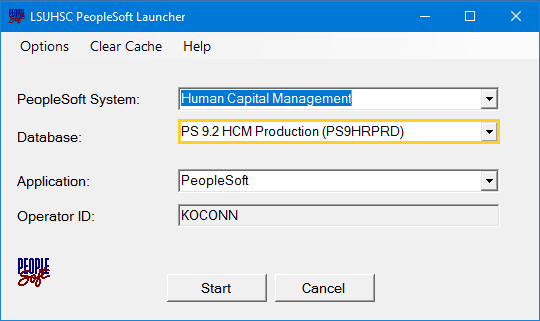
# Enter an Electronic Termination

***Initiators***

1. All tasks for *PER 3 - Terminations* will be performed in **PS HCM Production** database.



***NOTE: PER 3 – Terminations are used for all***

***employee types, except Gratis employees. For***

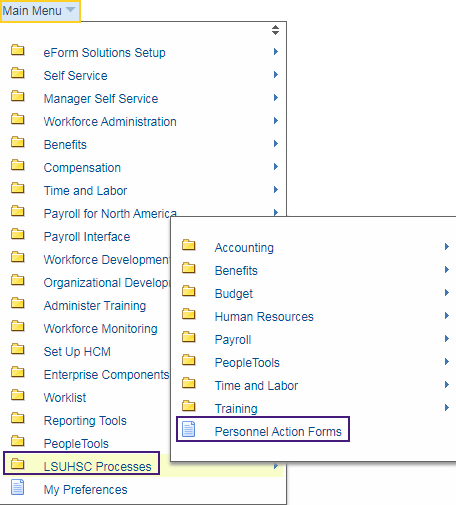
***Gratis employees, continue to send notification***

***of separation to distribution list and paper***

***PER 3.***

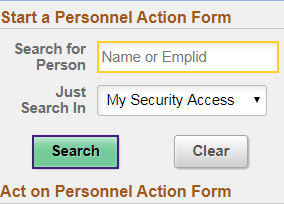
[***LSUHSC-NONotificationofEmployeeSeparation@lsuhsc.edu***](mailto:LSUHSC-NONotificationofEmployeeSeparation@lsuhsc.edu)

1. Click the **Main Menu** link.



Click **LSUHSC Processes**, then **Personnel Action Forms**.

1. You can search for an employee by entering his/her *last*

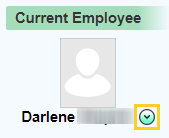


*name* or *Empl ID*.

Enter the desired information into the **Search for Person** field. Enter a valid value e.g. "**Doe**".

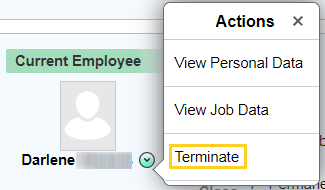
Click the **Search** button.

1. A list of employees with the first name '**Doe**' displays on the right side of the page Scroll down the page until you locate the correct employee. Click the drop-down button next to the employee name to view available actions.



Click the button to the right of the **Employee Name** field.

1. Click the **Terminate** button.



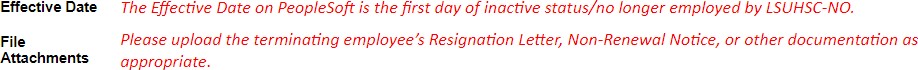
***NOTE: If an employee is on LWOP, you will not see a***

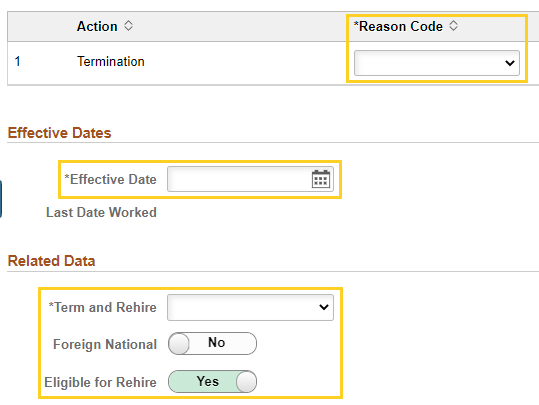
***an option to terminate. Please contact HRM with the***

***date the employee will return from LWOP (effective***

***date of termination).***

1. The notes in **red** explain how to determine the correct effective date, and for the resignation letter or other documentation to be uploaded as appropriate. If someone has taken leave, s/he is still in ‘**Active**’ status. The first day of ‘**Inactive**’ status is the day after the last day of active employment.



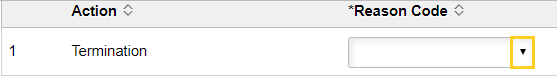
1. Once *Terminate* is selected, a panel will display where you will enter information required for the PeopleSoft termination process.

The *Initiator* will enter information into the following fields:

## Action Termination Reason Code

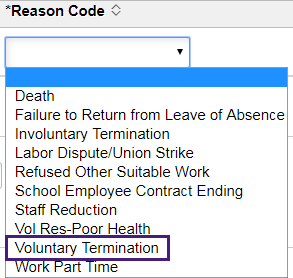
* + - **Effective Date**
    - **Term and Rehire**
    - **Foreign National (Yes or No)**
    - **Eligible for Rehire (Yes or No)**

1. Click the button to the right of the



**Reason Code** field.

1. **Reason Codes** correlate with the Department of



Labor separation notices,

Most Common:

* *Voluntary Termination*
* *Involuntary Termination* – use in case of issuance

of non-renewal notice

* *School Employee Contract Ending* – use in case of’

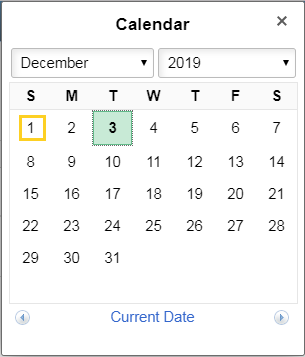
End of appointment/student graduating

Click the **Voluntary Termination** list item.

1. Click the **Calendar** button.



1. Click the desired date.



1. The **Term and Rehire** field is used if an employee

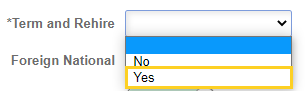
is moving between positions within LSUHSC with

**no break in service**. When this occurs, the employee

must be terminated from one position within LSUHSC

and re-hired to the new position. If this is the case,

follow the steps below:

Click the drop-down button for the **Term and**

**Rehire** field. Select the **Yes** option. When selecting

‘**Yes**’, please put notes in the **Reason/Justification**

box to advise the new position the employee is

moving to and confirm “no break in service.”

This is important so that the Talent Acquisition/

Operations Team is able to manage the termination/

hire in PeopleSoft to ensure the Employee’s access

is not interrupted – such as ID badge function,

Parking access, email access, etc.

1. Click the **Foreign National** radio button to

select ‘**Yes**’ the employee is a Foreign

National. This will ensure the termination

routes through the International Services

Office.

1. Only click the radio button to select the ‘No’

option for **Eligible for Rehire** if you have

been advised by Employee Relations to

make this selection.

1. If an employee is moving to another position,

with no break in service, please add notes to

the **Reason/Justification** section indicating

as much. This is so HRM can coordinate the

termination and rehire for the same day to

avoid access interruption. The Department

must submit timely documents for the new

position to HRM for PeopleSoft entry.

1. Add **File Attachment**.



File Attachments are required for all terminations except: ***Fellows, Interns, Student Workers, Graduate Assistants, and House Officers***. If supporting documents are not required, please provide justification in the Reason/Justification box (e.g., Student Worker/Graduate Assistant graduated or end of appointment). A Description for an uploaded file is required.

The following options are available if you are an *Initiator*:

1. If you are not ready to submit the termination,

click the **Save** button. This will allow you to

return at a later time to complete the form. No

one will have access to the saved action except

yourself.

1. Click the **Update Personnel Action Form** button to recall



saved pending terminations, when you are ready to

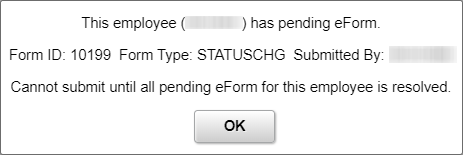
continue/complete.

1. Click the **Submit** button.

***NOTE: For terminations submitted/processed through the***

***electronic termination system, notification of separation to the***

***distribution list is sent automatically once the termination is complete.***

1. If a termination has *previously* been initiated

and a new one begun, an error message will

be received when the new termination is

Submitted.

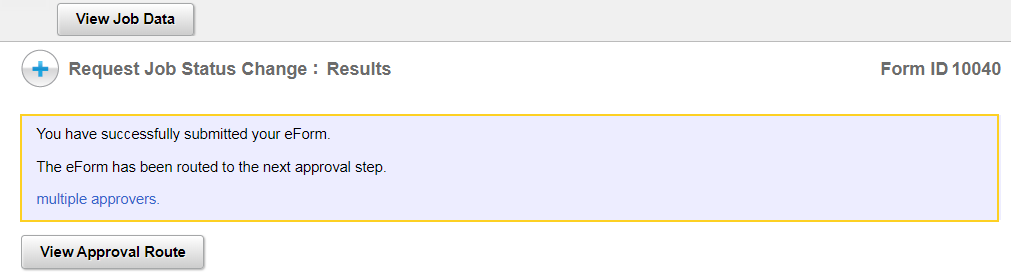
1. The Initiator **must** cancel the duplicate

transaction and submit the original.

Click the **Withdraw** button to cancel the duplicate

transaction.

1. The *Initiator* will receive a confirmation message after clicking the Submit button.



1. The *Initiator* will click the **View Personnel Action Form** button to view the status of the termination once it enters the approval process.

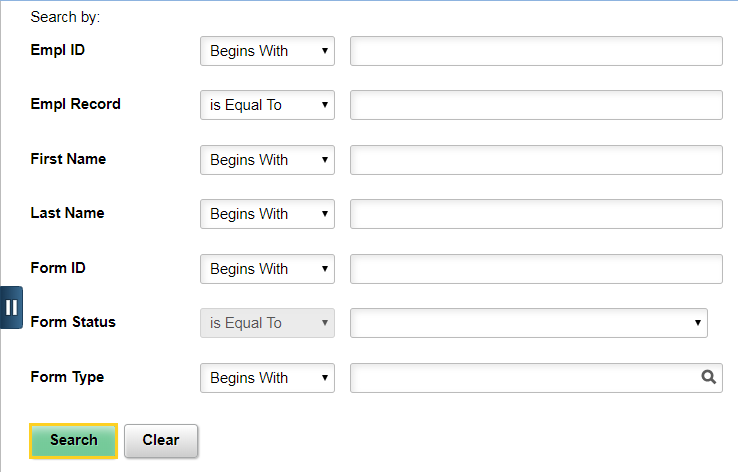


After searching for the terminated employee:

Click the **NEXT** button at the bottom of the page,

and then click the **View Approval Route** button.

1. ***NOTE: The Initiator can search by any of the***



***various methods displayed, but can also***

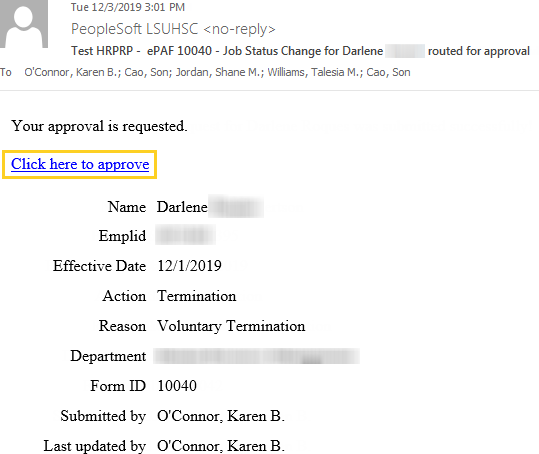
***simply click the Search button to either go directly to the next panel, or to get a list of Search result options at the bottom of the***

***page. This option will be used for example***

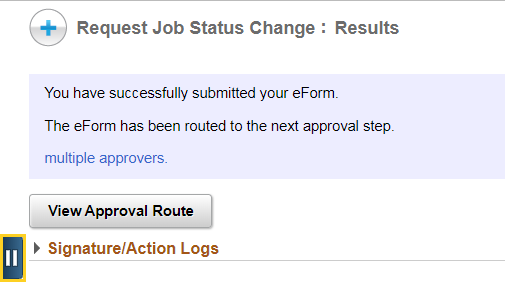
***when making adjustments requested by the Approver to the termination.***

***Approvers***

1. The next level *Approver* will receive an email request to approve the transaction. The Approver will click the link in the email notification to navigate to the approval panel.

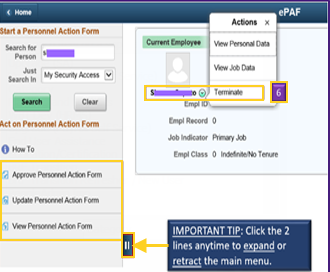


1. The **Request Job Status Change: Results**



confirmation message displays.

Click the **Open Sidebar Menu** button.

1. You have three actions from which to choose

on the sidebar menu:

## Approve Personnel Action Form – used

## to approve pending terminations in

## your queue

* **Update Personnel Action Form –** used

to recall saved/pending terminations you

are ready to continue/complete.

* **View Personnel Action Form –** used

to view the status of the termination in

the approval process

1. *Approvers* have two options for navigating to approve a Termination:



## Use the email link from the Job Status Change email, or



* **Approve Personnel Action Form**

1. The **Update Personnel Action Form** option is where the forms go for which the *Approver* clicked *Recycle* (with or without comments).

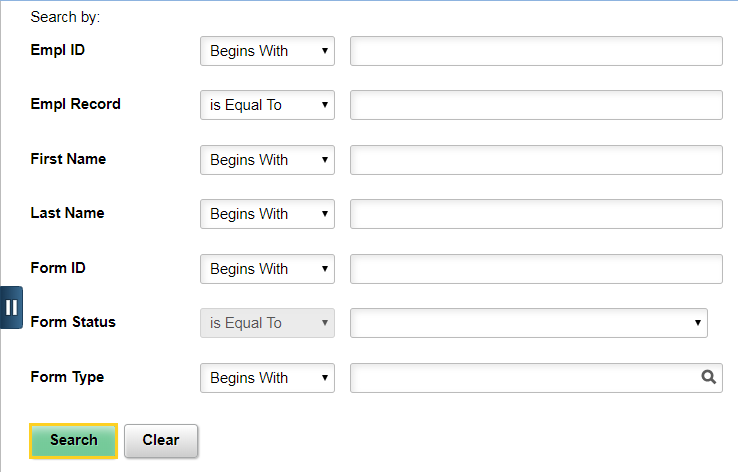


*Recycled* forms can be modified and sent back to the *Approver*.

1. Click the **Approve Personnel Action Form** button.



1. The *Approver* can search by any of the



various methods displayed, but can also

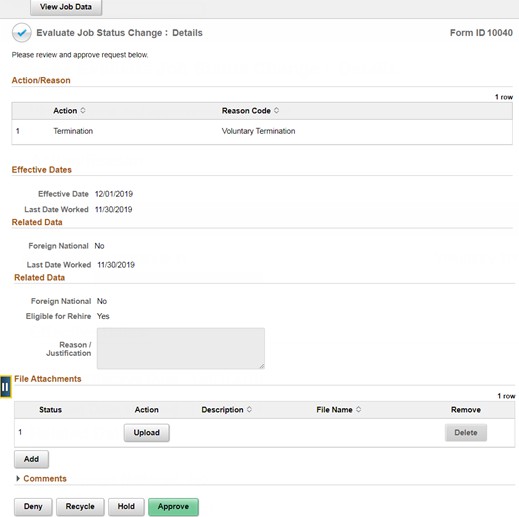
simply click the Search button to either go directly to the next panel, or to get a list of Search result options at the bottom of the

page.

Click the **Search** button.



1. Click the **Pending - Darlene** link.
2. The **Evaluate Job Status Change: Details** panel displays.



Click the **Open Sidebar Menu** button.

1. The same basic process is used when selecting the **Update**



**Personnel Action Form** as choosing Approve Personnel

Action Form. However, the Initiator is able to make

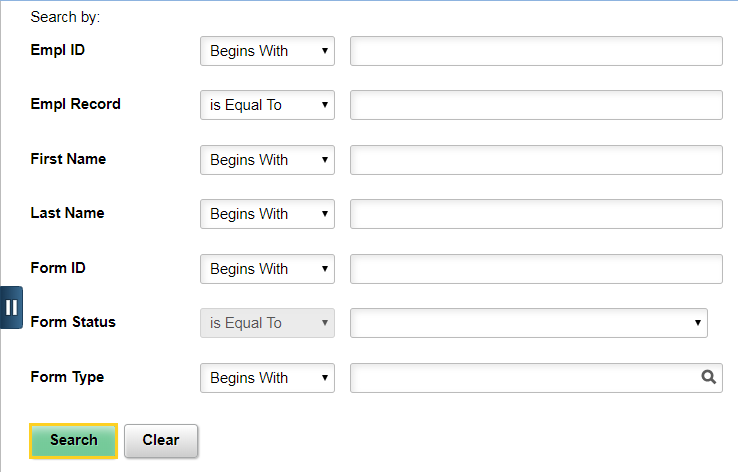
updates to the form **until** the form is fully approved. In

doing so, approval workflow will reset back to the first

approval step.

Click the **Update Personnel Action Form** button.

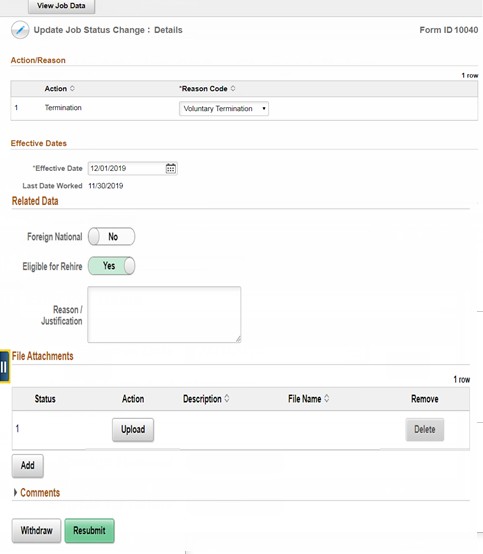
1. Click the **Search** button.



1. Click the **Pending - Darlene** link.



1. The **Update Job Status Change: Details** panel displays.



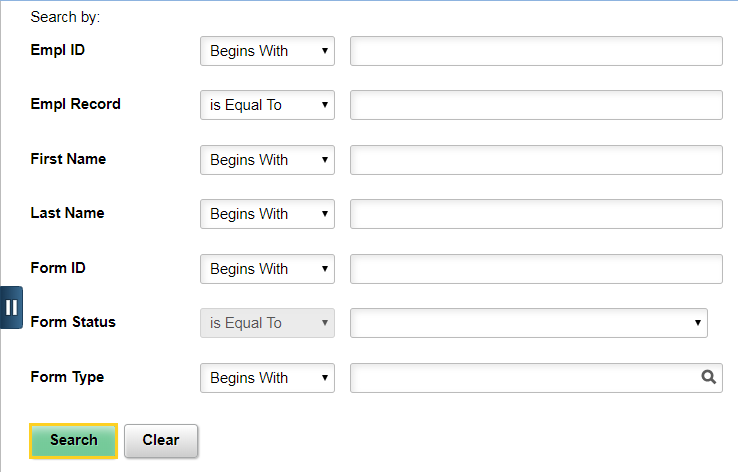
Click the **Open Sidebar Menu** button.

1. The same basic process is used when selecting the **View Personnel Action Form** as choosing *Approve Personnel Action Form*. However, this is a record keeping panel.

Clicking the **Search** button brings up a history of all transactions the *Initiator* processed.



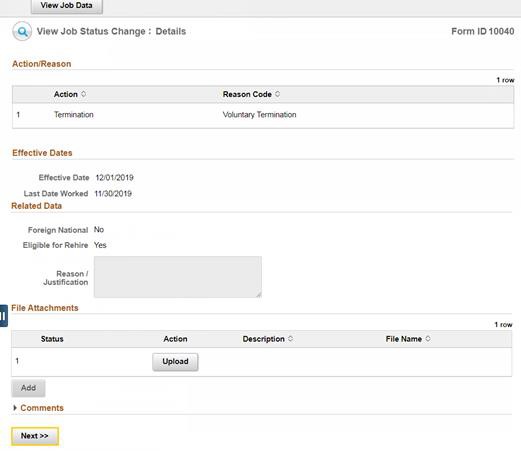
Click the **View Personnel Action Form** button.



1. Click the **Search** button.

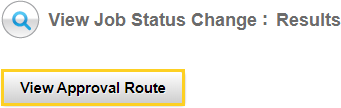
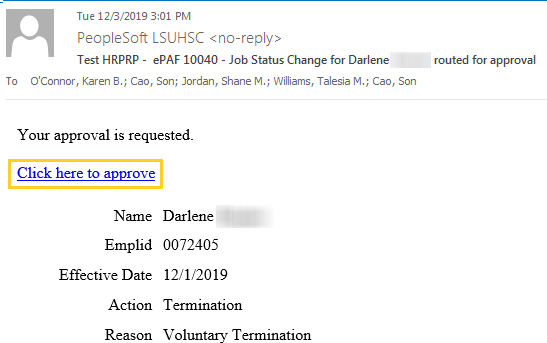


1. Click the **Pending - Darlene** link.

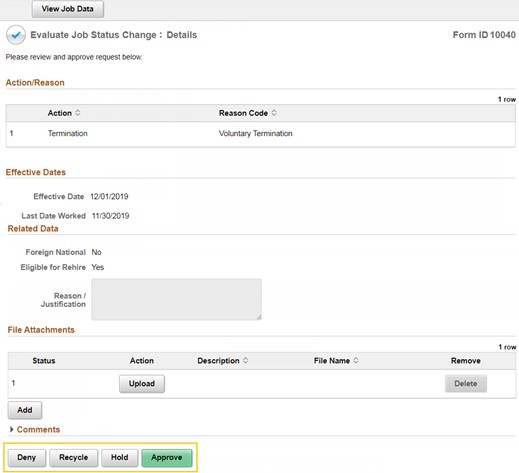


1. The **View Job Status Change: Details** panel displays.

Click the **Next** button.

1. Clicking the **View Approval Route** will display the next step *Approvers* in the termination process.
2. Clicking the link provided in the **Job Status Change** email brings the *Approver* to a panel where s/he is able to view the information entered for the transaction and then approve.

Click the ‘**Click here to approve**’ link.



1. The **Evaluate Job Status Change: Details** panel displays.
2. The *Approver* has four options from which to choose:

## Approve – will move termination to next

## level of approval

* + **Hold –** allows approver to return to review/

approve at a later date

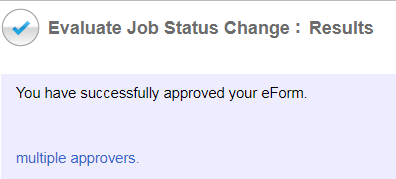
* + **Recycle –** additional information/documentation

Is required. This will send the termination back to the Initiator to correct and resubmit for approval. Add comments in Comments box if “recycling” the termination request to indicate why it is being recycled. (e.g., incorrect effective date/no supporting document attached)

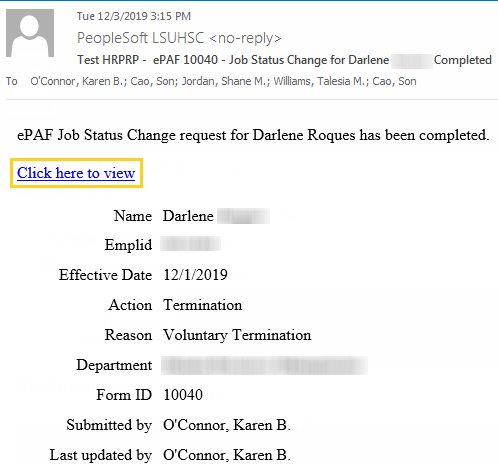
* + **Deny –** cancel termination

The *Approve* option will be demonstrated and each of the other options discussed.

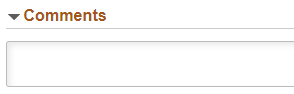
1. Click the **Approve** button.
2. A confirmation message will display after the *Approve* button is clicked.



1. The *Approver* will receive a Job Status Change email confirming the Termination has been approved. Select the ‘**Click here to view**’ link to navigate to the **View Job Status Change: Details** panel.



1. Clicking '**Recycle**' will send the form back to the *Initiator*. The *Approver* has the ability to add comments relative to what information has to be modified. Typically, this is done when date changes have to made, because the *Approver* is **not** able to make changes to the information submitted by the Initiator.

Please add comments in the **Comments** box when **Recycling**

the *Termination* request to indicate why it is being recycled

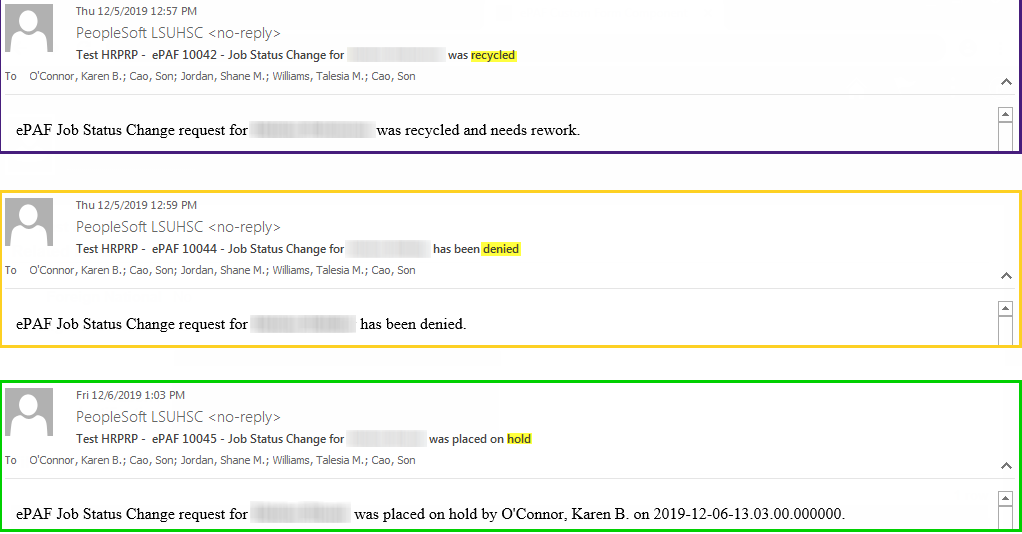
(e.g., Incorrect effective date, no supporting documentation

Attached).

If a termination is **recycled**, it will go back to the *Initiator*

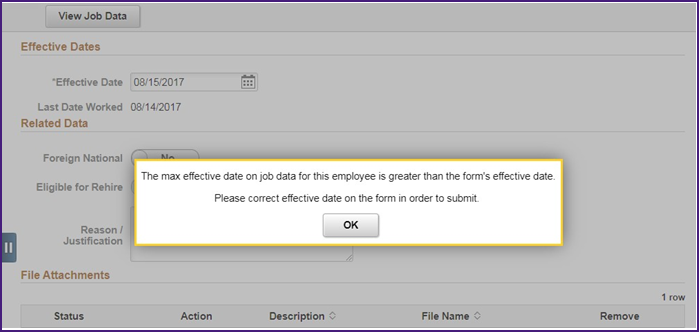
to correct and resubmit for approvals.

1. Clicking '**Deny**' will *cancel* the transaction, which *cannot be undone by the Initiator*. This would **not** be done if modifications have to be made, but rather when the employee, or his/her manager, has decided **not** to move forward with the termination.
2. Clicking '**Hold**' is similar to clicking *Save*, where the form still exists, and the *Initiator* can make *modifications*, but the termination is **not** going to occur at that time for various reasons.
3. Shown are the 3 different emails (outside of Approve) the *Initiator* will receive depending on if the *Approver* chose to **Recycle**, **Deny**, or **Hold** the transaction.



## Items to Note

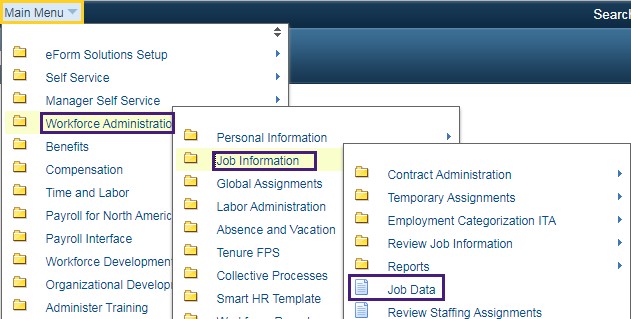
* The Effective Date cannot be before an effective dated row. If an employee’s termination is processed on 10/1, but backdated to 9/1, then the transaction will be allowed as long as the previous effected dated row is not 8/31 or after. So, if an employee has an effective dated row of 9/15, with any type of change (pay rate, transfer, title change, etc.), then the termination transaction would not be backdated prior to 9/16.
* The error shown below will display upon clicking ‘**Submit**’. The *Initiator* then has to look at the last effective dated row in PeopleSoft and contact HR Operations to have the change made.



* Once the *Approver* clicks ‘**Submit**’, the transaction is sent to HR Operations for final submission. No changes can be made to the form once it is fully approved.

1. The *Initiator* can verify the transaction in **Job Data**.

Click the **Main Menu** link.



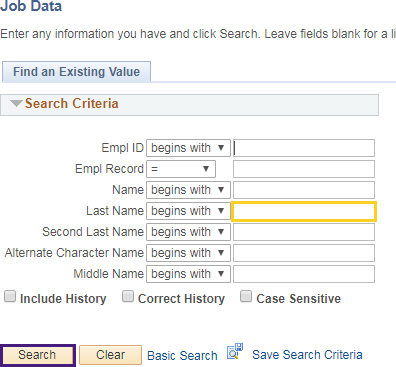
Click the **Workforce**

**Administration** link.

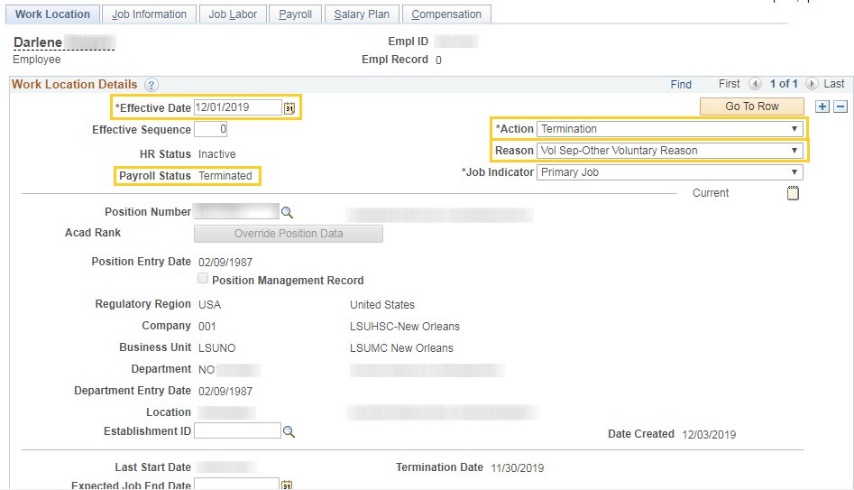
Click the **Job Information** link.

Click the **Job Data** link.

1. Enter the desired information into the **Last Name** field. Enter a valid value e.g. "**Doe**". Click the **Search** button.



1. Click the **Doe** link.



1. The employee **Job Data** record is updated once HR Operations submits the transaction. (HR Operations controls the final submission because transactions cannot be submitted while payroll is processing.
2. This completes ***Enter an Electronic Terminations***.

## End of Procedure.