How to Terminate Benefits/Deductions When an Employee Terminates Employment

This lesson will show the Banner user how to terminate benefits/deductions when an employee terminates employment.

When an employee terminates employment with the University System their benefit selections need to be terminated. This is critical to prevent incorrect benefits from being established if employment with the University System is every reinstated. There are two forms that can meet this need, PDADEDN and PEAESCH. The PDADEDN form allows terminations on a deduction-by-deduction basis and PEAESCH allows all benefit selections to be termed at the same time.

Employee Benefit/Deduction Form (i.e. PDADEDN)
The Employee Benefit/Deduction Form maintains information about an employee's benefits/deductions, and/or taxes. The PDADEDN form allows you to create, maintain, and terminate benefits, deductions and taxes for an employee. It can be used to establish a deduction record or change an existing deduction record. (See Lesson 4 – Terminating a Benefit/Deduction)
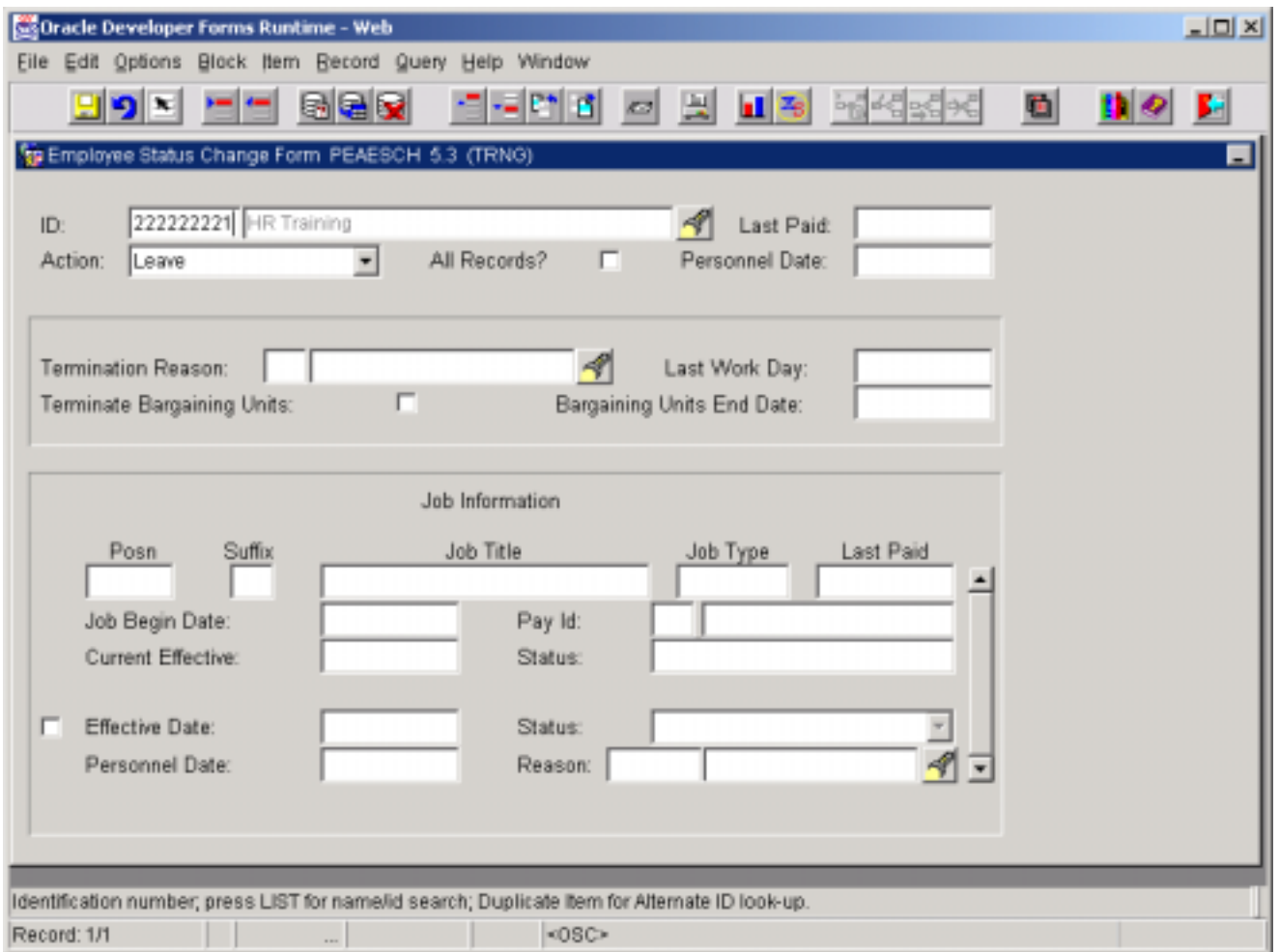
Employee Status Change Form (i.e. PEAESCH)
The Employee Status Change Form enables you to change an employee's status. This form can be used to terminate all deduction records that exist on the PDADEDN form.

PEAESCH   Employee Status Change Form
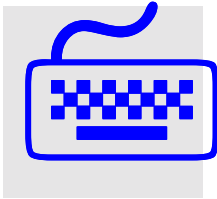
1. From the main screen, type in PEAESCH.

2. The Employee Status Change Form, PEAESCH, will be displayed at the top of the screen.

3. Enter the ID of the employee whose deductions you are terminating.

4. Tab to the Action field and select Termination – this defaults to Leave.

5. Tab across to the Personnel Date field. Insert the termination effective date for the employee.

Banner Tip – Yellow Flashlight
Any time you see a yellow flashlight displayed next to a field, you can click on the flashlight and you will be brought to a table with selections available for that field. Double click on the appropriate selection and the selection will be brought back into the form.

6. Select Next Block TWICE to be brought down into the Job Information section of the form.

7. Select Options from the tool bar, Employee Deduction Information.   Deduction Information will be displayed.
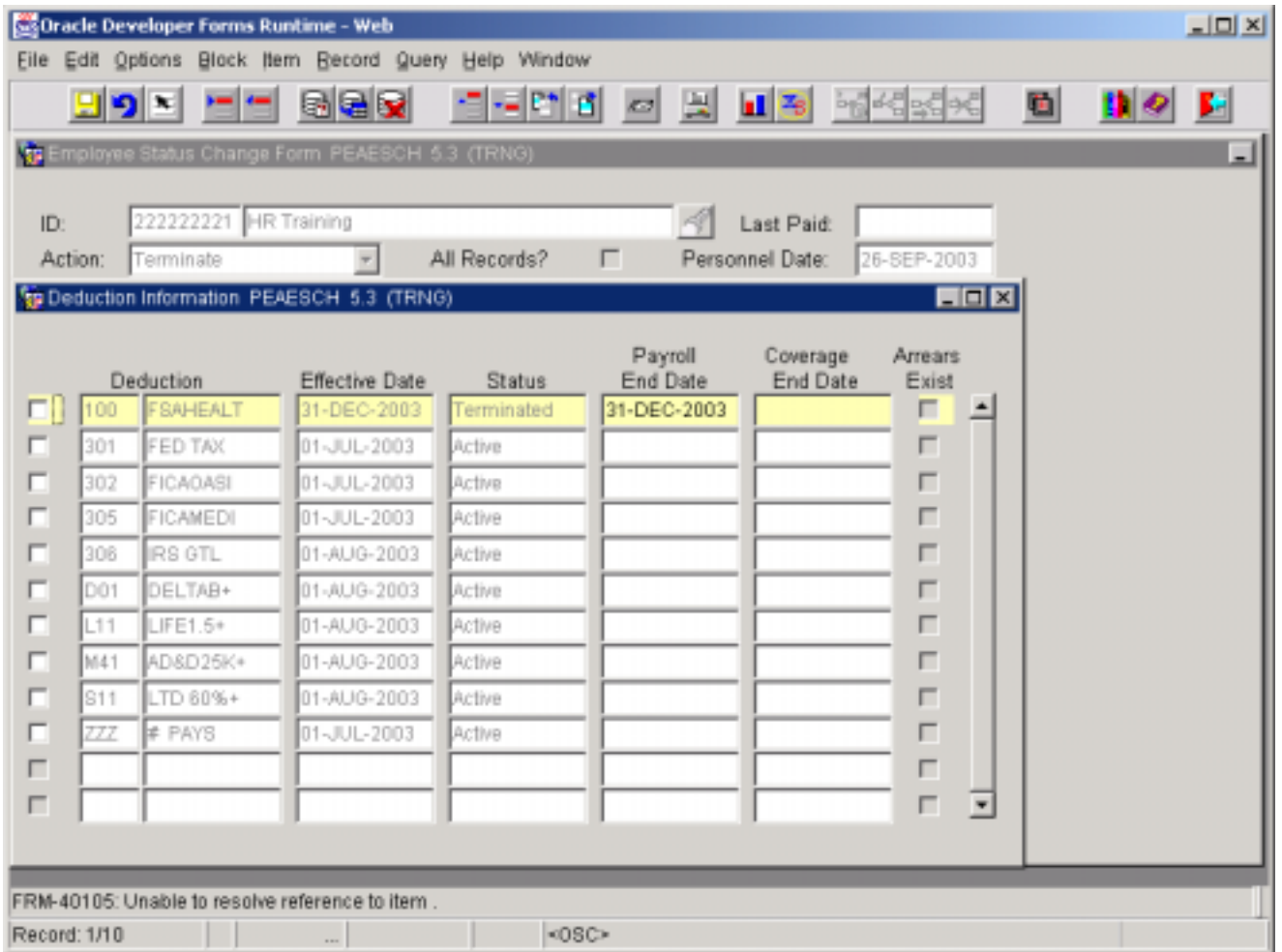
8. Place a check mark next to the Benefits/Deductions to be terminated.

- NOTE: The Benefits Department is responsible for terminating the core and voluntary benefit deductions ONLY – not payroll deductions.

9. The Payroll End Date should populate. If not, enter the last day of the pay period that the employee is terminating in. For example, if an employee is terminating 23-Sep-2003, you would code 26-Sep-03 as the Payroll End Date. This is very important.

10. Select Save. Please note the confirmation message in the bottom left hand corner of the screen.

11. If you would like to verify that the deductions have been terminated, go back to the main screen and access the Employee Deduction Query Form (PDIDLST).

12. Enter the ID of the Employee.

13. Tab and enter the Query Date, which should be equal to the current date.

14. Select Next Block.   The STAT field on the form should be updated for the appropriate benefit/deduction.

PDADEDN   Employee Benefit Deduction Form
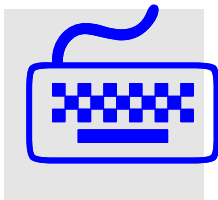
For instruction, refer to Lesson 4, Terminating a Benefit Deduction.