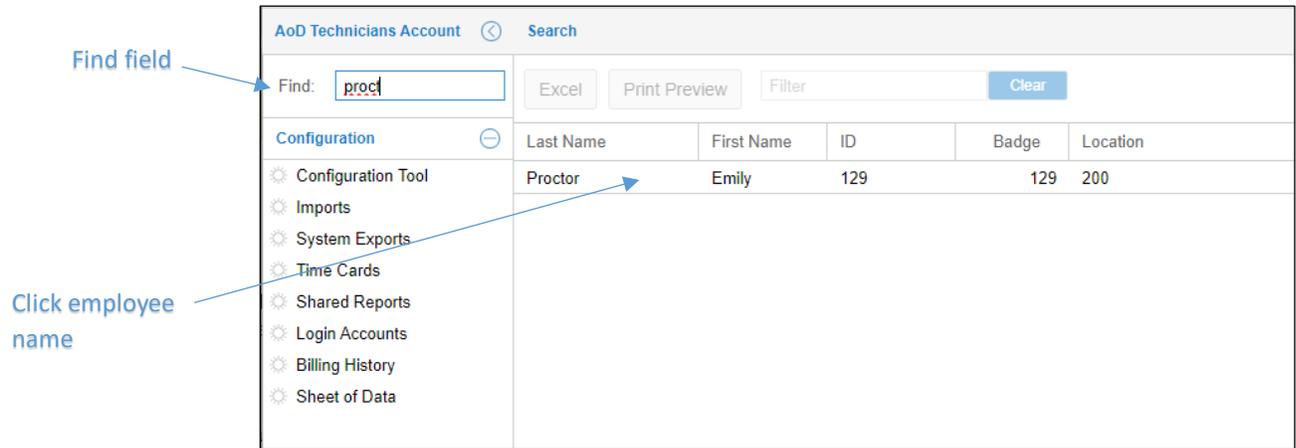


MSS: Terminating an Employee Record

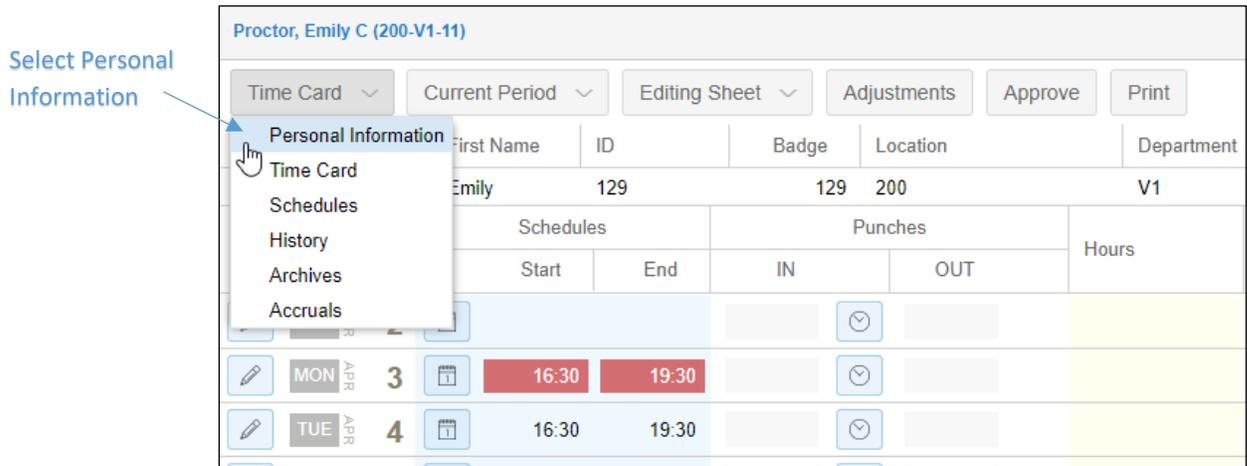
Job Aid

To terminate an employee record in Manager Self Service, locate the employee record using the Find field. Type all or part of the employee's name and hit the Enter key on your keyboard.



Click the employee's name in the list of results returned by the employee search.

In the employee's time card, select Personal Information from the Time Card drop-down list.



Select Active Status from the Basic drop-down list.

Proctor, Emily C (200-V1-11)

Personal Information Basic

Last Name	First Name	ID	Badge	Location
Proctor	Emily	129	129	200

Last Name: Proctor
First Name: Emily
Middle Initial: C
ID Number: 129
Badge: 129
Pay Class: Care
Pay Class Eff. Date: 01/10/17
Clock Group: Clock Group #1
Schedule Pattern: Student Hires
Sch. Patt. Eff Date: 06/06/16
Date of Hire: 1/10/17

Select Active Status

Click the Change Active Status button in the Active Status Page.

Proctor, Emily C (200-V1-11)

Personal Information Active Status

Last Name	First Name	ID	Badge	Location	Department
Proctor	Emily	129	129	200	V1

Change Active Status

Current

Adj	Active Status	Condition	Effective	Comments
	Active	Normal	1/10/17	

Historical

Adj	Active Status	Condition	Effective	Comments
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Click Change Active Status button

An employee's current status can be adjusted by clicking the pencil icon. This method is recommended only for repairing status settings, such as those that might occur during import, not for terminating an employee permanently.

Current			
Adj	Active Status	Condition	Effective
	Active	Normal	1/10/17

Only the Change Active Status button will preserve the employee's historical records.

The dialog box titled "Adjust Current Active Status Settings" contains a "Properties" section with a note: "Changes in this area will not maintain historical records. Unless you are simply repairing a mistake, select the 'New Active Status' button in the toolbar above." Below the note are four fields: "Active Status" (dropdown menu with "Active" selected), "Active Condition" (dropdown menu with "Normal" selected), "Terminated Condition" (dropdown menu), and "Effective Date" (calendar field with "4/3/17" selected). A "Notes" text area is at the bottom left, and "Ok" and "Cancel" buttons are at the bottom right.

Select **Terminated** in the Active Status drop-down list in the *Assign New Active Status* window.

The dialog box titled "Assign New Active Status" shows the "Active Status" dropdown menu open, displaying options: "Terminated", "Disciplinary Action", "On Leave", and "Permanent". A blue arrow points to "Terminated" with the text "Select Terminated". Another blue arrow points to "Permanent" with the text "Select Permanent". The "Terminated Condition" dropdown menu is also open, showing "Disciplinary Action" selected. The "Effective Date" field is empty. "Ok" and "Cancel" buttons are at the bottom.

Select **Permanent** in the Terminated Condition drop-down list.

Select the effective date for termination in the Effective Date field.

Click Calendar icon to select the date when termination is effective

Add notes by typing in Notes field

Click the OK button when settings have been selected

Add a note in the Notes field if needed and click the **OK** button when the fields have been completed.

Terminated employee records can be viewed in the Terminated Employees summary sheet in the Shared Reports Menu.

To view the terminated employee record, review the *Locating Terminated Employees* job aid.