

Termination Information Procedure – Add Record

Summary

This procedure explains how to manually create a Termination Information Data Collection using the Add Record method via Employer Access.

Steps

The procedure is as follows:

1. Navigate to the **Left-hand Tool Bar**.
 - a. Click the **Business Functions** (graph) icon.
 - b. Click **Data Collections**.
 - c. Click **Create Data Collection**.
 - d. Complete the following fields in the **1. Definition** tab:
 - **Data Type:** Determines the type of workflow (e.g., **Termination Information**)
 - **Partner Code:** This field will be pre-populated for your convenience.
 - **Effective Date**
 - **Data Collection Name:** For record-keeping purposes, we recommend naming the Data Collection with the following information:
Partner #-[data collection type]_[current date]- Member first and last name – Member ID.
 - e. Click **Save and Continue**.
2. Click **Add Record** to create the Termination Information Data Collection manually.
 - a. Complete the following fields in the **2. Add Member Data** tab:
 - Items with an asterisk are mandatory.
 - Enter:
 - Member Information
 - **Social Security Number**
 - **Member Id** (optional)
 - **First Name**
 - **Last Name**
 - Employment Information
 - **Position** (if member had multiple employment periods with your employer, ensure to use the current position the member is holding)
 - **Termination Reason**
 - **Termination Date**

- Payroll Information
 - **Unused / Unpaid Sick days (only in whole days)**
 - b. Click **Save**.
3. Click **Add Record** to enter another member, repeat instructions from step 2 until all members are added to the data collection.
 4. Click **Validate** to begin the validation process in the **3. Validate Member Data** tab. In this step, data is validated against formatting and business requirements. Respond to the errors and/or warnings and close the **Member Summary**. Once all exceptions have been resolved, click **Continue**.
 - a. Errors will show in **RED**, and warnings will show in **ORANGE**, with the total number of issues for each member. On the right-hand side of your screen, you have the option to check the box for the specific error/warning to view the members that were impacted as such. This allows you to filter by error/warning.
 - b. **To respond to an ERROR**, click the row of the member's name to highlight and open the Member Summary to the right.
 - o Click **View Member Data** to make any necessary changes and corrections. After the correction is made, click **Save and Validate**.
 - o Click **Postpone Member** to save the member in a Data Collection to be submitted later. In the pop-up window, enter an explanation regarding the reason why the member is being postponed, then click **Save**.
 - o Click **Reject Member** to remove the member from the data collection. In the pop-up window, enter an explanation regarding the reason why the member is being rejected, then click **Save**.
 - c. **To respond to a WARNING**, click the row of the member's name to highlight and open the Member Summary to the right. You then will need to complete one of the four options below to address the warning.
 - o Click **View Member Data** to make any necessary changes and corrections. After the correction is made, click **Save and Validate**.
 - o Click **Approve Warning**. In the pop-up window, click the drop-down arrow to indicate a reason to approve the warning. Click **Save**.
 - o Click **Postpone Member** to save the member in a Data Collection to be submitted later. In the pop-up window, enter an explanation regarding the reason why the member is being postponed, then click **Save**.
 - o Click **Reject Member** to remove the member from the data collection. In the pop-up window, enter an explanation regarding the reason why the member is being rejected, then click **Save**.

5. From the **4. Review & Submit** tab review the listed Data Collection, Data Entry Summary and Reports. Once review is complete, click **Submit** to finalize filing the Data Collection.

This procedure is complete.