

Labor Planning: Terminating an Employee

This guide outlines the process for terminating an employee in YBT. In the example below, you have an employee who is leaving Yale in January.

1. Go to the Employees tab of the Labor Planning Workbook.

2. Change from Summary to Detail view:

- Click the **Change View** button on the Axiom ribbon.
- Select **Detail**. When you scroll to the right, you will see the additional detail data.



Note: While you can perform this process in Standard view, the Detail view is recommended.

3. Select the **Plan End Date** (column AH) for the employee being terminated, then click the dropdown button to choose the date.



4. Scroll to the right to see the effect on monthly allocations. In this example, you will see that the employee is still allocated 100% in the months before the end date, but is no longer allocated in the months after the end date.

YBT Tip

Whether an employee is leaving Yale or just leaving your department, the above steps will be the same.

Need Assistance?

If you cannot install or open YBT, please call the ITS help desk at **203.432.9000**.

For questions and issues about specific YBT functions or data:

- Email ybtsupport@yale.edu or
- Call the YBT help desk at **203.436.5929**

System documentation and training materials can also be found on the **YBT home page**, as well as at <http://yalebiz.yale.edu/yale-budgeting-tool>.