



HOW TO PROCESS A TERMINATION

When to Use the Life Event Process Versus Termination

When you encounter the following situations, the best practice is to complete a life event versus the termination process:

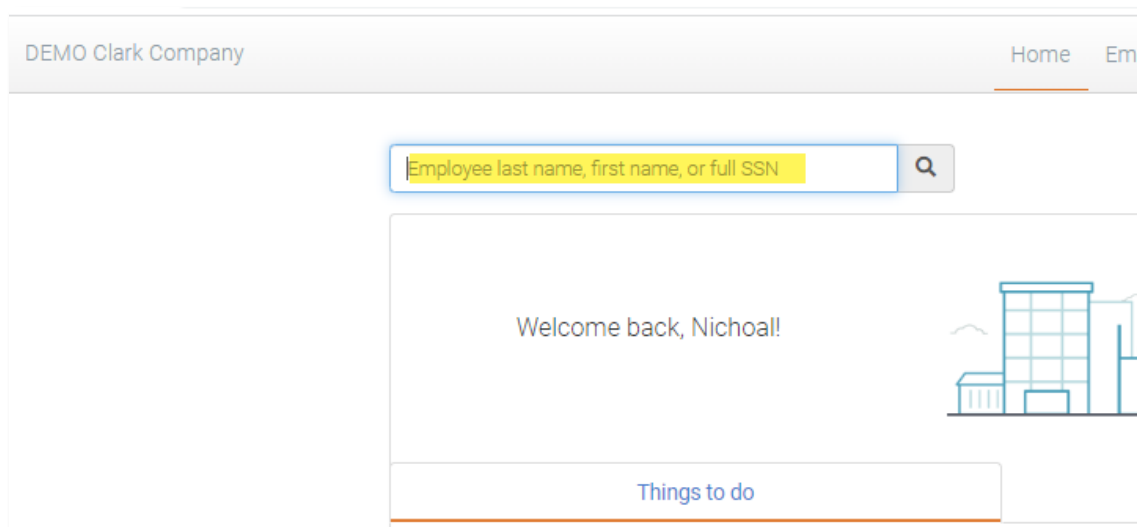
1. An employee wishes to terminate some of their benefits, but not all of them
2. An employee is still employed by the district but wishes to have all of their benefits terminated
Note: It is important to follow the life event process versus termination for this scenario to ensure the employee still receives communications from Employee Navigator regarding future open enrollments
3. You only need to terminate the benefits for a dependent or spouse but not the employee

Please ensure that the life event is applicable for your desired changes, such as using Spouse Gains Coverage at Their Employer when the employee wishes to drop their coverage due to obtaining other coverage. Please see the life event processing document for more information.

Processing a Retroactive or Current Termination

Note: Carrier retroactivity and section 125 rules may apply

1. Log in to Employee Navigator
2. Search for the employee's name or SSN in the search bar



3. In the Employee Management tab, select **Terminate Employment** in the Actions box



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4. Verify their address and click **Next**



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5. Enter the retroactive termination date and the reason for termination, then click **Next**

Note: Carrier retroactivity rules still apply – premium credits may not be given for any termination entered further back than 30 days and Section 125 rules apply

Terminate Employee [Read Support Article](#)

Bran Flakes

- Affected Plans
No plans affected
- Employee Information
- Dependent Information
- Validated Information

Termination Date
04/04/2023

What is the Reason for Termination?

- Voluntary Termination
- Involuntary Termination
- Reduction in Force
- Retirement
- Death of Employee
- Gross Misconduct

Next Cancel



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6. The system will ask you to confirm the termination action

The screenshot shows the 'Terminate Employee' interface. On the left, there are expandable sections: 'Affected Plans' (No plans affected), 'Employee Information', 'Dependent Information', and 'Validated Information' (checked). The main area contains a 'Termination Date' field set to 04/04/2023 and a 'What is the Reason for Termination?' section with radio buttons for 'Voluntary Termination' (selected), 'Death of Employee', and 'Gross Misconduct'. A confirmation dialog box is overlaid on the screen, asking 'Are you sure?' and 'Are you sure you want to terminate this employee?' with 'Continue' and 'Cancel' buttons.



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7. When the retroactive termination has been successfully completed, you will see this message:

Bran Flakes has been terminated 

The following affected plans have been ended:

Priority Health
2023 PH POS HSA 80-60% \$1500 -3000: End
Date: 04/04/2023

[Back to Manage](#)



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Processing a Future Termination

Please follow the below process for terminations 30+ days from the date of entry:

1. Log in to Employee Navigator
2. Search for the employee's name or SSN in the search bar
3. Go to the employee's Profile tab

The screenshot shows the Employee Profile page for Fred Flintstone. The page has a search bar at the top right with the placeholder text "Employee last name, first name". Below the search bar are several tabs: "Employee Management", "Profile" (highlighted in yellow), "Update Benefits", "Benefits Summary", "Documents", "Timeline", and "Integrations". The main content area shows the employee's name "Fred Flintstone" and title "Superintendent". To the right, there is a "Status" section with three items: "HRIS required fields complete" (checked), "Benefits required fields complete" (unchecked), and "EE-entered fields for enrollment complete" (checked). Below this is a "Manage Enrollments" button. On the far right, there is a "Tasks" section with three items: "Incomplete", "Complete", and "HR Pending".

4. Click **Employment**

The screenshot shows the Employee Employment page for Fred Flintstone. The page has a search bar at the top right with the placeholder text "Employee last name, first name, or full SSN". Below the search bar are several tabs: "Employee Management", "Profile" (highlighted in yellow), "Update Benefits", "Benefits Summary", "Documents", "Timeline", and "Integrations". The main content area shows the "Employment" section. On the left, there is a "Employee Record" dropdown menu with several options: "Profile", "Employment" (highlighted in yellow), "Leave Status", "Addresses", "Contact", "Compensation", "ACA", "Scheduled Changes", and "Personal". The "Employment" section contains several fields: "Employee ID" (text input), "Payroll ID" (text input), "Statutory class" (dropdown menu with "--Select--"), "Time clock ID" (text input), "Employment status" (radio buttons for "Active" and "Terminate"), and "Hire date" (calendar icon and text input with "03/29/2023"). A green "Save" button is located to the right of the "Employee ID" field.



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5. Click **show additional info**

The screenshot shows the 'Employee Management' interface with the 'Profile' tab selected. The 'Employment' section is active, displaying various fields for employee information. A red arrow points to a yellow button labeled 'show additional info' at the bottom of the form. The fields include:

- Employee ID (text input)
- Payroll ID (text input)
- Statutory class (dropdown menu)
- Time clock ID (text input)
- Employment status (radio buttons for Active and Terminate)
- Hire date (calendar icon)
- Affiliate hire date (calendar icon)
- Retired (radio buttons for Yes and No)
- Annual review date (calendar icon)
- EEO Job Category (dropdown menu)
- Decision maker (radio buttons for Yes and No)
- Is exempt (radio buttons for Yes and No)
- Is full-time (radio buttons for Yes and No)

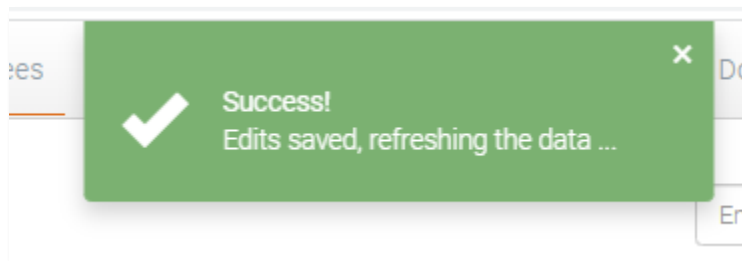
6. Enter the employee's future termination date and then click **Save** at the top of the page



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The screenshot shows the 'Employment' section of the Employee Navigator interface. The form includes fields for Employee ID, Payroll ID, Statutory class, Time clock ID, Employment status (Active/Terminate), Hire date, Affiliate hire date, Retired status, Annual review date, EEO Job Category, Decision maker, Is exempt, and Is full-time. A 'Future termination date' field is highlighted in yellow and contains the date 04/14/2023. A green 'Save' button is visible in the top right corner of the form area.

7. You will see a green box quickly pop up when the future termination date has been successfully saved



Note: Employees who are terminated for a future date will still be able to access Employee Navigator and will show as an active employee on your active employee reports and invoice until this date has passed



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How to Undo a Retroactive or Current Day Termination

If the termination was done in error and the termination date has passed, please follow the below steps to reinstate benefits as they were previously with no coverage gap:

1. Log in to Employee Navigator
2. Search for the employee's name or SSN in the search bar
3. On the Employee Management tab, select **Undo Termination** in the Terminate Actions box

Bran Flakes [Add a note](#)

Employee last name, first name, or full SSN

Employee Management Profile Update Benefits Benefits Summary Documents Timeline Integrations

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Administrators (Associates)
Principal

Status

- ✓ HRIS required fields complete
- ✓ Benefits required fields complete
- ✓ EE-entered fields for enrollment complete

Employee has been terminated.

Tasks

Incomplete	0
Complete	0
HR Pending	0

Manage Enrollments

- New Hire Enrollment
- Modify Current Enrollments You should only modify enrollments due to data entry errors. Use the Update Benefits tab for enrollment changes due to life events.
- Open Enrollment Open enrollment window has expired.
- Newly Eligible Enrollment

Termination Actions ⓘ

- Rehire
- Undo Termination**
- Terminate Editor beta



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- 4. Review the employees benefits and click **Undo Termination**

Undo Termination for an Employee

Undo Termination Onboarding Send an Email

Bran Flakes

! Undo Termination is for undoing an erroneous termination. It removes the employee termination date and reason and reinstates the employee's benefits. If you intend to rehire with a different date and a new benefits eligibility period then use the Rehire tool.

Plans that will be reinstated:
2023 PH POS HSA 80-60% \$1500 -3000 04/04/2023 04/04/2023

Employee was recently terminated. Carriers may not have received notice to end benefit coverage. It will be your responsibility to check with your carriers to ensure the termination was processed or contact them directly with any needed information.

Note: This will also remove the COBRA event record. It is your responsibility to contact your COBRA TPA after processing the reinstatement. If you intend to change the termination date or reason then use the Terminate Editor tool instead of reinstating.

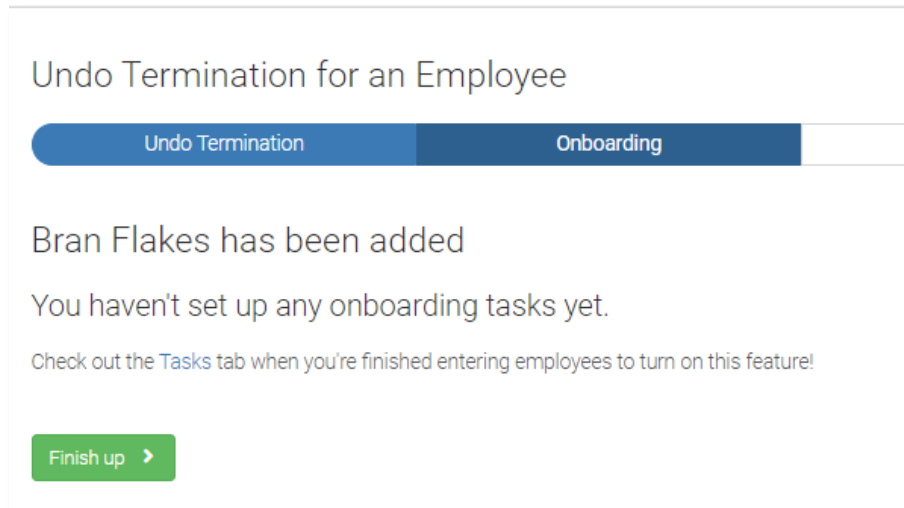
Hire Date: 04/04/2023
Termination Date: 04/04/2023
Terminated On: 04/04/2023
Reason: Voluntary Termination

Undo Termination > [Cancel Undo Termination](#)

- 5. Select **Finish up**



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6. The system will prompt you to send the employee a registration email. You can either select **Send** or **No, Not Now** depending on the circumstance
7. Review the employee's benefits to ensure their benefits reinstated as intended

Note: Please see the New Hire/Rehire Checklist for processing steps for a rehire – the rehire option is only to be used for situations when an employee is hired back to a district and a coverage gap or new hire election period needs to occur



HOW TO PROCESS A TERMINATION

How to Undo a Future Termination

If the future dated termination was done in error or the employee rescinds their resignation and the termination date has not yet passed, please follow the below steps to reinstate their benefits as they were previously with no coverage gap:

1. Log in to Employee Navigator
2. Search for the employee's name or SSN in the search bar
3. Go to the employee's Profile tab

The screenshot shows the 'Profile' tab for Fred Flintstone. The employee's name is Fred Flintstone, and their title is Superintendent. The status section shows three items: 'HRIS required fields complete' (checked), 'Benefits required fields complete' (unchecked), and 'EE-entered fields for enrollment complete' (checked). There is a 'Manage Enrollments' button and a 'Tasks' sidebar with 'Incomplete', 'Complete', and 'HR Pending' options.

4. Click **Employment**

The screenshot shows the 'Employment' page for Fred Flintstone. The 'Employee Record' sidebar is open, and 'Employment' is selected. The main form contains fields for Employee ID, Payroll ID, Statutory class (set to --Select--), Time clock ID, Employment status (set to Active), and Hire date (set to 03/29/2023). A 'Save' button is visible in the top right corner.



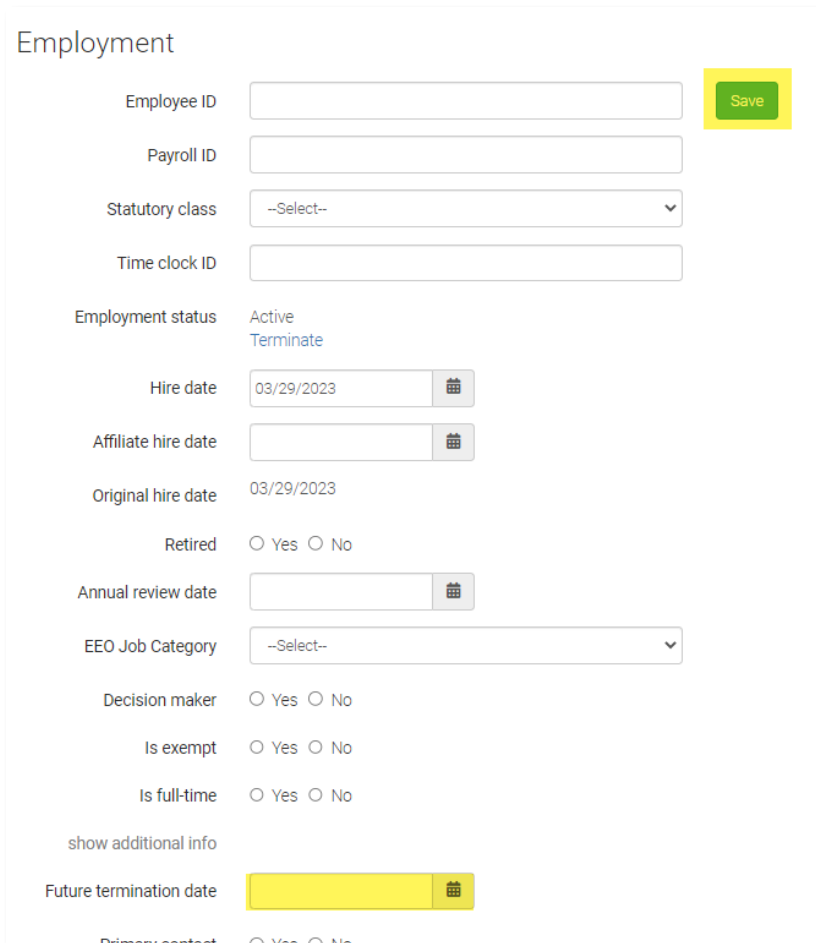
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5. Click **show additional info**

The screenshot displays the 'Employee Management' interface, specifically the 'Profile' tab under 'Employee Record'. The 'Employment' section is active, showing various fields for employee information. A yellow box highlights the 'show additional info' button at the bottom of the form, with a red arrow pointing to it. The form includes fields for Employee ID, Payroll ID, Statutory class, Time clock ID, Employment status (Active/Terminate), Hire date, Affiliate hire date, Retired status, Annual review date, EEO Job Category, Decision maker, Is exempt, and Is full-time. A 'Save' button is visible in the top right corner of the form area.

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6. Remove the employee's future termination date and then click **Save** at the top of the page



The screenshot shows an 'Employment' form with various fields. The 'Future termination date' field is highlighted in yellow. A green 'Save' button is visible in the top right corner of the form area.

Employment

Employee ID

Payroll ID

Statutory class --Select--

Time clock ID

Employment status Active Terminate

Hire date 03/29/2023

Affiliate hire date

Original hire date 03/29/2023

Retired Yes No

Annual review date

EEO Job Category --Select--

Decision maker Yes No

Is exempt Yes No

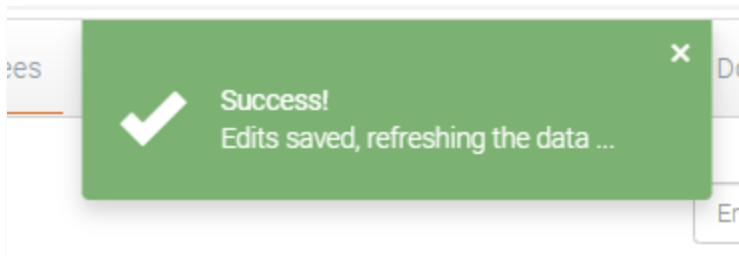
Is full-time Yes No

show additional info

Future termination date

Primary contact Yes No

7. You will see a green box quickly pop up when the future termination date has been successfully saved



8. Review the employees benefits to ensure their benefits reinstated as intended