



# **PER\_3\_Terminations**

**Version Date: December 10, 2019**

**Training Guide**  
**PER\_3\_Terminations**

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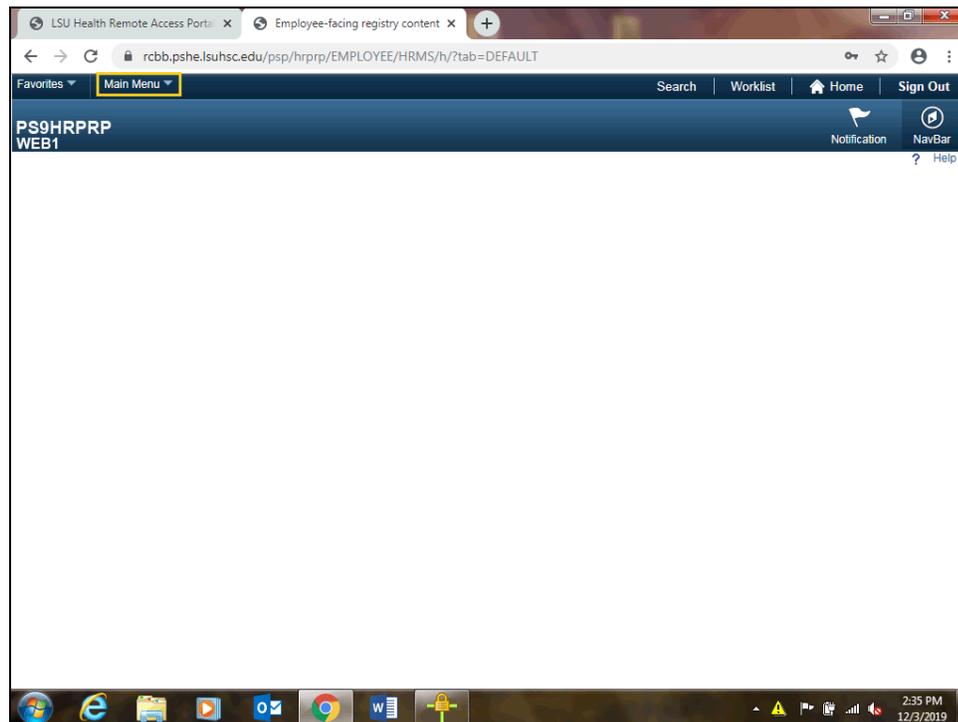
## PER\_3\_Terminations

### Enter a PER 3 Termination

#### Procedure

In this topic you will learn how to **Enter a Per 3 Termination**.

Step	Action
1.	All tasks for <i>PER 3 - Terminations</i> will be performed in the <b>PS HCM Production</b> database.

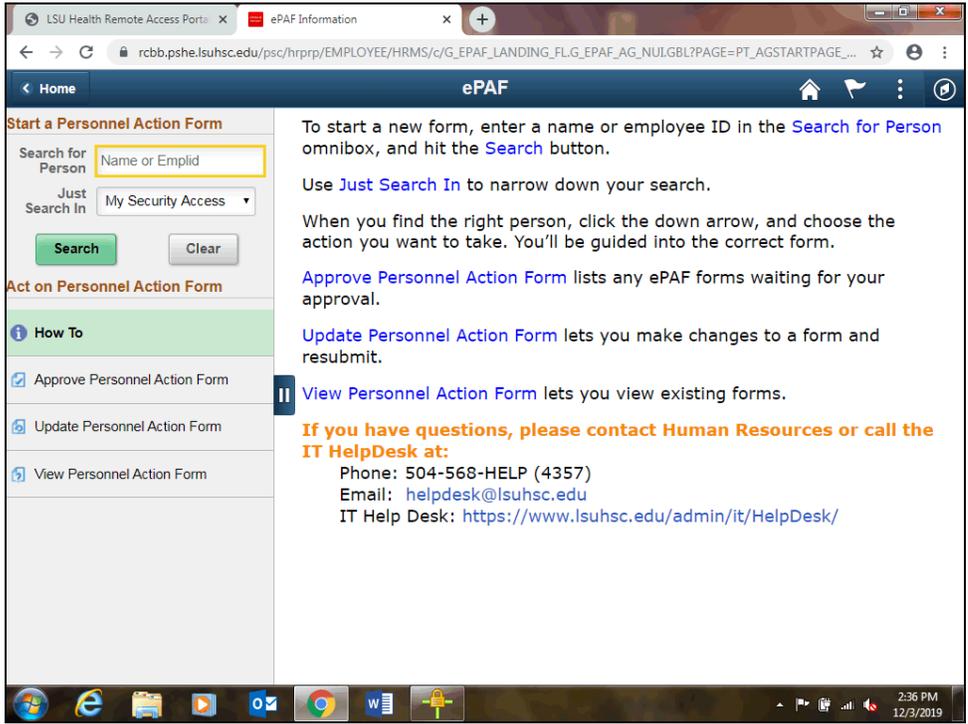


Step	Action
2.	Click the <b>Main Menu</b> link. 
3.	Click the <b>LSUHSC Processes</b> link. 

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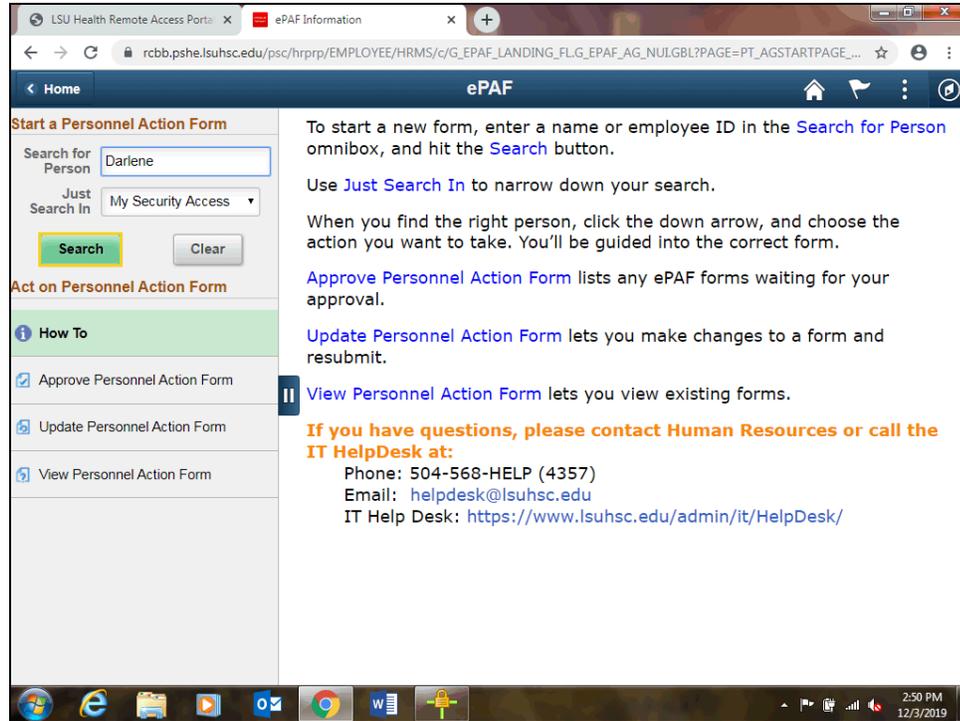
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Step	Action
4.	Click the <b>Personnel Action Forms</b> link. 



Step	Action
5.	You can search for an employee by entering his/her <i>first name</i> or <i>Empl ID</i> .  Enter the desired information into the <b>Search for Person</b> field. Enter " <b>Darlene</b> ".

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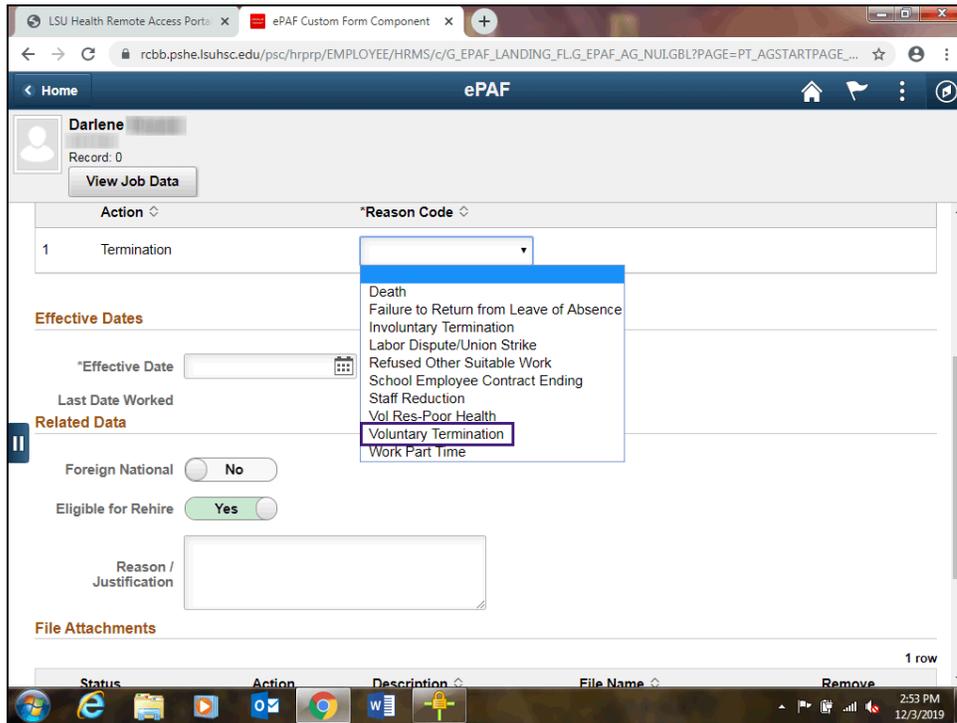


Step	Action
6.	Click the <b>Search</b> button. 
7.	A list of employees with the first name 'Darlene' displays on the right side of the page. Scroll down the page until you locate the correct employee. Click the drop-down button next to the employee name to view available actions.  Click the button to the right of the <b>Employee Name</b> field. 
8.	Click the <b>Terminate</b> button. 
9.	The notes in <b>red</b> explain how to determine the correct effective date, and for the resignation letter or other documentation to be uploaded as appropriate.
10.	Once <i>Terminate</i> is selected, a panel will display where you will enter information required for the PeopleSoft termination process.  The <i>Initiator</i> will enter information into the following field: <ul style="list-style-type: none"> <li>• <b>Action Termination Reason Code</b></li> <li>• <b>Effective Date</b></li> <li>• <b>Foreign National (Yes or No)</b></li> <li>• <b>Eligible for Rehire (Yes or No)</b></li> </ul>

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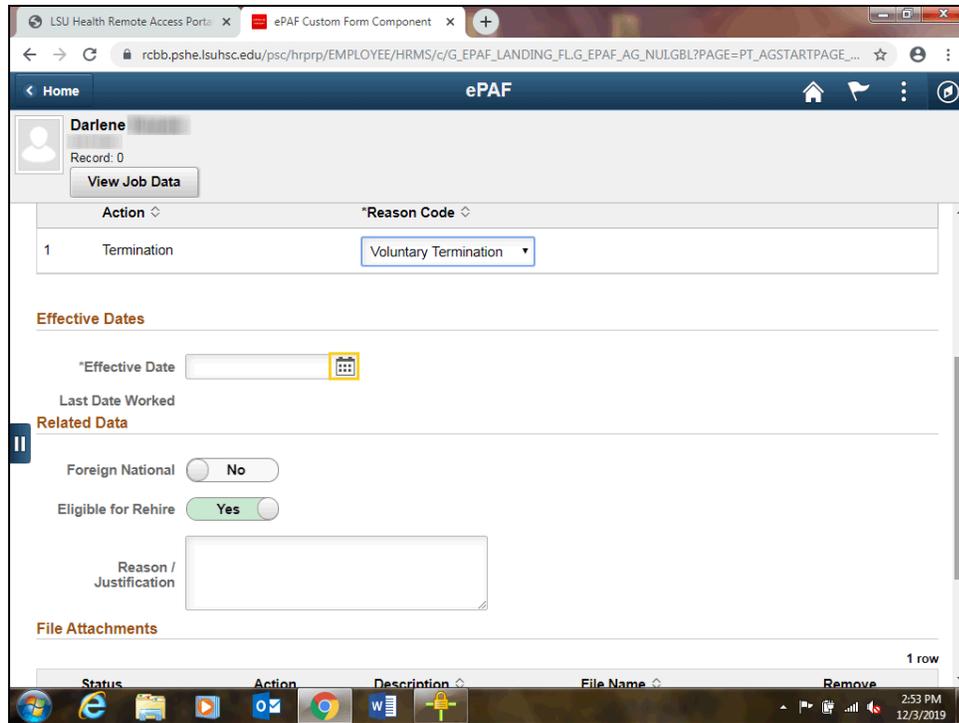
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Step	Action
11.	Click the button to the right of the <b>Reason Code</b> field. 



Step	Action
12.	Click the <b>Voluntary Termination</b> list item. 

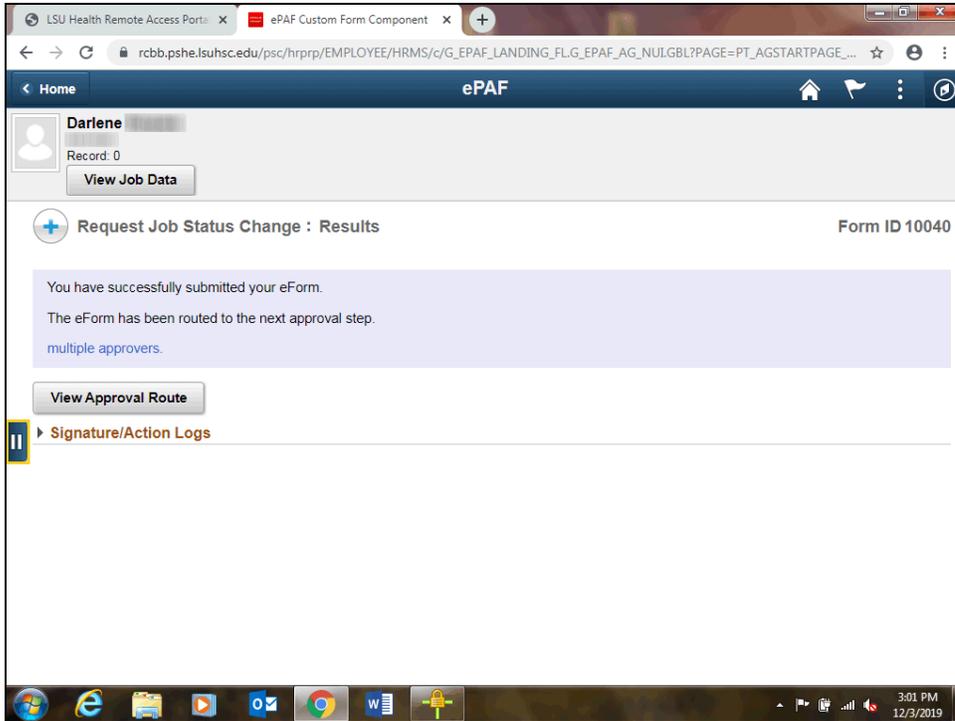
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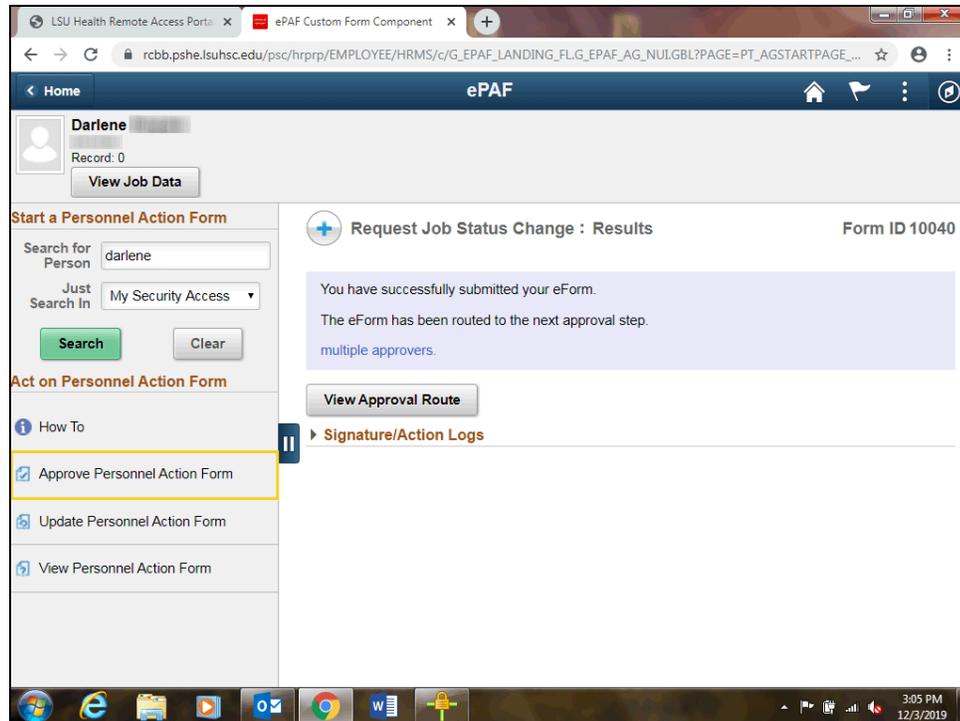
Step	Action
13.	Click the <b>Calendar</b> button. 
14.	Click the desired date. 
15.	Click the <b>Submit</b> button. 
16.	The <i>Initiator</i> will receive a confirmation message after clicking the Submit button.
17.	The next level <i>Approver</i> will receive an email request to approve the transaction. The <i>Approver</i> will click the link in the email notification to navigate to the approval panel.

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Step	Action
18.	Click the <b>Open Sidebar Menu</b> button. 
19.	You have three actions from which to choose on the sidebar menu: <ul style="list-style-type: none"> <li>• Approve Personnel Action Form</li> <li>• Update Personnel Action Form</li> <li>• View Personnel Action Form</li> </ul>
20.	<i>Approvers</i> have two options for navigating to approve a Termination: <ul style="list-style-type: none"> <li>• <b>Use the email link from the Job Status Change email, or</b></li> <li>• <b>Approve Personnel Action Form</b></li> </ul>
21.	The <b>Update Personnel Action Form</b> option is where the forms go for which the <i>Approver</i> clicked <i>Recycle</i> (with or without comments). <i>Recycled</i> forms can be modified and sent back to the <i>Approver</i> .



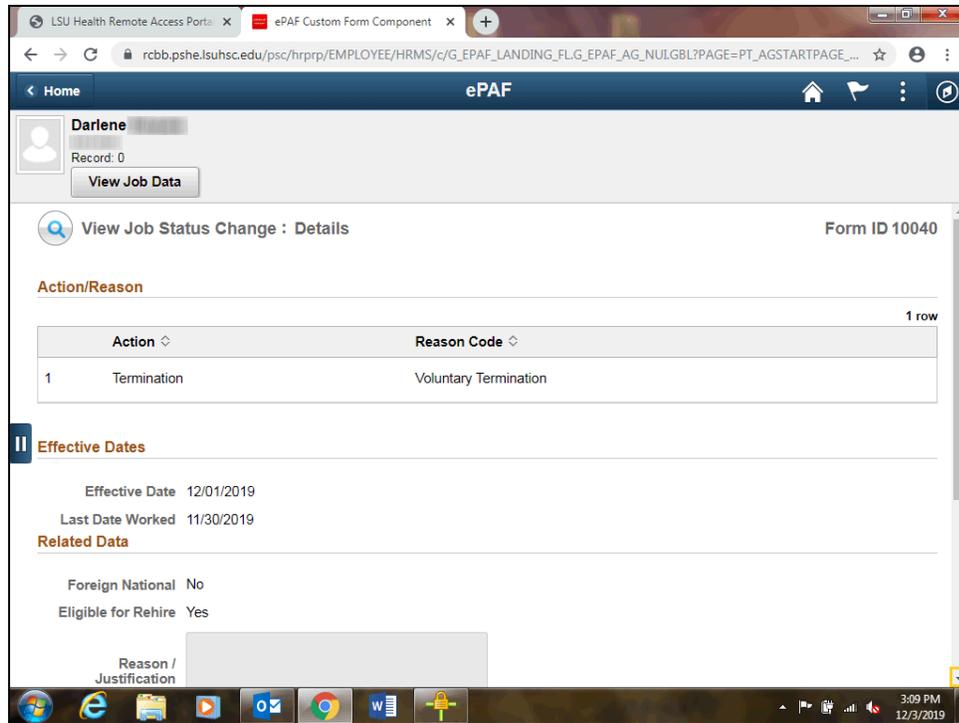
Step	Action
22.	Click the <b>Approve Personnel Action Form</b> button. 
23.	The <i>Approver</i> can search by any of the various methods displayed, but can also simply click the Search button to either go directly to the next panel, or to get a list of Search result options at the bottom of the page.  Click the <b>Search</b> button. 
24.	Click the <b>Pending - Darlene</b> link. 
25.	The <b>Evaluate Job Status Change: Details</b> panel displays.  Click the <b>Down</b> button of the scrollbar. 
26.	Click the <b>Open Sidebar Menu</b> button. 

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Step	Action
27.	<p>The same basic process is used when selecting the <b>Update Personnel Action Form</b> as choosing <i>Approve Personnel Action Form</i>. However, the <i>Initiator</i> is able to make updates to the form <b>until</b> the form is fully approved.</p> <p>Click the <b>Update Personnel Action Form</b> button.</p> 
28.	<p>Click the <b>Search</b> button.</p> 
29.	<p>Click the <b>Pending - Darlene</b> link.</p> 
30.	<p>The <b>Update Job Status Change: Details</b> panel displays.</p> <p>Click the <b>Down</b> button of the scrollbar.</p> 
31.	<p>Click the <b>Open Sidebar Menu</b> button.</p> 
32.	<p>The same basic process is used when selecting the <b>View Personnel Action Form</b> as choosing <i>Approve Personnel Action Form</i>. However, this is a record keeping panel. Clicking the Search button brings up a history of all transactions the Initiator processed.</p> <p>Click the <b>View Personnel Action Form</b> button.</p> 
33.	<p>Click the <b>Search</b> button.</p> 
34.	<p>Click the <b>Pending - Darlene</b> link.</p> 

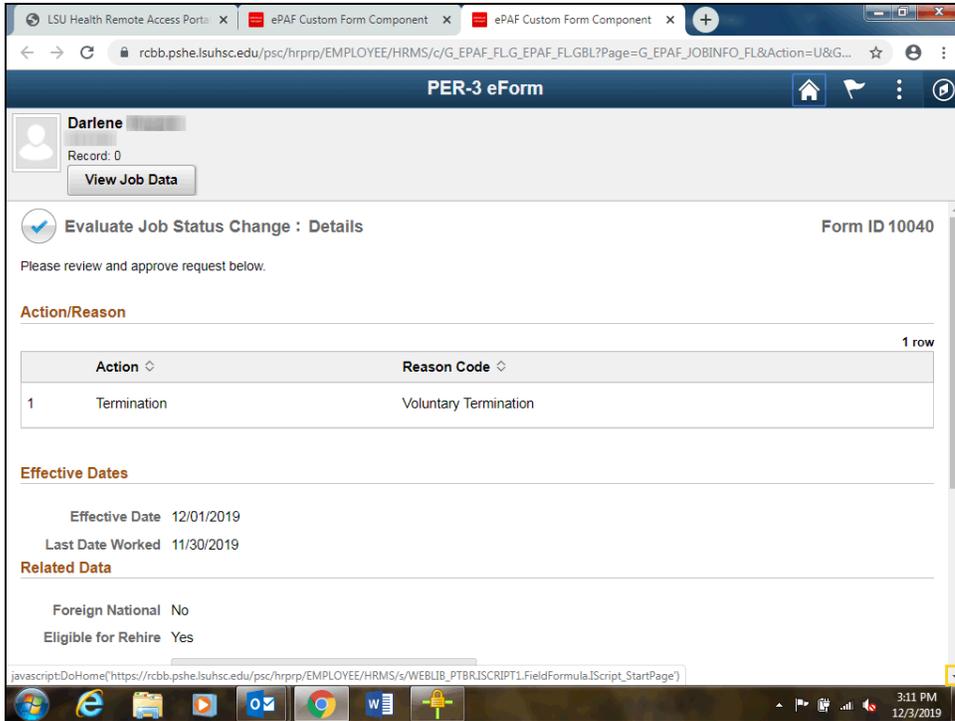
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Step	Action
35.	<p>The <b>View Job Status Change: Details</b> panel displays.</p> <p>Click the <b>Down</b> button of the scrollbar.</p> 
36.	<p>Click the <b>Next</b> button.</p> 
37.	<p>Clicking the <b>View Approval Route</b> will display the next step <i>Approvers</i> in the Termination process.</p>
38.	<p>Clicking the link provided in the <b>Job Status Change</b> email brings the <i>Approver</i> to a panel where s/he is able to view the information entered for the transaction and then approve.</p> <p>Click the <b>Click here to approve</b> link.</p> 

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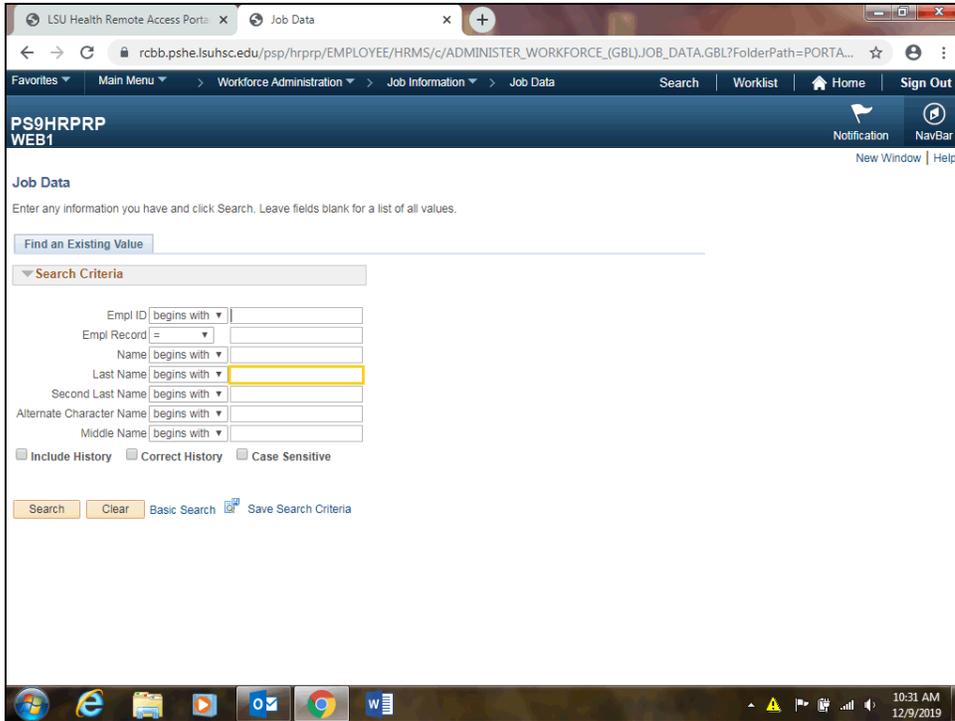


Step	Action
39.	<p>The <b>Evaluate Job Status Change: Details</b> panel displays.</p> <p>Click the <b>Down</b> button of the scrollbar.</p> 
40.	<p>The <i>Approver</i> has four options from which to choose:</p> <ul style="list-style-type: none"> <li>• <b>Approve</b></li> <li>• <b>Hold</b></li> <li>• <b>Recycle</b></li> <li>• <b>Deny</b></li> </ul> <p>The <i>Approve</i> option will be demonstrated and each of the other options discussed.</p>
41.	<p>Click the <b>Approve</b> button.</p> 
42.	<p>A confirmation message will display after the <i>Approve</i> button is clicked.</p>
43.	<p>The <i>Approver</i> will receive a Job Status Change email confirming the Termination has been approved. Select the <b><u>Click here to view</u></b> link to navigate to the <b>View Job Status Change: Details</b> panel.</p>
44.	<p>Clicking '<b>Recycle</b>' will send the form back to the <i>Initiator</i>. The <i>Approver</i> has the ability to add comments relative to what information has to be modified. Typically this is done when date changes have to be made, because the <i>Approver</i> is not able to make changes to the information submitted by the <i>Initiator</i>.</p>

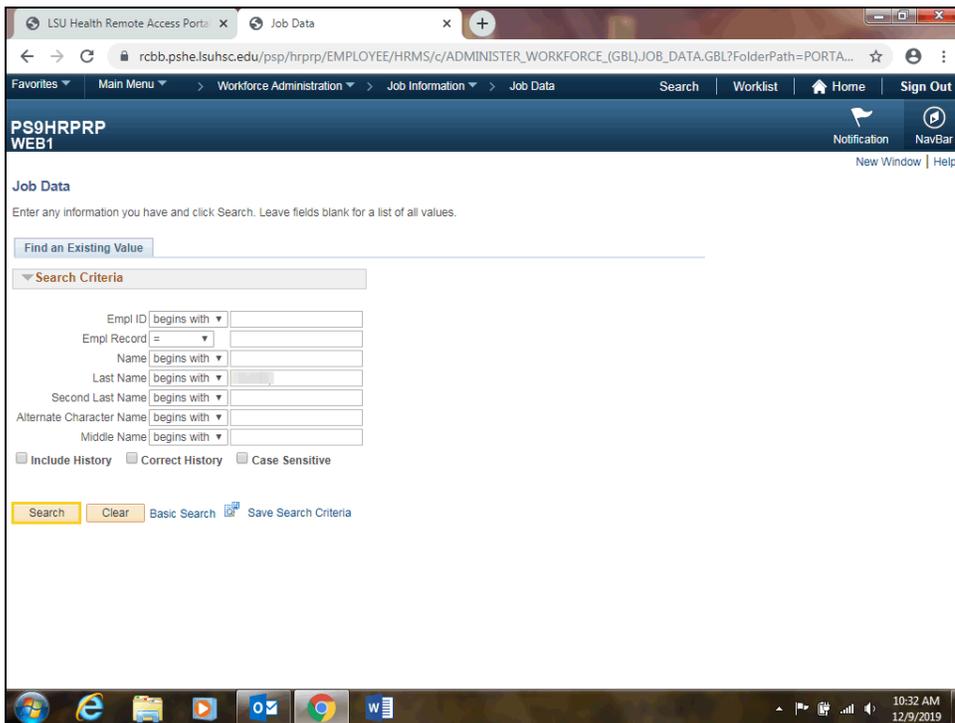
Step	Action
45.	Clicking <b>'Deny'</b> will <i>cancel</i> the transaction, which <i>cannot be undone by the Initiator</i> . This would <b>not</b> be done if modifications have to be made, but rather when the employee, or his/her manager, has decided <b>not</b> to move forward with the termination.
46.	Clicking <b>'Hold'</b> is similar to clicking <i>Save</i> , where the form still exists, and the <i>Initiator</i> can make <i>modifications</i> , but the termination is <b>not</b> going to occur at that time for various reasons.
47.	Shown are the 3 different emails (outside of <i>Approve</i> ) the <i>Initiator</i> will receive depending on if the <i>Approver</i> chose to <i>Recycle</i> , <i>Deny</i> , or <i>Hold</i> the transaction.
48.	<p><b>Items of Note</b></p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• The error shown will display upon clicking <b>'Submit'</b>. The <i>Initiator</i> then has to look at the last effective dated row in PeopleSoft and contact HR Operations to have the change made.</li> <li>• Once the <i>Approver</i> clicks <b>'Submit'</b>, the transaction is immediately sent to PeopleSoft and is processed automatically. That is the reason no changes can be made to the form once it is fully approved.</li> </ul>
49.	<p>The <i>Initiator</i> can verify the transaction in <b>Job Data</b>.</p> <p>Click the <b>Main Menu</b> link.</p> 
50.	<p>Click the <b>Workforce Administration</b> link.</p> 
51.	<p>Click the <b>Job Information</b> link.</p> 
52.	<p>Click the <b>Job Data</b> link.</p> 

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Step	Action
53.	Enter the desired information into the <b>Last Name</b> field. Enter " <b>Darlene</b> ".



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Step	Action
54.	Click the <b>Search</b> button. 
55.	Click the <b>Darlene</b> link. 
56.	The employee job data record is updated automatically, but not instantly. It takes a few minutes for PeopleSoft to reflect the change.
57.	This completes <b><i>Enter PER 3 Terminations.</i></b> <b>End of Procedure.</b>