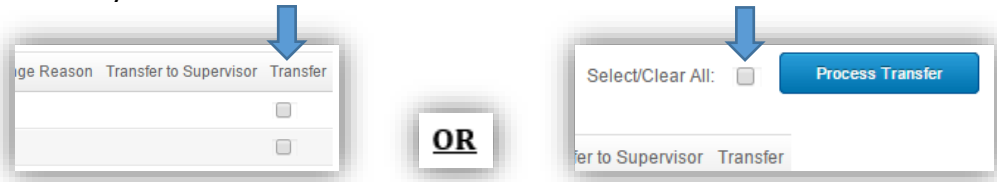
- f. **After you assign, then you PROCESS the employee assignments.**

- Check the checkbox under **“Transfer”**, for all the employees you want to process.

- **OR** -

## How To Terminate an Employee

- If you want to process all the listed employees, check the checkbox for “**Select/Clear All**” next to the blue **Process Transfer**” button.



- g. Click the blue “**Process Transfer**” button, to process the employees to the new supervisor on the effective date chosen. Click **OK** to confirm.
8. Once finished on all tabs, click ✓ in the upper right toolbar.
  9. You will get a notification to confirm that the termination has been submitted.
  10. Once finished on all tabs, click ✓ in the upper right toolbar.
  11. You will get a notification to confirm that the termination has been submitted.