This job aid provides resources for terminating employees using either the **Smart HR Template** or **Manage Job**. It also explains how to request an employee's Final Pay through the **Payroll Request (E-078)** as well as the **Final Pay Activity Guide** for Final Pay locations. Terminating an employee in the UC system requires two steps.

Step 1: WFA Termination Transaction

Smart HR Template or Manage Job

Step 2: Payroll Request (E-078) Final Pay or

Final Pay Activity Guide

Step 1: Submitting Termination Transaction

Submitting a Termination transaction is the first step of the final pay process. You can use either the **Smart HR Template** or the **Manage Job** transaction.

Note: When terminating employment due to Death or Retirement, only one termination transaction is required, whether submitted through the Smart HR Template or Manage Job.

- **Death**: UCPath will terminate all active Employee (EE) records and complete any Contingent Worker (CWR) records.
- **Retirement**: UCPath will retire all other active records except for Contingent Worker (CWR) records. To terminate a CWR record, you must submit a Complete Contingent Worker Instance transaction.

⚠ To prevent delays in processing final payroll requests, ensure that you submit the appropriate Termination template(s) and that they are approved locally. This step must be completed *before* processing with the Final Pay Payroll steps.

Navigation:

PeopleSoft Homepage > Workforce Administration (Homepage) > HR Tasks (Tile) > Smart HR Templates > **Smart HR Transaction**

OR

PeopleSoft Homepage > Workforce Administration (Homepage) > **Manage Job (Tile)**

Select the appropriate link below for further processing instructions:

Job Aid: Manage Job - Terminations
Simulation: Initiate Voluntary Termination Template Transaction
Simulation: Initiate Involuntary Termination Template Transaction

Step 2a: Payroll Request (E-078) – Final Pay (Non-Final Pay Pilot Locations)

Once the termination transaction is complete, you can submit the **Final Pay Payroll Request (E-078).**

Navigation:

PeopleSoft Homepage > Workforce Administration (Homepage) > Payroll Tasks (Tile) > Payroll Transactions > Self Service Transaction Links > **Payroll Request (E-078)**

For further instructions, follow the Simulation: *Submit Final Pay Request*

Step 2b: Final Pay Activity Guide – (Final Pay Pilot Locations)

Once the termination transaction is locally approved, the employee appears on the Final Pay Dashboard.

> ⚠ **Note: Retirement (RET), Death (DEA), or Voluntary Separation Program (VSP)** termination transactions do not immediately appear. These actions/reasons submitted through **Manage Job** require special processing by UCPath Personnel, which may cause a slight delay.

For confidential involuntary terminations requiring exception processing, use the Confidential / Involuntary Terminations link within the Final Pay Dashboard. This process allows you to submit the Final Pay transaction before terminating an employee in the UCPath system.

For further instructions, follow the *Confidential / Involuntary Terminations Final Pay Job Aid*

Navigation:

PeopleSoft Homepage > Workforce Administration (Homepage) > Payroll Tasks (Tile) > Final Pay > **Final Pay Dashboard**

For further instructions, follow the *Final Pay Activity Guide Job Aid*