STATEWIDE PERSONNEL SYSTEM

Terminate an Employee (for HR Coordinators)

December 2024

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Terminate Employee Business Process

Process Overview

The process steps in the Termination business process are listed in the table below.

#	Process Steps	Role	Description
1	**Initiate Termination**	HR Coordinator	Specify employee, termination reason, date of termination, etc.
2	**Agency Approvals**	Appointing Authority Partner	Agency approval of termination request
		Budget and Finance Partner	Agency budget approval for termination request.
3	**To Dos: Security**	HR Coordinator HR Partner	Review the security role of the position and outside of Workday, fill out the Application & Authority for OPSB System Access (if applicable).
		Security Administrator	Remove user-based security groups (if applicable)
		HR Coordinator	Assign roles to another worker
4	**To Dos: Manage Business Processes Assigned for a Worker**	HR Coordinator	Route assigned tasks to another worker.
5	**Update Retiree Status**	Retiree Partner	Add/Update retiree status (if applicable)
6	**To Dos: Payroll**	Payroll Partner	Request severance payout and/or final leave payout (if applicable)
			Process final paycheck
7	**Terminate User Account**	Workday System	Terminate user Workday account

NOTE: Routing is based on the reason selected when initiating the business process.

Events and Reasons

The table below includes valid voluntary and involuntary reasons that a manager can terminate an employee.

You must always select a primary reason. Secondary reasons are generally entered for informational purposes.

Table 1 – Termination Primary Reasons

Event	Reason
Termination (Primary Reasons - Voluntary)	Resignation in Lieu of Termination
	Resignation Without Proper Notice
	Resigned for Military Service
	Resignation State Service *****
	Transfer to a non-SPMS Agency
	Retired
Termination (Primary Reasons - Involuntary)	**Terminated**
	Terminated on Probation
	Terminated with Prejudice
	Contract Expired *****
	Deceased *****
	End of Temporary Employment *****
	New Hire – No Show *****
	New Hire – Declined Offer After Acceptance *****
	Leave Without Pay (Medical, Military, Personal)
	Laid Off From Allocated Position
	Position Abolished

NOTE: An asterisk (*) indicates a reason for which a manager can initiate a termination.

Table 2 – Termination Secondary Reasons

Event	Reason
Termination (Secondary Reasons)	Accepted Another Job*
	Best Interest of the State
	Continuing Education*
	Insufficient Salary*
	Job Affiliated with a Union*
	Job Location*
	Job Not Affiliated with a Union*
	Lack of Career Path with Job*
	Lack of Parking at Job Location*
	Lack of Tuition Assistance*
	Military Obligation*
	Personal Reasons*
	Relocating Outside of Area*
	Unable or Unwilling to Perform All Job Duties*
	Unsatisfactory Report of Service

NOTE: An asterisk (*) indicates a reason for which a manager can initiate a termination.

Information: Approval is required for termination processes.

The designated Appointing Authority approves the following termination reasons:
- *Laid Off from Allocated Position*
- *LWOP-Medical*
- *LWOP-Military*
- *LWOP-Personal*
- *Position Abolished*
- *Terminated*
- *Terminated On Probation*
- *Terminated With Prejudice*
- *Resignation in Lieu of Termination*
- *Resignation Without Proper Notice*

The designated Budget and Finance Partner approves the following termination reasons:
- *Laid Off from Allocated Position*
- *Position Abolished*

Before you begin…

You will need the following information to complete the Termination business process.
- Terminated Employee Name or Employee ID Number
- Termination Date
- Reason for Termination
- Last Day or Work
- Pay Through Date

Procedure: Terminate Employee

Use this procedure to enter and submit an employee termination in Workday.

IMPORTANT:

- All employee timesheets should be submitted and approved prior to the termination date. Timesheets should include any time off taken.
- If there is going to be a position overlap:
  - The termination must be processed in advance of the termination date.
  - The overlap hire (employee assuming the position) must be processed in advance of the termination date.
- The effective date of contractual employee terminations should be the last day of work

The screenshots used in this guide show a future change from Inbox to My Task Box. This will be a change effective March 2024.

Procedure:

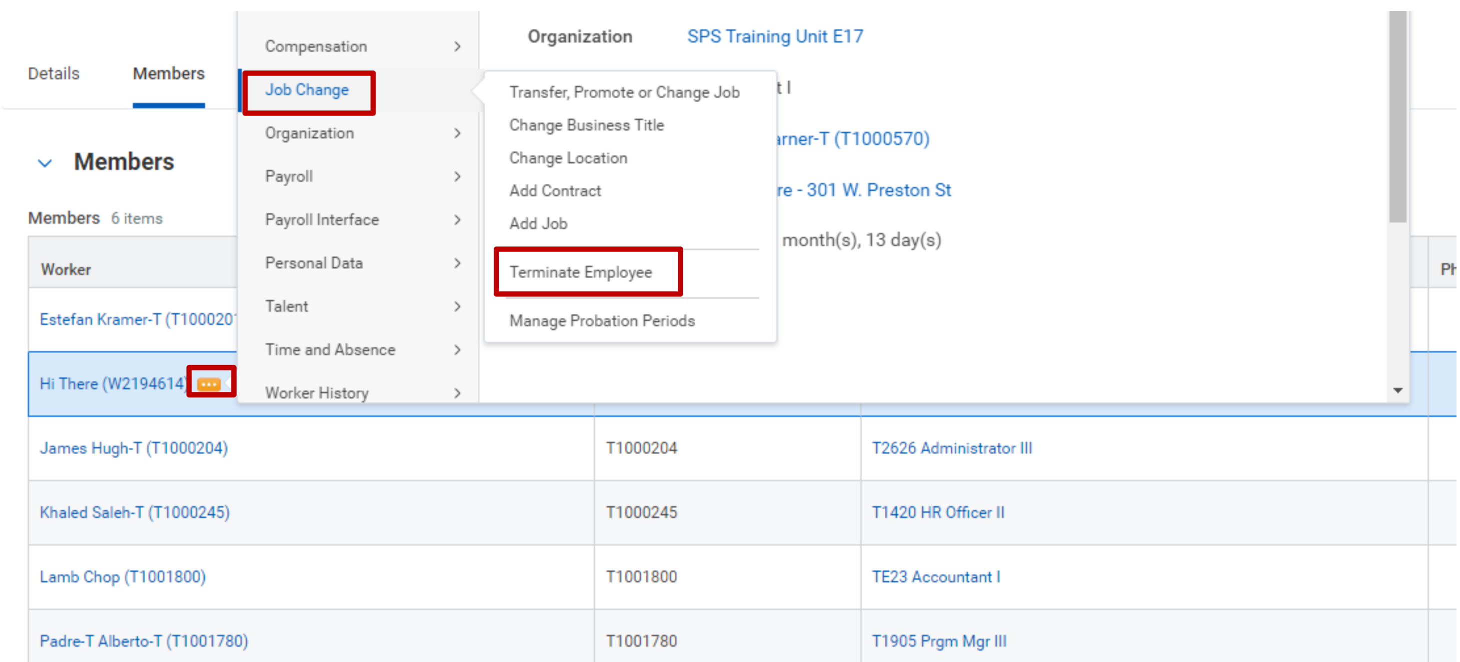
1. Navigate to the employee that will be terminating.

Tip: To find an employee…

- Type the employee's name or employee ID in the **Search** field. Then, click the **Search** icon,
- Find the employee in their assigned Supervisory Organization on the **Members** tab. OR
- Go to the employee's profile

2. Click the Related Actions and Preview icon next to (or beneath) the employee's name.

3. In the drop down menu, hover over Job Change and then click Terminate Employee.

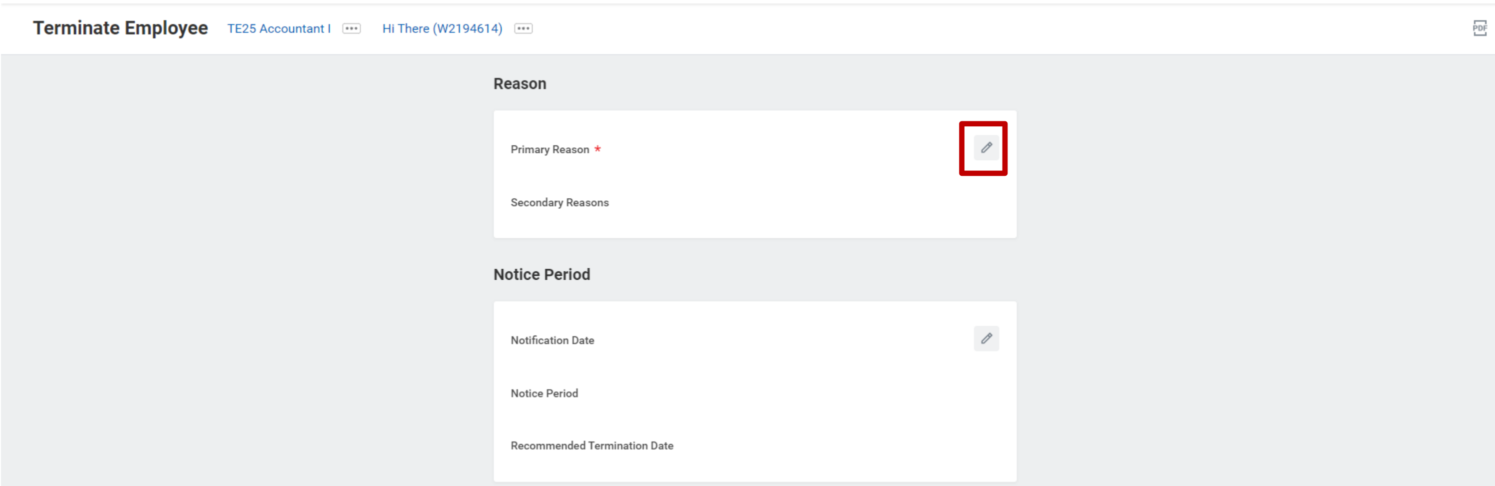


Updated: 12/20/24

Terminate Employee

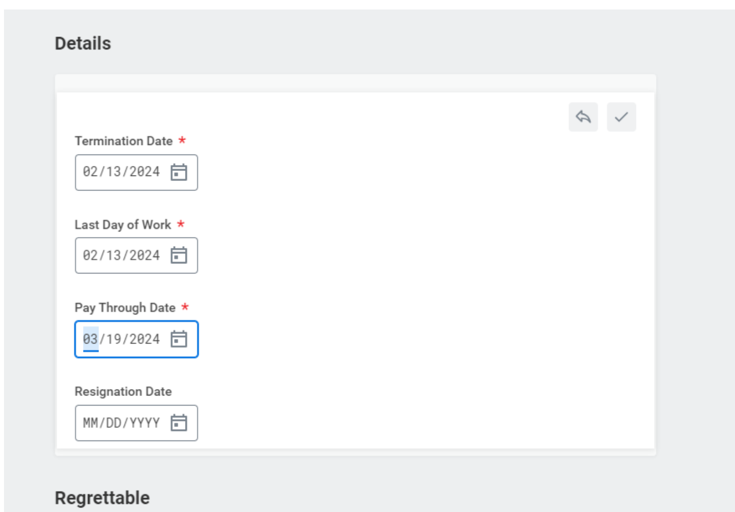
4. In the **Primary Reason** field, use the prompt to select the reason for termination.

Information: Any former terminated employee that has a termination anywhere in their Workday history with the **Primary Termination Reason: *Involuntary > Terminated with Prejudice*** will be found on the Pre-Offer Check Website/Report (POC) and in JobAps as MS106P.



5. A secondary reason may be required. If applicable, use the prompt to select a secondary reason for termination in the **Secondary Reason** field.

6. In the Details section, click the Edit icon to complete the fields.



7. Enter the dates on the Terminate Employee page based on the criteria below. **Note:** Refer to the **Workday Termination Reference** table on page 9 for examples

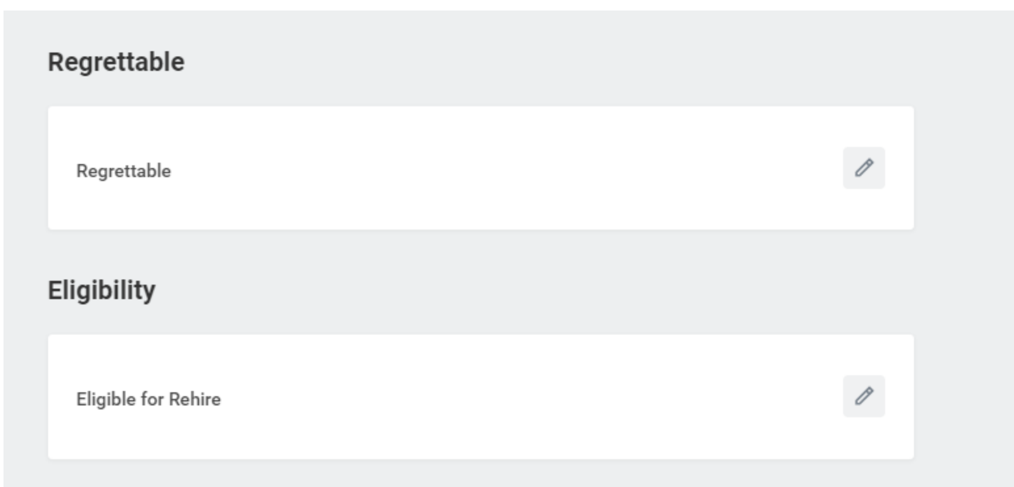
Note: Remember that a retiree's termination date <u>must be on the last day of the month</u> for their benefits to be effective immediately.

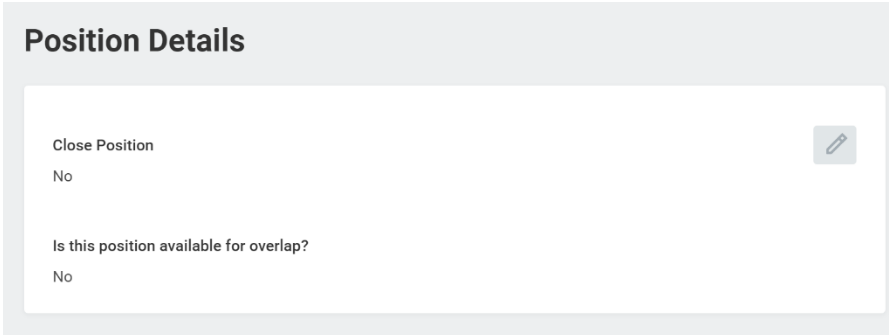
Terminate Employee: Date Guide

#	Date Field	Description
1	Termination Date	• **Mandatory Field.** • This is the effective date of the termination event. • This field is mandatory and should reflect the employee's last day in the position, which would include work time and the use of paid leave. • The termination is assumed to take effect at the end of the workday. • The Termination Date for an employee retiring directly from employment should reflect the last day of the month, and the retirement date would reflect the first day of the following month.
2	Last Day of Work	• **Mandatory Field.** • This date should be the same as the Termination Date. • This date will auto populate after the Termination Date is entered and should not be changed. • The last day of work may include the last physical day at work or the last day on paid leave as an active employee, whichever is later.
3	Pay Throug h Date	• **Mandatory Field.** Allows employee to be remain on payroll CPB. • This date is used to remove the employee from Payroll; Reflects the date the employee will be removed from the State's payroll. • Allows the processing of pay/time card corrections prior to the final payments. • Must be **<u>two full pay periods</u>** after the Termination Date; should always be the pay period end date of the pay period. • Will not prevent the agency from recruiting activities for the vacant position. **Note:** Workday will calculate what is owed the employee for accrued/earned leave based on COMAR. This will be automatically paid out to the employee on the first pay date following the Pay Through Date.
4	Resignation Date	• **Optional Field.** The Resignation Date applies to voluntary terminations only. • This is the date the employee submitted their notice of resignation. • This information may be useful in situations that involve employee relations activities.

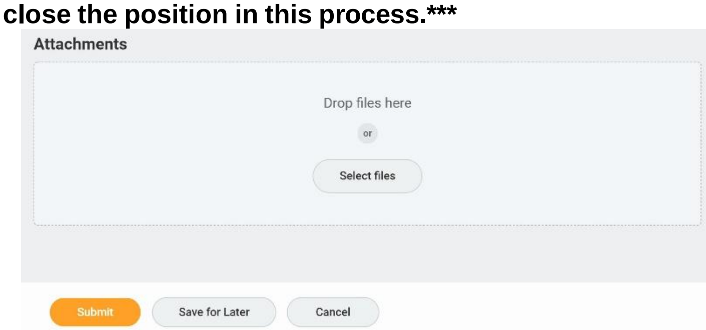
Workday Termination Date Reference				
Dates (System date fields in **bold**)	<u>**Scenario**</u> **Employee Resigned:** 2/2/2024 **Last day in the office:** 2/20/24 **Leave:** No leave taken	<u>**Scenario**</u> **Employee Resigned:** 1/26/2024 **Last day in the office:** 2/9/2024 **Leave:** 2/12/2024 – 2/20/2024	<u>**Scenario**</u> **Retirement Submitted:** 2/3/2024 **Retirement Date:** 3/1/2024 **Last day in the office:** 2/29/2024 **Leave:** No leave taken	<u>**Scenario**</u> **Retirement Submitted:** 2/3/2024 **Retirement Date:** 3/1/2024 **Last day in the office:** 2/9/2024 **Leave:** 2/12/2024 – 2/29/2024
Resignation Date	February 2, 2024	January 26, 2024	February 2, 2024	February 2, 2024
Timesheets approved by	February 20, 2024	February 20, 2024	February 29, 2024	February 29, 2024
Termination Date	February 20, 2024	February 20, 2024	February 29, 2024	February 29, 2024
Last Day of Work	February 20, 2024	February 20, 2024	February 29, 2024	February 29, 2024
Pay Through Date	March 19, 2024	March 19, 2024	April 2, 2024	April 2, 2024
Final Payout Pay Date	March 27, 2024	March 27, 2024	April 10, 2024	April 10, 2024
Retirement Date	N/A	N/A	March 1, 2024	March 1, 2024

8. Do not enter any information into the *Regrettable* or *Eligibility* prompts for any reason.





9. In the "Position Details" section, you may overlap the position if appropriate.
   NOTE: This checkbox is only active when the Termination Date entered is in the future.
   *****Do not close the position in this process.*****



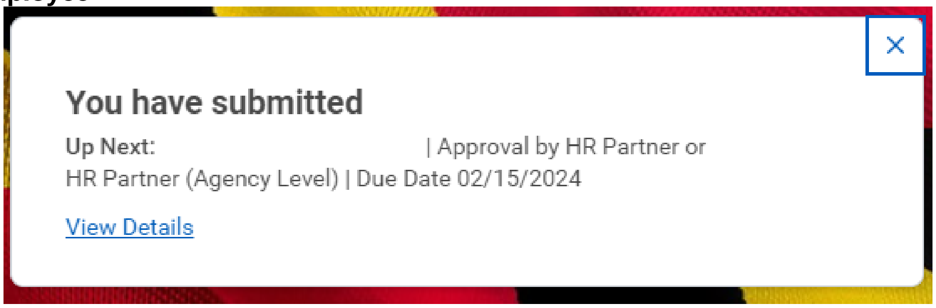
10. If applicable, attach the appropriate documents in the Attachments section at the bottom of the transaction screen.

NOTE: All termination related documents must be uploaded into Workday, either in the Attachments section of the termination event or under Personal Documents for the employee. Termination related documents may include a resignation letter, disciplinary action form, Unsatisfactory Report of Service form (MS-106 form), termination memo, etc.

11. Click the Submit  button. This will submit the termination and route to the next step in workflow.

Information: The termination will be routed for approval. Additional tasks (e.g. To Dos are completed and will appear in the HR Coordinator's My Task box. Refer to the Process Overview for details.

Terminate Employee



12. Review the next step in the process and then do one of the following:
13. Click the grey button in the **Up Next** section if there is another task for you to complete in the process.

14. The System Task is complete.

Information: If the termination reason is retirement, the transaction will be routed to the HRC and Retiree Partner to be completed. You should navigate back to your My Task box to complete this step.

Procedure: Terminating a Retiring Employee

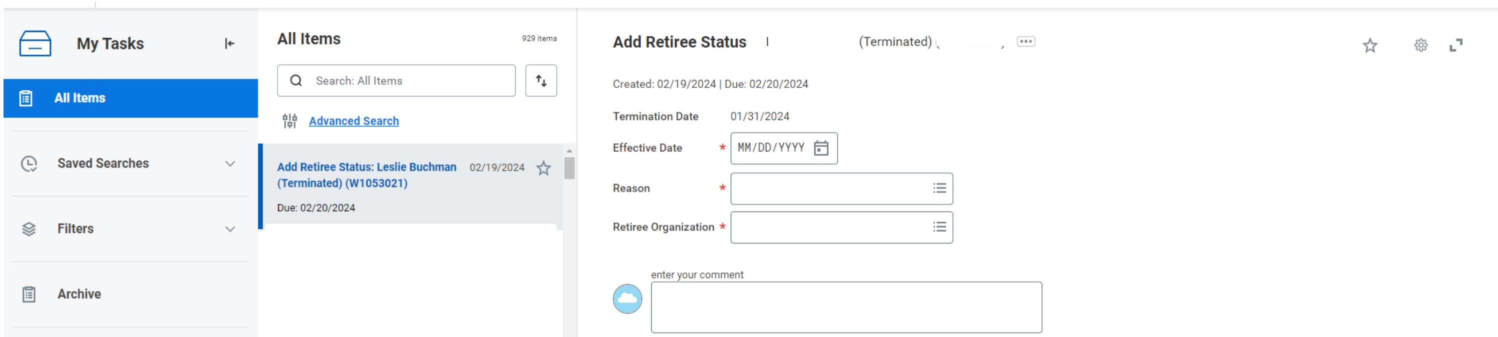
If Retirement is selected as the termination reason, there will be an “Add Retiree Status” task in the My Task box of the HRC and Retiree Partner to be completed, after the termination is approved.

The screenshots used in this guide show a future change from Inbox to My Task Box. This will be a change effective March 2024.

Procedure:

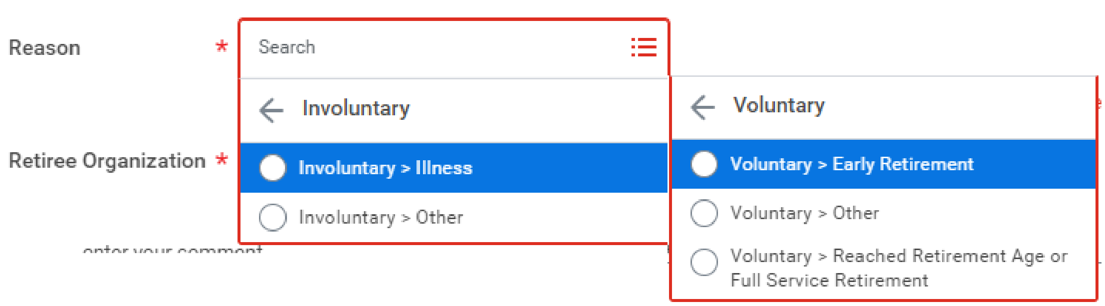
1. Click the **My Tasks** icon.

   Information: This task will appear in the “All Items” box or in Archive under the overall “Terminate” business process, as an open item in the *My Actions* tab.

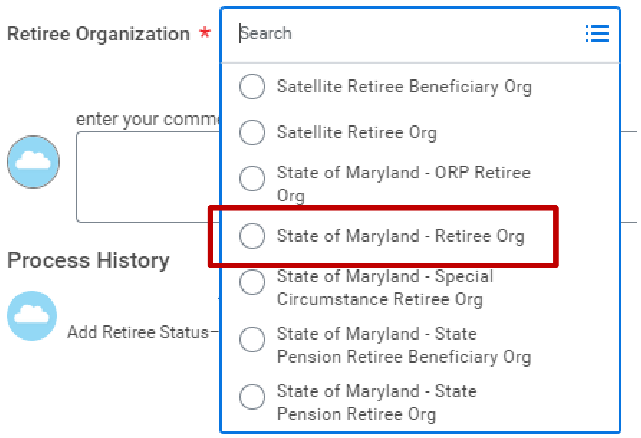


2. Expand the task to full screen and navigate through the prompts to complete with the correct information.
   1. Remember that a retiree’s termination date must be on the last day of the month for their benefits to be effective immediately, so The *Effective Date* needs to be the first of the month following the term date.

   2. Choose the correct retirement reason (*select from Involuntary or Voluntary drop down*):



3. Selecting the correct Retiree Org is important. It should be "**State of Maryland - Retiree Org**". (EBD will move them from this group if necessary.)



3. Hit the submit 

button. The System Task is complete.

*******Retiree Reminders:***

- To retire, the employee must terminate from ALL positions.
- A retired employee may not be rehired into State service for at least 45 days after termination.

Procedure: End Additional Job

Use this procedure to remove employee from the additional job as identified in the system.

As a reminder, you may only use the "End Addition Job" process if the position is shown with a (+) next to it in the Workday system. If it is not, you may need to process a Primary Job Switch transaction.

The screenshots used in this guide show a future change from Inbox to My Task Box. This will be a change effective March 2024.

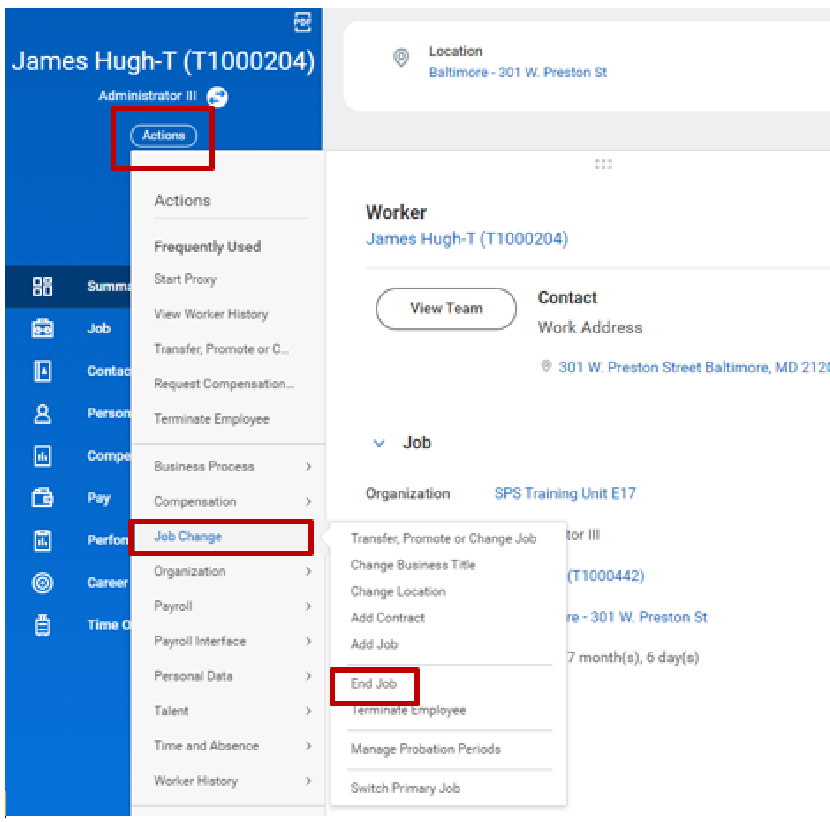
Procedure:

1. Search for the employee.

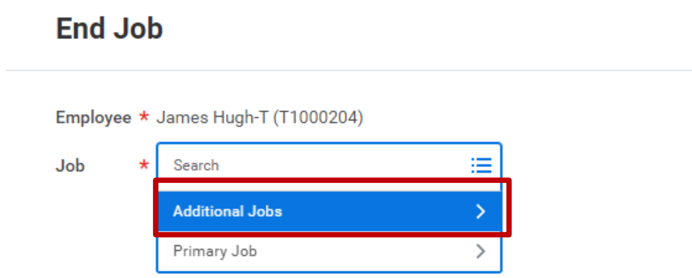
Tip: To find an employee…
- Type the employee name or employee ID in the **Search** field. Then, click the **Search** icon, OR
- Find the employee in their assigned Supervisory Organization on the **Members** tab.

2. Click the Related Actions and Preview 

icon next to the employee's name, then Job Change, and select "End Job".

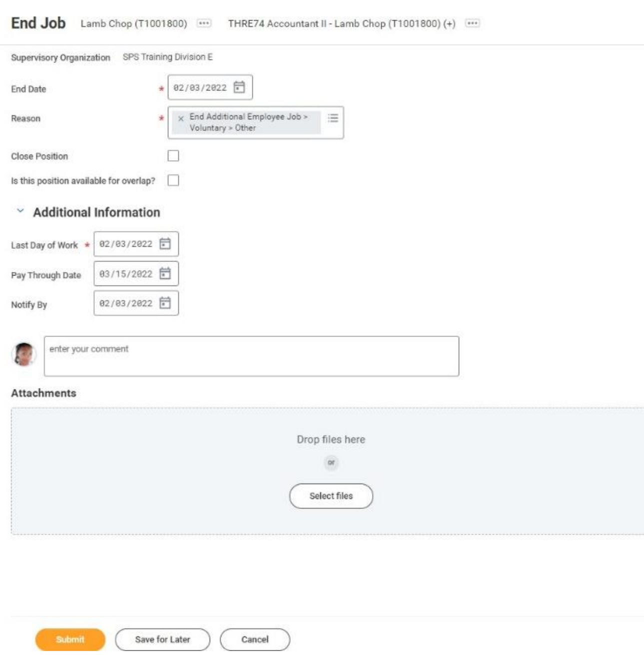


3. In the prompt, Identify the job to be ended (needs to be an additional job) and hit the OK button.



4. Complete the prompts with accurate information including the Pay Through Date under "Additional Information". Attach any documents needed and then hit the Submit button.

<u>NOTE:</u> All termination related documents must be uploaded into Workday, either in the Attachments section of the termination event or under Personal Documents for the employee. Termination related documents may include a resignation letter, disciplinary action form, Unsatisfactory Report of Service form (MS-106 form), termination memo, etc.



5. You will receive a system confirmation and a task for "Manage Business Processes for Worker" in your My Tasks box. Complete the rest of the employee's off boarding processes from the My Tasks box.

6. The System Task is complete.

Procedure: Remove User-Based Security Group Assignments

Use this procedure to review and mark the “Remove User Based Security Group Assignments” task complete.

A reminder to evaluate the terminated employee’s user-based role assignments may also appear in the HR Coordinator’s My Tasks box. The user-based role assignments (such as an administrator) for the terminated worker need to be evaluated, if applicable. An OPSB System Access form should be submitted to shared.services@maryland.gov to add, delete or change role assignments.

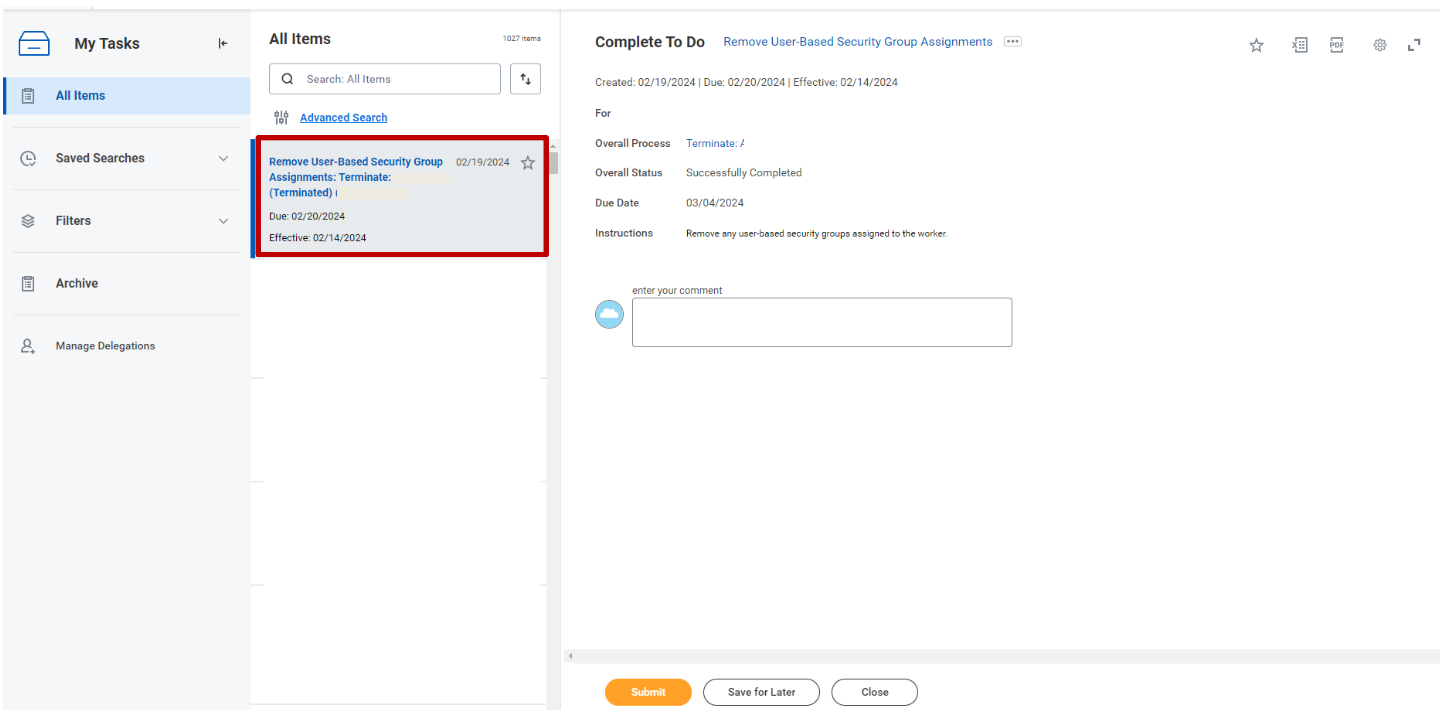
The screenshots used in this guide show a future change from Inbox to My Task Box. This will be a change effective March 2024.

Procedure:

1. Click the **My Tasks** icon.

2. Locate and select the *Remove User-Based Security Group Assignments* To Do for the employee.

3. Click on the arrow icon to expand the screen.



4. Read the instructions and then click the **Submit** button.

Information: The roles for the terminated worker need to be evaluated and reassigned to another worker, if applicable. An OPSB System Access form should be submitted to shared.services@maryland.gov to add, delete or change role assignments.

5. The System Task is complete.

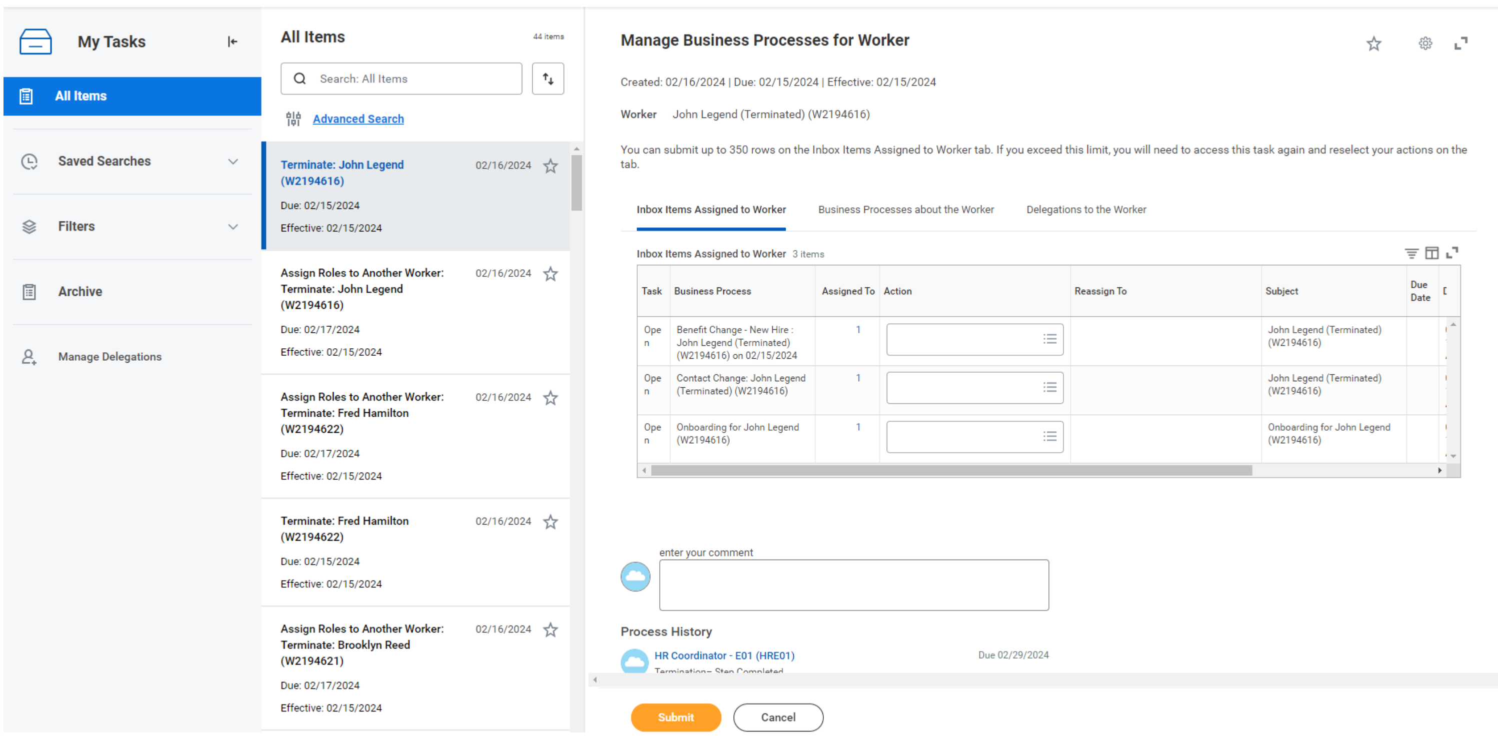
Procedure: Manage Business Processes for Worker

Use this procedure to cancel or reassign pending tasks for a worker that is leaving. This task appears in the HR Coordinators My Tasks box when an employee leaves a position (e.g., after a termination is approved in the system) and has tasks awaiting action.

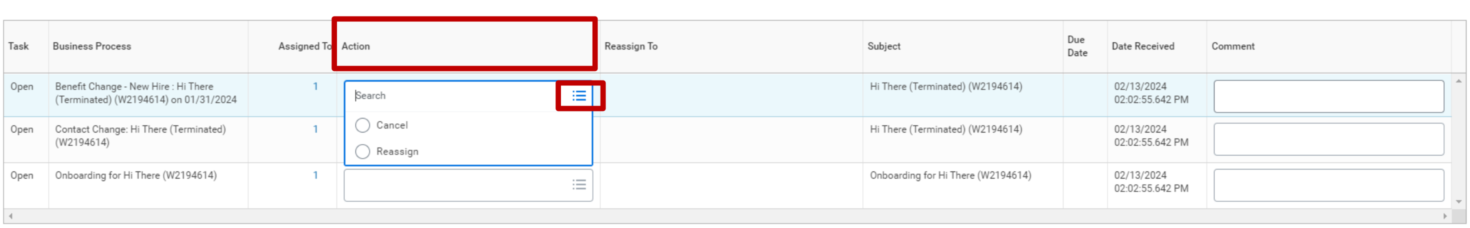
The screenshots used in this guide show a future change from Inbox to My Task Box. This will be a change effective March 2024.

Procedure:

1. Click the **My Tasks** icon.
2. Locate and select the *Manager Business Processes for Worker* task for the terminated employee.
3. Click on the arrow icon to expand the screen



6. Identify any tasks in this employee's My Task box that should be reassigned to a current employee.
7. You can choose from the "Action" drop down menu to cancel or reassign the task.



8. Use the prompt to select the employee to reassign the task to and add a comment if necessary.
9. Click the **Submit** button.
10. The System Task is complete.

Procedure: Assign Roles to Worker

Use this procedure to review and mark the “Assign Roles to Another Worker” task complete.

The Assign Roles to Worker task is a “To Do” that displays when a worker leaves a position. When a worker leaves a job, you may need to assign that worker’s roles to another worker. The roles for the terminated worker need to be evaluated and reassigned to another worker, if applicable. An OPSB System Access form should be submitted to shared.services@maryland.gov to add, delete or change role assignments.

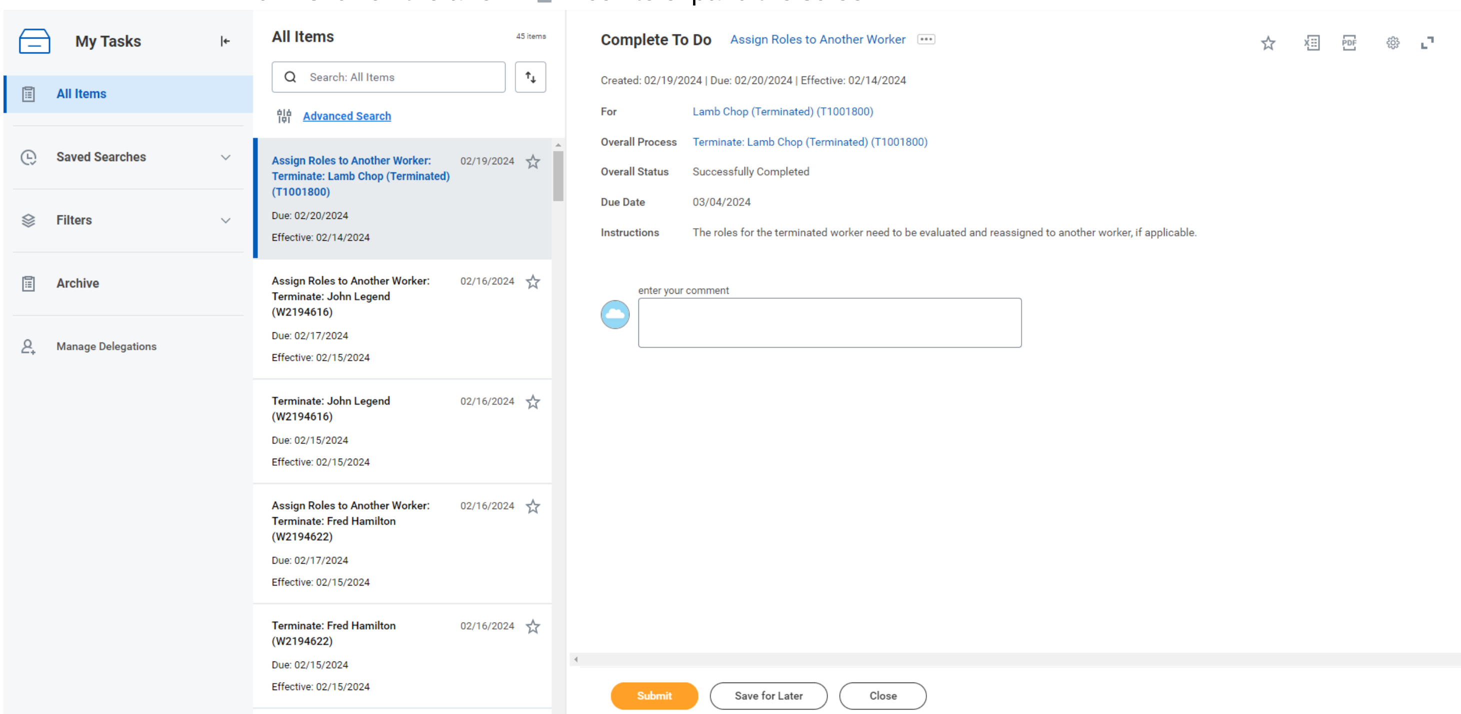
The screenshots used in this guide show a future change from Inbox to My Task Box. This will be a change effective March 2024.

Procedure:

4. Click the **My Tasks** icon.

5. Locate and select the *Assign Roles to Another Worker* To Do, followed by the name of the employee.

6. Click on the arrow icon to expand the screen



11. On the All Items tab, click the “Assign Roles to Worker” task for the terminated employee.

12. Read the instructions and then click the **Submit** Submit button.

Information: The roles for the terminated worker need to be evaluated and reassigned to another worker, if applicable. An OPSB System Access form should be submitted to shared.services@maryland.gov to add, delete or change role assignments.

13. The System Task is complete.