

# Department of Administrative Services



Workday Foundations

# Data Integrity Team Workday Foundations

- Worker Data
- Hire Process
- Job Change
- Additional Jobs
- Compensation Change
- **Terminations**



# Agenda

1. Introduction
2. Series Overview
3. Terminations
4. Audits and Reporting
5. Close



# Introductions



## Data Integrity Team

- Ryan Englund
- Libbie Saunders

# Workday Foundations



# Workday Foundations – Termination



Termination is separation from state service, not to be confused with off season, or movement to another agency.

Any period less than 15 days of separation is considered a transfer, not a term.

(Mainly Executive branch based on CBA or policy, not to include temps)

( See ORS 240.145)



# Prior to beginning a Termination

- What is the term reason?
- Any outstanding actions such as compensation changes, absence requests, etc?
- Has leave been handled?
- Is the worker off season or on leave?
- Terms should be completed in the month they are effective and/or 14 days in advance to minimize issues with leave payout, final pay, future compensation changes
- Work with managers to keep temp and/or hourly worker terminations up to date.

# Workday Foundations – Termination



## Terminate Employee

Can be initiated by Manager or HR Partner

### Attention:

Oregon state government is one employer. ONLY submit this termination if your employee is leaving state employment. Do not initiate a termination if your employee is moving to a position in another state agency, or another branch of state government. Your employee's new agency will complete the necessary actions to start your employee's transfer. If your employee is leaving state government employment, or retiring, please continue submitting this termination.

## Submit Resignation

Submitted by employee but not required

### Attention:

Oregon state government is one employer. ONLY submit this resignation if you are leaving state employment. Your new agency will complete the necessary actions to start your transfer. If you are leaving state government employment, or retiring, please continue submitting your resignation.



# Termination



## Reason

Primary Reason \*

Search

Secondary Reasons

## Details

Termination Date \*

Last Day of Work \*

Pay Through Date \*

Resignation Date

Primary Reason \*

Search

Board or Commission Member End

Dismissal

Executive Appointment End

Layoff

Limited Duration End

Other

Resignation

Retirement

Seasonal Employment End

Temporary Appointment End

Termination

Trial Service Removal

Pay Through Date \*

# Termination



Reason

Primary Reason \*

Search

← Other

Other > Deceased

Other > Error

Other > No Hours Worked

Other > Other (Involuntary)

De

Termination Date \*

Last Day of Work \*

Pay Through Date \*

Resignation Date

- Before using the reason of error or no hours worked, please connect with our Workday Team via case management. In many cases we can rescind the hire or fix the worker so this reason does not need to be used.
- For the reason of deceased, it should be the date the employee passed away, not after.

# Termination - Retirement



- If a worker will retire and return as a temp, it is not a job change, you must term and hire. How close together you do this is up to your agency payroll, as they have activities with leave and final checks that need to be complete prior to reemployment as a temporary worker.
- Retirement terminations for PERS employees can be tricky for effective date entry in Workday.
- A worker is considered by PERS as retired the 1<sup>st</sup> day of the month following their regular status end, ( a termination with a reason of retirement), so PERS retirement is often listed as the 1<sup>st</sup> of the next month.
- However, the date the retirement should be added to Workday is likely the last day of the month preceding, or the last date worked if employee is not using paid leave.
- For any questions regarding eligibility, effective date, or status you will want to reach out to central PERS and the worker to confirm details regarding the retirement.

# Termination Changes



Reasons may include:

Seasonal - Non return to season

Settlement

Audit results/correction



# Multiple Job Worker - Terminations

- Is it a WOC, 2<sup>nd</sup> paid position, Board and commission member, or volunteer?
- If you have confirmed the additional job should remain, you will need to reach out to us for a primary job swap in order to term the job as an additional.
- Effective date for additional job end should be the last day of employment, not before or after.

# Workers On Leave - Terminations



- Extended leave should be ended prior to the termination.
- If the worker will not be paid for the last day of employment daily LWOP should be used to prevent overpayment.

# What to do after you have done it all



## If you discover a mistake – Things to **know**

We can make changes to existing compensation, but we cannot add new actions to a termed worker.

If the position has been filled after the employee terminated, we cannot rescind a term for addition of compensation or correction purposes

We can often update the date and reason, if we change a term date you will want to work closely with your payroll partners as it will likely cause an over or under payment.

- We do not rescind errors that agencies have the ability to correct on their own
- If you get an error with an effective date you are trying to use, send in a help case
- **PLEASE** leave comments with details of what you updated for all actions

# What to do after you have done it all



## **If you discover a mistake – Things you need to submit a Workday Help Case for assistance**

- Any change in date, or reason
- Any comp changes needed after a termination is complete

If you initiate one of these Business Processes and then remember its not something you can do, please cancel the action and then send in a case. We cannot finish those actions for you.



# Reports for Audit



HCM | Employee Separations Including Transfers to Other Agencies  
HCM | Employee Separations from State Report

Questions?

The background features a light green and white color palette. On the right side, there are several overlapping, wavy, semi-transparent shapes that create a sense of depth and movement. These shapes are layered over a background of fine, light green lines that form a subtle grid or pattern, similar to a topographic map or a technical drawing. The overall aesthetic is clean, modern, and professional.

Next up.....

Look for the Audit Series to be presented again this summer!

