

MSS3: Locating Terminated Employees

Job Aid

When an employee no longer works for a company, their employment is terminated. You must change their active status in their **Active Status** section of the **Personal Information** page by indicating the terminated condition and effective date. The terminated condition tracks why an employee is no longer employed, and can be used to determine whether a terminated employee is eligible to be rehired. Typical terminated status types are Disciplinary Action, On Leave, and Permanent.

The image shows two parts of the software interface. On the left is the 'Personal Information' page for an employee named Bailey Ackerman. It has tabs for 'Personal Information' and 'Active Status'. A 'Change Active Status' button is visible. Below is a table showing the current active status: Active, Normal, effective 1/12/18. On the right is the 'Assign New Active Status' dialog box. It has fields for 'Active Status' (Terminated), 'Active Condition' (Normal), and 'Terminated Condition' (Permanent). There is also an 'Effective Date' field and a 'Notes' section. 'Ok' and 'Cancel' buttons are at the bottom.

You can locate all terminated employees or a specific terminated employees via the **Terminated Employees** summary sheet or by generating a report.

Terminated Employees Summary Sheet

You can locate all terminated employees in the **Terminated Employees** summary sheet. You can also locate a specific terminated employee, then drill down to their pages, such as Personal Information, Time Card, or Archived Time Card for more information about this employee.

1. Click the Plus icon (⊕) to expand the **Reporting** menu group. Then click **Terminated Employees**. The **Terminated Employees** page is displayed.

The image shows a 'Reporting' menu with a minus sign icon in the top right corner. The menu items are: Shared Reports, Private Reports, Department Hours, Position Hours, Employee Details, Personal Information, and Terminated Employees. The 'Terminated Employees' item is highlighted with a dashed blue border.

- You can export all terminated employees to Excel and/or PDF, enter the term in the **Filter** field to search a specific employee or click a heading to sort terminated employees as follows.

Terminated Employees

Excel Print Preview Filter Clear Refresh

Last Name	First Name	ID Number	Badge ↑	Division	Department	Job	Supervisor	Training	Term Date	Duration
Brooks	Mason	2345	2345	Michicare	Z-DEFAULT	Z-DEFAULT	5?0	6?0	02/09/18	7
Dixie	Jenna	5046	5046	Michicare	Z-DEFAULT	Z-DEFAULT	Z-DEFAULT	Default	03/08/18	7
Bromfield	Blake	5121	5121	Michicare	Z-DEFAULT	Z-DEFAULT	Z-DEFAULT	Default	02/19/18	7
Van Hoorn	Hailey	5129	5129	Michicare	Z-DEFAULT	Z-DEFAULT	Z-DEFAULT	Default	05/17/18	4

- Click Excel to export all terminated employees to an Excel spreadsheet.

Terminated Employees .xml - Excel

File Home Insert Page Layout Formulas Data Review View Acrobat

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	A	B	C	D	E	F	G
1	Last Name	First Name	ID Number	Badge	Division	Department	Job
2	Brooks	Mason	2345	2345	Michicare	Z-DEFAULT	Z-DEFAULT
3	Dixie	Jenna	5046	5046	Michicare	Z-DEFAULT	Z-DEFAULT
4	Bromfield	Blake	5121	5121	Michicare	Z-DEFAULT	Z-DEFAULT

- Click Print Preview to export all terminated employees to a PDF document.

Terminated Employees

Last Name	First Name	ID Number	Badge	Division	Department	Job
Brooks	Mason	2345	2345	Michicare	Z-DEFAULT	Z-DEFAULT
Dixie	Jenna	5046	5046	Michicare	Z-DEFAULT	Z-DEFAULT
Bromfield	Blake	5121	5121	Michicare	Z-DEFAULT	Z-DEFAULT
Van Hoorn	Hailey	5129	5129	Michicare	Z-DEFAULT	Z-DEFAULT

- To locate a specific employee, you can enter his/her last name, first name, ID number, badge number, workgroup, or terminate date in MM/DD/YY format in the text field. Wait a few seconds, the search results are returned in the list.

Terminated Employees

Excel Print Preview 02/09/18 Clear Refresh

Last Name	First Name	ID Number	Badge ↑	Division	Department	Job	Supervisor	Training	Term Date	Duration
Brooks	Mason	2345	2345	Michicare	Z-DEFAULT	Z-DEFAULT	5?0	6?0	02/09/18	7
Nottingham	Brian	9999	9999	Michicare	Z-DEFAULT	Z-DEFAULT	Z-DEFAULT	Default	02/09/18	7

- Click a heading, for example, *Badge* to sort terminated employees by their badge numbers in ascending or descending order.

Terminated Employees

Excel Print Preview Filter Clear Refresh

Last Name	First Name	ID Number	Badge ↑	Division	Department	Job	Supervisor	Training	Term Date	Duration
Brooks	Mason	2345	2345	Michicare	Z-DEFAULT	Z-DEFAULT	5?0	6?0	02/09/18	7
Dixie	Jenna	5046	5046	Michicare	Z-DEFAULT	Z-DEFAULT	Z-DEFAULT	Default	03/08/18	7
Bromfield	Blake	5121	5121	Michicare	Z-DEFAULT	Z-DEFAULT	Z-DEFAULT	Default	02/19/18	7
Van Hoorn	Hailey	5129	5129	Michicare	Z-DEFAULT	Z-DEFAULT	Z-DEFAULT	Default	05/17/18	4

- Once the terminated employee is located, click this entry. The employee's **Active Status** section of the **Personal Information** page is displayed.

Terminated Employees					
Excel	Print Preview	Filter	Clear		
Last Name	First Name	ID Number	Badge	Division	Department
Alfred	Timothy	5252	5252	Michicare	Z-DEFAULT
Bromfield	Blake	5121	5121	Michicare	Z-DEFAULT
Brooks	Mason	2345	2345	Michicare	Z-DEFAULT

- The employee's active status is displayed with *Terminated*, terminated condition, and an effective date.

Personal Information		Active Status		
Last Name	First Name	ID Number	Badge	Division
Bromfield	Blake	5121	5121	Michicare
Revert to Earlier Settings		Change Active Status		
Current				
Adj	Active Status	Condition	Effective	Comments
	Terminated	Permanent	2/19/18	
Historical				
Adj	Active Status	Condition	Effective	Comments
	Active	Normal	1/12/18	

- Click **Time Card** or **Archives** in employee page drop down menu to access this terminated employee's time card or archived time card. You can also access other pages of this terminated employee.

Personal Information		Active Status	
Last Name	First Name	ID Number	Badge
Bromfield	Blake	5121	5121
Revert to Earlier Settings		Change Active Status	
Current			
Adj	Active Status	Condition	Effective
	Terminated	Permanent	2/19/18

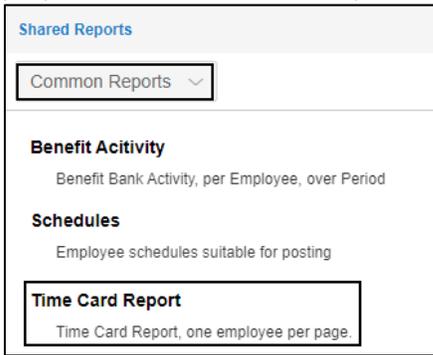
Terminated Employees Report

You can generate a terminated employees report for specific employees or workgroup within a specific period.

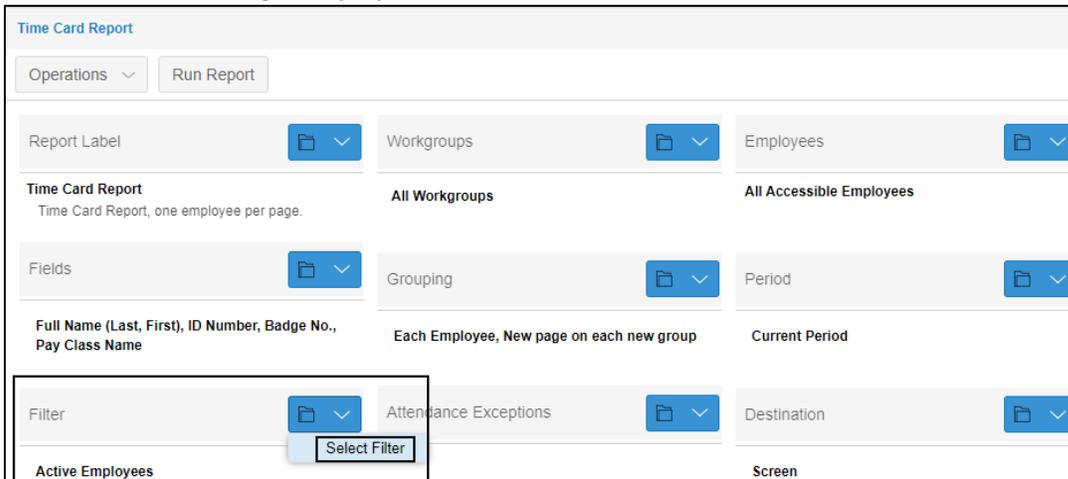
1. Expand **Reports** menu group and click **Shared Reports**.



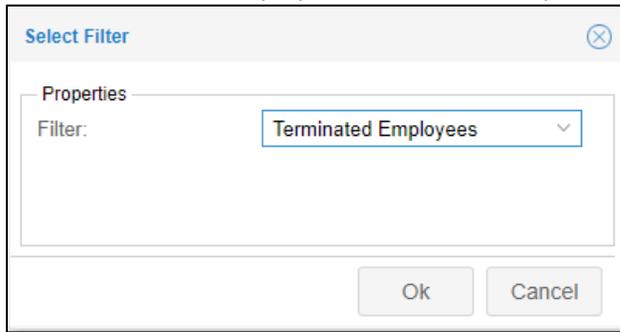
2. Click the first drop-down arrow and select a report group to locate the **Time Card Report** to open up properties of the time card report.



3. On the **Time Card Report** page, click the drop-down arrow for the **Filter** section and choose **Select Filter**. The **Select Filter** dialog is displayed.

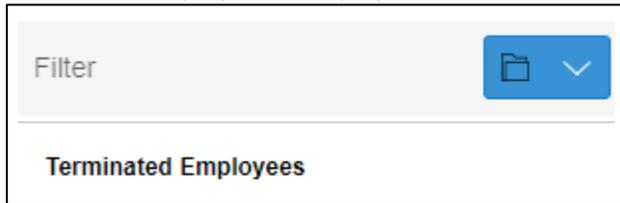


4. Select *Terminated Employees* in the **Filter** drop down list. Then click **Ok**.



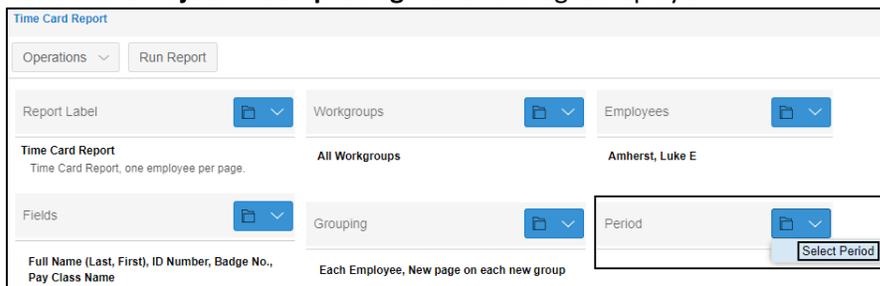
The screenshot shows a dialog box titled "Select Filter" with a close button in the top right corner. Inside, there is a "Properties" section containing a "Filter:" label and a dropdown menu currently displaying "Terminated Employees". At the bottom of the dialog are "Ok" and "Cancel" buttons.

5. *Terminated Employees* is displayed in the **Filter** section.



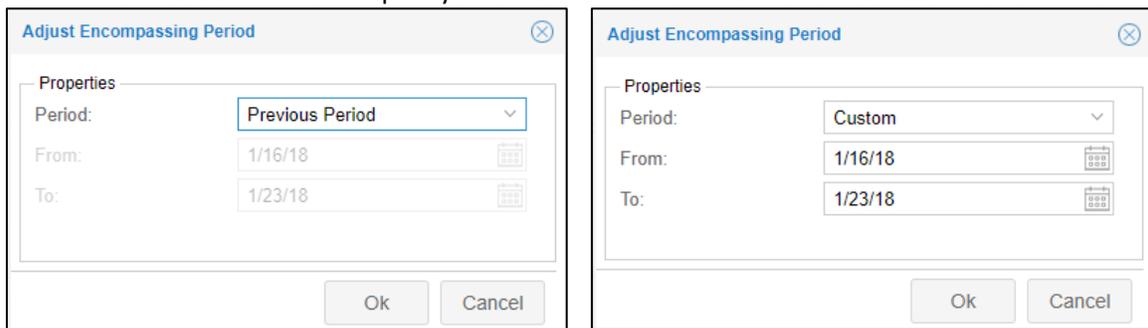
The screenshot shows a "Filter" section with a dropdown menu icon and a blue arrow button. Below the section, the text "Terminated Employees" is displayed.

6. On the **Time Card Report** page, click the drop-down arrow for the **Period** section and choose **Select Period**. The **Adjust Encompassing Period** dialog is displayed.



The screenshot shows the "Time Card Report" page. It has a header with "Operations" and "Run Report" buttons. Below are sections for "Report Label", "Workgroups", "Employees", "Time Card Report", "Fields", "Grouping", and "Period". The "Period" dropdown menu is open, showing a "Select Period" button.

7. Select any period needed, for example, *Previous Period*. Or you can customize the date range by selecting *Custom* in the **Period** field and specify the start date and end date in the **From** and **To** fields. Click **Ok**.



The screenshot shows two instances of the "Adjust Encompassing Period" dialog box. The left one has "Previous Period" selected in the "Period:" dropdown, with "From:" set to "1/16/18" and "To:" set to "1/23/18". The right one has "Custom" selected in the "Period:" dropdown, with "From:" set to "1/16/18" and "To:" set to "1/23/18". Both have "Ok" and "Cancel" buttons at the bottom.

8. The selected period is displayed in the **Period** section.

The screenshot shows a 'Period' section with a dropdown menu icon on the right. Below the section, the text 'From Jan-16 to Jan-23' is displayed.

9. Click **Run Report** to generate a time card report.

The screenshot shows the 'Time Card Report' configuration dialog. It has a 'Run Report' button highlighted. The dialog is divided into several sections: 'Report Label' (Time Card Report), 'Workgroups' (All Workgroups), 'Employees' (All Accessible Employees), 'Fields' (Full Name, ID Number, Badge No., Pay Class Name), 'Grouping' (Each Employee, New page on each new group), 'Period' (From Jan-16 to Jan-23), 'Filter' (Terminated Employees), 'Attendance Exceptions', and 'Destination' (Screen).

10. In the **Build Report** dialog, select the report format (Adobe Reader (PDF) or Microsoft Excel (XMLSS)) in the **Format** field and specify how to obtain the report (Screen or Email) in the **Destination** field. If *Email* is selected in the **Destination** field, specify the email address in the available **Recipients** field. Click **Ok**.

The screenshot shows the 'Build Report' dialog. It has a 'Format' field set to 'Adobe Reader (PDF)', a 'Destination' field set to 'Screen', and a 'Recipients' field containing 'rongl@infotronics.com'. There are 'Ok' and 'Cancel' buttons at the bottom.

11. In the **Preview Report** dialog, verify the report properties. Click **Ok**.

The screenshot shows the 'Preview Report' dialog. It has a 'Report Details' field showing '"Time Card Report" Created On Jul-20 2017 4:09pm by AODTECH'. It also has 'Format' (Adobe Reader (PDF)), 'Destination' (Screen), and 'Recipients' (rongl@infotronics.com) fields. There are 'Ok' and 'Cancel' buttons at the bottom.

12. The time card report for terminated employees is exported to PDF or Excel based on your selected destination. You can access employee's time and attendance information when they were hired.

Time Card Report							
Custom (01/16/18 to 01/23/18)							
Fulham, Brian E							
Employee	ID Number		Badge		Pay Class		
Fulham, Brian E	5257		5257		MFT		
Date	In	Out	In	Out	Amount	Schedule	Exceptions
01/16/18	7:56a	1:01p	1:58p	5:01p	8:00	Unsch	Unsch.
01/16/18					8:00	Regular	
01/17/18	7:45a	12:50p	1:55p	5:06p	21:55	Unsch	Unsch.
01/17/18					21:55	Regular	
01/18/18	7:56a	12:00p	12:53p	5:05p	8:00	Unsch	Unsch.
01/18/18					8:00	Regular	
01/19/18	7:57a	12:03p	12:30p	4:51p	8:15	Unsch	Unsch.
01/19/18					2:05	Regular	
01/19/18					6:10	Overtime	

The screenshot shows an Excel spreadsheet titled "Time Card Report Custom (01_16_18 to 01_23_18).xml - Excel". The spreadsheet contains the following data:

	A	B	C	D	E	F	G	H	I	J	K	L
	Employee	ID Number	Badge	Pay Class	Date	In	Out	In	Out	Amount	Schedule	Exceptions
62	Fulham, Brian E	5257	5257	MFT								
63			0		1/16/2018	7:56a	1:01p	1:58p	5:01p	8.00	Unsch	Unsch.
64			0		1/16/2018					8.00	Regular	
65			0									
66			0		1/17/2018	7:45a	12:50p	1:55p	5:06p	21.92	Unsch	Unsch.
67			0		1/17/2018					21.92	Regular	
68			0									
69			0		1/18/2018	7:56a	12:00p	12:53p	5:05p	8.00	Unsch	Unsch.
70			0		1/18/2018					8.00	Regular	
71			0									
72			0		1/19/2018	7:57a	12:03p	12:30p	4:51p	8.25	Unsch	Unsch.
92	Harrington, Garret	5256	5256	CON	1/16/2018							

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