Retroactive Payments to Terminated Employees

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Use this job aid to guide you through the process of entering a retroactive payment for a terminated employee.

Section 1: *Refer to this Section when making a retroactive payment to an employee who has been terminated in Core-CT*

Section 2: *Refer to this Section when making a retroactive payment to an employee who was never converted into Core-CT*

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Section 1 - Employees who are terminated in Core-CT and have an HR Status of Inactive.

Part A – Rehire Terminated Employee

Step	Step Details	Core-CT Module
Rehire terminated employee	1. Verify the position and combination code are currently active and in the same Department as the terminated employee. If the position or combo code is inactive, or it has been transferred to a different department, you must use the Conversion position. See FAQ "What is the Conversion Position". 2. The Agency HR Specialist navigates from the ***Fluid Dashboard***, select ***Core-CT HRMS > Workforce Administrator Tile > Manage Human Resources > Manage Job.*** 3. At the Search Page, enter the employee number or name in the correct search field and press "Search". 4. Click "Create Job Action" button. 5. Enter the *Effective Date which is the date of termination. 6. Enter the Effective Sequence which is one number higher than the last 7. Enter the **Action of "Rehire" 8. Enter the *Reason of "NoEmploy-Payout /DataChg Only" 9. **Verify** all Job Data fields remained the same as termination row. 10. **Save the Job Data information and return to the Job Actions Summary page.** Click the "Dropdown" icon underneath Actions and then click on Time Reporter Data. Verify the status is 'Inactive'. (Terminated employees will be paid out of Additional Pay.) If status is "Active", click on the "+" button to add in a new effective dated row. Enter Effective Date of previous job data termination row and change the status to "Inactive". Click save to save any changes. 11. At the Job Actions Summary page click the "Dropdown" icon underneath Actions and then click on Notes. Verify the selection criteria, and then click on the "Add a Note" button to add notes for the action. 13. Click "Save"	HR
	Important: Once the paycheck has been confirmed, you must then return the employee to terminated status. Use the same effective date and Action Reason combination as the original termination	

Part B – Enter Additional Pay for employees.

Record the retroactive payment entry into Additional Pay on-line (or via interface for Limited Scope agencies) to complete the retroactive process: (Limited Scope Agencies should provide transactions using the same Earnings information required in the on-line Additional Pay entry.) Agencies should ensure that all types of applicable retroactive payments due to the employee are entered under the appropriate earnings code, for example: retroactive salary, overtime adjustment, longevity adjustment.

Step	Step Details	Core-CT Module
Additional Pay	1. Agency Payroll Specialist navigates to ***Nav Bar> Menu > Core-CT HRMS > Payroll for North America> Employee Pay Data USA> Create Additional Pay*** 2. At the Search Page, enter the employee number or name in the correct search field and press "Search" 3. Review existing Additional Pay records, if one does not exist for the needed earning code, add a new row by clicking the "+" button. If one does exist, then add a new row at the effective date section. If this is a new employment record, do not add a new row because the page will open as blank. 4. Enter the Earnings Code for the payout payments 5. Enter the *Effective Date which is the first day of the pay period you are entering the payment 6. Enter the End Date which is the last day of the pay period you are entering the payment 7. Enter Additional Sequence which is "1" 8. Enter Earnings Amount, which is the payment amount 9. Click the 'OK to Pay' check box If the retro payment needs to be charged to a specified account code, expand the Job Information section and scroll down to the Job Data Override section. Enter the appropriate Combination Code. (If you do not override the combination code, the payment will be charged against the default position you have selected.) 10. Click "Save"	PY

Part C – Enter Employee's General Deduction Data

Use this section to set up an employee's General Deduction. If a new Employee Record number has been added, you will need to enter new appropriate General Deductions. If an employee record has been activated, you will need to review the existing General Deductions for accuracy.

Step	Step Details	Core-CT Module
General Deduction Data	1. The Agency Payroll Specialist navigates to ***Nav Bar> Menu > Core-CT HRMS > Payroll North America> Employee Pay Data USA> Deductions>Create General Deductions*** to verify if employee needs General Deductions added or updated. 2. At the Search Page, enter the employee information into the correct search field and click "Search" 3. If employee needs general deductions entered, in the General Deduction subtitle, add a new effective dated row by clicking the "+" button. If this is a new employment record you will see a blank page, begin entering the data without clicking on the "+" button 4. Select the Retirement Deduction code needed (must add in deduction codes for retirement for both Employee and Employer share prior to clicking on the 'Save' button). 5. Under Deduction Details section, enter in the Effective Date, which is the beginning of the pay period the payment will be issued. (The Deduction Calculation Routine should default in as Default to Deduction Table.) 6. At the Deduction End Date field, enter in the End Date which is the end of the pay period. 7. Add another new effective dated row by clicking the "+" button. 8. Select the next Retirement Deduction code needed (either remaining Employee or Employer share deduction code). 9. Under Deduction Details section, enter in the effective date, which is the beginning of the pay period which the payment will be issued. (The Deduction Calculation Routine should default in as Default to Deduction Table.) 10. At the Deduction End Date field, enter in the End Date which is the end of the pay period. 11. Click "Save".	PY

Part D –Verify existing Employee's State and Federal Taxes or Enter for Part C Employee

Use this section to enter or verify an employee's State and Federal Taxes. An employee only has one State and Federal Tax setup in Core-CT. Verify the setup is accurate.

Step	Step Details	Core-CT Module
State and Federal Taxes	1. The Agency Payroll Specialist navigates to ***Nav Bar> Menu > Core-CT HRMS > Payroll North America> Employee Pay Data> Tax Information> Update Employee Tax Data*** 2. At the Search Page, enter the employee information into the correct search field and click "Search" 3. Verify employee's federal and state taxes are valid or complete their tax setup.	PY

Part E – Review Direct Deposit Setup for employee

An employee only has one Direct Deposit setup in Core-CT. Employees who terminated for reasons *other than retirement* must have an **inactive** Direct Deposit setup. If the setup is active, follow the instructions below to inactivate the Direct Deposit. Employees who retired may choose to have Direct Deposit for retirement payroll purposes. This setup is maintained by OSC/Retirement Payroll **and must not be changed**. In cases where a retiree has chosen to have Direct Deposit, the retroactive payment will go to the retiree's Direct Deposit account.

Step	Step Details	Core-CT Module
Direct Deposit	1. The Agency Payroll Specialist navigates to ***Nav Bar> Menu > Core-CT HRMS > Payroll for North America> Employee Pay Data> Request Direct Deposit*** 2. At the Search Page, enter the employee into the correct search field and click "Search" 3. Verify employee's direct deposit has a status of "Inactive". 4. If status is "Active", enter a new effective dated row by clicking the "+" button. Insert effective date which is date prior to the beginning of the pay period. Change the Status field to "Inactive". 5. If the Deposit Type is not set to "Balance of Net Pay", you must do so now before you save the transaction. If Balance of Net Pay is not set at this point, you will get a warning message and will be unable to save the page. 6. Click "Save".	PY

Part F – Processing events in On Demand Event Maintenance.

After the Job Data transaction is entered, the Agency Benefit Specialist must process the HIR-Hire or REH-Rehire events in the On Demand Event Maintenance page.

Step	Step Details	Core-CT Module
On Demand Event Maintenance	7. The Agency Benefits Specialists navigates to ***Nav Bar> Menu > Core-CT HRMS > Benefits> Manage Automated Enrollment> Events>On Demand Event Maintenance*** 8. At the Search Page, enter the employee information into the correct search field and then click “Search” 9. If Benefits Administration has run after the event was entered into Job Data, the Event Status will be “Prepared” and will be in “Open” status 10. Check the “Finalize/Apply Defaults” check box, and press ‘Validate/Finalize’ to close the event. • If Benefits Administration has not run, go to the On Demand Event Maintenance page and click Schedule/Prepare Activities. 11. After processing is completed, check the “Finalize/Apply Defaults” check box, and press “Validate /Finalize” to close the event.	BN

Important - Once the entire process is completed, return the employee back to terminated status in job data, using the same effective date and *Action Reason combination as the original termination. You will also need to repeat the On Demand Maintenance steps in Part F.

Section 2 – For Employees who <u>were not converted</u> in Core-CT but have a retroactive salary adjustment due:

Part A – Hire Terminated Employee into Core-CT

Step	Step Details	Core-CT Module
Hire employee that was never converted into Core-CT.	12. The Agency HR Specialist reviews the job aid located at: http://www.corehttp://www.core-ct.state.ct.us/hr/human_resources/hr_jobaids.htmct.state.ct.us/hr/human_resources/hr_jobaids.htm titled "Hiring an Employee" beginning on page 3. 13. Enter the effective date of the original termination for the Personal Information. 14. Once the Personal Information has been entered and you have arrived at the Work Location tab in Job Data, the *Action will default in as "Hire". 15. Enter the Reason of "NOE - No Employment - Payout Only". 16. Enter the Conversion Position Number assigned to your agency. (See FAQs to find information on locating the Conversion Position) The Department and Location codes will default in. Verify the default for the location is accurate and if not accurate correct. <u>The Department code must not be changed</u>. If your agency has multiple Department codes, you must locate a position with the correct department code. 17. Click the tab for Job Information and change the job code to the employee's job code prior to termination for which the retroactive payment is due. Also, verify the following fields reflect the employee's information at the time of termination: Regular/Temporary, Full/Part, Employee Class, Standard Hours and FTE. (Note: If these fields are inaccurate, correct this information.) 18. Click the tab for Job Labor and change the Union Code to the union code at time of termination. 19. Click the Payroll tab and verify the FICA Status has defaulted in as appropriate. (Check with your Payroll Specialist to verify the appropriate status.) 20. Click the Salary and Compensation tab and change the employee's salary plan, grade and step as of time of termination. (Note: If employee is in a range plan, there would not be a step to insert and the step field must be left blank.) 21. Click the "Default Pay	HR

	22. Click the "Default Pay Components" button if this Salary Plan is a Step plan and the compensation rate at the time of separation should default into the Compensation Rate in the bottom and center of the page. If the Salary Plan is a range plan, delete the existing amount in the bottom of the page and enter in the new biweekly amount. Then click on the "Calculate Compensation" button and the biweekly rate will default into the Compensation Rate at the center of the page. **NOTE**: (A) If employee is hourly and the incorrect hourly compensation rate defaults in at the point you click the "Calculate Compensation" button, review your employee's set up on the Job Information tab. Verify the employee is set up as "Part Time" and the correct standard hours for this employee are listed. Next, multiply the standard hours (weekly) by 2 (per pay period) and multiply this amount by the employee's last hourly rate. The result is the biweekly compensation rate, which must be entered on the Compensation tab, Comp Rate field (bottom of the page). Next verify the Frequency under Pay Components is set to "BCT" and the Frequency on the Compensation Rate line is set to "State of CT Hourly". Next, click the "Calculate Compensation" button and verify the correct hourly compensation rate appears (at the center of the page). 23. Example: On the Job Information tab, 24. The employee's full/part time indicator is set up as "Part Time". 25. The Standard Hours are listed as "20" hours per week. 26. The employee's hourly rate is $25.00 (Hourly rate does not appear on this page; you must determine the rate outside of the system). 27. Multiply the standard hours (20) by 2, which will give you the standard hours worked per pay period (40). Multiply 40 hours per pay period by the hourly rate ($25.00), which will give you the biweekly compensation rate ($1,000.00). Enter the biweekly compensation rate on the Compensation tab. Next, click the 'Calculate Compensation' button and verify the correct hourly compensation rate appears. (B) If the employee is Full Time biweekly and the correct default compensation does not appear in the compensation rate and comp rate sections please review the pay plan value for effective date. If the pay plan which must be used is PRIOR to the pay plan used at conversion these values will not be available in Core-CT and you will need to manually enter the biweekly amount in the Comp Rate box and click the Calculate Compensation button. The correct biweekly will then appear in the Compensation Rate section above.	

	29. If you continue to have a problem with the Compensation Rate please log a Core-CT Help Desk ticket for assistance. 30. From the Job Actions Summary page click the "Dropdown" icon underneath Actions and then click on Notes. Verify the selection criteria, and then click on the "Add a Note" button to add notes for the action. 31. Click "Save". Continue with Part B through F above to complete the payment process. **Important:** Once paycheck has been confirmed, you must return the employee to terminated status. Use same effective date and Action/Reason combination as the original termination.	

What if there is a row in Job Data after the termination date preventing me from the entering the rehire?
Log a ticket with the Core-CT Helpdesk. We will evaluate the record to determine if the row dated after termination can be removed or if the Rehire will need to be done using Correct History.

What if the employee is no longer active in my agency but is currently employed at a different agency and I no longer have access to the record? (Ex. Transfer)
Your Agency Payroll Specialist will need to contact the current agency with the retroactive amount, the Earn Code, and the Combination Code from your agency that the payment should be made from. The current agency will enter this information into Additional Pay on the employee's record for payment.

What is the Conversion Position?
All Departments have a generic position for payout only purposes. To locate this position from the ***Fluid Dashboard***, select ***Core-CT HRMS >Workforce Administrator> Position Management> Manage Position***. In the search criteria enter your specific Department and the Job Code of CONVVR. If your agency has multiple Department codes, you must locate the position with the correct Department. This position may be filled with multiple terminated employees to make a retroactive payment. If the position number is unknown or if the Refill Indicator is set to Manual, log a ticket with the Core-CT Helpdesk for assistance.
Important – Since this is a generic position, when you hire an employee into this position, you must update all the fields in Job Data to reflect the employee information at the time of termination.

What if the employee is no longer active and the last employing agency was not my agency? You will need to create a new Employee Record Number within your agency to make the payment. Using the Fluid Dashboard, navigate to ***Core-CT HRMS >Workforce Administrator> Manage Human Resources> Organizational Relationship***. At the search page, enter the Employee Number and click on Add Relationship. Change the effective date to reflect the date the employee left your agency and continue with the instructions above for Section 2 – Part A "Hiring a Terminated Employee into Core-CT" as the employee must be placed in the Conversion Position.