

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 PS HCM Production database.



Step	Action		
2.	Click the Main Menu link.		
	Main Menu 🔻		
3.	Click the LSUHSC Processes link.		
	LSUHSC Processes		

Step	Action
4.	Click the Personnel Action Forms link.
	Personnel Action Forms



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

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Start a Personnel Action Form Search for Darlene Just Search In My Security Access Search Clear Act on Personnel Action Form How To Approve Personnel Action Form Vupdate Personnel Action Form View Personnel Action Form View Personnel Action Form	To start a new form, enter a name or employee i omnibox, and hit the Search button. Use Just Search In to narrow down your search. When you find the right person, click the down a action you want to take. You'll be guided into the Approve Personnel Action Form lists any ePAF fo approval. Update Personnel Action Form lets you make cha resubmit. View Personnel Action Form lets you view existin If you have questions, please contact Huma IT HelpDesk at: Phone: 504-568-HELP (4357) Email: helpdesk@lsuhsc.edu IT Help Desk: https://www.lsuhsc.edu/admi	ID in the Search for Person irrow, and choose the e correct form. rms waiting for your anges to a form and ig forms. In Resources or call the n/it/HelpDesk/

Step	Action
6.	Click the Search button.
	Search
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 Employee Name field.
	$\overline{\mathbf{O}}$
8.	Click the Terminate button.
	Terminate
9.	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.
10.	Once <i>Terminate</i> 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 field:
	Action Termination Reason Code Effortive Data
	Foreign National (Yes or No)
	• Eligible for Rehire (Yes or No)

Step	Action
11.	Click the button to the right of the Reason Code field.

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	Eligible for Rehire	Yes				
	Reason / Justification					
	File Attachments					
	-	•			1 row	
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Step	Action
12.	Click the Voluntary Termination list item.
	Voluntary Termination

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	Action \diamond	*Reason Code ⇔				
1	Termination	Voluntary Termination				
L Rela	ast Date Worked					
	Foreign National	No				
E	ligible for Rehire	Yes				
	Reason / Justification					
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Step	Action
13.	Click the Calendar button.
14.	Click the desired date.
	1
15.	Click the Submit button.
	Submit
16.	The <i>Initiator</i> will receive a confirmation message after clicking the Submit button.
17.	The next level Approver 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.



Step	Action
18.	Click the Open Sidebar Menu button.
19.	 You have three actions from which to choose on the sidebar menu: Approve Personnel Action Form Update Personnel Action Form View Personnel Action Form
20.	 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
21.	The Update Personnel Action Form 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> .

Darlene Record: 0		
view 300 Bata		
Search for Person darlene	Request Job Status Change : Results	Form ID 1004
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How To II How To	w Approval Route gnature/Action Logs	
Approve Personnel Action Form		
J Update Personnel Action Form		
View Personnel Action Form		

Step	Action
22.	Click the Approve Personnel Action Form button.
	Approve Personnel Action Form
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 Search button.
	Search
24.	Click the Pending - Darlene link.
	Pending Darlene
25.	The Evaluate Job Status Change: Details panel displays.
	Click the Down button of the scrollbar.
	· •
26.	Click the Open Sidebar Menu button.

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

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Last Date Worked Related Data	11/30/2019		
Foreign National	No		
Eligible for Rehire	Yes		
Reason / Justification			
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Step	Action
35.	The View Job Status Change: Details panel displays.
	Click the Down button of the scrollbar.
	Y
36.	Click the Next button.
	Next >>
37.	Clicking the View Approval Route will display the next step <i>Approvers</i> in the Termination process.
38.	Clicking the link provided in the Job Status Change 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.
	Click the Click here to approve link.
	Click here to approve

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Step	Action
39.	The Evaluate Job Status Change: Details panel displays.
	Click the Down button of the scrollbar.
40.	The Approver has four options from which to choose: • Approve • Hold • Recycle • Domain
	• Deny
	The <i>Approve</i> option will be demonstrated and each of the other options discussed.
41.	Click the Approve button. Approve
42.	A confirmation message will display after the <i>Approve</i> button is clicked.
43.	The <i>Approver</i> will receive a Job Status Change email confirming the Termination has been approved. Select the ' <u>Click here to view</u> ' link to navigate to the View Job Status Change: Details panel.
44.	Clicking ' Recycle ' 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 made, because the <i>Approver</i> is not able to make changes to the information submitted by the <i>Initiator</i> .

Step	Action
45.	Clicking ' Deny ' will <i>cancel</i> the transaction, which <i>cannot be undone by the Initiator</i> . 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.
46.	Clicking 'Hold' 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 not going to occur at that time for various reasons.
47.	Shown are the 3 different emails (outside of Approve) the <i>Initiator</i> will receive depending on if the <i>Approver</i> chose to Recycle, Deny, or Hold the transaction.
48.	Items of 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 will display upon clicking ' Submit '. 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.
	• Once the <i>Approver</i> clicks ' Submit ', 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.
49.	The <i>Initiator</i> can verify the transaction in Job Data .
	Click the Main Menu link.
	Main Menu 💌
50.	Click the Workforce Administration link.
	Workforce Administration
51.	Click the Job Information link.
	Job Information
52.	Click the Job Data link.
	Job Data

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Step	Action
53.	Enter the desired information into the Last Name field. Enter "Darlene".

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Step	Action
54.	Click the Search button.
	Search
55.	Click the Darlene link.
	Darlene Darlene
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 <i>Enter PER 3 Terminations</i> . End of Procedure.