



iSolved Offboarding User Guide

1. Navigate to Employee Admin Tools -> Employee Administration -> Pending Terminations. Click **+Initiate Offboarding**.

Pending Terminations

+ Initiate Offboarding **▼ Expand All Groups** **▲ Collapse All Groups** **↺ Clear Grouping/Filters**

Drag a column header here to group by that column

Actions	Employee Name ▼	Employee ID ▼	Legal Name
		🔍	

2. Select the Legal Company, Offboarding Template, Employee, and enter their Termination Date, Termination Reason, and mark if they're Eligible for Rehire. Enter any optional Notes or Documents and click **Save**.

Pending Terminations

Save **Cancel**

Company Information

* Legal Company: July Training 2021, LLC

Offboarding Template

* Offboarding Template: Offboarding

Employee Information

* Employee: Adamski, Shane L - 1205

* Termination Date: 4/29/2022

* Termination Reason: Resignation

Termination Type: Voluntary

Eligible for Rehire

Employee Notes



Notes:

Documents

Add Document

- Click on the **Edit** button next to the employee from the list of Pending Terminations.

Pending Terminations

+ Initiate Offboarding ▾ Expand All Groups ▲ Collapse All Groups ↺ Clear Grouping/Filters				
Drag a column header here to group by that column				
Actions	Employee Name ▾	Employee ID ▾	Legal Name ▾	Termination Date ▾
 	Shane L Adamski	1205	July Training 2021, LLC	4/29/2022


- Make any changes to the Termination Details that are necessary and then click **Next**.

Pending Terminations

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Shane L Adamski-1205 (4/29/2022)

Employee Termination

* Termination Date: 

* Termination Reason: ▾

Termination Type:

Eligible for Rehire

Employee Notes

Notes:

Documents


- Enter a Date Returned for any currently assigned Company Assets and then click **Next**.

Pending Terminations

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Shane L Adamski-1205 (4/29/2022)

Assets

Asset Type	Asset Make	Asset Model	Serial Number	Equipment Number	Description	Date Assigned	Date Returned
Laptop	Lenovo	Thinkpad	1234			01/01/2022	<input type="text" value="4/26/2022"/> 

6. Record Stop Dates for any currently active Benefit Plans and then click **Next**.

Pending Terminations

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Shane L Adamski-1205 (4/29/2022)

Benefit Plans

Benefit Type	Benefit Plan	COBRA Eligible	Start Date	Calculated Stop Date	Stop Date	Delete Plan
401(k)	401(k)	No	1/1/2022	4/29/2022	4/29/2022	

Group Term Life Plans

No group term life records exist for this employee.

7. Choose a Current Balance Action for all Accrual Plans and select if you'd like to delete any Pending Absences then click **Next**.

Pending Terminations

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Shane L Adamski-1205 (4/29/2022)

Leave Accruals

Accrual Type	Plan Name	Current Balance Action	Payout Option	Additional Check Type	Payout Earning
PTO	PTO Full Time	Inactivate Plan			
Vacation	Vacation	Inactivate Plan			

Pending Absences

No pending absences exist for this employee.

8. Unassign any current Manager or Supervisor Roles and select a Replacement and then click **Next**.

Pending Terminations

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Shane L Adamski-1205 (4/29/2022)

Assigned Roles

Role	Unassign	Replacement
Manager	<input checked="" type="checkbox"/>	1201 - Jerry L Cork (July ...

Default Job Assignments

No default job assignments exist for this employee.

Organization Roles

No organization roles exist for this employee.

- Choose if you'd like to inactivate any currently active Direct Deposit Accounts, Enter Stop Dates for any currently scheduled Earnings or Deductions and then click **Next**.

Pending Terminations

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Shane L Adamski-1205 (4/29/2022)

Direct Deposit
 Inactivate all direct deposit accounts

Account Type	Frequency	Sequence	Amount	Percent	Description
Checking	Every Pay	Remaining Net			

The list above contains all direct deposit records that are currently active or in prenote status, if any, for the employee. When the option to inactivate all direct deposit accounts is selected, any records added prior to saving the termination will also be inactivated.

Deductions

Pay Item	Amount	Percent	Balance	Stop Date
Advance	100.00		400.00	4/29/2022

Earnings

Pay Item	Amount	Percent	Rate	Stop Date
Cell Reimb	50.00			4/29/2022

Memo Calcs
 No active memo calc records exist for this employee.

- Enter Stop Dates for any currently active Garnishments, then click **Next**.
 - This screen is primarily to notify the client if the employee has any currently active garnishments so they can notify the agency that the employee is terminated.

Pending Terminations

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Shane L Adamski-1205 (4/29/2022)

Garnishments
 No active garnishment records exist for this employee.

- Choose if you'd like to delete any Pending Performance Reviews and then click **Next**.

Pending Terminations

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Shane L Adamski-1205 (4/29/2022)

Pending Performance Reviews
 Delete all of the following performance reviews

Scheduled Review Date	Review Type	Review Period	Reviewer	Is Complete	Status	Delete Review
5/1/2022	Annual		Mary P Thomas	No	Pending EE Acknowledgement	<input checked="" type="checkbox"/>
5/1/2023	Annual		Mary P Thomas	No	Not Started	<input checked="" type="checkbox"/>

- Click **Run Audit** to confirm there are no Data Conflicts that need to be resolved. When all Data Conflicts are resolved, click **Save**.

Pending Terminations

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Shane L Adamski-1205 (4/29/2022)

Data Conflicts
 No conflicts found. Selecting Save will complete the termination process and save all employee data entered in the termination wizard.