PeopleSoft
Termination Checklist
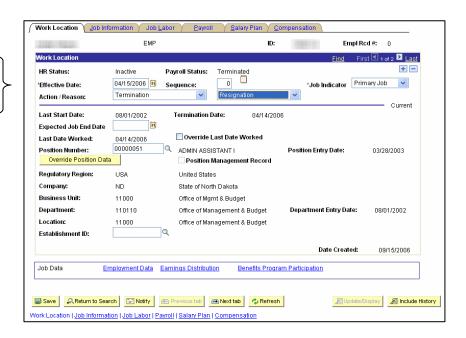# HR/Payroll/Benefits
September 15, 2006

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
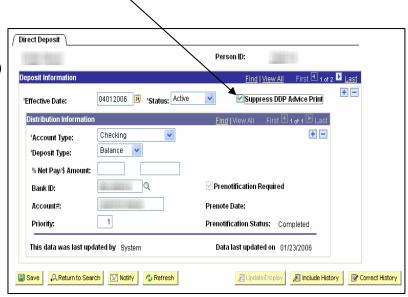- Enter appropriate Reason
- Save!

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
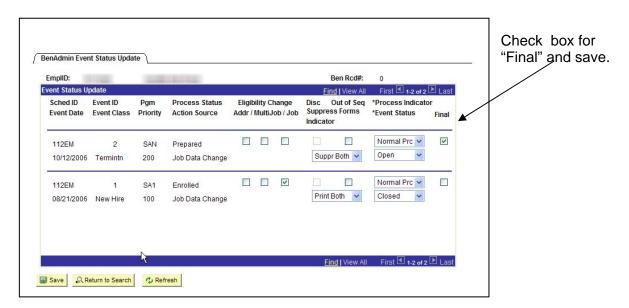Suppress DDP Advice Print
Save

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).

Check box for "Final" and save.

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