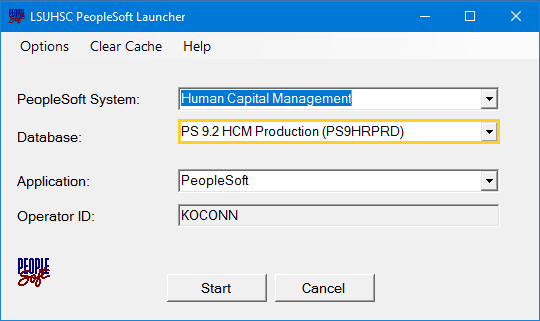
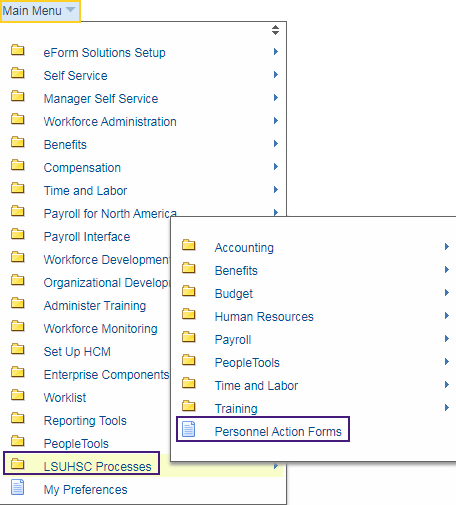
# Enter a PER 3 Termination



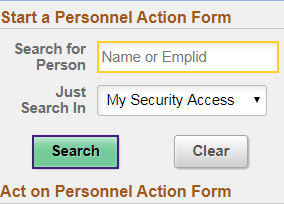
1. All tasks for *PER 3 - Terminations* will be performed in **PS HCM Production** database.
2. Click the **Main Menu** link.



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

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

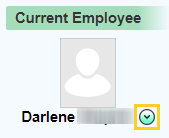
*name* or *Empl ID*.



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

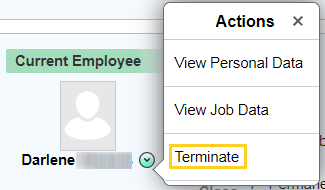
Click the **Search** button.

1. 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.

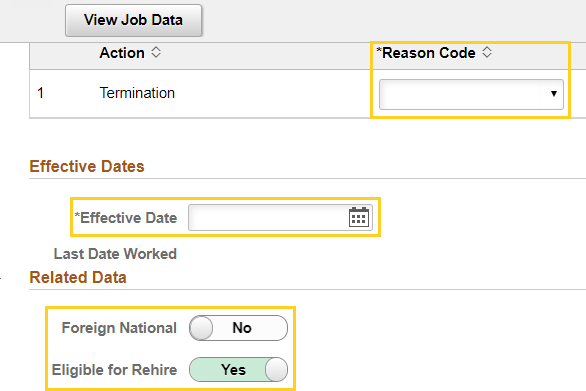
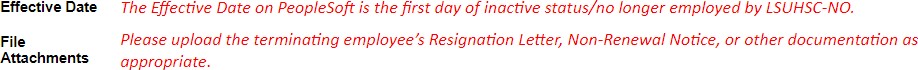


Click the button to the right of the **Employee Name** field.

1. Click the **Terminate** button.



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.

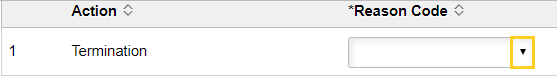


1. Once *Terminate* is selected, a panel will display where you will enter information required for the PeopleSoft termination process.

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

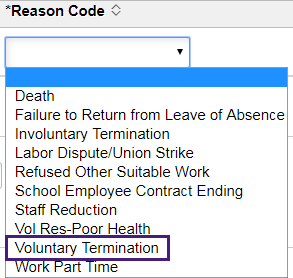
## Action Termination Reason Code

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



1. Click the button to the right of the

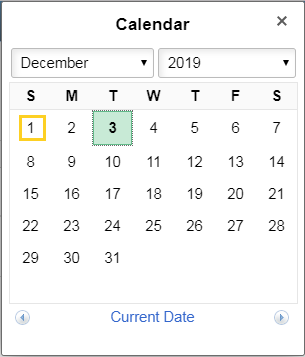
**Reason Code** field.



1. Click the **Voluntary Termination** list item.



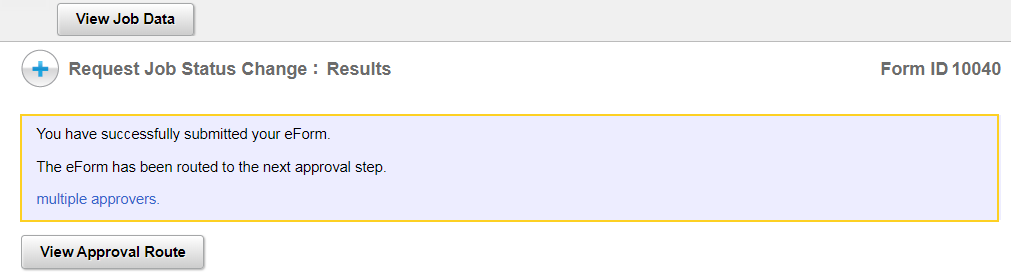
1. Click the **Calendar** button.



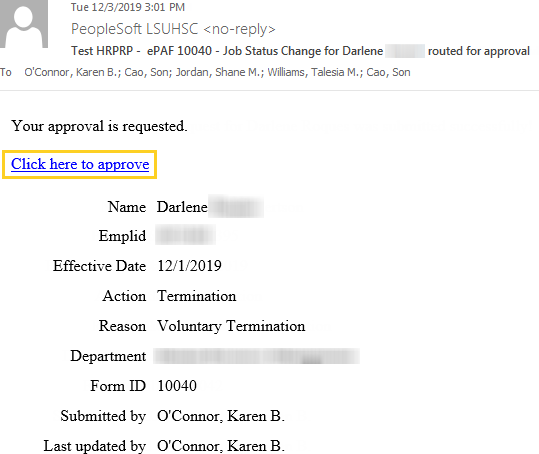
1. Click the desired date.



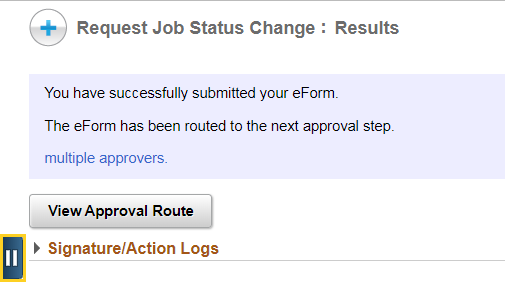
1. Click the **Submit** button.



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



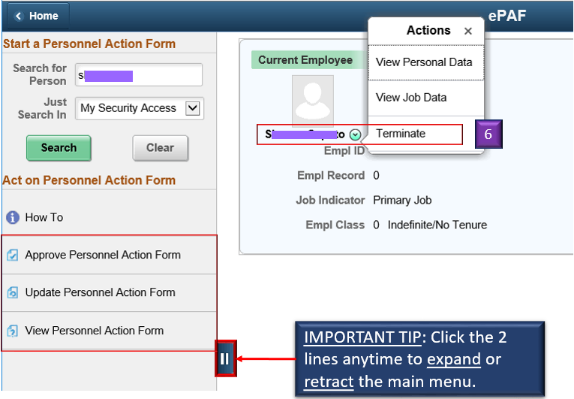
1. The next level *Approver* will receive an email request to approve the transaction. The Approver will click the link in the email notification to navigate to the approval panel.



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

* **Update Personnel Action Form**
* **View Personnel Action Form**

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**

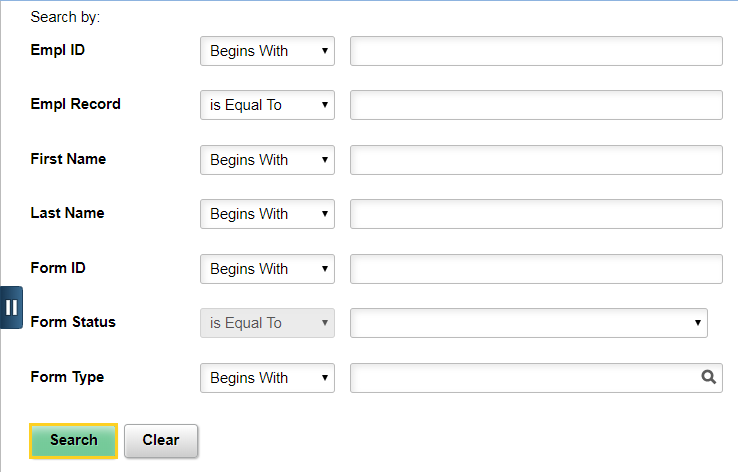
1. The **Update Personnel Action Form** option is where the forms go for which the *Approver* clicked *Recycle* (with or without comments).



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



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

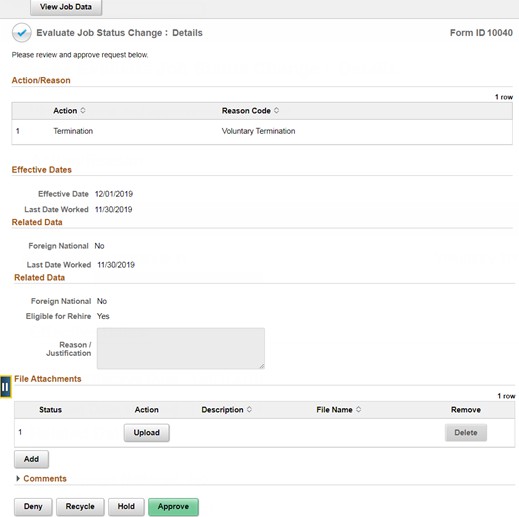


1. The *Approver* can search by any of the various methods displayed, but can also simply click the Search button to either go directly to the next panel, or to get a list of Search result options at the bottom of the page.

Click the **Search** button.



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



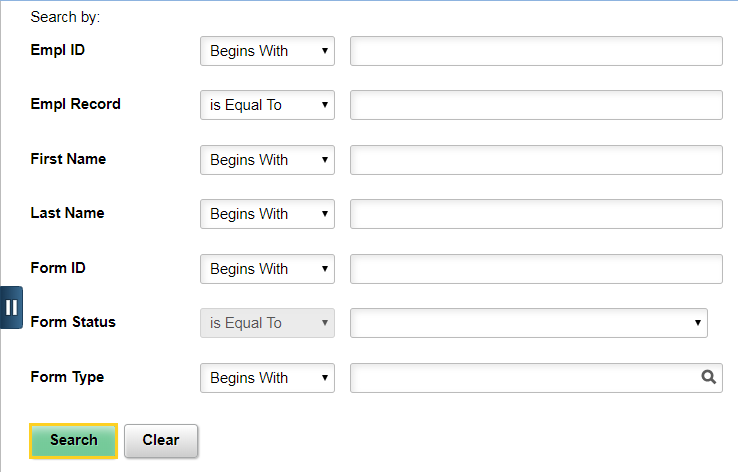
Click the **Open Sidebar Menu** button.

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.



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

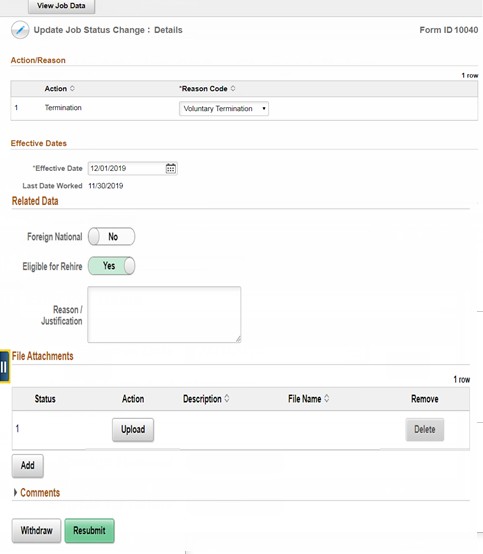
1. Click the **Search** button.



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



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



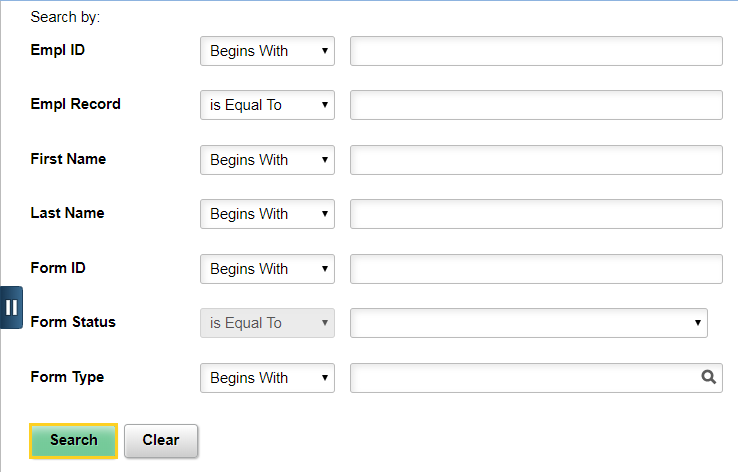
Click the **Open Sidebar Menu** button.

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.



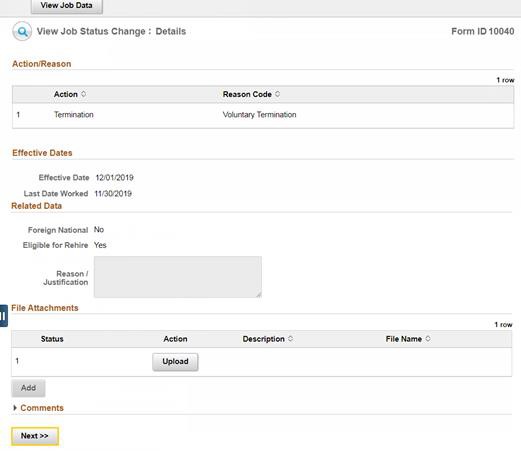
Click the **View Personnel Action Form** button.



1. Click the **Search** button.

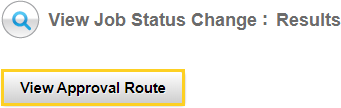
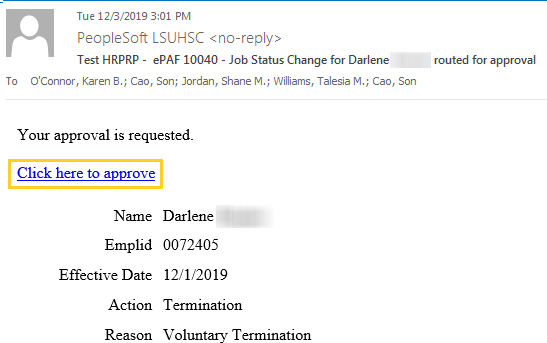


1. Click the **Pending - Darlene** link.

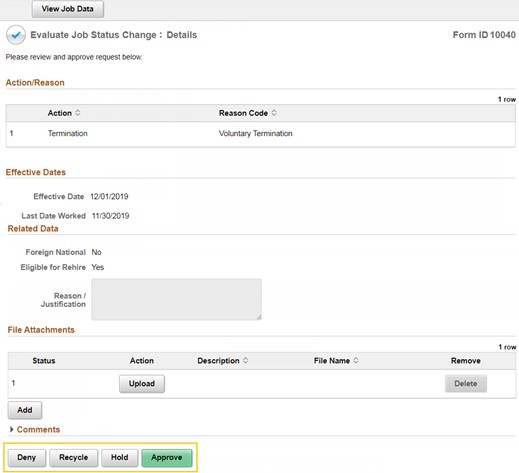


1. The **View Job Status Change: Details** panel displays.

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:

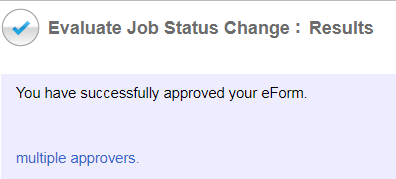
## Approve

* + **Hold**
  + **Recycle**
  + **Deny**

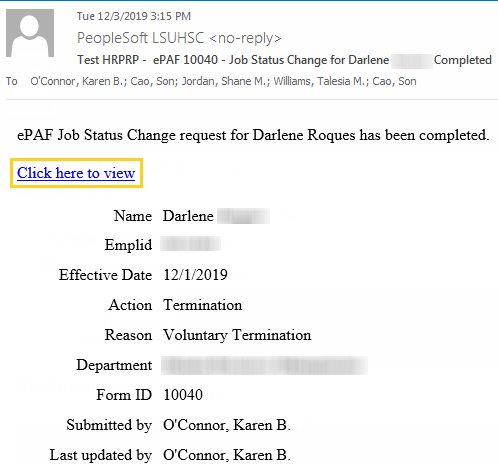


The *Approve* option will be demonstrated and each of the other options discussed.

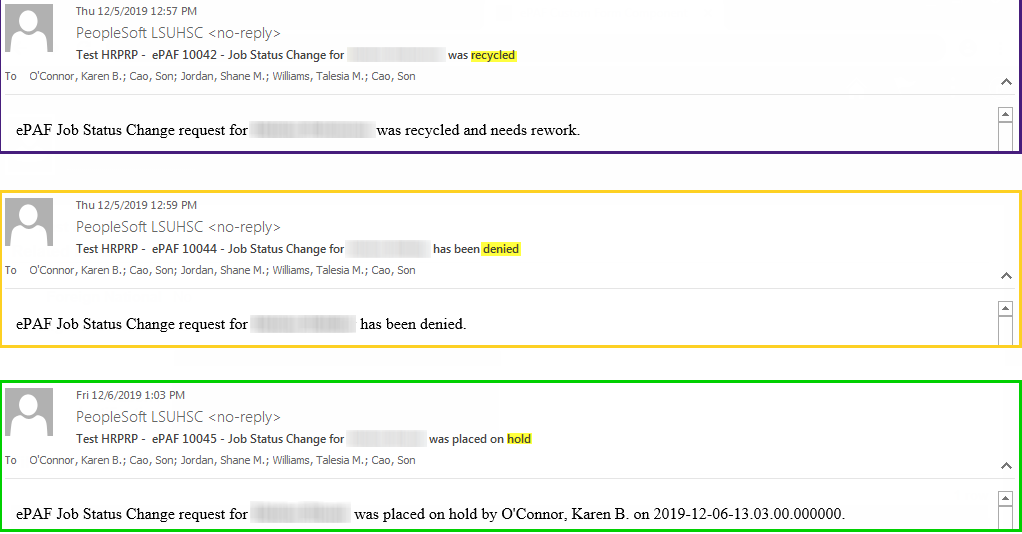
1. Click the **Approve** button.
2. A confirmation message will display after the *Approve* button is clicked.



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.

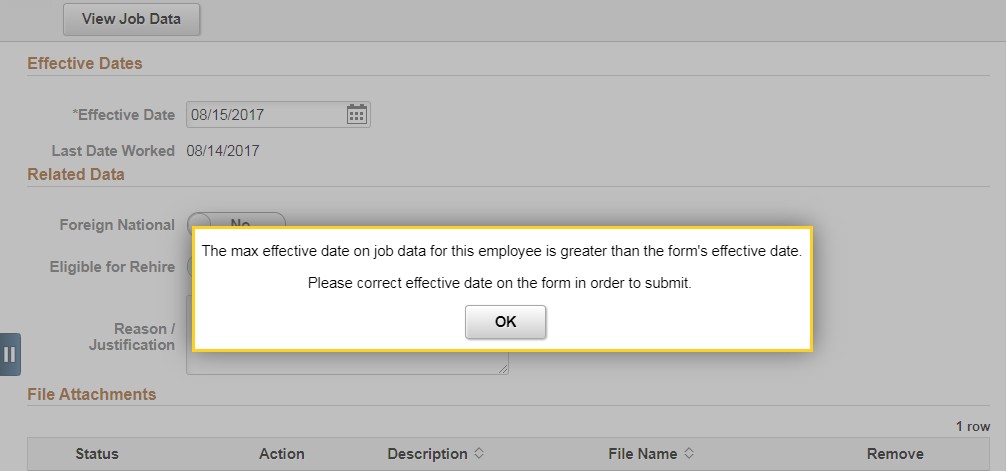


1. Clicking '**Recycle**' will send the form back to the *Initiator*. The *Approver* has the ability to add comments relative to what information has to be modified. Typically, this is done when date changes have to made, because the *Approver* is **not** able to make changes to the information submitted by the Initiator.
2. 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.
3. 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.
4. 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

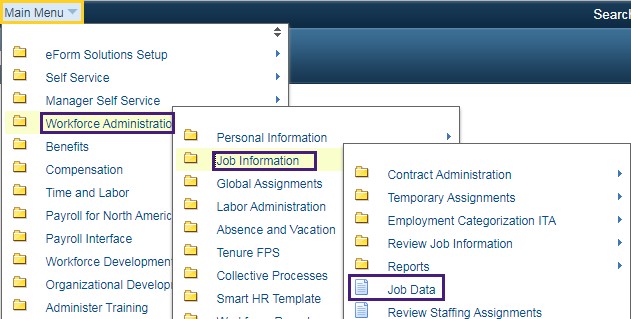
* The Effective Date cannot be before an effective dated row. If an employee’s termination is processed on 10/1, but backdated to 9/1, then the transaction will be allowed as long as the previous effected dated row is not 8/31 or after. So, if an employee has an effective dated row of 9/15, with any 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.



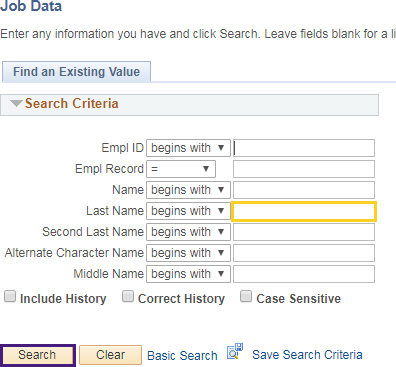
Click the **Workforce**

**Administration** link.

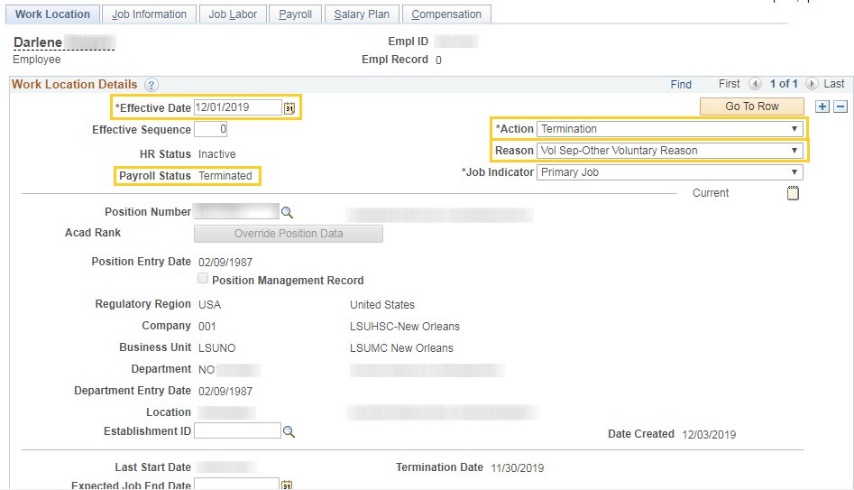
Click the **Job Information** link.

Click the **Job Data** link.

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



1. Click the **Darlene** 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 PER 3 Terminations***.

## End of Procedure.