Enter a PER 3 Termination

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

   ![Screenshot of PeopleSoft Launcher]

2. Click the **Main Menu** link.
   Click the **LSUHSC Processes** link.
   Click the **Personnel Action Forms** link.

   ![Screenshot of Main Menu]

3. 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 a valid value e.g. "Darlene".
   Click the **Search** button.
4. 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.

5. Click the **Terminate** button.

6. 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.

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>The Effective Date on PeopleSoft is the first day of inactive status/no longer employed by LSUHSC-NO.</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Attachments</td>
<td>Please upload the terminating employee’s Resignation Letter, Non-Renewal Notice, or other documentation as appropriate.</td>
</tr>
</tbody>
</table>
7. 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 field:
- Action Termination Reason Code
- Effective Date
- Foreign National (Yes or No)
- Eligible for Rehire (Yes or No)

8. Click the button to the right of the Reason Code field.

9. Click the Voluntary Termination list item.

10. Click the Calendar button.
11. Click the desired date.

12. Click the **Submit** button.

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

14. 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.
15. The **Request Job Status Change: Results** confirmation message displays.

Click the **Open Sidebar Menu** button.

16. You have three actions from which to choose on the sidebar menu:

- **Approve Personnel Action Form**
- **Update Personnel Action Form**
- **View Personnel Action Form**

17. **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**

18. 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**.

19. Click the **Approve Personnel Action Form** button.
20. 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.

![Search Options](image)

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

```plaintext
2 10040 STATUSCHG Pending Darlene 0 KOCONN 2019-12-03 12:43
```
22. The **Evaluate Job Status Change: Details** panel displays.

Click the **Open Sidebar Menu** button.

23. 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.

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

25. Click the **Pending - Darlene** link.
26. The **Update Job Status Change: Details** panel displays. Click the **Open Sidebar Menu** button.

![Update Job Status Change: Details panel](image)

27. 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.
28. Click the **Search** button.

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

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

   Click the **Next** button.
31. Clicking the **View Approval Route** will display the next step *Approvers* in the Termination process.

32. 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.
33. The **Evaluate Job Status Change: Details** panel displays.

34. The **Approver** has four options from which to choose:
   - **Approve**
   - **Hold**
   - **Recycle**
   - **Deny**

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

35. Click the **Approve** button.

36. A confirmation message will display after the **Approve** button is clicked.
37. 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.

38. 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.

39. 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.

40. 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.
41. 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.

- **Recycle**
  - ePAF Job Status Change request for [Redacted] was recycled and needs rework.

- **Deny**
  - ePAF Job Status Change request for [Redacted] has been denied.

- **Hold**
  - ePAF Job Status Change request for [Redacted] was placed on hold by O'Connor, Karen B. on 2019-12-06-13.03.00.000000.
42. **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 affected 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.

![Image showing an error message in PeopleSoft]

- Once the Approver 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.

43. 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.

44. Enter the desired information into the **Last Name** field. Enter a valid value e.g. "Darlene".
    Click the **Search** object.

45. Click the **Darlene** link.
46. The employee **Job Data** record is updated automatically, but not instantly. It takes a few minutes for PeopleSoft to reflect the change.

47. This completes **Enter PER 3 Terminations**.

**End of Procedure.**