DIRECTIONS FOR TURNOVER TEMPLATE REPORTS

The turnover template provides a comprehensive way to calculate the different turnover rates by overall region/area, as well as more detailed look at turnover per cost center/department. The upgraded version includes additional insight into the tenure of employees when terminated, as well as the termination reasons.

The template consists of several tabs/pages, where you can paste your employee data into each section. In each tab/page, you only need to paste the column headers highlighted green, for the summary pages to work. However, you can add additional information to the right if needed for your own review.

Most of the reports to be pasted into each tab/page, only need these main columns filled out:

- Employee ID (good to have in case you need to review or research the counts further).
- Functional Area or Region – This might be called something different in each company, but this will be the area that you want to review totals. The summary for this allows for 20 areas/regions.
- Cost Center or Department Number -Again this could be called something else at each company (which you can change it in the reports to fit with your organization). This represents the more detailed breakdown that you would like in the summary detail page. The detailed summary will allow for 20 Cost Centers or Departments per main Functional Area. The detailed summary page has 11 separate charts that each allow up to 20 detailed breakdowns.

To use with the Tenure and Term reason reports:

- Each page should have the Date of Hire column populated.
- Termination pages should also have the termination date and term reason populated
- The Tenure will automatically calculate based on the current date for active employees and based on the termination date of terminated employees.

Here are each of the tabs/pages needed to track the headcounts-

- Previous Employee List – For an annual turnover, you would paste the employee's information as of the beginning of the year (ie. 1/1). For monthly turnover, paste the employee's information as of the 1st of the month.
- Current Employee List – For annual turnover, paste the employee information as of the end of the year (12/31). For monthly turnover, paste the information as of the last day of the month.
- New Hires
- Voluntary Terminations
- Involuntary Terminations
- Transfer report – note that the transfer report will need 2 extra columns:
    - The first Functional Area/Region and Cost Center should be the current/ new one they have transferred into.
    - The previous functional area and cost center should also be listed in columns D & E (this way they are also subtracted from the previous headcounts they were listed in).

Summary pages – Both the general overview and detailed summary pages contain mostly formulas that will link and update to the other pages. Before the links work though, you will need to enter the

- Overall Functional Area/ Region / Department in column A - the names/numbers you enter here MUST match to what is listed for each employee in the reports you have already pasted in.
- Cost Center / Specific Department Numbers in column A – You can group these into sets of 20, however they must match exactly to the numbers listed for each employee in all the other report pages in order to link correctly.

Review Page - If you aren't sure what functional area/ region/ cost center numbers to use for the summary pages, or you want to double check that you aren't missing any department numbers that contain employees in them, this page will be a good place to start. The review page will summarize all the data in the previous and current employee lists, so you can be sure to use the right names and numbers for the areas you want to report on, as well as insure you aren't missing a cost center that happens to fall in a particular functional area, etc.

- Be sure to click the Refresh button in the review page, anytime new data is added to the other pages. Just go to the data tab at the top and click refresh all. Or right click inside each table and click refresh.

Customizing your Tenure Reports

In the Set Tenure Ranges page – you will be able to review and customize how you want your employees grouped together by tenure ranges. You will enter everything in the green cells, including the year and month of the beginning to the ending range, as well as how you want the label to appear in the summary:

From Year	From Month	Years Numeric	To Year	To Month	Years Numeric	Label for Range (how it will appear in summary)
0	0	0.00	0	6	0.50	0 - 6 months
0	6	0.50	1	0	1.01	6 months - 1 year
1	0	1.01	3	0	3.04	1 - 3 years
3		3.04	5		5.07	3 - 5 years
5		5.07	7		7.10	5 - 10 years
7		7.10	10		10.14	10 - 15 years
10		10.14	15		15.21	15 - 20 years
15		15.21	20		20.28	
		0.00			0.00	
		0.00			0.00	

Double checks – on each summary page, if you scroll to the right, columns P & O will automatically double check your data, to make 2 comparisons:

Ending Headcount in column I is calculated as: Beginning headcount + Hires + Transfers In – Transfers out – Terminations = Ending Headcount

Ending Headcount per current employee list – column O will pull this from the employee list that is entered in the specified tab.

Both numbers should line up, and when they don't match, column P will be highlighted red and flagged to 'double check'. It might be rare to get this error, but it could be a sign that the employee list is not matching the end date you are collecting data on, or there could be terms or hires that have not been included in the reports for some reason, but are listed in the employee lists – further research may be required.

To see an example of this template in use:

https://www.youtube.com/watch?v=hM062UrLMOk&t

For more HR related templates:

https://timesavingtemplates.com/product-category/humanresourcesadministration/