

Use this task to initiate a voluntary termination template transaction. This template can be used for academic and staff employees. A separate termination template must be initiated for all applicable jobs.

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OR



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


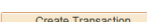
Smart HR Transactions



Smart HR Transactions




Select a template and press Create Transaction.

Transaction Template 


Transaction Type: All  Effective Date: 

Select Template:  

Transaction Type: All  

Transactions in Progress    First 1-12 of 12 Last

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	JOB	11/01/2018	Claire Ramirez	10005571	Transfer	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Cassandra Perry	NEW	Hire	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Gus Gonzalez	NEW	Hire	United States
<input type="checkbox"/>	JOB	09/29/2018	Grisby, Elizabeth N	10000841	Terminatn	United States
<input type="checkbox"/>	HIRE	11/01/2018	Tam Triet Ngo Duc	10008356	Hire	United States
<input type="checkbox"/>	HIRE	11/01/2018	Cheong Yankura	10087236	Hire	United States
<input type="checkbox"/>	HIRE	11/01/2018	Kirstin Bright	10000008	Hire	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Maricar Sherck	10000023	Rehire	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Randy Sacks	10000098	Rehire	United States
<input type="checkbox"/>	HIREJPM	10/01/2018	Anthony Perez	10130745	Rehire	United States
<input type="checkbox"/>	HIREJPM	09/29/2018	Taylor Baker	10130925	Rehire	United States
<input type="checkbox"/>	JOB	11/01/2018	Nitya Perry	10000063	Terminatn	United States

Step	Action
1.	Use the Smart HR Transactions page to select the appropriate template to begin the termination process.
2.	Click the Look up Select Template button. 

Look Up Select Template

Search by: begins with

Search Results

View 100 First 1-21 of 21 Last

Template	Description
UC_ADD_CWR	Add Contingent Worker - No Position Data
UC_ADD_CWR_POSN	Add Contingent Worker With Position
UC_COM_CWR	Complete Contingent Worker Instance
UC_CONC_HIRE	Staff Concurrent Hire/Inter Location Transfer
UC_CONC_HIRE_AC	Academic Concurrent Hire/Inter Location Transfer
UC_EXT_CWR	Extend CWR Appointment
UC_EXT_CWR_POSN	Extend CWR (with Position) Appointment
UC_FULL_HIRE	Full Hire - Staff Only
UC_FULL_HIRE_AC	Full Hire - Academic Use Only
UC_INVOL_TERM	Involuntary Termination
UC_PERSON_DATA	UC Personal Data
UC_REHIRE	UC Rehire - Staff Only
UC_REHIRE_AC	Rehire - Academic
UC_REHIRE_REI	Rehire Reinstatement - For Staff Appointments
UC_REHIRE_REI_AC	Rehire Reinstatement - For Academic Appointments
UC_RENW_CWR	Renew Contingent Worker - Without Position
UC_RENW_CWR_POS	Renew CWR Instance - with Position
UC_RETIREMENT	Retirement
UC_TRANSFER	Intra-Business Unit Transfer - Staff Only
UC_TRANSFER_AC	Intra-Business Unit Transfer - Academic Only
UC_VOL_TERM	Voluntary Termination

Step	Action
3.	<p>Select the appropriate termination template. There are two termination templates, one for voluntary terminations and one for involuntary terminations.</p> <p>Click the UC_VOL_TERM list item.</p> <p><u>UC VOL TERM</u></p>
4.	<p>The Effective Date field is the effective date of the selected template action. The date you enter in this field automatically populates the Effective Date field on the Enter Transaction Details page.</p> <p>Click in the Effective Date field.</p> <input type="text"/>
5.	<p>Enter the desired information into the Effective Date field.</p> <p>For this example, enter 11/1/18.</p>
6.	<p>Click the Create Transaction button.</p> <p><input type="button" value="Create Transaction"/></p>

Smart HR Transactions

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Smart HR Transactions

[Enter Transaction Details](#)


The following transaction details are required.

Template

Voluntary Termination

Organizational Relationship

Employee

*Employee ID 


*Employment Record Number

*Effective Date

Action

Termination

*Reason Code

Step	Action
7.	<p>In the Employee ID field, enter the employee's ID number or use the lookup to search for and select it. You have access only to employee records within your business unit.</p> <p>For this example, click the Look up Employee ID button.</p> 

Look Up Employee ID


Search by: Empl ID begins with

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

Empl ID	Name	Empl Record	Employee Status	Business Unit
10000005	Skonieczny, Avner Gabrielle	0	Active	UCOP1
10000007	Liu, Pauline Charles	0	Active	UCOP1
10000008	Bright, Kirstin Mivida	0	Active	UCOP1
10000014	Oh, Deepak A	0	Active	UCOP1
10000021	Omorogieva, Grant	0	Active	UCOP1
10000022	Bradshaw, Rosemarie D	0	Active	UCOP1
10000025	Wadhams, Jau-Nian C	0	Active	UCOP1
10000026	Balmuth-Loris, Raquel R	0	Active	UCOP1
10000028	Deng, Hayarpi	0	Active	UCOP1
10000032	Thompson, Dalton	0	Active	UCOP1
10000034	Pedrick, Kollin Citali	0	Active	UCOP1
10000036	Gudiel, Sofia	0	Active	UCOP1
10000039	Kartman, Ashley B	0	Active	UCOP1
10000045	Kavand, Hector Daniel	0	Active	UCOP1
10000046	Pyo, Meghan	0	Active	UCOP1
10000047	Chan, Elizabeth	0	Active	UCOP1
10000048	Cabrera, Kristen	0	Active	UCOP1
10000051	Kaushal, Taehwan	0	Active	UCOP1
10000052	Pajukanta, Thomas J	0	Active	UCOP1
10000054	Eslamimehr, Michael Rowene	0	Active	UCOP1
10000055	Eristhee, Patricia	0	Active	UCOP1
10000056	Foley, Tod B	0	Active	UCOP1
10000057	Shah, Samantha	0	Active	UCOP1
10000059	Sully, Miles B	0	Active	UCOP1
10000063	Perry, Nitya Z	0	Active	UCOP1
10000064	Rivera, Nicholas Martin	0	Active	UCOP1

Step	Action
8.	<p>Select the appropriate Employee ID.</p> <p>For this example, click the 10000036 list item.</p> <p><u>10000036</u></p>
9.	<p>The Employment Record Number defaults to the first record number for which you have departmental access (in this example, 0). Select the correct Employment Record Number for the job to terminate.</p> <p>For this example, accept the default.</p>
10.	<p>The Effective Date is populated based on your entry on the previous page. Ensure that you entered the correct Effective Date. If necessary, click the Cancel button to return to the previous page and correct the Effective Date.</p>
11.	<p>Click the button to the right of the Reason Code field.</p> <p></p>

Smart HR Transactions

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Enter Transaction Details

The following transaction details are required.

Template Voluntary Termination

Organizational Relationship Employee

*Employee ID Sofia Gudiel

*Employment Record Number

*Effective Date

Action Termination

*Reason Code

- Career to Per Diem
- Interlocation (BU) Transfer
- Release fr Trial Emplmt-Vol
- Resign - Accept Another Job
- Resign - Attend School
- Resign - Dissatisfied w/ Job
- Resign - Job Abandonment
- Resign - Look For Another Job
- Resign - Military Service
- Resign - Moved out of Area**
- Resign - No Reason Given
- Resign - Personal Reasons
- Resign - Quit Without Notice
- Resign - Self Employment
- Resign - Failed to Ret fr Leave
- Transfer from UCPath PS
- Transfer-Intra Location
- Voluntary Separation Program

Step	Action
12.	<p>Select the appropriate Reason Code.</p> <p>For this example, click the Resign - Moved out of Area list item.</p> <p>Resign - Moved out of Area</p>
13.	<p>Click the Continue button.</p> <p>Continue</p>

Smart HR Transactions

Smart HR Transactions

Enter Transaction Information

Click here to Hide Header Details

Template: UC_VOL_TERM

Name: Sofia Gudiel

Effective Date: 11/01/2018

Action/Action Reason: TER/MOA (Resign - Moved out of Area)

Employee ID: 10000036

Employee Record: 0 (VENDOR REL SPEC 2)

[Return to Enter Transaction Details Page](#)

Save and Submit

Save for Later

Cancel

Job Data

Work Location - Position Data

Position Number 40001929

Work Location - Job Fields

Business Unit UCOP1

Department 815600

Location Code KAISER

Job Information - United States

Last Date Worked 10/31/2018

Comments

Comments

[Return to Enter Transaction Details Page](#)

Step	Action
14.	<p>The voluntary termination template appears.</p> <p>The top of the page displays header data, which you can show/hide as needed.</p>
15.	The employee's position number and work location data automatically populate for the selected employment record.

Smart HR Transactions

Smart HR Transactions

[Enter Transaction Information](#)

[Click here to Hide Header Details](#)

Template: UC_VOL_TERM **Name:** Sofia Gudiel
Effective Date: 11/01/2018 **Action/Action Reason:** TER/MOA (Resign - Moved out of Area)
Employee ID: 10000036 **Employee Record:** 0 (VENDOR REL SPEC 2)

[Return to Enter Transaction Details Page](#)

Job Data


Work Location - Position Data

Position Number 40001929


Work Location - Job Fields

Business Unit UCOP1 Department 815600
Location Code KAISER

Job Information - United States

Last Date Worked 10/31/2018 

Comments

Comments 

[Return to Enter Transaction Details Page](#)

Step	Action
16.	<p>The Last Date Worked field defaults to the work day prior to the Effective Date, but you can update it as necessary. If the Effective Date is a Monday, the Last Date Worked defaults to the previous Friday.</p> <p>This date should always be a date earlier than the Effective Date you entered on the previous page.</p> <p>For this example, the date was changed to 10/26/2018 as the Last Date Worked.</p>

Smart HR Transactions

Smart HR Transactions

Enter Transaction Information

Click here to Hide Header Details

Template: UC_VOL_TERM

Name: Sofia Gudiel

Effective Date: 11/01/2018

Action/Action Reason: TER/MOA (Resign - Moved out of Area)

Employee ID: 10000036

Employee Record: 0 (VENDOR REL SPEC 2)

[Return to Enter Transaction Details Page](#)

Save and Submit

Save for Later

Cancel

Job Data

Work Location - Position Data

Position Number 40001929

Work Location - Job Fields

Business Unit UCOP1

Department 815600

Location Code KAISER

Job Information - United States

Last Date Worked 10/31/2018 ☒

Comments

[Return to Enter Transaction Details Page](#)

Step	Action
17.	<p>The Override Last Date Worked check box defaults to selected. No action is needed in this field.</p> <p>The check box will ensure that when the template action is processed by UCPath, the Last Date Worked that was entered will be saved to the employee's Job Data record</p>

Smart HR Transactions

Smart HR Transactions

[Enter Transaction Information](#)

[Click here to Hide Header Details](#)

Template: UC_VOL_TERM **Name:** Sofia Gudiel
Effective Date: 11/01/2018 **Action/Action Reason:** TER/MOA (Resign - Moved out of Area)
Employee ID: 10000036 **Employee Record:** 0 (VENDOR REL SPEC 2)

[Return to Enter Transaction Details Page](#)

Job Data

Work Location - Position Data

Position Number 40001929

Work Location - Job Fields

Business Unit UCOP1 Department 815600
Location Code KAISER

Job Information - United States

Last Date Worked 10/31/2018

Comments

Comments

[Return to Enter Transaction Details Page](#)

Step	Action
18.	Use the Comments field to enter specific details or explanation regarding the transaction. This field is referenced by UCPath Center's WFA Production to assist with the processing of the transaction.
19.	Click the scroll bar.

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Job Data

Work Location - Position Data

Position Number 40001929

Work Location - Job Fields

Business Unit UCOP1 Department 815600

Location Code KAISER

Job Information - United States

Last Date Worked 10/31/2018

Comments

Comments

[Return to Enter Transaction Details Page](#)

[Supporting documents](#)

Transaction ID: NEW

Initiator Comments:

Requester ID: 10095340 Ima Gudadmin

Requested:


Step	Action
20.	Use the Supporting documents link to attach supporting documents.
21.	<p>Enter comments for the approver in the Initiator Comments field.</p> <p>Comments you enter here appear only with the request; they do not display on the employee's record after the transaction is processed to completion.</p>
22.	<p>Click the Save and Submit button.</p> <p><input type="button" value="Save and Submit"/></p>

Smart HR Transactions


[New Window](#) | [Help](#) | [Personalize Page](#)

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
Submit Confirmation

 The submit was successful. The Human Resources department will review the person's data and update the HR system.

Go to the Transaction Status page to review the status of this person.



[Add Payroll Request](#)

Step	Action
23.	<p>Some Location's business process allows users to have the Template Initiator role as well as the Payroll Initiator role. In these cases, the Add Payroll Request link is available. This link allows direct access to the Payroll Requests page.</p> <p>For specific steps on entering a payroll request or final pay, refer to the Payroll folder > PHCMPAYL200: Additional Compensation and Pay Adjustment Requests course and applicable simulations.</p>
24.	<p>Click the OK button.</p> 

Smart HR Transactions

Smart HR Transactions

Select a template and press Create Transaction.

Transaction Template ?

Transaction Type All

Effective Date

Select Template

Create Transaction

Transaction Type All

Refresh

Transactions in Progress

Personalize Find 1-13 of 13 First Last

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	JOB	11/01/2018	Claire Ramirez	10005571	Transfer	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Cassandra Perry	NEW	Hire	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Gus Gonzalez	NEW	Hire	United States
<input type="checkbox"/>	JOB	09/29/2018	Grisby, Elizabeth N	10000841	Terminatn	United States
<input type="checkbox"/>	HIRE	11/01/2018	Tam Triet Ngo Duc	10008356	Hire	United States
<input type="checkbox"/>	HIRE	11/01/2018	Cheong Yankura	10087236	Hire	United States
<input type="checkbox"/>	HIRE	11/01/2018	Kirstin Bright	10000008	Hire	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Maricar Sherck	10000023	Rehire	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Randy Sacks	10000098	Rehire	United States
<input type="checkbox"/>	HIREJPM	10/01/2018	Anthony Perez	10130745	Rehire	United States
<input type="checkbox"/>	HIREJPM	09/29/2018	Taylor Baker	10130925	Rehire	United States
<input type="checkbox"/>	JOB	11/01/2018	Nitya Perry	10000063	Terminatn	United States

Step	Action
25.	The template transaction is routed for approval and appears in the Transactions in Progress section until it is processed.
26.	You have initiated a voluntary termination template transaction. End of Procedure.