

PeopleSoft Termination Checklist HR/Payroll/Benefits

September 15, 2006



This checklist highlights the Menu Items, Components, and Pages necessary for basic initial processing. The checklists focus on the most common general situations. For specific detail see relevant manual.

HR/Payroll Checklist for Termination

HR: (Navigation: Workforce Administration>Job Information>Job Data)

Termination (work location tab)

- Insert an effective dated row **(day after last day worked)**
- Enter appropriate Action
- Enter appropriate Reason
- Save!

The screenshot displays the 'Job Data' page in PeopleSoft, with the 'Work Location' tab selected. The page shows the following information:

- EMP ID:** [Redacted]
- Empl Rcd #:** 0
- Work Location:** Find First 1 of 2 Last
- HR Status:** Inactive
- Payroll Status:** Terminated
- Effective Date:** 04/15/2006
- Sequence:** 0
- Job Indicator:** Primary Job
- Action / Reason:** Termination (Reason: Resignation)
- Last Start Date:** 08/01/2002
- Termination Date:** 04/14/2006
- Expected Job End Date:** [Field]
- Last Date Worked:** 04/14/2006
- Position Number:** 00000051
- Position:** ADMIN ASSISTANT I
- Position Entry Date:** 03/28/2003
- Regulatory Region:** USA (United States)
- Company:** ND (State of North Dakota)
- Business Unit:** 11000 (Office of Mgmt & Budget)
- Department:** 110110 (Office of Management & Budget)
- Department Entry Date:** 08/01/2002
- Location:** 11000 (Office of Management & Budget)
- Establishment ID:** [Field]
- Date Created:** 09/15/2006

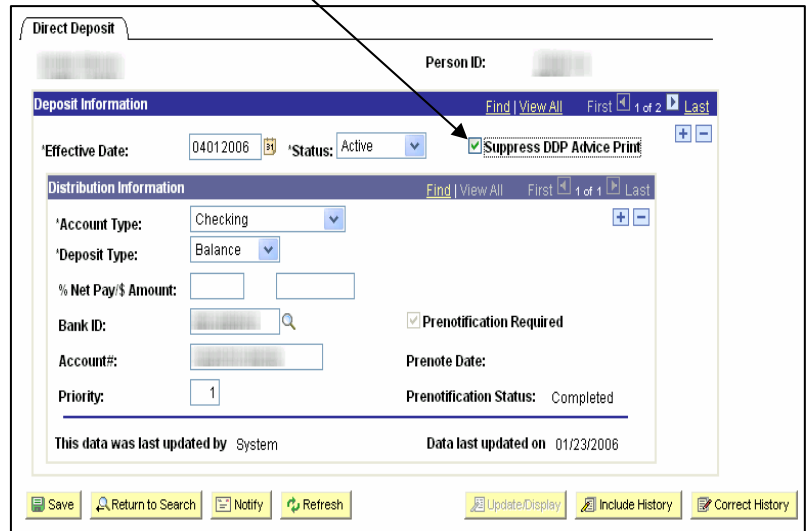
Navigation links at the bottom include: Save, Return to Search, Notify, Previous tab, Next tab, Refresh, Update/Display, and Include History.

Payroll:

(Navigation: Payroll for North America>Employee Pay Data USA>Request Direct Deposit)

The Suppress DDP Advice Print box needs to be unchecked upon termination. The employee will then receive a printed DDP Advice.

Add an effective dated row
(1st day of the termination month)
Uncheck the box for
Suppress DDP Advice Print
Save



The screenshot shows the 'Direct Deposit' form for a specific person. The 'Deposit Information' section includes an 'Effective Date' of 04/01/2006, a status of 'Active', and a checked 'Suppress DDP Advice Print' checkbox. The 'Distribution Information' section shows an account type of 'Checking', deposit type of 'Balance', and a 'Prenotification Required' checkbox that is also checked. The 'Prenotification Status' is 'Completed'. The form is updated by the system on 01/23/2006. A black arrow points from the text above to the 'Suppress DDP Advice Print' checkbox.

Deposit Information	
'Effective Date:	04/01/2006
'Status:	Active
	<input checked="" type="checkbox"/> Suppress DDP Advice Print

Distribution Information	
'Account Type:	Checking
'Deposit Type:	Balance
% Net Pay/\$ Amount:	
Bank ID:	
Account#:	
Priority:	1
	<input checked="" type="checkbox"/> Prenotification Required
	Prenote Date:
	Prenotification Status: Completed

This data was last updated by System Data last updated on 01/23/2006

Buttons: Save, Return to Search, Notify, Refresh, Update/Display, Include History, Correct History

Benefits:

Once you have entered and saved the Termination in Job Data, a benefit event is created. Before you can process the event, it needs to be assigned to your schedule. This is a centralized activity that automatically runs every half hour.

To stop benefits when an employee terminates employment, the termination event needs to be finalized through benefits administration. The system has been set up to stop the FlexComp medical and dependent care deductions on the last paycheck. All other benefit deductions will be taken, unless a deduction override is done.

Prepare Benefit Options: (Benefits>Manage Automated Enrollment>Run Automated Event Processing)

Prepare for Finalization: (Benefits>Manage Automated Enrollment>Events >Update Event Status or Update Processing Controls).

The screenshot shows the 'BenAdmin Event Status Update' window. It features a table with columns for Sched ID, Event ID, Pgm, Process Status, Eligibility Change, Disc, Out of Seq, *Process Indicator, *Event Status, and Final. The 'Final' column contains checkboxes. An arrow points to the 'Final' checkbox for the first event, which is checked.

Sched ID	Event ID	Pgm	Process Status	Eligibility Change	Disc	Out of Seq	*Process Indicator	*Event Status	Final
112EM	2	SAN	Prepared	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Normal Prc	Open	<input checked="" type="checkbox"/>
10/12/2006	Termintr	200	Job Data Change				Suppr Both		
112EM	1	SA1	Enrolled	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Normal Prc	Closed	<input type="checkbox"/>
08/21/2006	New Hire	100	Job Data Change				Print Both		

Check box for "Final" and save.

Finalize/Close: (Benefits>Manage Automated Enrollment>Events>Run Automated Event Processing).