

Offboarding An Employee



This guide walks through offboarding an employee in Isolved, ensuring a smooth transition and compliance with HR protocols for terminations. By following these instructions, users can efficiently manage pending terminations, handle benefits, and document necessary information

1 Navigate to <https://connect.threadhcm.com/default.aspx>

Employee Admin Tools

- Employee Management
- Client Management
- ACA Executive Dashboard
- Client Landing Page
- Client Summary
- Client Maintenance
- Client Utilities
- Payroll
- Taxes
- Work Location
- Tables
- Labor & GL
- Job
- Benefits
- ACA Setup Options
- HR Management
- Attendance Management
- Time Management
- Workflow Setup
 - Client User Groups
 - Client Email Templates
 - Onboarding Templates
 - Offboarding Templates
- Payroll
- Reports
- Employee Self Service

Welcome Ryan

MY PROFILE

Ryan Cynkar
Boss
rcynkar@threadhcm.com

MY REMINDERS

MY ACCOUNT REPS

QUICK LINKS

NEW! Isolved's next release goes live June 6, 2025 - read the notes here!

NEW! ALERT: Spoofed websites and fake emails are targeting payroll logins. To stay safe, always use your secure company link or the Isolved app - never click login links from emails or search engines. Thread will never ask for your login credentials. Stay sharp!

CALENDAR

JUNE 2025

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

ANNOUNCEMENTS

NEW! In observance of Juneteenth, Thread will be CLOSED Thursday, June 19. It is also a Federal holiday, and payrolls will not be processed due to bank closures. Your processing dates and/or check dates may have changed. Please review your processing calendar. As a reminder, payrolls must be submitted two business days before check date. Happy Juneteenth from all of us at thread!

NEXT SCHEDULED PAYROLL

Pay Group	Frequency	Due In Date	Check Date	Period Begin	Period End	Period	Run Type	Processing Schedule
Bi-Weekly	Bi-Weekly	06/04/2025	06/06/2025	05/18/2025	05/31/2025	03	Regular Payroll	View

2 To begin offboarding an employee, Click "Employee Admin Tools"

The screenshot shows the 'isolved' dashboard for user Ryan Cynkar. The left sidebar menu has 'Employee Admin Tools' highlighted with an orange circle. The main content area includes a 'Welcome Ryan' message, a profile section for Ryan Cynkar (Boss, rcynkar@threadhcm.com), a ZayZoon on-demand pay service announcement, a calendar for June 2025, and a 'NEXT SCHEDULED PAYROLL' table.

Client: CYN22 - CynTech **Legal:** Cynkar Technologies

Search the menu:

- Employee Admin Tools
- Employee Management
- Client Management
- ACA Executive Dashboard
- Client Landing Page
- Client Summary
- Client Maintenance >
- Client Utilities >
- Payroll >
- Taxes >
- Work Location >
- Tables >
- Labor & GL >
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Welcome Ryan

MY PROFILE

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ZayZoon

Your employees have access to on-demand pay via our partner ZayZoon. This service is free to employers.

[Learn more](#)
[View my dashboard](#)

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Legend: Payroll Due (blue), Pay Date (pink), Run Date - Off Cycle Run (black)

NEXT SCHEDULED PAYROLL

Pay Group	Frequency	Due In Date	Check Date	Period Begin	Period End	Period	Run Type	Processing Schedule
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3 Click "Employee Administration"

The screenshot shows the 'isolved' dashboard for user Ryan Cynkar. The left sidebar menu has 'Employee Administration' highlighted with an orange circle. The main content area is identical to the previous screenshot, showing the 'Welcome Ryan' message, profile section, ZayZoon service, calendar, and payroll information.

Client: CYN22 - CynTech **Legal:** Cynkar Technologies

Search the menu:

- Employee Admin Tools
- Employee Administration >
- Employee Analytics >
- Employee Utilities >
- Employee Management
- Client Management
- Payroll

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CALENDAR

JUNE 2025

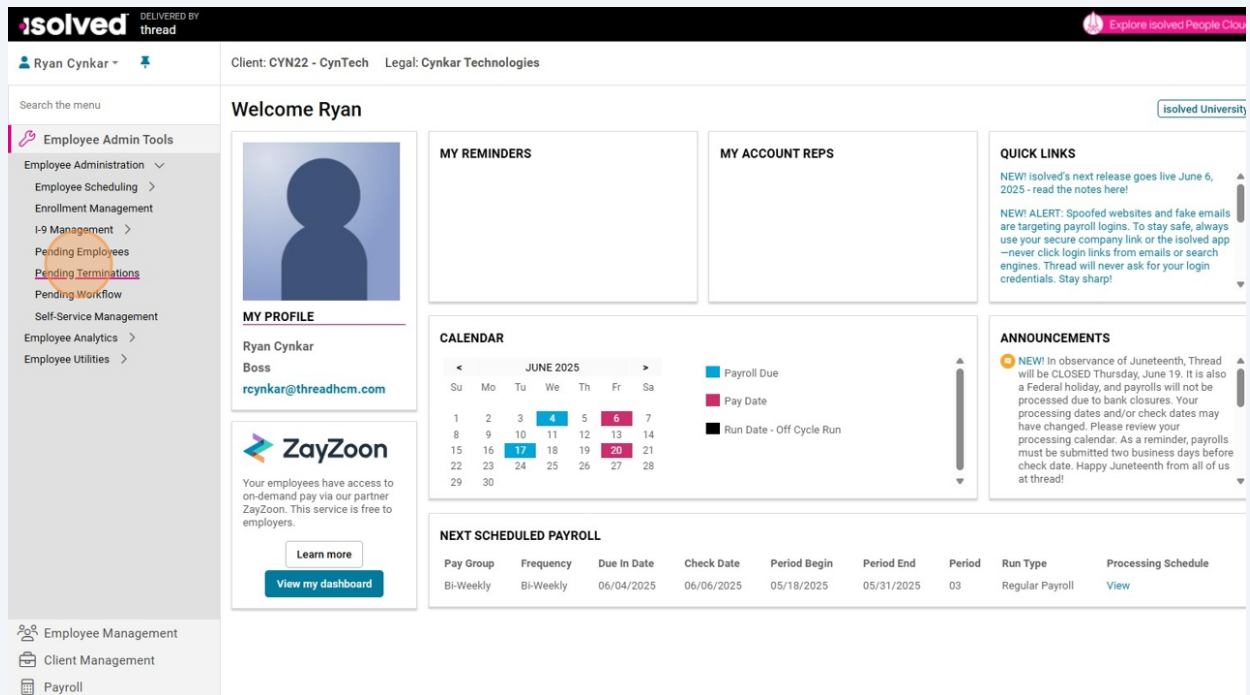
Su	Mo	Tu	We	Th	Fr	Sa
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4 Click "Pending Terminations"



The screenshot shows the 'isolved' dashboard for user Ryan Cynkar. The left sidebar contains a menu with 'Employee Admin Tools' expanded, and 'Pending Terminations' highlighted with a red circle. The main content area shows a 'Welcome Ryan' message, a profile card for Ryan Cynkar, a calendar for June 2025, and a 'NEXT SCHEDULED PAYROLL' table.

Employee Admin Tools

- Employee Administration
- Employee Scheduling
- Enrollment Management
- I-9 Management
- Pending Employees**
- Pending Terminations**
- Pending Workflow
- Self-Service Management
- Employee Analytics
- Employee Utilities

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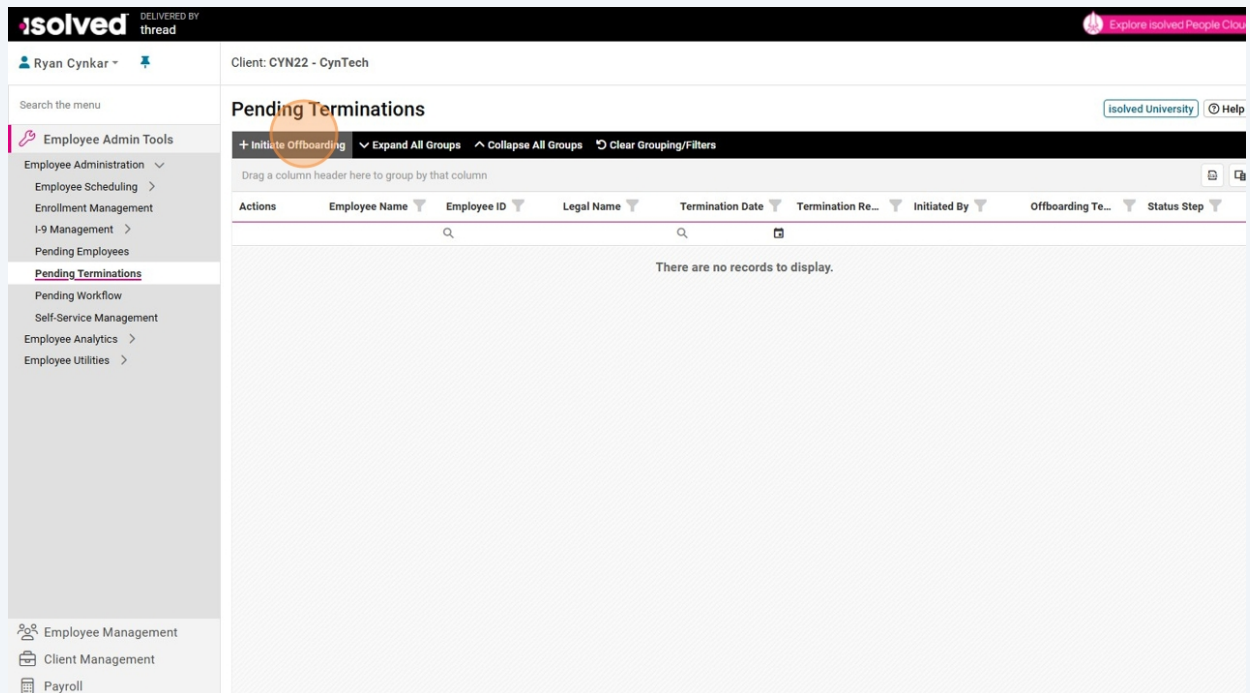
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NEXT SCHEDULED PAYROLL

Pay Group	Frequency	Due In Date	Check Date	Period Begin	Period End	Period	Run Type	Processing Schedule
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5 From this screen you can see any current pending terminations, or to begin a new one, Click "Initiate Offboarding"



The screenshot shows the 'Pending Terminations' screen in the 'isolved' dashboard. The left sidebar is the same as in the previous screenshot. The main content area shows a 'Pending Terminations' header with a red circle around the 'Initiate Offboarding' button. Below the header is a table with columns for Actions, Employee Name, Employee ID, Legal Name, Termination Date, Termination Reason, Initiated By, Offboarding To, and Status Step. The table is currently empty, displaying 'There are no records to display.'

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	Termination Re...	Initiated By	Offboarding To...	Status Step
There are no records to display.								

6 Choose your company

isolved DELIVERED BY thread Explore isolved People Cloud

Ryan Cynkar Client: CYN22 - CynTech

Search the menu

Employee Admin Tools

- Employee Administration
- Employee Scheduling
- Enrollment Management
- I-9 Management
- Pending Employees
- Pending Terminations**
- Pending Workflow
- Self-Service Management
- Employee Analytics
- Employee Utilities

Employee Management Client Management Payroll

Pending Terminations

Save Cancel

Company Information

* Legal Company: Search or Select from list

Offboarding Template

* Offboarding Template: Search or Select from list

Employee Information

* Employee: Search or Select from list

* Termination Date: [Calendar Icon]

* Termination Reason: [Dropdown]

Termination Type: [Dropdown]

☐ Eligible for Rehire

Employee Notes

Notes: [Text Area]

Documents

Add Document

7 Choose your Offboarding Template

isolved DELIVERED BY thread Explore isolved People Cloud

Ryan Cynkar Client: CYN22 - CynTech

Search the menu

Employee Admin Tools

- Employee Administration
- Employee Scheduling
- Enrollment Management
- I-9 Management
- Pending Employees
- Pending Terminations**
- Pending Workflow
- Self-Service Management
- Employee Analytics
- Employee Utilities

Employee Management Client Management Payroll

Pending Terminations

Save Cancel

Company Information

* Legal Company: Cynkar Technologies

Offboarding Template

* Offboarding Template: Search or Select from list

Employee Information

* Employee: Search or Select from list

* Termination Date: [Calendar Icon]

* Termination Reason: [Dropdown]

Termination Type: [Dropdown]

☐ Eligible for Rehire

Employee Notes

Notes: [Text Area]

Documents

Add Document

8

Then choose the employee, Termination Date, and Reason. You can also add notes or any documents.

isolved DELIVERED BY thread Explore isolved People Cloud

Ryan Cynkar Client: CYN22 - CynTech

Search the menu

Employee Admin Tools

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- Enrollment Management
- I-9 Management
- Pending Employees
- Pending Terminations**
- Pending Workflow
- Self-Service Management
- Employee Analytics
- Employee Utilities

Pending Terminations isolved University Help

Save Cancel

Company Information

* Legal Company: Cynkar Technologies

Offboarding Template

* Offboarding Template: Termination

Employee Information

* Employee: Search or Select from list

* Termination Date:

* Termination Reason:

Termination Type:

☐ Eligible for Rehire

Employee Notes

Notes:

Documents

Add Document

9

If you may bring back this employee and want to keep their records, you can choose, Click "Eligible for Rehire"

isolved DELIVERED BY thread Explore isolved People Cloud

Ryan Cynkar Client: CYN22 - CynTech

Search the menu

Employee Admin Tools

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- Pending Terminations**
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- Employee Analytics
- Employee Utilities

Pending Terminations isolved University Help

Save Cancel

Company Information

* Legal Company: Cynkar Technologies

Offboarding Template

* Offboarding Template: Termination

Employee Information

* Employee: Buffet, Warren - 0030

* Termination Date: 6/10/2025

* Termination Reason: Relocation

Termination Type: Voluntary

☒ Eligible for Rehire

Employee Notes

Notes:

Documents

Add Document

10 Click "Save"

isolved DELIVERED BY thread Explore isolved People Cloud

Ryan Cynkar Client: CYN22 - CynTech

Search the menu

Employee Admin Tools

- Employee Administration >
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- Employee Utilities >

Employee Management Client Management Payroll

Pending Terminations

Save Cancel

Company Information

* Legal Company: Cynkar Technologies

Offboarding Template

* Offboarding Template: Termination

Employee Information

* Employee: Buffet, Warren - 0030

* Termination Date: 6/10/2025

* Termination Reason: Relocation

Termination Type: Voluntary

☐ Eligible for Rehire

Employee Notes

Notes:

Documents

* Document type: * Attach File:

Upload Document

Add Document

11 When you are ready to complete the termination, you will go back to Pending Terminations, and click the Edit Button.

isolved DELIVERED BY thread Explore isolved People Cloud

Ryan Cynkar Client: CYN22 - CynTech

Search the menu

Employee Admin Tools



- Employee Administration >
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- I-9 Management >
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Employee Management Client Management Payroll

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	Termination Re...	Initiated By	Offboarding Te...	Status Step
 	Warren Buffet	0030	Cynkar Technologies	6/10/2025	Relocation	rcyn	Termination	Client Offboarding ...

12

This will take you through the Wizard to complete the termination. Click "Next" through each screen. If there is items to review or change, you can do so on those screens.

isolved DELIVERED BY thread Explore isolved People Cloud

Ryan Cynkar Client: CYN22 - CynTech

Search the menu

Pending Terminations

→ Next Go Back to List

Warren Buffet-0030 (6/10/2025)

Employee Termination

* Termination Date: 6/10/2025

* Termination Reason: Relocation

Termination Type: Voluntary

☐ Eligible for Rehire

Employee Notes

Notes:

Documents

Add Document

13

Here you could make sure you get back any company equipment the employee has. Then Click "Next"

isolved DELIVERED BY thread Explore isolved People Cloud

Ryan Cynkar Client: CYN22 - CynTech

Search the menu

Pending Terminations

← Previous → Next Go Back to List

Warren Buffet-0030 (6/10/2025)

Assets

No active asset records exist for this employee.

14

Here you can confirm any Benefits Information that needs to be updated.
Then Click "Next"

isolved DELIVERED BY thread Explore isolved People Cloud

Ryan Cynkar Client: CYN22 - CynTech

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Pending Terminations

← Previous → Next Go Back to List

Warren Buffet-0030 (6/10/2025)

Benefit Plans
No active or pending benefit plans exist for this employee.

Group Term Life Plans
No group term life records exist for this employee.

15

If the employee has a remaining Time Off Balance, you can opt to pay it out, move the balance to 0 or inactivate the plan.
Click "Next"

isolved DELIVERED BY thread Explore isolved People Cloud

Ryan Cynkar Client: CYN22 - CynTech

Search the menu

Employee Admin Tools

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Employee Management Client Management Payroll

Pending Terminations

← Previous → Next Go Back to List

Warren Buffet-0030 (6/10/2025)

Accrual Type	Plan Name	Current Balance Action	Payout Option	Additional Check Type	Payout Earning
PTO	PTO	Reset balance to 0.00, inactivate			

Pending Absences
No pending absences exist for this employee.

16 Click "Next"

The screenshot shows the 'Pending Terminations' page for employee Warren Buffet-0030 (6/10/2025). The left sidebar contains the 'Employee Admin Tools' menu, with 'Pending Terminations' selected. The main content area shows three sections: 'Assigned Roles', 'Default Job Assignments', and 'Organization Roles', each with a message stating 'No [category] exist for this employee.' The navigation bar at the top includes 'Previous', 'Next', and 'Go Back to List' buttons. The 'Next' button is highlighted with an orange circle.

17 Click the "Inactivate all direct deposit accounts" field. Click "Next"

The screenshot shows the 'Pending Terminations' page for employee Warren Buffet-0030 (6/10/2025). The left sidebar contains the 'Employee Admin Tools' menu, with 'Pending Terminations' selected. The main content area shows four sections: 'Direct Deposit', 'Deductions', 'Earnings', and 'Memo Calcs'. The 'Direct Deposit' section is expanded, showing a checkbox labeled 'Inactivate all direct deposit accounts' which is highlighted with an orange circle. Below the checkbox is a note: '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.' The other sections ('Deductions', 'Earnings', 'Memo Calcs') each show a message stating 'No active [category] records exist for this employee.' The navigation bar at the top includes 'Previous', 'Next', and 'Go Back to List' buttons.

18 Check Garnishments and Click "Next"

isolved DELIVERED BY thread Explore isolved People Cloud

Ryan Cynkar Client: CYN22 - CynTech

Search the menu

Employee Admin Tools

- Employee Administration
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Employee Management Client Management Payroll

Pending Terminations

← Previous **Next** → Go Back to List

Warren Buffet-0030 (6/10/2025)

Garnishments

No active garnishment records exist for this employee.

19 Once completed with all of the steps, Click "Run Audit"

isolved DELIVERED BY thread Explore isolved People Cloud

Ryan Cynkar Client: CYN22 - CynTech

Search the menu

Employee Admin Tools

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- I-9 Management
- Pending Employees
- Pending Terminations**
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Employee Management Client Management Payroll

Pending Terminations

← Previous **Run Audit** → Go Back to List

Warren Buffet-0030 (6/10/2025)

This is the last step in the workflow process. In order to finalize termination, an audit must be run to verify data entered in the wizard does not conflict with existing employee data. Any conflicts found must be resolved in order to save the employee termination.

Select Run Audit to begin the audit process.

20 If there are no conflicts, then Click "Save"

The screenshot displays the 'isolved' People Cloud interface. At the top, the header includes the 'isolved' logo, 'DELIVERED BY thread', and a user profile for 'Ryan Cynkar'. The client name 'Client: CYN22 - CynTech' is shown in the top right. A search bar is present on the left side of the header.

The left sidebar contains a menu with the following items: 'Employee Admin Tools' (expanded), 'Employee Administration', 'Employee Scheduling', 'Enrollment Management', 'I-9 Management', 'Pending Employees', 'Pending Terminations' (highlighted), 'Pending Workflow', 'Self-Service Management', 'Employee Analytics', and 'Employee Utilities'. Below this, there are icons for 'Employee Management', 'Client Management', and 'Payroll'.

The main content area is titled 'Pending Terminations' and includes a sub-header 'Warren Buffet-0030 (6/10/2025)'. Below this, the section is labeled 'Data Conflicts' and contains the text: 'No conflicts found. Selecting Save will complete the termination process and save all employee data entered in the termination wizard.' A navigation bar at the top of the main content area includes links for 'Previous', 'Save' (highlighted with an orange circle), and 'Go Back to List'. The bottom right corner of the main content area features links for 'isolved University' and 'Help'.