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.

Find field	AoD Technicians Account	Search				
	Find: proct	Excel Print Pre	Filter		Clear	
	Configuration	Last Name	First Name	ID	Badge	Location
	Configuration Tool	Proctor	Emily	129	129	200
	Imports					
	System Exports					
	C Time Cards					
Click employee	Shared Reports					
name	Cogin Accounts					
	Billing History					
	Sheet of Data					

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.

Colort Devenuel	Proctor, Emily C (200-V1-11)						
Information	Time Card \lor C	urrent Period	Editing	Sheet 🗸 🗌 Adj	justments Appro	Print	
	Personal Information	ⁿ First Name	ID	Badge	Location	Department	
	Schedules	Emily	129	129	200	V1	
	History	Schedu	ıles	Pu	inches	Hours	
	Archives	Start	End	IN	OUT		
	Accruals			\odot			
		16:30	19:30	\odot			
		16:30	19:30	\odot			

Select Active Status from the Basic drop-down list.

	Proctor, Emily C (200-V1-11)					
	Personal Information	1 ~ [Basic 🗸			
	Last Name	First N	Basic	Badge	Location	
	Proctor	Emily Private		129	200	
Select Active	Last Name:	Proc	Address		•••	
	First Name:	Emil	Rate of Pay Workgroup			
	Middle Initial:	C	Active Status			
	ID Number:	129	Hourly Status 🖑			
	Badge:	129	Pay Class		Change	
	Pay Class:	Care	Activity		Change	
	Pay Class Eff. Date:	01/10/17	7			
	Clock Group:	Clock (Group #1		~	
	Schedule Pattern:	Studen	t Hires		Change	
	Sch. Patt. Eff Date:	06/06/10	3			
	Date of Hire:	1/10/17	7			

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

	Proctor, Emily C (200-V1-11)							
Click Change Active Status button	Persona	I Information \sim	Active Status $\ \lor$					
	Last Name	First N	lame ID	Badge	Location	Department		
	Proctor	Emily	129	129	200	V1		
	Change Active Status							
	Current							
	Adj	Active Status	Condition		Effective	Comments		
	Ø	Active	Normal		1/10/17			
	Historical							
	Adj	Active Status	Condition		Effective	Comments		

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
Ø	Active	Normal	1/10/17

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

Note:	Changes in this are maintain historical you are simply rep select the "New Ac button in the toolba	ea will not records. Unless airing a mistake, tive Status" ar above.
Active Status:	Active	~
Active Condition:	Normal	~
Terminated Condition:		
Effective Date:	4/3/17	
Notes:		

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

Assign New Active Status		\otimes	
Properties			Select
Active Status:	Terminated	~	Terminated
Active Condition:	Normal	\sim	
Terminated Condition:	Disciplinary Action	~	
Effective Date:	Disciplinary Action		Select
Notes:	On Leave		Permanent
140165.	Permanent	Jm A	remanent
		\mathbf{O}	
	Ok	Cancel	

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

Properties				
Active Status:	Terminated	~		
Active Condition:	Normal	~		Click Calendar icon to select
Terminated Condition:	Permanent	\sim		the date when termination is
Effective Date:	4/3/17		ſ	effective
Notes:	Employee left for new job.			Add notes by typing in Notes field
				Click the OK button when settings have been selected

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

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.

AoD Technicians Account	Shared Reports				
Find: Search Employee	Employee Lists \lor Revert				
Configuration 🕞	Active Employees by Workgroup	Terminated Employees by Workgroup			
Configuration Tool	Simple employee list, active employees by Workgroup.	Operations \checkmark Run Report			
System Exports	All Employees by Workgroup				
© Time Cards © Shared Reports	Simple employee list, active and inactive employees by Workgroup.	Report Label 🛅 🗸	Workgroups 🛅 🗸		
C Login Accounts		Terminated Employees by Workgroup			
Billing History	Terminated Employees by Workgroup	Simple employee list, inactive employees by All Workgroups			
Sheet of Data	Simple employee list, inactive employees by Workgroup.	workgroup.			

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

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