SPS

STATEWIDE PERSONNEL SYSTEM

Terminate an Employee (For HR Coordinators)

November 2014

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Termination Business Process

Business Process Overview
The process steps in the Termination business process are listed in the table below.

Process Steps	Role	Description
Initiate Termination	HR Coordinator	Specify employee, termination reason, date of termination, etc.
Agency Approvals	Appointing Authority Partner	Agency approval of termination request
	Budget and Finance Partner	Agency budget approval for termination request.
To Dos (Security)	HR Coordinator/HR Partner Security Administrator	Remove user-based security groups (if applicable).
	HR Coordinator	Assign roles to another worker
Update Retiree Status	Retiree Partner	Add/Update retiree status (if applicable)
Manage Business Processes for Worker *	HR Coordinator	If employee has pending tasks assigned, cancel or assign tasks to another worker.
Freeze Position *	Budget Administrator	DBM OBA freezes position unless there is a hiring freeze exception.
To Dos (Payroll)	Payroll Partner	Request severance payout and/or final leave payout (if applicable) *
		Process final paycheck
Terminate User Account	Workday System	Terminate user Workday account

NOTE: Approval routing is based on the reason selected when initiating the business process. Steps that are not always required are marked with an asterisk (*).

Events and Reasons
The table below includes valid voluntary and involuntary reasons that a manager can terminate an employee.

You must always select a primary reason. Secondary reasons are generally entered for informational purposes. However, disciplinary termination reasons marked with a caret (^) require a secondary reason. When you select one of these primary reasons, you must also select the "Unsatisfactory Report of Service" secondary reason. Primary and secondary reasons are listed in the tables below.

Table 1 – Termination Primary Reasons

Event	Reason
Termination (Primary Reasons - Voluntary)	Resignation in Lieu of Termination*
	Resignation Without Proper Notice*
	Resigned for Military Service*
	Resigned State Service*
	Transfer to a non-SPMS Agency*
	Retired
Termination (Primary Reasons - Involuntary)	Terminated*^
	Terminated on Probation*^
	Terminated with Prejudice*^
	Contract Expired*
	Deceased*
	End of Temporary Employment*
	New Hire – No Show*
	New Hire – Declined Offer After Acceptance*
	Leave Without Pay (Medical, Military, Personal)*
	Laid Off From Allocated Position
	Position Abolished

NOTE: An asterisk (*) indicates a reason for which a manager can initiate a termination.

Table 2 – Termination Secondary Reasons

Event	Reason
Termination (Secondary Reasons)	Accepted Another Job
	Best Interest of the State
	Continuing Education
	Insufficient Salary
	Job Affiliated with a Union
	Job Location
	Job Not Affiliated with a Union
	Lack of Career Path with Job
	Lack of Parking at Job Location
	Lack of Tuition Assistance
	Military Obligation
	Personal Reasons
	Relocating Outside of Area
	Unable or Unwilling to Perform All Job Duties
	Unsatisfactory Report of Service

Before you begin…
You will need the following information to complete the Termination business process.

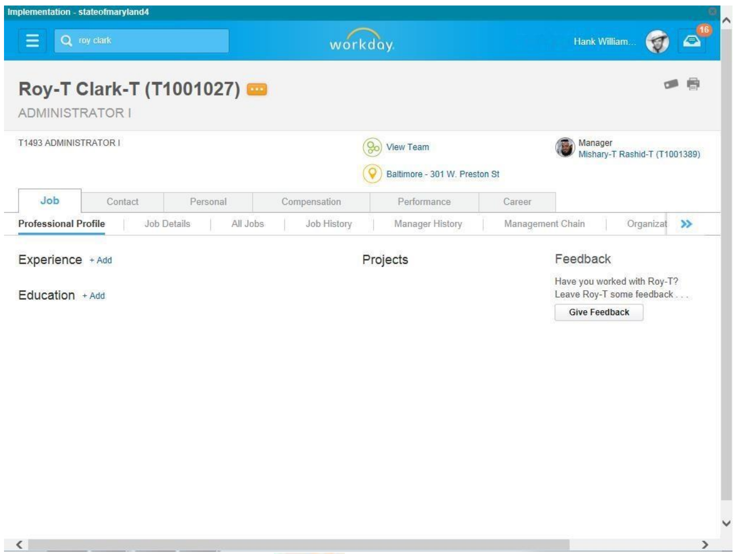
- Terminated Employee Name or Employee ID Number
- Termination Date
- Reason for Termination
- Last Day or Work
- Pay Through Date

Terminate Employee

Procedure:

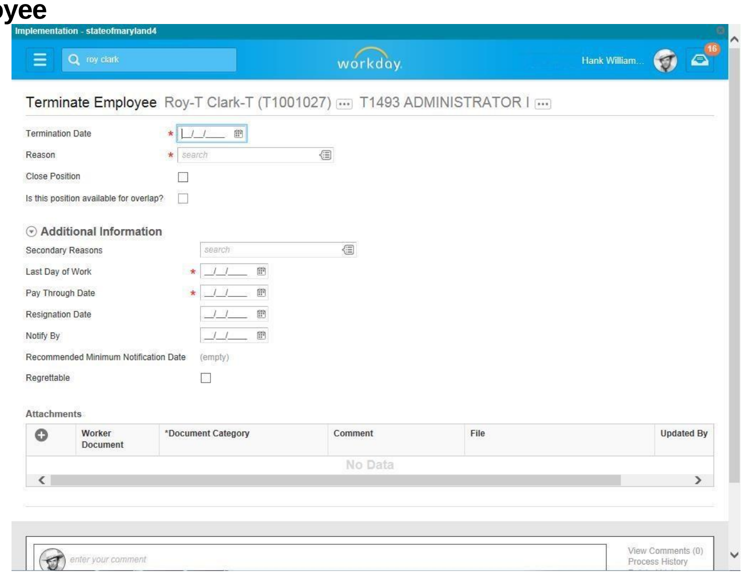
1. Type the name of the employee to terminate in the search field.
2. Click the **search** icon.
3. Click the name of the worker hyperlink.

Professional Profile for Worker - Profile View



4. Click the **Related Actions and Preview** button.
5. In the menu, hover over Job Change and click Terminate Employee.

Terminate Employee



6. Use the Calendar icon to select the Termination Date.
7. Use the prompt to select the Reason.

Information: If the primary reason selected is a disciplinary termination, then Unsatisfactory Report of Service must be selected as a secondary reason. The combination of these reasons will trigger a 106 or 106P and put the person in the POC database so that all agencies can access the information.

8. Select one or more of the following options:

If	Then
You want to abolish the position after it is vacated...	Click the **Close Position** checkbox.
You want to make the position available for overlap...	Click the **Is This Position Available for Overlap** checkbox. **NOTE:** This checkbox is only active when the **Termination Date** entered is in the future.
You want to enter a secondary reason....	Use the search prompt to enter a value in the **Secondary Reason** field. **NOTE**: A secondary reason is required if the primary reason selected is for a disciplinary termination.
The termination is voluntary (i.e., you selected a primary reason in the "Voluntary" category)...	Use the **Calendar** icon to enter a **Resignation Date.**
You want to add an attachment...	Click the **Add** (+) icon in the **Attachments** section and attach the appropriate document. **NOTE:** For example, attachments that may be added are the Unsatisfactory Report of Service documentation, letter of resignation, and the disciplinary termination form.

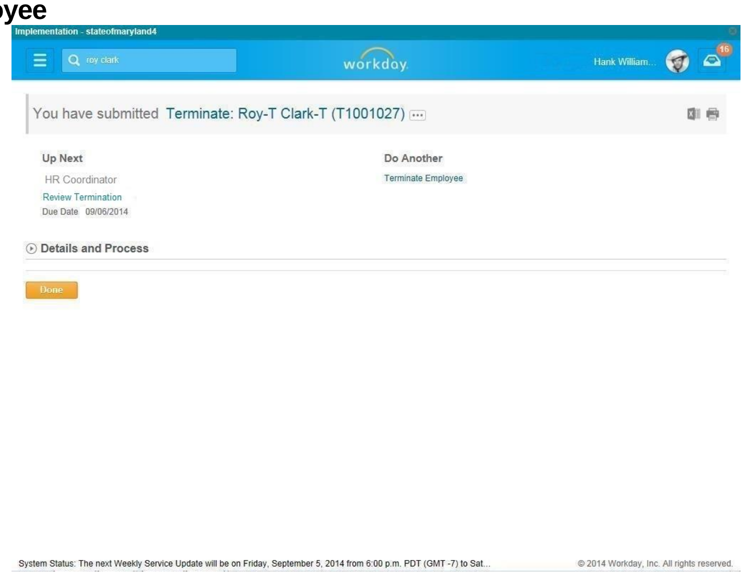
9. If needed, update the Last Day of Work, Pay Through Date, and/or Notify By dates. These dates default from the date entered in the Termination Date field. Change, if needed.

10. Click the Submit Submit button. This will submit the termination and route to the next step in workflow.

Tip: If you do not want to submit the request at this point, you can also click one of the following buttons:

- Click **Save for Later** to save your changes but not submit.
- Click **Cancel** to cancel the process and start at another time.

Terminate Employee



11. Click the **Done** 

button.

Tip: After completing a task in the business process you can view the next step.

- Click the drop-down arrow next to **Details and Process** to expand the section.
- Click the **Process** tab to see the path that the process will take.
- See the *Check the Status of a Business Process* section of this guide for details on how to view and access in the process.

12. The System Task is complete.

Assign Roles to Worker

The Assign Roles to Worker task is a “To Do” that displays when a worker leaves a position. When a worker leaves a job, there may be a need to assign that worker’s roles to another worker.

If the worker’s role is assigned to more than one person, it may not be necessary to assign roles to another worker. If this is the case, you will submit the task in your inbox without taking action.

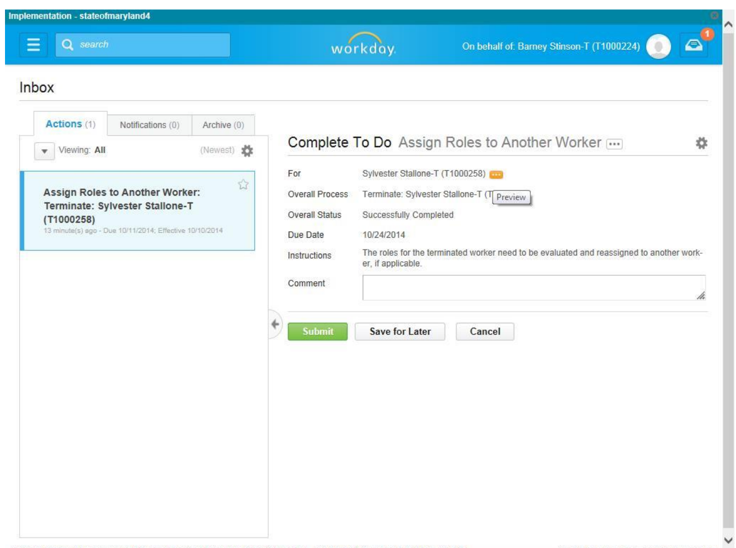
If there is no one else assigned to the role, assign the roles to another worker. The procedure to assign roles to another worker follows.

Procedure:

1. Click the **Inbox**  icon.
2. Click the **View Inbox** 

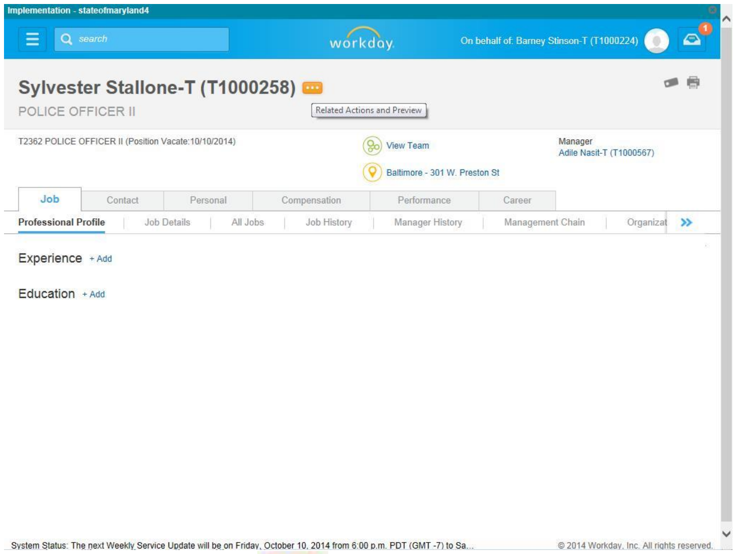
hyperlink.

Inbox



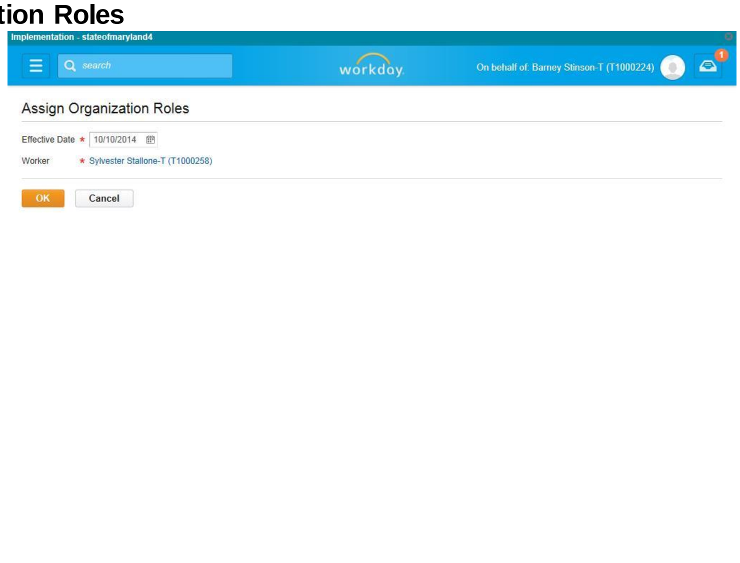
3. Click the Related Actions and Preview icon  next to the worker's name.
4. Click the name of the worker to view the worker's profile.

Professional Profile for Worker - Profile View



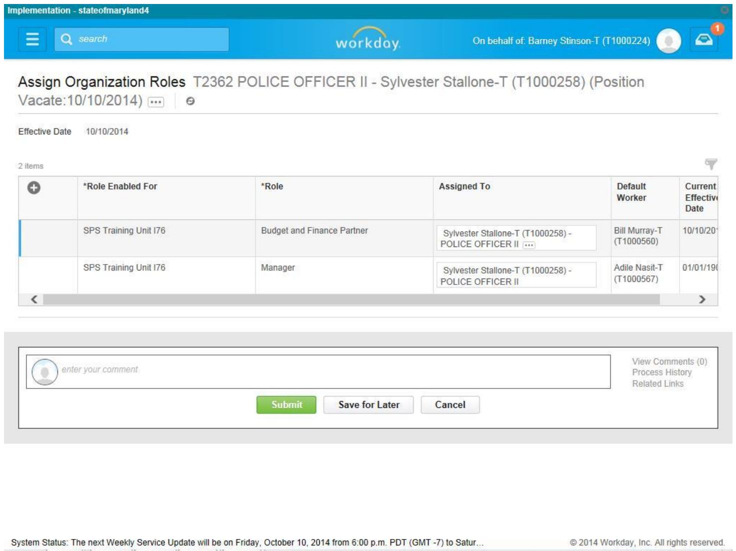
5. Click the Related Actions and Preview icon next to the worker's name.
6. In the menu, hover over Security Profile and click Assign Roles.

Assign Organization Roles



7. Click the **OK** button.

Assign Organization Roles



Information: To determine if a role needs to be assigned to another worker:

- When there are no rows, the worker does not have any roles assigned.
- When a worker is assigned roles, there will be a row for each role that the worker is assigned listed by supervisory organization. In this scenario you should review the **Default Worker** column to review any other workers that would carry out the role in the departing worker's absence.
- If a role re-assignment is not necessary, go back to the **Actions** tab in your inbox and find the "Assign Roles to Another Worker Task" for the worker. Then, click the **Submit** button.
- If you determine that a role re-assignment is necessary follow the steps below.

8. Click in the **Assigned To** column and type in the name of the worker for whom you want to assign the role.

9. Click the **Submit** Submit button once the appropriate names are populated in the **Assigned To** column.

Tip: If you do not want to submit the request at this point, you can also click one of the following buttons:

- Click **Save for Later** to save your changes but not submit
- Click **Cancel** to cancel the process and start at another time

Information: The next step in the process is for the Role Maintainer to approve the assigned role.

Tip: After completing a task in the business process you can view the next step.

- Click the drop-down arrow next to **Details and Process** to expand the section.
- Click the **Process** tab to see the path that the process will take.
- See the *Check the Status of a Business Process* section of this guide for details on how to view, access, or complete other tasks in the process.

10. After the roles re-assignment has been approved, go back to the Actions tab in your inbox and find the “Assign Roles to Another Worker Task” for the worker.
11. Click the **Submit** 

button
12. The System Task is complete.

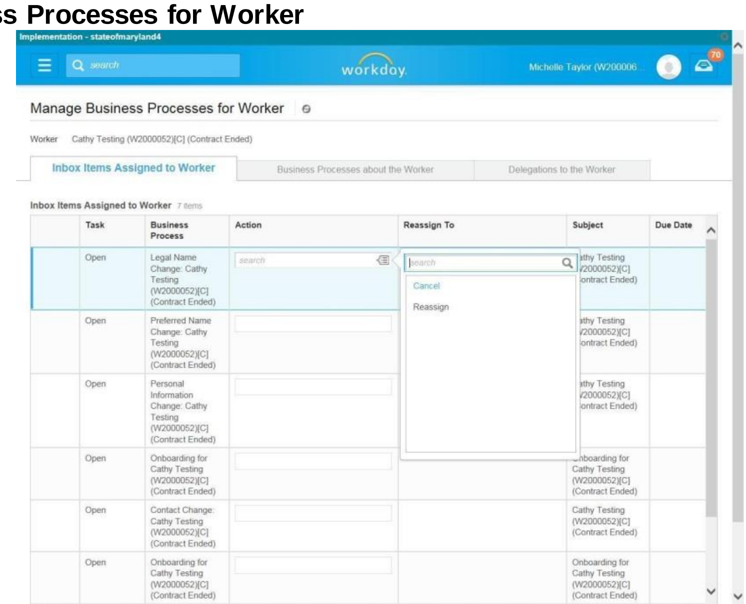
Manage Business Processes for Worker

The Manage Business Processes for Worker task is used when there are pending tasks for a worker that is leaving a position. This process allows you to reassign or cancel business processes for the terminated worker.

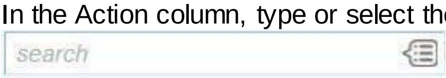
Procedure:

1. Click the Inbox icon.
2. Click the **View Inbox** View Inbox hyperlink.
3. Click the assigned task from you action list.
4. Click the arrow to collapse the inbox.
5. To cancel or reassign tasks, click on the "Inbox Items Assigned to Worker" tab.

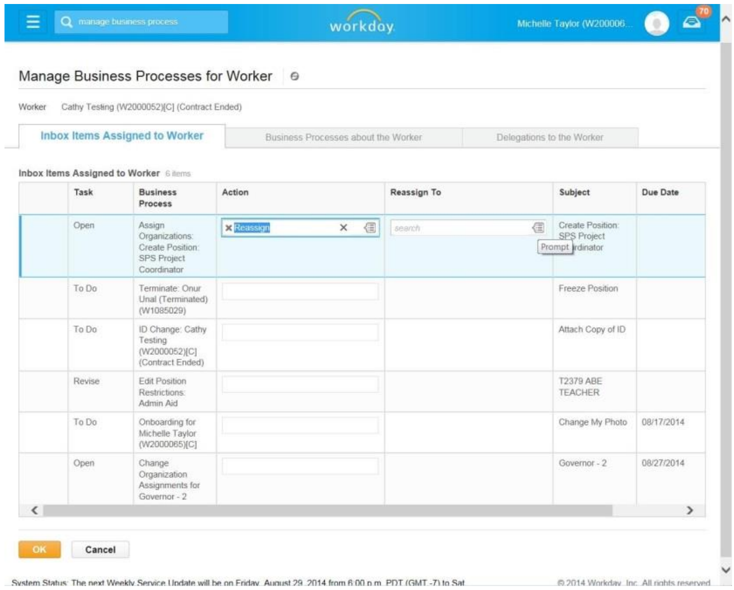
Manage Business Processes for Worker



6. In the Action column, type or select the prompt to either an action (i.e.), cancel or reassign).



Manage Business Processes for Worker



7. If you are reassigning the task, use the prompt to select the reassigned worker.
8. Click the **OK** button.
9. Click the **Submit** button.

Tip: If you do not want to submit the request at this point, you can also click **Cancel** to cancel any changes and start at another time.

10. Click the **Done** button.
11. The System Task is complete.

Check the Status of a Business Process

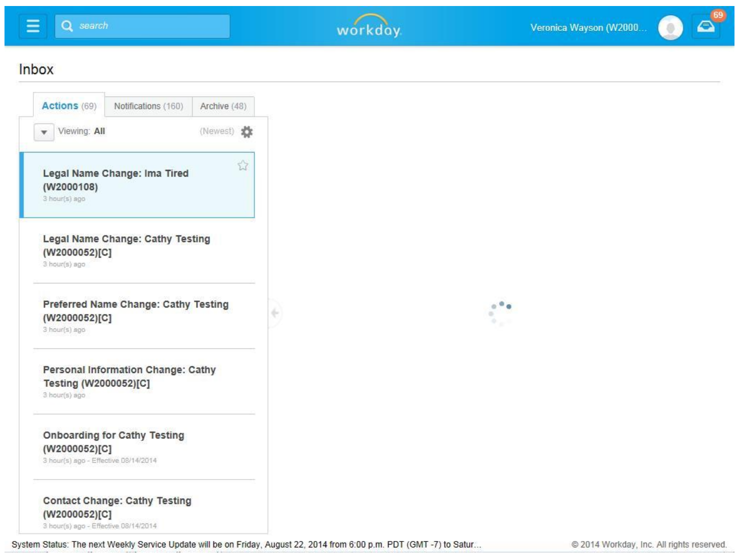
The status of a business process event can be checked at any time by going to the **Archive** tab within the Inbox of the person who initiated the event.

The procedure to check the status of a business process event follows.

Procedure:

1. Select the Inbox  button.
2. Click the **View Inbox**  hyperlink.

Inbox



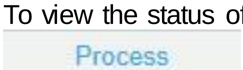
3. Click the **Archive**  tab.

Information: The **Archive** tab shows all items initiated by you. You can select an item and view the status on the right hand side of the screen.

4. Select the item for which you want to view status.
5. Review the transaction details on the Details tab, if desired.
6. Review the Overall Status field at the top-left side of the transaction page.

Information: The overall status of a business process displays as….

- “Successfully Completed” when all required steps in the process have been completed.
- “In Progress” when there are some tasks awaiting action by someone in the business process routing.

7. To view the status of individual tasks in a business process, click the **Process**  tab.

8. Review the status, which steps have been completed/not completed and who has the step for action.

9. The System Task is complete.