Termination Checklist

Purpose

This job aid provides checklists for the *Termination* business process. To complete the *Termination* and *Add Retiree Status* business processes in Workday, please review the Termination Job Aid.

Resources

Use the following resources to support you in the *Termination* business process.

- Termination Reason Guidance
- Dates Cheat Sheet

Tasks for All Employees

The following tasks must be completed for all employees regardless of the termination reason:

- ☐ The incumbent's termination must be processed before the job requisition can be created in both Workday and Neogov.
- ☐ All banked Comp, Holiday Comp, and Banked Holiday hours will automatically be paid out.
- ☐ For a permanent (non-temp) employee who terminated with less than six (6) months of employment, send an email to DAS-SAE to ask for an IPERS refund to be processed.
- ☐ If applicable, check if the employee has any insurance premium arrears balances that have not been paid. Review the Arrears for Terminated Employees on Medical Leave Job Aid for support. Collect the remainder of any amounts owed.

Checklists by Termination Reason

Select the reason for termination in the following list to jump to the correct checklist.

Voluntary Termination

Complete this checklist for any regular termination. For support, review Termination Reason Guidance.

- ☐ Add Employee Separation form to Workday.
- ☐ The last day worked needs to be the last day they have hours worked on their Workday timesheet.
- ☐ Add Notice of resignation to Workday – either their own resignation letter or a notice to the employee that they've been terminated.

  Note: When it's a job abandonment, it needs to be 3 consecutive days missed.
- ☐ Ask if they want to defer any of their leave payouts to a deferred comp account (available for new and existing RIC participants) and verify that they submitted a RIC Special Deduction form to the RIC team.

Involuntary Termination

Complete the appropriate following checklist for an involuntary termination, either dismissal or layoff.

Dismissal

☐ Add Employee Separation form to Workday.

☐ The last day worked needs to be the last day they have hours worked on their Workday timesheet.

☐ Add Termination letter to Workday – this is usually a letter created and sent from the Agency stating the employee is being terminated involuntarily.

Layoff

☐ Add Employee Separation form to Workday.

☐ Add notice of layoff to Workday - see Sample Letters.

☐ The last day worked needs to be the last day they have hours worked on their Workday timesheet.

☐ Ask if they want to defer any of their leave payouts to a deferred comp account (available for new and existing RIC participants) and verify they submitted a RIC Special Deduction form to the RIC team.

Board Council Member Term Expired

Complete the following check list for terminations of all board members in job class 14000.

☐ No attachments required.

☐ Last day worked does not matter as they don’t submit hours.

☐ Make sure they have submitted all meetings they have attended for payment.

☐ Term date must also be before new person starts

Retirement

Complete the appropriate following checklist for termination due to retirement, either Sick Leave Insurance Program (SLIP) retirement or regular/Medicare retirement.

Sick Leave Insurance Program (SLIP)

- ☐ Complete the SLIP Retirement Checklist.
- ☐ Add Employee Separation form to Workday.
- ☐ Add Notice of Resignation to Workday.– either their own resignation letter or notice from the Agency.
- ☐ Add SLIP Enrollment form to Workday.
- ☐ The last day worked needs to be the last day they have hours worked on their Workday timesheet.
- ☐ List IPERS file date in comments in Workday.
    - ☐ Employees cannot retire in Workday until they have filed with IPERS.
- ☐ Make the paythrough date +40 years from the date of termination.
- ☐ Email insurance paperwork to stateretirees@iowa.gov. Do not upload into Workday.
- ☐ Ask if they want to defer any of their payouts to a deferred comp account (available for new and existing RIC participants) and verify they submitted a RIC Special Deduction form to the RIC team.
- ☐ If the employee has a health FSA, ask if the employee wants to prepay for the rest of the year. If so, provide the Prepayment form to the employee and ask the employee to submit it per instructions on the form.
- ☐ Add the SLIP Worker costing in the pay period after the SLIP retirement processes.

Regular or Medicare Retirement

- ☐ Identify the correct Termination Reason that needs to be used in Workday by reviewing the Termination Reason Guidance.
- ☐ Complete the checklist that correlates with the type of Retirement:
  - ☐ Regular Retirement Checklist
  - ☐ Medicare Retirement Checklist
- ☐ Add Employee Separation form to Workday.
- ☐ Add Notice of Resignation to Workday.
- ☐ Make the last day worked the last day they have hours worked on their Workday timesheet.
- ☐ List IPERS file date in comments in Workday.
  - ☐ Employees cannot retire in Workday until they have filed with IPERS.
- ☐ Email insurance paperwork to stateretirees@iowa.gov. Do not upload into Workday.
- ☐ Ask if they want to defer any of their payouts to a deferred comp account (available for new and existing RIC participants) and verify they submitted a RIC Special Deduction form to the RIC team.
- ☐ If the employee has a health FSA, ask if the employee wants to prepay for the rest of the year. If so, provide the Prepayment form to the employee and ask the employee to submit it per instructions on the form.

Client/Patient

Complete the following checklist for client/patient terminations.

- ☐ No attachments required.
- ☐ If the employee records hours on a timesheet, they will need to submit their hours on their last day.

Long Term Disability (LTD) Termination

Long Term Disability (LTD) insurance from Standard Insurance Company (The Standard) helps provide financial protection for insured members by paying a monthly benefit in the event of a covered disability. For more information, please refer to the DAS website. Complete the following checklist for long-term disability terminations.

- ☐ Add LTD approval letter to Workday.
- ☐ Add Employee Separation form to Workday
- ☐ The termination date is usually the date on the LTD approval letter unless the agency designates a different date.
- ☐ Make the last day worked the last day they have hours worked on their Workday timesheet.
- ☐ Ask if they want to defer any of their payouts to a deferred comp account (available for new and existing RIC participants) and verify they submitted a RIC Special Deduction form to the RIC team.
- ☐ Are they eligible to retire? If so, provide the link to the applicable retiree checklist.

Note: Once approved for LTD, the employee is eligible for the Retiree/Disabled insurance group instead of COBRA.

Death of Employee

Complete the following checklist for terminations due to the death of an employee.

Note: For the death of an employee age 55 or older, their sick leave balance will be paid out up to $2,000.

- ☐ Add Employee Separation form to Workday.
- ☐ Make the last day worked the last day they have hours worked on their Workday timesheet.
- ☐ Include the date of death in the remarks.
- ☐ Enter new tax elections checking the no wage or no tax box.

Temporary, Seasonal, or Internship

Complete the following checklist for terminations of temporary, seasonal, or internship positions.

- ☐ No attachments required.
- ☐ Make the last day worked the last day they have hours worked on their Workday timesheet.

Transfers

Complete the following checklist for terminations due to **DOT or Regents transfers**.

- ☐ Add Notice of resignation to Workday – either their own resignation letter or a notice to the employee that they've been transferred.
- ☐ The last day worked needs to be the last day they have hours worked on their timesheet.
- ☐ Sick and vacation balances will transfer with the employee.
- ☐ Any comp, holiday comp, banked holiday needs to be paid out prior to transferring.
- ☐ Contact the receiving HRA and provide them the following information. Use the Employee Information Form for Transfers (EIFT).
    - ☐ Sick and Vacation accrual rates and final balances after the last pay period has been processed
    - ☐ FMLA hours used for the fiscal year and total hours worked in the last 12 months
    - ☐ Military hours used for the calendar year
    - ☐ Family Care leave used for the fiscal year
    - ☐ Employment dates
    - ☐ Send them a copy of the employee's personnel file
    - ☐ DOT transfers only: provide all benefits enrollment information
- ☐ Notify the RIC Team, providing employee name, transfer effective date, and new agency.