Use this task to initiate an involuntary termination template transaction. The steps in this procedure can be used for academic and staff employees. For termination reason of Death, UCPC WFA Production will terminate all employee jobs. For all other reasons, a separate termination template must be initiated for all applicable jobs.

**Navigation:** Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**
OR
**Navigation:** Workforce Administration (Homepage) HR Tasks (Tile) > Smart HR Templates > **Smart HR Transactions**



| Step | Action |
|---|---|
| 1. | Use the **Smart HR Transactions** page to select the appropriate template to begin the termination process. |
| 2. | **Note:** The **Transaction Type** field is not used by UC. <br><br> Click the **Look up Select Template** button. |

| Step | Action |
|------|--------|
| 3. | Select the appropriate termination template. There are two termination templates, one for voluntary terminations and one for involuntary terminations.<br><br>Click the **UC_INVOL_TERM** link.<br><br>UC_INVOL_TERM |
| 4. | 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.<br><br>Click in the **Effective Date** field. |
| 5. | Enter the desired information into the **Effective Date** field.<br><br>For this example, enter **11/1/18**. |
| 6. | Click the **Create Transaction** button.<br><br>Create Transaction |

**Smart HR Transactions**

New Window | Help | Personalize Page

Smart HR Transactions

Enter Transaction Details

The following transaction details are required.

|  |  |
|---|---|
| Template | Involuntary Termination |
| Organizational Relationship | Employee |
| *Employee ID |  |
| *Employment Record Number |  |
| *Effective Date | 11/01/2018 |
| Action | Termination |
| *Reason Code |  |

Continue     Cancel

| Step | Action |
|------|--------|
| 7. | 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.<br><br>Click the **Look up Employee ID** button. |

| Step | Action |
|---|---|
| 8. | Select the appropriate **Employee ID**.<br><br>For this example, click the **10000063** list item.<br><br>10000063 |
| 9. | 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.<br><br>For termination reason of **Death**, UCPath Center's WFA Production will terminate all employee jobs. For all other reasons, a separate termination template must be initiated for all applicable jobs.<br><br>For this example, accept the default. |
| 10. | The **Effective Date** is populated based on your entry on the previous page. Ensure that you entered the correct date on which the termination is effective. This date should be one day after the employee's last day of work.<br><br>If necessary, click the **Cancel** button to return to the previous page and correct the **Effective Date**. |
| 11. | Click the button to the right of the **Reason Code** field.<br><br>⌄ |

| Step | Action |
|------|--------|
| 12. | Select the appropriate **Reason Code**.<br><br>For this example, click the **Dismissal - Attendance** list item.<br><br>Dismissal - Attendance |
| 13. | Click the **Continue** button.<br><br>Continue |

**Smart HR Transactions**

Smart HR Transactions
Enter Transaction Information

Click here to Hide Header Details

| | | | |
|---|---|---|---|
| **Template:** | UC_INVOL_TERM | **Name:** | Nitya Perry |
| **Effective Date:** | 11/01/2018 | **Action/Action Reason:** | TER/ATT (Dismissal - Attendance) |
| **Employee ID:** | 10000063 | **Employee Record:** | 0 (TAX CMPLNC MGR 2) |

Return to Enter Transaction Details Page

[ Save and Submit ] [ Save for Later ] [ Cancel ]

**Job Data**

**Work Location - Position Data**

Position Number 40000394

**Work Location - Job Fields**

Business Unit UCOP1          Department 813100

Location Code FRANKLIN

**Job Information - United States**

Last Date Worked 10/31/2018

**Comments**

Comments

Return to Enter Transaction Details Page

| Step | Action |
|---|---|
| 14. | The involuntary termination template appears. <br><br> The top of the page displays header data, which you can show/hide as needed. |
| 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_INVOL_TERM | Name: | Nitya Perry |
| Effective Date: | 11/01/2018 | Action/Action Reason: | TER/ATT (Dismissal - Attendance) |
| Employee ID: | 10000063 | Employee Record: | 0 (TAX CMPLNC MGR 2) |

Return to Enter Transaction Details Page

[ Save and Submit ]   [ Save for Later ]   [ Cancel ]

**Job Data**

**Work Location - Position Data**
　　Position Number 40000394

**Work Location - Job Fields**
　　Business Unit UCOP1　　　　　Department 813100
　　Location Code FRANKLIN

**Job Information - United States**
　　Last Date Worked 10/31/2018

**Comments**
　　Comments

Return to Enter Transaction Details Page

| Step | Action |
|------|--------|
| 16. | 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.<br><br>This date should always be a date earlier than the **Effective Date** you entered on the previous page.<br><br>For this example, the date was changed to **10/26/2018** as the **Last Date Worked**. |

**Smart HR Transactions**

Smart HR Transactions

Enter Transaction Information

Click here to Hide Header Details

| | | | |
|---|---|---|---|
| **Template:** | UC_INVOL_TERM | **Name:** | Nitya Perry |
| **Effective Date:** | 11/01/2018 | **Action/Action Reason:** | TER/ATT (Dismissal - Attendance) |
| **Employee ID:** | 10000063 | **Employee Record:** | 0 (TAX CMPLNC MGR 2) |

Return to Enter Transaction Details Page

Save and Submit    Save for Later    Cancel

**Job Data**

**Work Location - Position Data**

Position Number 40000394

**Work Location - Job Fields**

Business Unit UCOP1          Department 813100

Location Code FRANKLIN

**Job Information - United States**

Last Date Worked 10/31/2018

**Comments**

Comments

Return to Enter Transaction Details Page

| Step | Action |
|---|---|
| 17. | The **Override Last Date Worked** check box defaults to selected. No action is needed in this field.<br><br>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 |

**Smart HR Transactions**

Smart HR Transactions
Enter Transaction Information

Click here to Hide Header Details

| | | | |
|---|---|---|---|
| **Template:** | UC_INVOL_TERM | **Name:** | Nitya Perry |
| **Effective Date:** | 11/01/2018 | **Action/Action Reason:** | TER/ATT (Dismissal - Attendance) |
| **Employee ID:** | 10000063 | **Employee Record:** | 0 (TAX CMPLNC MGR 2) |

Return to Enter Transaction Details Page

[ Save and Submit ]  [ Save for Later ]  [ Cancel ]

**Job Data**

**Work Location - Position Data**

Position Number 40000394

**Work Location - Job Fields**

Business Unit UCOP1          Department 813100

Location Code FRANKLIN

**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 an explanation regarding the transaction. This field is referenced by UCPath Center's WFA Production to assist with processing the transaction. |
| 19. | Click the scroll bar. |

**Smart HR Transactions**

Return to Enter Transaction Details Page

[ Save and Submit ] [ Save for Later ] [ Cancel ]

**Job Data**

**Work Location - Position Data**

Position Number 40000394

**Work Location - Job Fields**

Business Unit UCOP1          Department 813100

Location Code FRANKLIN

**Job Information - United States**

Last Date Worked 10/31/2018

**Comments**

Comments

Return to Enter Transaction Details Page

[ Save and Submit ] [ Save for Later ] [ Cancel ] 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. | Enter comments for the approver in the **Initiator Comments** field.<br><br>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. |
| 22. | Click the **Save and Submit** button.<br><br>[ Save and Submit ] |

**Smart HR Transactions**

New Window | Help | Personalize Page

Smart HR Transactions

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.

OK

Add Payroll Request

| Step | Action |
|------|--------|
| 23. | 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. <br><br> For specific steps on entering a payroll request or final pay, refer to the *PHCMPAYL200: Additional Compensation and Pay Adjustment Requests* course and applicable simulations. |
| 24. | Click the **OK** button. <br><br> OK |

**Smart HR Transactions**

Smart HR Transactions

Select a template and press Create Transaction.

| | | | | | | |
|---|---|---|---|---|---|---|
| **Transaction Template** ? | | | | Effective Date | | Create Transaction |
| Transaction Type | All | | | | | |
| Select Template | | | | | | |
| Transaction Type | All | Refresh | | | | |

**Transactions in Progress**     Personalize | Find | |   First ◀ 1-12 of 12 ▶ Last

| Select | Transaction Type | Effective Date | Name | Person ID | Action | Country |
|---|---|---|---|---|---|---|
| ☐ | JOB | 11/01/2018 | Claire Ramirez | 10005571 | Transfer | United States |
| ☐ | HIREJPM | 11/01/2018 | Cassandra Perry | NEW | Hire | United States |
| ☐ | HIREJPM | 11/01/2018 | Gus Gonzalez | NEW | Hire | United States |
| ☐ | JOB | 09/29/2018 | Grisby,Elizabeth N | 10000841 | Terminatn | United States |
| ☐ | HIRE | 11/01/2018 | Tam Triet Ngo Duc | 10008356 | Hire | United States |
| ☐ | HIRE | 11/01/2018 | Cheong Yankura | 10087236 | Hire | United States |
| ☐ | HIRE | 11/01/2018 | Kirstin Bright | 10000008 | Hire | United States |
| ☐ | HIREJPM | 11/01/2018 | Maricar Sherck | 10000023 | Rehire | United States |
| ☐ | HIREJPM | 11/01/2018 | Randy Sacks | 10000098 | Rehire | United States |
| ☐ | HIREJPM | 10/01/2018 | Anthony Perez | 10130745 | Rehire | United States |
| ☐ | HIREJPM | 09/29/2018 | Taylor Baker | 10130925 | Rehire | United States |
| ☐ | 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 an involuntary termination template transaction. <br> **End of Procedure.** |