# SMART PAYROLL – SEPARATIONS/TERMINATIONS CHECKLIST

Revised 10/8/18

| SEPARATIONS AND TERMINATIONS PROCESS – SCREEN CHECKLIST | | | |
|---|---|---|---|
| Dept | Screen Title and Description | Processing Notes | √ |
| | Employee Life Cycle<br>Separation and Terminations | Effective Date, Term or Leave of Absence. | |
| | Demographics<br>Employee Demographics | Payroll Tab, Change Pay Code to Hourly-TE Required. Change Check Location to Inactive/Not Working/Term. Change other fields as necessary – New address for W2 purposes, etc. | |
| | Contact<br>Employee Phone | Change if applicable. | |
| | Demographics, Retirement Tab<br>Retirement Plan | If employee is retiring Do Not change retirement plan or retirement status. These fields are only to be updated if a retired employee returns to work for your district. | |
| | Pay Item<br>Employee Earnings/Deductions | If employee has any miscellaneous auto pay or deductions (cash in lieu of insurance coverage, for example) change the frequency to Inactive. | |
| | Pay Item 9990 - Direct Deposit | Inactivate direct deposit | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |