



Initiate a Voluntary Termination

The following describes the process of initiating a voluntary termination for one of your employees. Voluntary terminations consist of resignations and retirements and the department is required to process these directly in Workday.

NOTES:

- This process is not to be used for temporary or student employees. If one of your temporary or student employees has resigned you need to send an email to WCCSupport@montclair.edu with the details.
- When possible, do not initiate terminations more than 3 months in advance.
- You cannot initiate an involuntary termination. All involuntary terminations are processed in Workday by Human Resources. If you have questions about an involuntary termination you can contact hr@montclair.edu.
- An attachment is required to submit a voluntary termination. The attachment should be the letter or email notice from the employee if the voluntary termination is for a resignation or retirement.

Who can initiate this process?

- Supervisor/Manager
- Unit Head/Alternate Unit Head
- Vice President

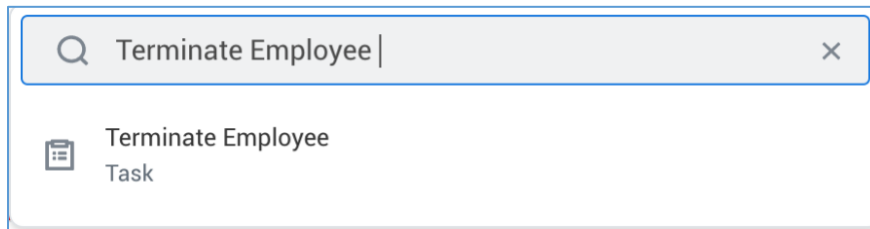
Workflow Steps

- 1) Supervisor/Manager initiates the termination
- 2) Human Resources approval
- 3) Unit Head/Alternate Unit Head approval
- 4) Vice President approval
- 5) HR/Payroll processing

If you have any questions or you encounter any errors during this process contact Workday Customer Care (973-655-5000 option 3 or WCCSupport@montclair.edu).

Instructions

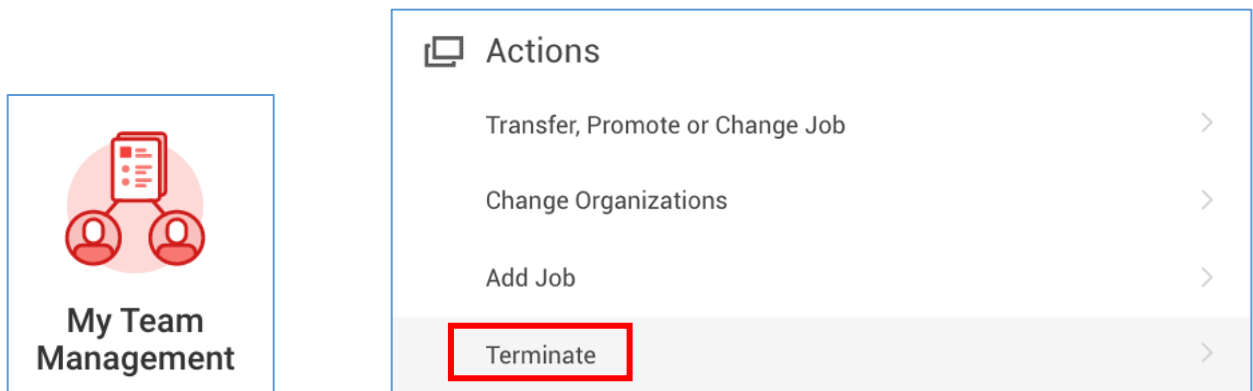
- 1) In the Workday search bar type **Terminate Employee** and select the task that appears.



A search bar with a magnifying glass icon on the left and a close 'x' icon on the right. The text 'Terminate Employee |' is entered in the search bar. Below the search bar, a dropdown menu is open, showing a calendar icon and the text 'Terminate Employee Task'.


OR

Click on the **My Team Management** worklet on your Workday homepage and click on the **Terminate** menu option.



The image shows two parts of the Workday interface. On the left is a 'My Team Management' worklet icon, which consists of a red circle containing a document icon and two person icons, with the text 'My Team Management' below it. On the right is a 'Actions' menu, which is a white box with a red border. The menu title is 'Actions' with a laptop icon. Below the title are four menu items: 'Transfer, Promote or Change Job', 'Change Organizations', 'Add Job', and 'Terminate'. The 'Terminate' item is highlighted with a red rectangular box.

- 2) Search for and select the employee in the **Employee** prompt.



A red header bar with the text 'Terminate Employee' in white. Below the header is a form with a label 'Employee *' and a text input field. The input field is empty and has a dropdown arrow icon on the right side.

- 3) Click **OK** at the bottom of the page.
- 4) Under the **Reason** section you are required to select a **Primary Reason** for the voluntary termination. The **Secondary Reasons** are optional and multiple reasons can be selected. Please review the chart below for a brief explanation of each available reason.

Reason

Primary Reason *

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Secondary Reasons

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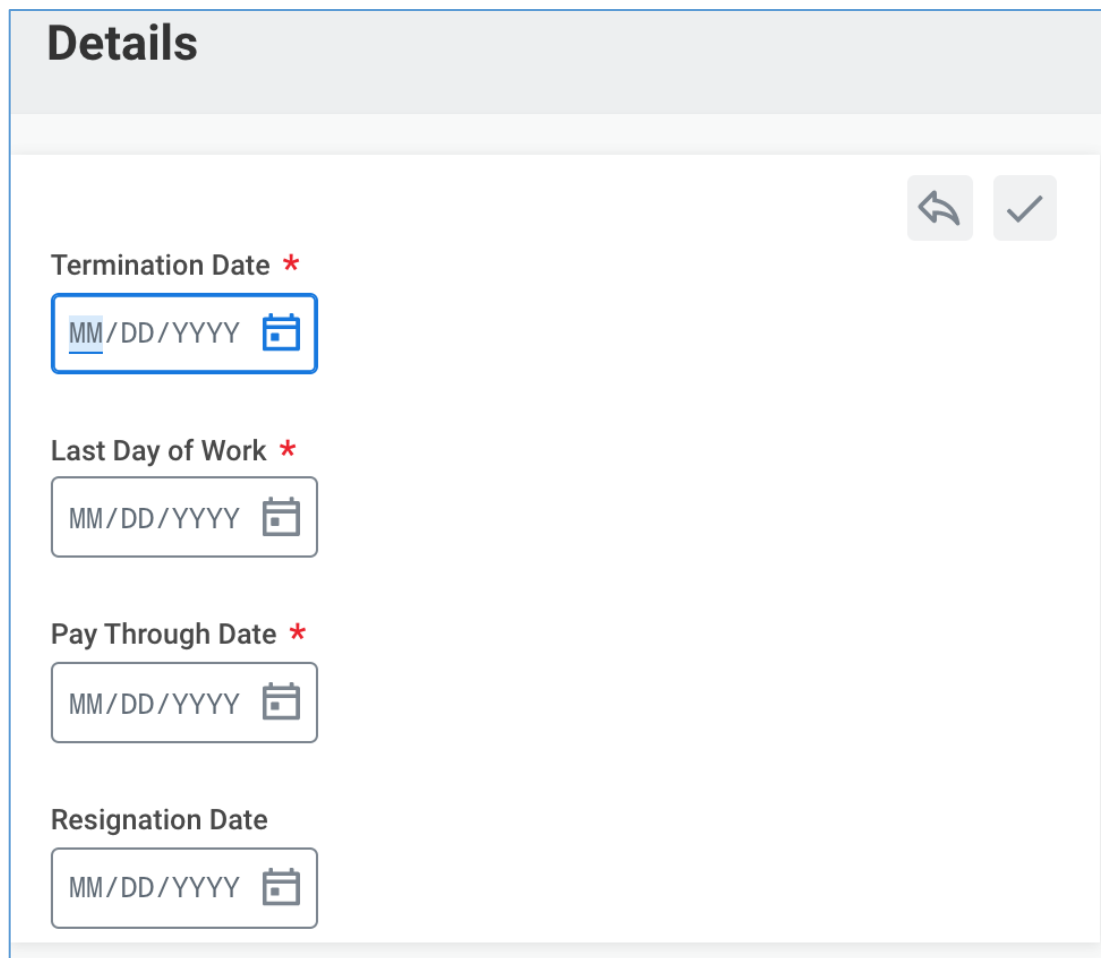
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<i>Reason</i>	<i>Definition</i>
<i>Resigned</i>	Employee gives proper notice that they will be leaving the University. This can be for a variety of different reasons. If no specifics are provided, please chose this reason.
<i>Retirement (Regular)</i>	When employee follows proper protocol for retirement.
<i>Retirement (Early)</i>	When employee retires before the State's official retirement age.
<i>Retirement (Disability)</i>	When employee chooses to retire due to a disability.
<i>Transfer to Other State Agency</i>	To be used if employee transfers to one of the following NJ State Agencies
<i>Health (Family Member)</i>	Resigned due to family related medical reasons.
<i>Health (Self)</i>	Resigned due to personal medical reasons.
<i>Lack of Advancement Opportunity</i>	Resigned due to the inability to advance in their position.
<i>Lack of Child Care</i>	Resigned due to lack of affordable child care.
<i>Lack of Transportation</i>	Resigned due to a lack of transportation to and from work.
<i>Lack of Development Opportunity / Professional Growth</i>	Resigned because they feel their position is finite and they have reached their limit growth-wise.
<i>Death</i>	If employee passes away.
<i>Military</i>	Resigned due to military service.
<i>Personal</i>	Resigned for personal/family related reasons.
<i>Pursue Education</i>	Resigned to return to school/pursue education.
<i>Pursue Another Career Opportunity</i>	Resigned to pursue another career opportunity.
<i>Relocation</i>	Resigned due to relocating.

5) Under the **Details** section you are required to enter three dates. All three dates should be the same.

- **Termination Date** = The termination date is the last date of employment.
- **Last Day of Work** = This date should be the same as the Termination Date even if the employee is planning to use vacation time leading up to their official last date of employment.
- **Pay Through Date** = This date should always match the Termination Date.

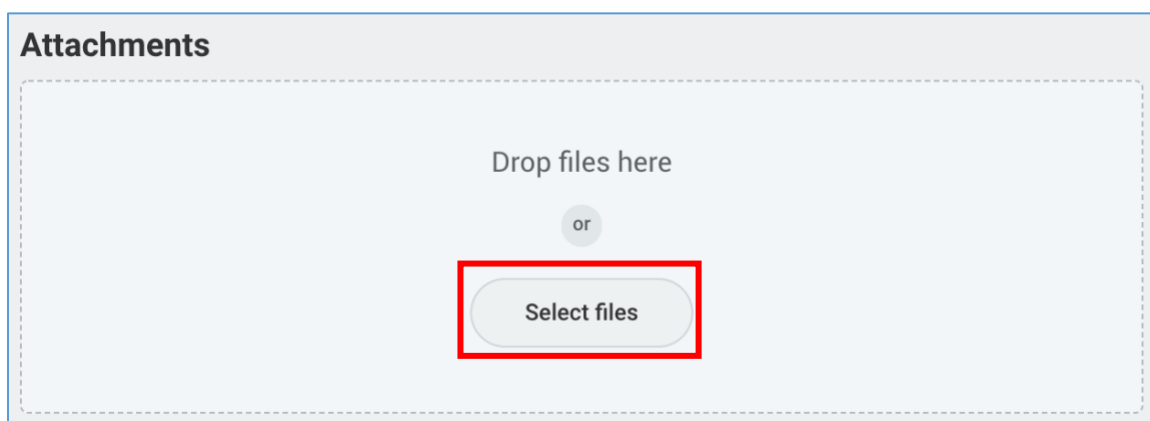
You should enter the **Resignation Date** for all resignations and retirements. This is the date that the employee submitted their notice of resignation or retirement.



The screenshot shows a form titled "Details" with a light gray header. In the top right corner, there are two icons: a share icon and a checkmark icon. The form contains four date input fields, each with a calendar icon to its right:

- Termination Date ***: The input field contains "MM/DD/YYYY" and is highlighted with a blue border.
- Last Day of Work ***: The input field contains "MM/DD/YYYY".
- Pay Through Date ***: The input field contains "MM/DD/YYYY".
- Resignation Date**: The input field contains "MM/DD/YYYY".

- 6) An attachment is required for all voluntary terminations. Scroll to the bottom of the page to the **Attachments** sections. You can drag and drop a file into the box to attach it or you can click the **Select files** button to search for a file on your device for attachment.



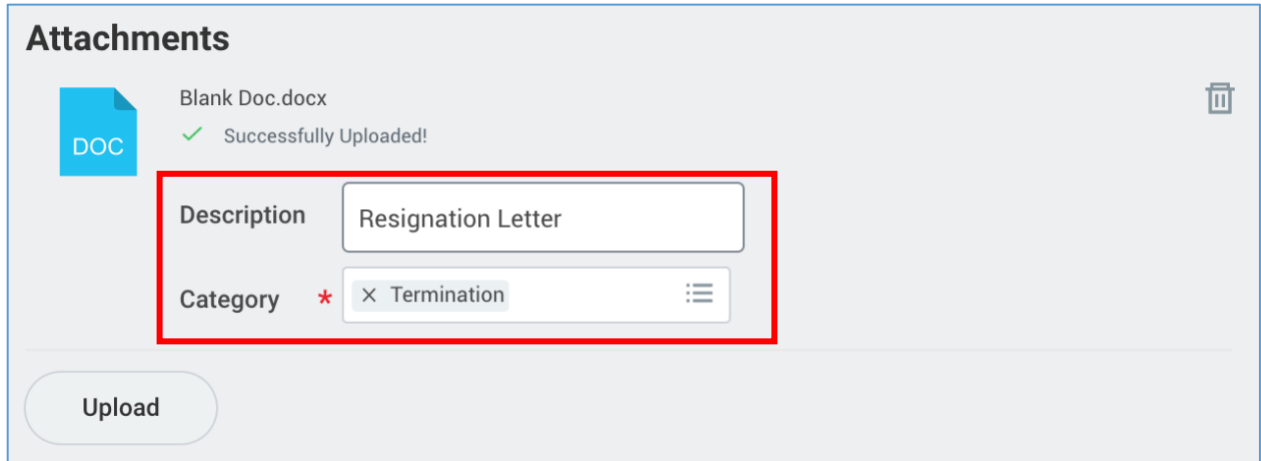
The screenshot shows a section titled "Attachments" with a light gray header. Below the header is a large dashed-line box containing the text "Drop files here" and "or" in a small circle. Below this is a button labeled "Select files", which is highlighted with a red rectangular border.

Type a brief description of the attachment in the **Description** field.

Always select **Termination** as the **Category**.

If you need to attach more than one file click the **Upload** button below the file you already added.

If you need to remove a file click the trash can icon to the right of the file.



The screenshot shows a form titled "Attachments" with a light gray background. At the top left, there is a blue document icon labeled "DOC" next to the text "Blank Doc.docx" and a green checkmark with the text "Successfully Uploaded!". A trash can icon is located at the top right. Below this, a red rectangular box highlights the "Description" and "Category" fields. The "Description" field is a text input containing "Resignation Letter". The "Category" field is a dropdown menu with a red asterisk, showing "Termination" and a menu icon. At the bottom left of the form is a rounded "Upload" button.

7) Click **Submit** at the bottom of the page.