

Terminal Leave Request Form – Instructions

Business Purpose

- The Terminal Leave Request Form (TLV) is used to pay out Vacation Leave when an employee terminates employment or transfers to another state agency. TLV requests are processed during the On-Cycle Pay Period one pay period following the termination date. This is to ensure that all final payroll processing and leave accruals are processed before the Leave Payout is requested.
- This is a fillable form. To complete the form, use your mouse to navigate between the fields. We recommend you complete this form electronically to avoid illegible entries.
- *Forms should be submitted by email to DFA-CentralPayrollForms@state.nm.us or faxed to 505-827-1223 by noon on the Friday of the Pay Period End date.*
- A copy of the NMS Terminal Leave Report **must** be attached to the Terminal Leave Request Form. Instructions for generating the NMS Terminal Leave Report can be found on the DFA website.

Business Procedure

Please complete all fields in the top section of the form.

| | | | |
|---|----------------------|--------------------------|-------------------------|
|  | | | |
| State of New Mexico – Department of Finance and Administration TERMINAL LEAVE REQUEST FORM | | | |
| <small>Revised 08-06-13</small> | | | |
| Today's Date: | Requested By: | Telephone Number: | Pay Group: |
| 8/1/2013 | Esteban Terrazas | 827-3676 | CLS |
| Pay Period Ending: | Employee Name | EMPLID#: | Business Unit: |
| 7/19/2013 | Jane Smith | 111233 | 35600 Governor's Office |

1. **Today's Date** - the date you are filling out the form
2. **Requested By** - the name of the person completing the form
3. **Telephone Number** - the telephone number of the person completing the form
4. **Pay Group** - choose the correct value from the “drop down menu”
5. **Pay Period Ending** - this is the current pay period ending date
6. **Employee Name** - full name of the employee
7. **EMPLID#** - always include the employee's state ID number
8. **Business Unit** - choose the correct value from the “drop down menu”

Please complete all fields in the middle section of the form.

| | | |
|--|--|--|
| Effective Date of Termination in Job Data: 7/6/2013 | | |
| TERMINAL LEAVE REQUEST WILL NOT BE PROCESSED IF THE STEPS IN BOX 1 HAVE NOT BEEN COMPLETED AND VERIFIED | | |
| Box 1 | | |
| <input checked="" type="checkbox"/> | Employee has been terminated or retired in Job Data | |
| <input checked="" type="checkbox"/> | Workgroup has been updated to "INACTIVE" with date after last day worked | |
| <input checked="" type="checkbox"/> | Payable time does not exist in Time and Labor and all leave has been accrued | |
| <input checked="" type="checkbox"/> | Termination event has been processed in Benefits | OR <input type="checkbox"/> Employee is being immediately rehired and benefits should not terminate. |
| Earning Type: | Hours: | Rate of Pay or Amount: |
| TLV: Terminal Leave | 114.84 | 10.00 |

9. **Effective Date of Termination in Job Data** - this date should match the date used in job data when inserting the termination row – effective date should be the day after the employee’s last day worked (i.e. if the employee worked Friday, the termination date is Saturday).

The screenshot shows the 'Job Information' tab in HCM. Key fields include:

- HR Status: Inactive
- Payroll Status: Terminated
- Effective Date: 07/06/2013 (highlighted with a yellow box and an arrow)
- Sequence: 0
- Job Indicator: Primary Job
- Action / Reason: Termination
- Relocation: Relocation
- Last Start Date: 04/27/2011
- Termination Date: 07/05/2013
- Expected Job End Date: [blank]
- Last Date Worked: 07/05/2013

10. **Box 1** - If the employee has terminated, then it is required that all of the procedures in Box 1 have been completed in HCM before submitting the form to Central Payroll. If any of the steps have not been completed, the form will not be processed. These steps include:
- Process the termination or retirement event in Job Data.** Ensure that the **effective date is the day after the last day worked** (i.e. employee worked Friday, Saturday is the termination date)
 - Update the workgroup in Maintain Time Reporter Data to "INACTIVE"**. This stops further payable time from being created and prevents accidental approval of the time, which will result in overpayment to the employee.
 - Verify that there is no payable time after the last day worked** that has either been approved, or is available for approval. Verify that all leave has been accrued and that the balances on the form are accurate and reflect the balances from the employee’s timesheet. If your agency does not use SHARE to track leave balances, a memo from the HR Manager is required to validate that the balances are true and accurate.

The screenshot shows the 'Time Reporter Data' form. Key fields include:

- Effective Date: 08/08/2013
- Time Reporter Status: Active
- Time Reporter Type: Elapsed
- Time Reporting Template: [blank]
- Time Period ID: [blank]
- Workgroup: INACTIVE
- Taskgroup: 252000001
- Task Profile ID: 00025036
- TCD Group: [blank]
- Restriction Profile ID: [blank]
- Rule Element 1-5: [blank]
- Time Zone: MST

Middle section of the form continued

11. **Earning Type** – this form is used only for Terminal Leave payout therefore the only earning type allowed on this form is TLV.
12. **Hours** – refer to employee’s balance on timesheet. DO NOT round up when entering the number of hours and use only first two decimal places (i.e. if the employee has 86.365 hours, enter 86.36 NOT 86.37 as this will cause the employee to go into a negative balance situation)
13. **Rate of Pay or Amount** – use rate of pay for all leave and comp time paid at termination

Please complete all fields in the bottom section of the form.

| | | | |
|---|--|--|----------------|
| Box 2 | | Complete these fields if employee is a transfer | |
| If these payments should charge to a Business Unit or Department other than where the employee currently charges, please provide the following information: | | | |
| Business Unit: Choose an item. | | | |
| Dept. ID: | | Position#: | |
| Job Code: | | Combination Code: | |
| Additional Comments: | | | |
| HR Manager SIGNATURE (Required) | | <i>Signature Here</i> | DATE: 8/1/2013 |
| HR MANAGER Name: _____ (Printed) | | | |
| This document must be reviewed and signed by the HR Manager or an HR Supervisor other than the requestor. If proper signature is not included the request will not be processed. | | | |
| Please attach the Terminal Leave Report and submit this form no later than 12 noon Friday to DFA-CentralPayrollForms@state.nm.us or fax to 505-827-1223. | | | |
| PAGER DFA CPB Use Only | | | |

14. **Box 2** – Only complete fields in box 2 if the employee is now working at another agency, and the hours requested on the form are being charged to the employee’s previous agency.

The bottom section of the form requires a signature by the Human Resource Manager or a Human Resource Supervisor indicating that they have reviewed the form. **Note:** the person reviewing and signing the form cannot be the same as the one requesting. A copy of the Terminal Leave Report must be attached in order for us to process your request.

Although you have until Friday of Pay Period End at 12:00 (noon) to submit the TLV form and TLV Report, we encourage you to submit them as soon as you have them completed. This allows Central Payroll more time to address any questions and/or to request any corrections.

Document Control

| DATE | AUTHOR | DESCRIPTION | VERSION |
|------------|-------------|-------------|---------|
| 08/08/2013 | Carol Ortiz | Draft | 0.1 |