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TERMINATE EMPLOYMENT INITIATOR

WHO CAN ACCESS THE REQUEST EMPLOYMENT/CHANGES DOCUMENT

Each workflow document requires a minimum of two participants: an Initiator and an Approver.

Systems Control will be included as an approver for these transactions. They will be the final approval on these transactions prior to the data entering the system.

Initiating or creating a document requires:
- Position Cross-Reference access

Documents require between one and four approvers:
- HR Department Approver
- College Reviewer
- College/Division Funding Approver
- College Flex Approver
- Systems Control Approver

College/Divisions determine the number of approval steps required.
NAVGATING THE MANAGER SELF SERVICE MENU

HOW TO NAVIGATE TO THE CREATE/MODIFY DOCUMENT

The Create/Modify Document is located in UAccess Employee – www.uaccess.arizona.edu

To access the document:

1. Click on the Manager Self Service menu item
2. Click on MSS Online Forms
3. Click on Employment and Job
4. Click on Request Employment/Job Changes

The “Request Employment/Job Changes” page provides multiple field search options for accessing the employee for the Terminate Employment Request.

1. Enter the Employee ID or other search criteria in the appropriate box in the search template.
2. Select the transaction type Termination or Retirement
3. Click on the Search button.
4. Select an Employee from the Search Results to start requesting changes.
INITIATING REQUESTS

The “Request Employment /Job Changes” page allows the user to:

- **Terminate an Employee**
  - Multiple options are displayed depending on the employee.
    - **End All University Employment** - selecting this option will end employment at the University and end ALL jobs.
    - **End Job** – selecting this option will end one or more jobs.

- **Retire an Employee**

HOW TO TERMINATE – END ALL UNIVERSITY EMPLOYMENT

Click on the “End All University Employment” radio button to end all jobs at the university.

Note: This action moves the transaction to the next page—“Job/s Selected for Termination”.

Jobs are displayed in “Read Only” format for review. Click on the Continue button to move to the Online Termination Form.
1. LAST DAY AT WORK

The “Last Day at Work” field on the “Online Termination Form” page will default to blank for most employee types. It can be changed to reflect a past date within the current fiscal year and can be created for future dates up to 90 days. Please see examples below.

- Last Day at Work is blank
  - Once populated the system automatically defaults the Effective date to the next business day.

- 9 Pay 12 Employees
  - Last Day worked will automatically populate to the end of the current semester. The effective date will also populate based on tables within the system. Users will have the option to override these dates.

- Employees on Leave or Short Work Break
  - The Last Day worked will automatically populate with the value already in the system for the employee. Users will have the option to override these dates.
2. REASON CODE

The Reason code determines the reason for terminating the employee. Users will see both involuntary and voluntary reason codes in the drop down list. Emails will be generated to both Human Resources and Payroll based on these reasons.

- Select the Reason for Termination

![Online Termination Form]

**Termination Reason Definitions:**

- **Contract Non Renewal**
  Faculty/Apointed Personnel Only – Contract is not renewed
- **Deceased**
  Employee has passed away
- **Discharge/Dismissal**
  Employee is discharged for job performance problems.
- **Discharge/Dismissal – Attendance**
  Employee is discharged for documented poor attendance.
- **Discharge/Dismissal – Background**
  Employee is discharged for not passing background check.
- **Discharge/Dismissal – Evrfy/I-9**
  Employee is discharged for E-Verify or I-9 issues.
- **Discharge/Dismissal – Misconduct**
  Employee is discharge for misconduct.
- **Employment Ended**
  Temporary, seasonal or on-call job or assignment ends.
- **Layoff with Recall Rights**
  (Classified Staff) Employee has “meets” or above on most recent performance review at time.
- **Layoff without Recall Rights**
  (Classified Staff) Employee has below “meets” on most recent performance review at time.
- **Probationary**
  Employee is separated during initial or transfer/promotion probationary period.
- **Pursue Additional Education**
  Employee indicates that he/she is resigned specically for educational purposes.
- **Voluntary Resignation**
  Employee is leaving for outside employment, personal reasons, relocation, or is unable to return from personal or medical leave of absence, visa expiration.

<table>
<thead>
<tr>
<th>Voluntary Termination Reasons</th>
<th>Involuntary Termination Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Attach resignation letter or other supporting documentation)</td>
<td>(Does not require employee signature)</td>
</tr>
<tr>
<td><strong>Voluntary Resignation</strong></td>
<td><strong>Contract Non Renewal</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Discharge/Dismissal</strong></td>
</tr>
<tr>
<td><strong>Pursue Additional Education</strong></td>
<td><strong>Probationary</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Discharge/Dismissal – Attendance</strong></td>
</tr>
<tr>
<td><strong>Retirement (see page15)</strong></td>
<td><strong>Layoff with Recall Rights (requires attachment)</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Discharge/Dismissal – Background</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Layoff without Recall Rights</strong></td>
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</tr>
<tr>
<td></td>
<td><strong>Employment Ended</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Discharge/Dismissal – Misconduct</strong></td>
</tr>
</tbody>
</table>
3. **DISABLE SECURITY DATE**

The “Disable Security Date” field gives the user the option to add an effective date to disable security. The Security Team will receive reports for employees that are Ending All Employment. They will disable security roles based on this effective date. If the effective date is not populated they will remove security based on the effective date of the termination.

![Termination Check List](image)

*Reason Code: Discharge/Dismissal

**Note:** Please continue to follow normal procedures for removing access for an employee as this date will only be used for employees ending all employment. Removing security may be time sensitive so following your normal business practice is still required.

4. **VACATION ADJUSTMENT**

The Leave Balances as of most recent accrual displays the employee's current vacation balance. If the employee has a balance available and meets paygroup criteria the user can enter a vacation adjustment. The system requires an adjustment explanation for all vacation adjustments. Payroll will be receiving a report adjustments entered and will be submitting payment requests if needed.

**Employee has a vacation balance:**

1. Select the type of adjustment
   a. Add
   b. Subtract
2. Enter the amount to be adjusted.

**Employee does not have a vacation balance and or may not be eligible for vacation adjustment:**

![Leave Balances (as of most recent accrual)](image)

*Note: Please add comments to the request if you know the vacation payout will be used for a different account than currently used for distribution.*
6. **FORWARDING ADDRESS/ FORWARDING EMAIL**

The forwarding address area is available if the employee has given you an address or email to forward all future notifications. These are optional fields and is not required.

7. **GRAD TERM REASON**

For Grads, the system will automatically default the expected end date in the Last Day at Work field. If this date is changed then a reason is required for the Graduate College.

Please select a reason in the drop down list.

8. **TERMINATION CHECK LIST**

The Termination Checklist is a printable PDF that Human Resources has created for depts/colleges. This checklist will ensure that all of the services are discontinued and university property is returned to the appropriate department authority.
9. EMAIL HISTORY

Upon submission, an email may be sent to Human Resources and Payroll personnel based on the reason code selected. Please expand the email history section to display this information.

![Email History Table]

10. ATTACHMENTS

Initiators and Approvers may upload and remove attachments to a request. Due to the sensitive nature of documents added for Employment/Job Changes, these attachments can only be viewed by anyone who has access as an approver for the specific transaction.

To Add an Attachment:
1. Click the “Add Attachment” link.
2. Click the “Browse” button and navigate to your saved document for uploading. Select the document.
3. Once the document path has loaded, click “Upload”.
4. The document will display with the description and document extension type.

To View an Attachment:
1. Click the link in the “View Attachment” column for the document you wish to view.
2. The document will open up in a separate window.

To Delete an Attachment:
1. Select the radio button next to the attachment you want to remove.
2. Click the “Delete Attachment” link.
3. A confirmation message will say “Attachment Deleted Successfully.”
11. SUBMITTING TERMINATION REQUEST FOR APPROVAL

To submit the Termination request for approval.

1. Click on the “Submit” button

![Submit and Cancel buttons](image)

*Note: The request can be cancelled by clicking on the “Cancel” button.*
HOW TO TERMINATE – END JOB(S)

Click on the “End Job” radio button to end one or more jobs at the University.

Note: This action moves the transaction to the next page—“Job/s Selected for Termination”.

Jobs are displayed for selection. Select the job(s) you wish to terminate for the employee. Click on the Continue button to move to the Online Termination Form.

Note: Please refer back to Section “How to Terminate – End All University Employment” for details on the fields to populate on the request form.
1. DISCHARGE CHECK BOX FOR END JOB(S)

When ending job(s) the only Reason that is available is END JOB. This is how the system is designed for jobs that are ending. However, users must indicate whether or not the job is ending due to a discharge reason by selecting the “Discharge” checkbox.

Note: Human Resources will be notified by email for all jobs that end and indicate the discharge checkbox.

2. ATTACHMENTS

Initiators and Approvers may upload and remove attachments to a request. Due to the sensitive nature of documents added for Employment/Job Changes, these attachments can only be viewed by anyone who has access as an approver for the specific transaction.

To Add an Attachment:
5. Click the “Add Attachment” link.
6. Click the “Browse” button and navigate to your saved document for uploading. Select the document.
7. Once the document path has loaded, click “Upload”.
8. The document will display with the description and document extension type.

To View an Attachment:
3. Click the link in the “View Attachment” column for the document you wish to view.
4. The document will open up in a separate window.

To Delete an Attachment:
4. Select the radio button next to the attachment you want to remove.
5. Click the “Delete Attachment” link.
6. A confirmation message will say “Attachment Deleted Successfully.”
3. SUBMITTING TERMINATION REQUEST FOR APPROVAL

To submit the Terminate Employment request for approval.

1. Click on the “Submit” button

Note: The request can be cancelled by clicking on the “Cancel” button.
HOW TO RETIRE AN EMPLOYEE

Enter search criteria to find the employee you wish to retire. Select the transaction type of Retirement from the initial search page.

Note: This action moves the transaction to the next page—“Online Termination Form”.

- If an employee has more than one job, all jobs will be listed in the “Selected Jobs” section on the online termination form. When an employee retires they retire from ALL jobs at the University.
- Users will only have the option of “Official UA Retirement Status” as the reason for retirement. To obtain Official UA Retirement Status certain criteria must be met. Systems Control reviews and determines if the criteria has been met.

Note: Please refer back to Section “How to Terminate – End All University Employment” for details on the fields to populate on the request form.
2. ATTACHMENTS

Initiators and Approvers may upload and remove attachments to a request. Due to the sensitive nature of documents added for Employment/Job Changes, these attachments can only be viewed by anyone who has access as an approver for the specific transaction.

To Add an Attachment:
9. Click the “Add Attachment” link.
10. Click the “Browse” button and navigate to your saved document for uploading. Select the document.
11. Once the document path has loaded, click “Upload”.
12. The document will display with the description and document extension type.

To View an Attachment:
5. Click the link in the “View Attachment” column for the document you wish to view.
6. The document will open up in a separate window.

To Delete an Attachment:
7. Select the radio button next to the attachment you want to remove.
8. Click the “Delete Attachment” link.
9. A confirmation message will say “Attachment Deleted Successfully.”

3. SUBMITTING RETIREMENT REQUEST FOR APPROVAL

To submit the Retirement request for approval.
2. Click on the “Submit” button

Note: The request can be cancelled by clicking on the “Cancel” button.
HOW TO APPROVE TERMINATE EMPLOYMENT REQUESTS

Terminate Employment requests pending approval can either be accessed through the “pagelet” or the “Manage Termination/Retirement” page. The option to approve a request will only appear if the user has both the appropriate approval role and is the next step in the approval chain.

1. APPROVING THE TERMINATE EMPLOYMENT REQUEST

To approve a terminate employment request

- Click on the “Approve” button
2. **CONFIRMING APPROVED REQUEST**

Once the terminate employment request is approved, a confirmation page displays the information from the previous page in view only mode. The “green box” in the process monitor (the rectangular boxes on the bottom of the page) shows that the first approval step has been satisfied.

1. Click on the “Exit” button to return to the search menu

![Image](image_url)

2. **ADDING AD HOC APPROVERS AND REVIEWERS**

Ad hoc approvers and reviewers can be added by HR Department, College Reviewers and College Approvers at any step following an approval step in the chain. For example, the HR Department can add an ad hoc approver or reviewer after the College Reviewer or College Approver steps. Note: the Ad hoc “Approver” will stop the routing flow until the user takes action—the Ad hoc “Reviewer” notifies the user of the transaction and does not require approval.

To add an ad hoc approver or reviewer:

1. Click on the + sign to the right of the approval step the ad hoc reviewer will follow.
   - Do **NOT** add an **ADHOC APPROVER** after the Systems Control Step. Systems Control is the final step in the workflow and will deny requests that include an adhoc APPROVER after their step. **Users may however add adhoc REVIEWER's after systems control step if needed.**

   ![Image](image_url)

2. This will activate the “Insert additional approver or reviewer” window.
   a. Type in the user id for the ad hoc approver or reviewer

   ![Image](image_url)
a. See Approver/Reviewer Search below if the user id is unknown
b. Click on either the “Approver” or the “Reviewer” radio button
c. Click on the “Insert” button

Note: the User ID must be typed in Caps

3. Approver Reviewer Search
The spy glass in the “Insert additional approver or review” window will activate the “Approver/Reviewer Search” option (see previous section)
   1. Type the user’s name or user ID
   2. Click on the “Search” button
      A list of users meeting the search criteria will appear
   3. Select the ad hoc approver or reviewer by clicking on the individual’s name or user id.

The “Insert additional approver or reviewer” window will reappear
   4. Click on either the “Approver” or the “Reviewer” radio button
   5. Click on the “Insert” button
HOW TO DENY TERMINATE EMPLOYMENT REQUESTS

The option to deny a request appears if the user has both the appropriate approval role and is the next step in the approval chain.

To deny a request

1. Type the reason for denial in the comments section
2. Click on the “Deny” button

Once the terminate employment transaction is denied, a confirmation page displays the information from the previous page in view only mode. The process monitor shows that the position funding change has been denied. Additionally, an email is sent to the initiator notifying him/her of the denied request.

1. Click on the “Exit” button to return to the search menu
HOW TO WITHDRAW - TERMINATE EMPLOYMENT REQUESTS

Initiators have the ability to withdraw Terminate Employment requests by accessing the specific transaction in the “Manage Termination/Retirement” page. Withdrawing the request essentially cancels the request from all pending approvers. Initiators may withdraw a request up until final approval. These requests are stored for 30 days and may be cloned to create a new request.

How to withdraw a request:

1. Search for the request in the “Manage Position Create/Modify”.
2. Once transaction is selected and opened click the “Withdraw” button.
VIEWING PENDING REQUESTS

Pending approval requests are available for viewing in two formats:

- Pagelets
- Manage Position Create/Modify Requests

1. HOW APPROVERS KNOW DOCUMENTS ARE PENDING THEIR APPROVAL

The UAccess Employee main page automatically displays a “pagelet” summary listing the transactions pending the individual approver’s action.

- The “pagelet” provides a “transaction” link directly to the transactions requiring the user’s approval.
- Each transaction type displays a total count of transactions available for approval.
- Selecting the “home” key on the first tab on the upper right side of any page will return the user to the MSS Approval Summary Pagelet.

Note: if a transaction type link is not available, this means no requests are available for approval at this time.

- Once a user selects a transaction type from the MSS Approval Summary they are directed to the individual transaction pagelet.
- Additional details for each transaction are made available to allow for selection of the transaction to work next.

Remember to Refresh!
2. HOW INITIATORS KNOW WHEN DOCUMENTS ARE APPROVED, DENIED OR PENDING

The “Manage Termination/Retirement” allows users with the UAccess Employee Position Cross-Reference role to view position management documents that are pending, approved, denied, saved or withdrawn.

The Search dialog box provides multiple options for accessing position management transactions.

1. Enter the HR Dept or other criteria listed in the Search dialog box
2. Click on the “Search” button
   A list of values that meet the search criteria will be displayed
3. Click on any of the values listed to access specific transactions
   1. The user’s role and current approval step will determine whether the record is view only or available for change or approval.

![Manage Termination/Retirement]

Enter any information you have and click Search. Leave fields blank for a list of all values.

- **Transaction Number**: easiest way to find a record
- **Department**: begins with [checkbox]
- **Effective Date**: = [date]
- **EmpId**: begins with [checkbox]
- **Last Name**: begins with [checkbox]
- **First Name**: begins with [checkbox]
- **Request Status**: = [Pending]
- **Initiator NoteID**: begins with [checkbox]

[Case Sensitive]

**Find on Existing Value**

[Search] [Clear] [Basic Search] [Save Search Criteria]
The following examples describe the workflow paths a user may encounter when initiating or approving a document.

**SELF APPROVAL**

Initiator with HR Dept, College Reviewer or College approval role(s)

- The step for the specific approval role automatically self approves when the request is submitted.

Please see the example below:

**HR Department Approver initiating a request**

**AUTO APPROVAL**

Approver listed on multiple steps in path(s)

- Multiple paths for the same approver are automatically approved on all steps.

Please see the example below:

**College/Division approving a request in which they are listed in multiple paths/steps.**
COLLEGE INITIATES A REQUEST

College initiates a request
  • The HR Department Approvers are notified of the change via email.
  • The request will automatically route to Systems Control upon submission.

Please see the example below:

![Diagram of request process]

SKIPPED STEPS

The system skips steps if it does not find approvers
  • Steps are skipped if no one is assigned to an approval role
  • At least one “account” approver is required for the path

Please see the example below:

![Diagram showing skipped steps]
NO APPROVERS FOUND

Transactions routed to an Error Step if no approvers assigned

- All steps are skipped if no approvers are assigned
- A Systems Control Approver will troubleshoot the transaction

Please see the example below:
ERROR/WARNING MESSAGES

The following examples describe the error or warning messages a user may encounter when initiating or approving documents.

ANOTHER APPROVER HAS TAKEN ACTION

A single step may have multiple approvers
- More than one approver can simultaneously review a transaction; however, only ONE can take action.

The following error message indicates another approver has already completed the step.

MISSING INFORMATION

A request cannot have missing required fields upon submission. If the user tries to submit a request with missing information the following error message will display. The message will refer the user back to the field that is missing information.
NO ATTACHMENTS HAVE BEEN ADDED

If a user clicks on the “view attachments” link but no attachments exist, the following error message will appear.
CONTACT INFORMATION

If you are experiencing problems or just have questions about the Manager Self Service Terminate Employment, please contact the Workflow Administrators.

WHO TO CALL????

E-mail is the best communication method for contacting the Workflow Administrators. Please include both administrators when emailing. Their contact information is:

2. Esperanza Gallagher – espieg@email.arizona.edu
3. Abbie Montenegro – abbiem@email.arizona.edu

The Mosaic Project – Workforce Administration Team phone number is:

- 626-9917