



Time and Labor (OTL)

HR CSR

Terminate and Reverse Terminate
an Employee Record

DoDEA R12 Work Instructions



Document Control

Change Record

| Date | Author | Version | Change Reference |
|-------------|-------------|---------|------------------|
| 16-Sep-2014 | Robin Hardy | 1.0 | R12 Upgrade |

Reviewers

| Date | Name | Position |
|-------------|--------------|------------------------------|
| 18-Sep-2014 | Bill Mohamed | Work Force Preparation, Lead |

Distribution

| Copy No. | Name | Location |
|----------|--|----------|
| 1 | DODEA_R12_WI_OTL_Terminate and Reverse Terminate an Employee | DEPS |

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Business Process Description

Use this procedure to Terminate or to Reverse Terminate an employee from your Agency in DAI.

Termination:

For government employees, terminations normally occur in DAI via the Defense Civilian Personnel Data System (DCPDS) interface. Under normal circumstances, the Agency follows the established process for submitting an SF-50 (Notification of Personnel Action form) to have the employee record updated in DCPDS. This information is transferred to DAI during the DCPDS interface process and subsequently terminates the employee record in the DAI system.

Manual termination of an employee in DAI and/or update of the Termination record **only** needs to occur under the following circumstances:

- Abrupt and/or unscheduled termination of government employees, where there is not adequate time to follow the SF50 process
- For non-government employees (Contingent Workers and Military) that are not in the DCPDS system and require termination, or non-government employees that need to be rehired as government employees
- Updating missing fields on the Termination form (i.e., Leaving Reason, Final Process Date)

Terminating an employee prevents any hours from being entered on the terminated employee's timecards past the Termination date entered in the Actual date field.

Reverse Termination:

This could be as a result of an error or for the need to modify termination data, such as their termination date or terminated employee type.

Some fields are protected from update once a termination is complete. Therefore, the only way to correct or modify those fields is to reverse terminate the employee record and then re-complete the termination process with the corrected information.

Trigger

An employee will no longer be working for an Agency deployed in DAI and they meet the above requirements for manual termination. Perform this procedure after identifying an employee end/termination date. Or a previously terminated employee is identified as an employee that requires a correction or reversal of their terminated status.

Prerequisites

- The employee record exists in DAI.
- The employee record has been terminated with a populated **Effective To Date** field on the **People** form.
- The employee record has an Employee Type record of "Ex- Employee" or similar "Ex" type.

The user with HR CSR belongs to the same Agency as the employee to be terminated **OR** the employee record being reverse terminated.



Business Process Description (Continued)

Responsibilities

- HR CSR – DODEA

Menu Path

Use the following menu path(s) to begin this task.

- People → Enter and Maintain

Training Exercises:

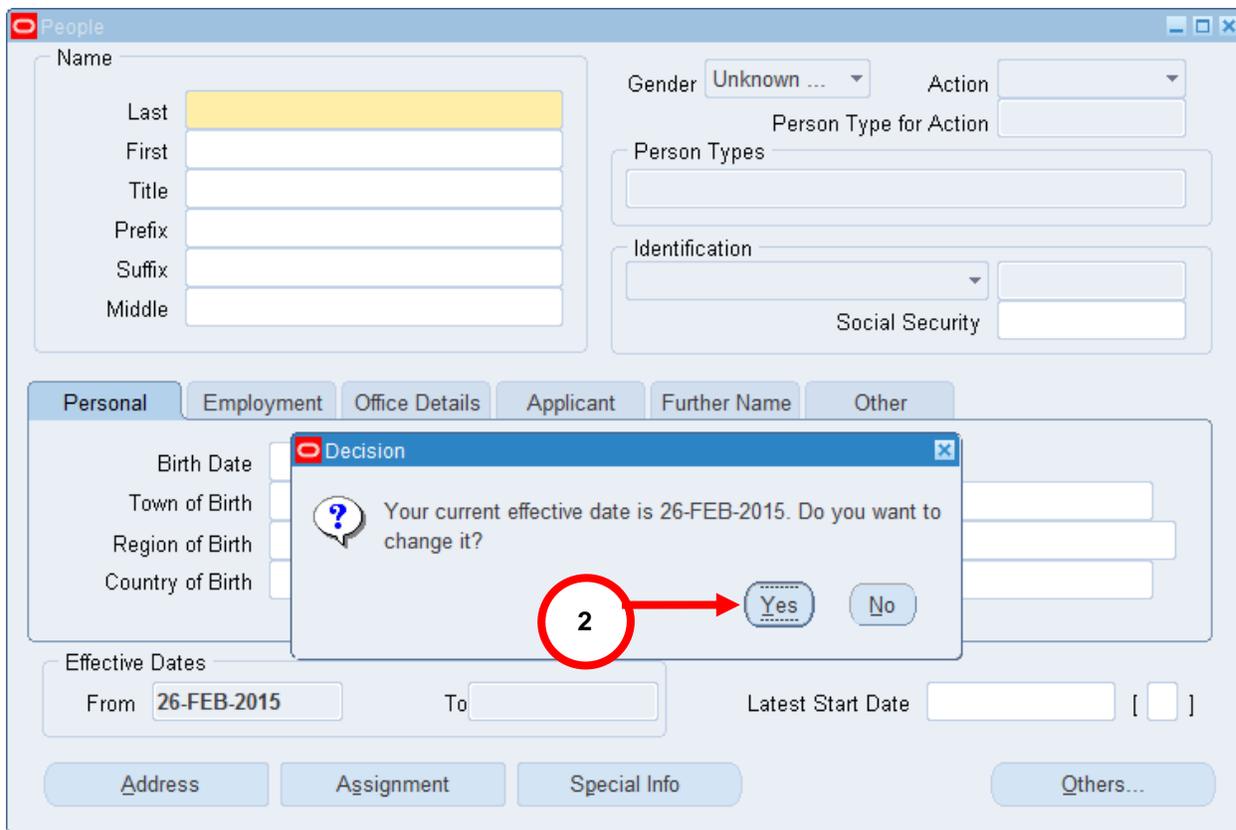
- Terminate and Reverse Terminate an Employee.

Terminate an Employee Record

1. Start the task using the responsibility and menu path to open the **People** form:
Responsibility: HR CSR – DODEA
Menu Path: People → Enter and Maintain



People – Decision



The screenshot shows the 'People' application interface. A 'Decision' dialog box is open, asking: "Your current effective date is 26-FEB-2015. Do you want to change it?" with 'Yes' and 'No' buttons. A red circle with the number '2' is around the 'Yes' button, with an arrow pointing to it. The background shows the 'People' form with tabs for Personal, Employment, Office Details, Applicant, Further Name, and Other. The 'Effective Dates' section shows 'From 26-FEB-2015' and 'To'.

2.

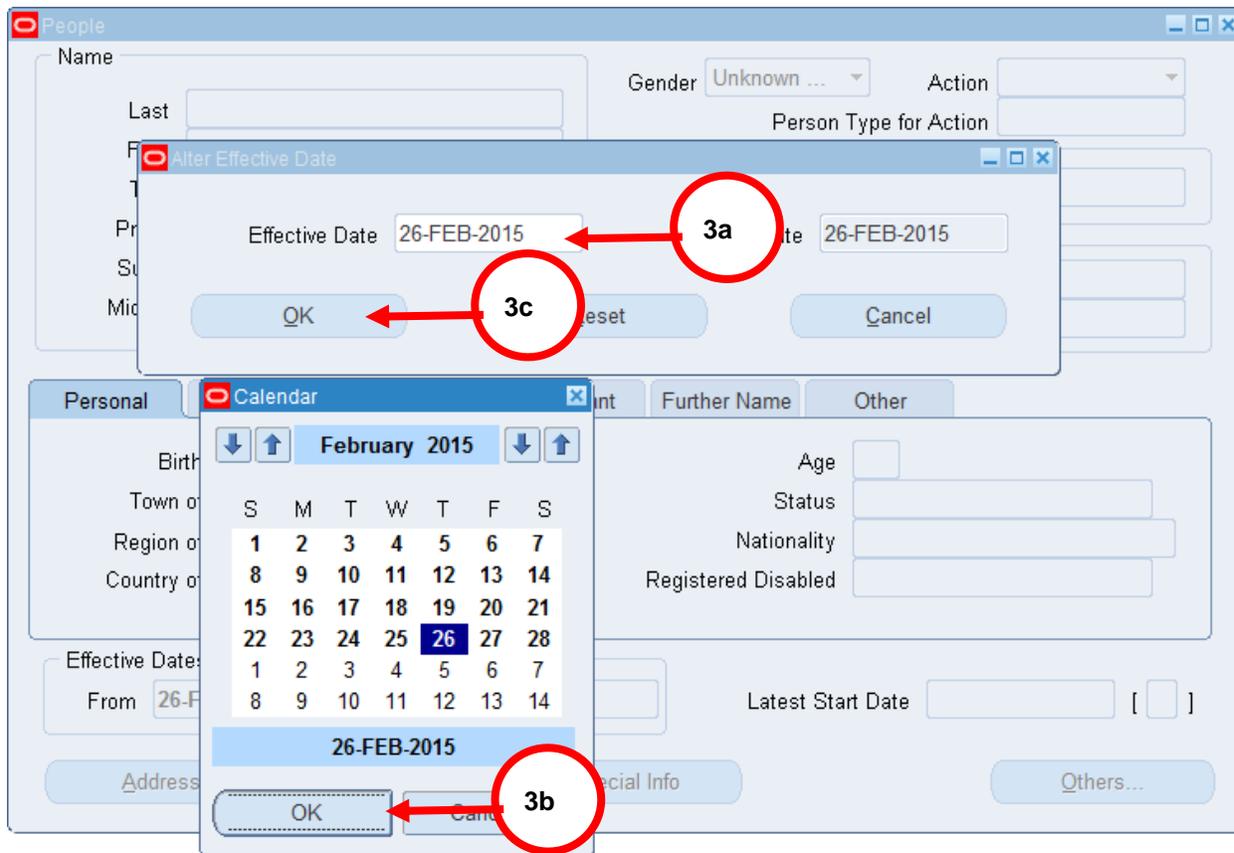
Decision:

Click the **Yes** button to change the effective date to always be the date of the employee's last day working. Do not change the current date displayed in the **Decision** box, if the employee's last day working is today's date.

Note: If the employee being terminated is a timecard approver, be sure to move the associated employees to a new approver or set up a delegate to approve those employee's timecards.

DAI does not allow the employee being terminated to enter time on a timecard past the **Last Standard Process** date on the Terminate form displayed later.

Calendar – Alter Effective Date

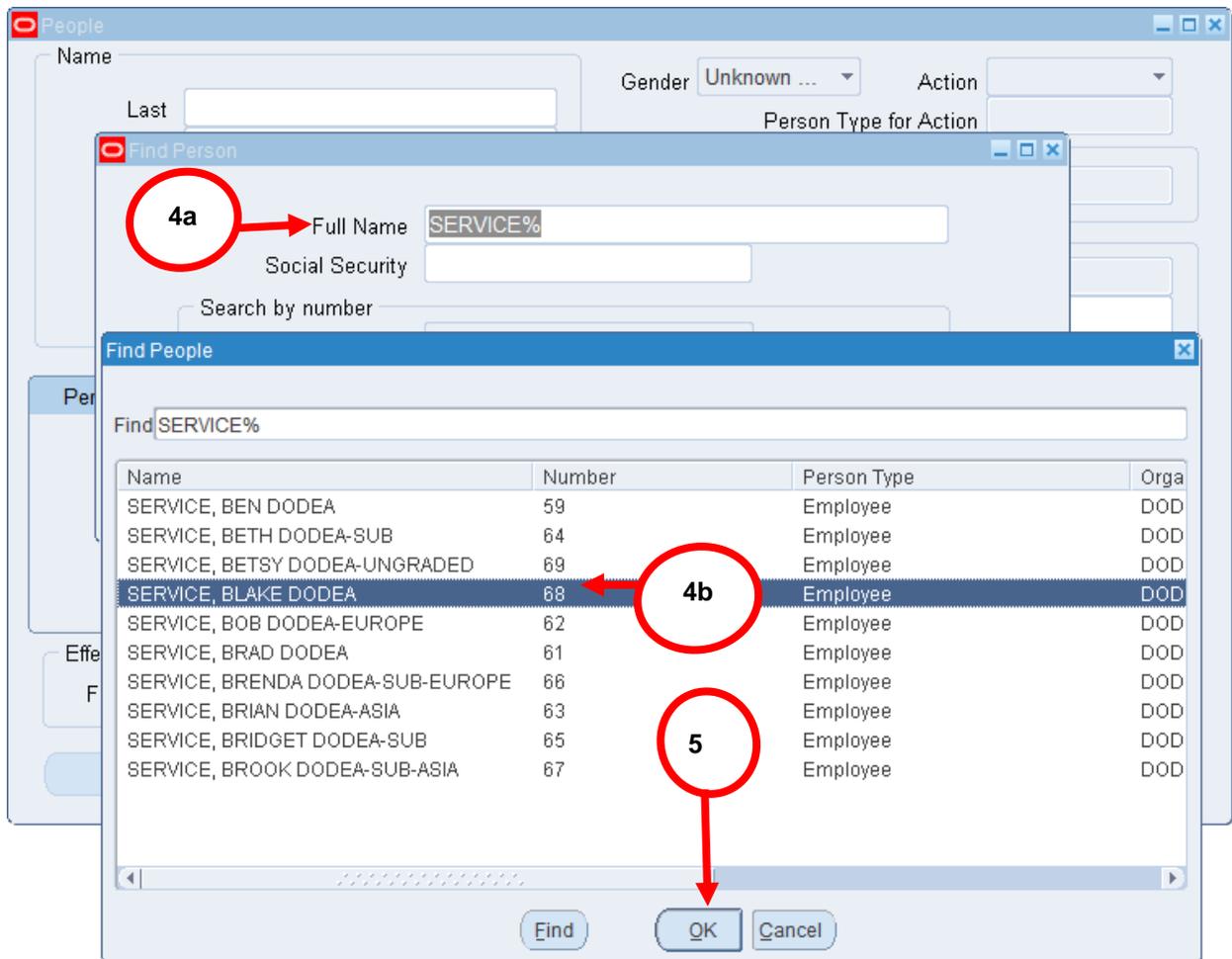


3.

- a) Enter the **Effective Date** value directly into the field using the following format **DD-MON-YYYY**, or select the date using the List of Values (**LOV**) calendar.
- b) Click the **OK** button on the calendar form.
- c) Click the **OK** after selecting the effective date on the **Alter Effective Date** form.

Note: The **Reset** button changes the **Effective Date** back to the current (today's) date.

People – Find Person



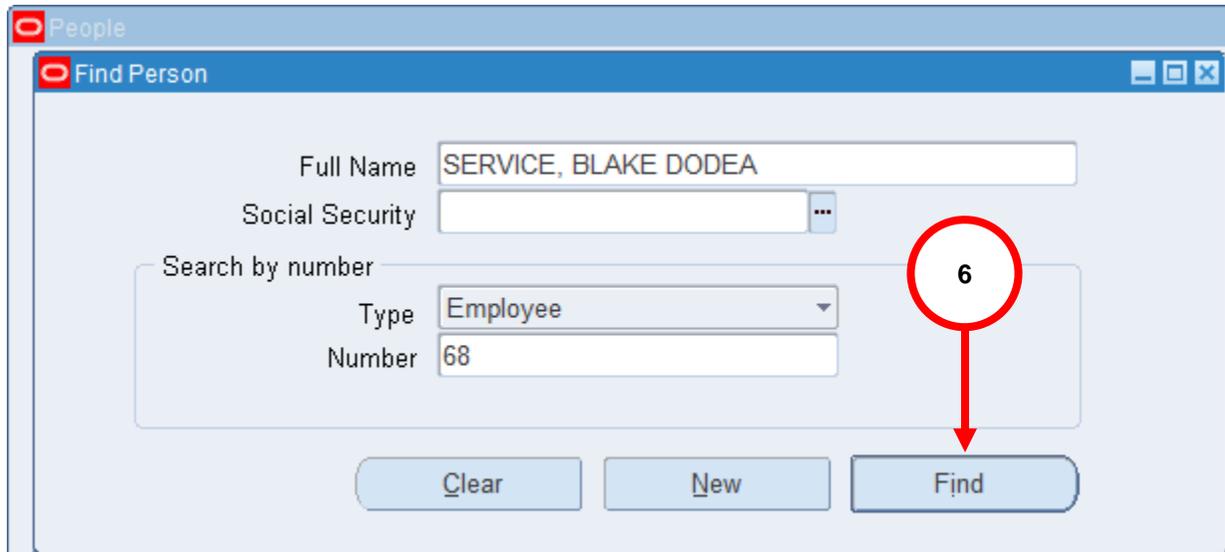
The screenshot displays the 'People - Find Person' application. The 'Find Person' dialog box is open, showing the 'Full Name' field with the text 'SERVICE%'. Below it, the 'Find People' dialog box shows a list of search results. The row 'SERVICE, BLAKE DODEA' is selected. The 'OK' button is highlighted.

| Name | Number | Person Type | Orga |
|----------------------------------|--------|-------------|------|
| SERVICE, BEN DODEA | 59 | Employee | DOD |
| SERVICE, BETH DODEA-SUB | 64 | Employee | DOD |
| SERVICE, BETSY DODEA-UNGRADED | 69 | Employee | DOD |
| SERVICE, BLAKE DODEA | 68 | Employee | DOD |
| SERVICE, BOB DODEA-EUROPE | 62 | Employee | DOD |
| SERVICE, BRAD DODEA | 61 | Employee | DOD |
| SERVICE, BRENDA DODEA-SUB-EUROPE | 66 | Employee | DOD |
| SERVICE, BRIAN DODEA-ASIA | 63 | Employee | DOD |
| SERVICE, BRIDGET DODEA-SUB | 65 | Employee | DOD |
| SERVICE, BROOK DODEA-SUB-ASIA | 67 | Employee | DOD |

4.
 - a) Enter a **Partial Name plus the wildcard (%)** or **Full Name** in the **Full Name** field to search for the employee record.
 - b) Select the **Full Name** from the **LOV** listing.

Note: Use wildcards and partial name searches (for example, **(SERVICE%)**) to limit the results. Additional search options are by **Social Security** or **Employee Number**, if known.
5. Click the **OK** button to search for the employee's record.

Find Person



People

Find Person

Full Name

Social Security

Search by number

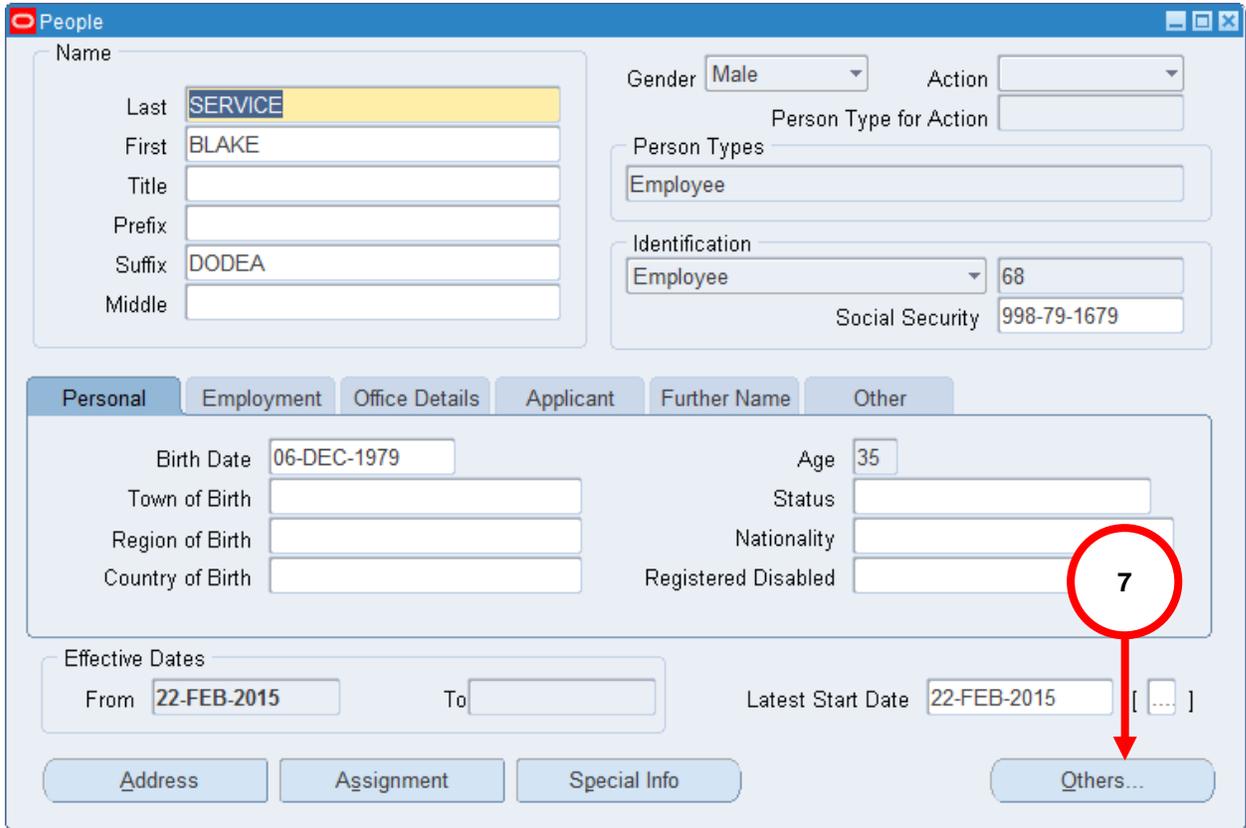
Type

Number

6

6. Click the **Find** button to locate the employee's record.

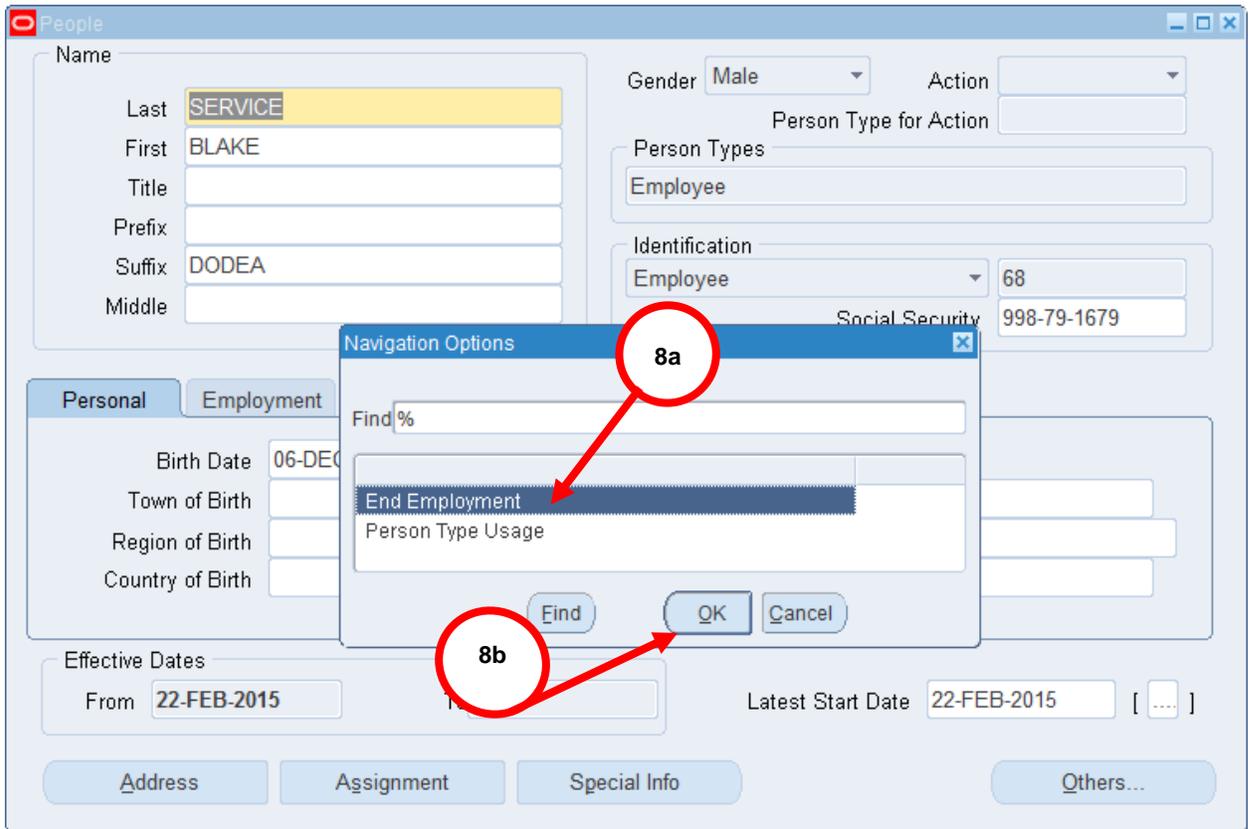
People – Find Person



The screenshot shows a web application window titled "People". It contains several input fields and dropdown menus for employee information. The "Name" section includes fields for Last (SERVICE), First (BLAKE), Title, Prefix, Suffix (DODEA), and Middle. The "Gender" is set to "Male" and "Action" is a dropdown menu. The "Person Types" section has a dropdown menu set to "Employee". The "Identification" section includes a dropdown menu set to "Employee", a field for "68", and a "Social Security" field with "998-79-1679". Below these are tabs for "Personal", "Employment", "Office Details", "Applicant", "Further Name", and "Other". The "Personal" tab is active, showing "Birth Date" (06-DEC-1979), "Age" (35), "Town of Birth", "Region of Birth", "Country of Birth", "Status", "Nationality", and "Registered Disabled". The "Effective Dates" section shows "From" (22-FEB-2015) and "To" (empty), and "Latest Start Date" (22-FEB-2015). At the bottom, there are buttons for "Address", "Assignment", "Special Info", and "Others...". A red circle with the number "7" is around the "Others..." button, and a red arrow points from it to the instruction below.

7. Click the **Others...** button to open the **Navigation Options** form for the selected employee's record.

People – Navigation Options

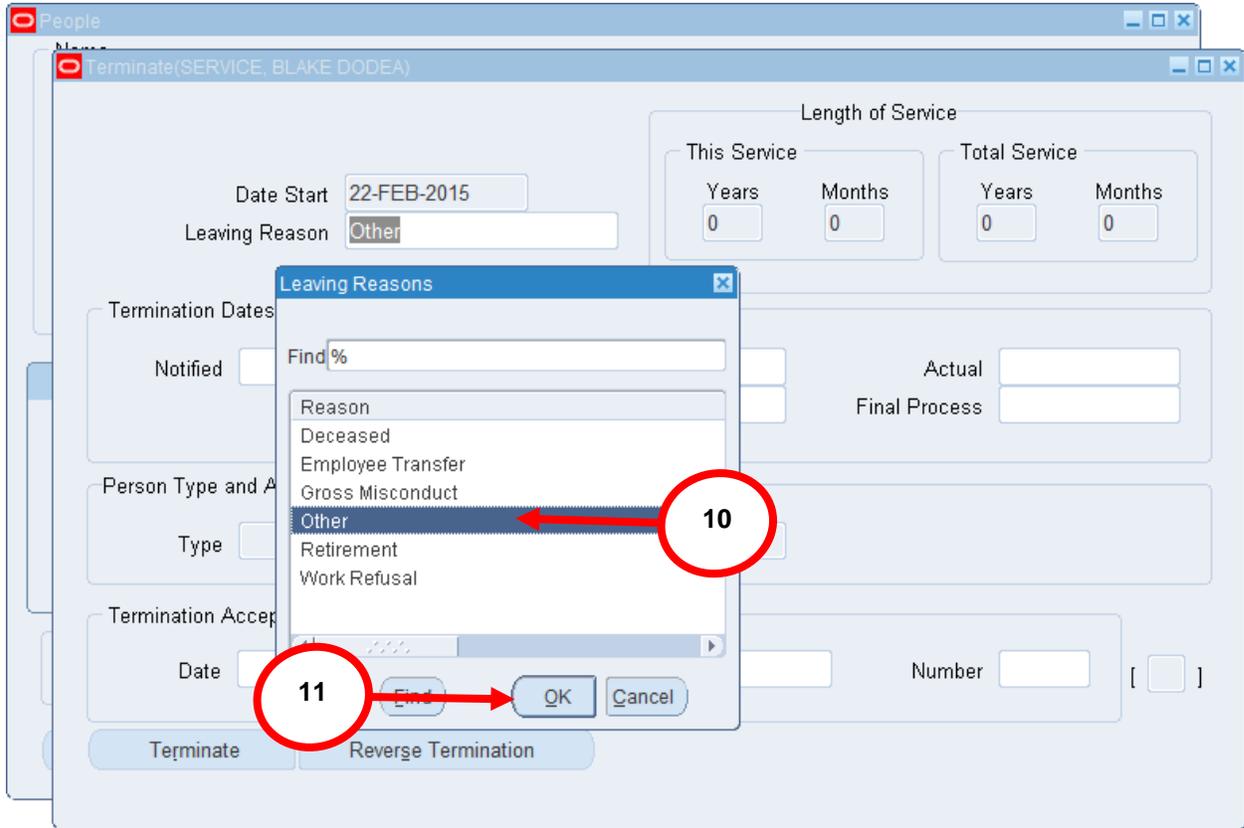


8.

- a) Click the **End Employment** option in the **Navigation Options LOV**.
- b) Click the **OK** button to close the **Navigation Options** form.

Note: Currently, the **Person Type Usage** option is not being utilized within DAI. The **Terminate** form opens.

People – Terminate (employee name) – Leaving Reason

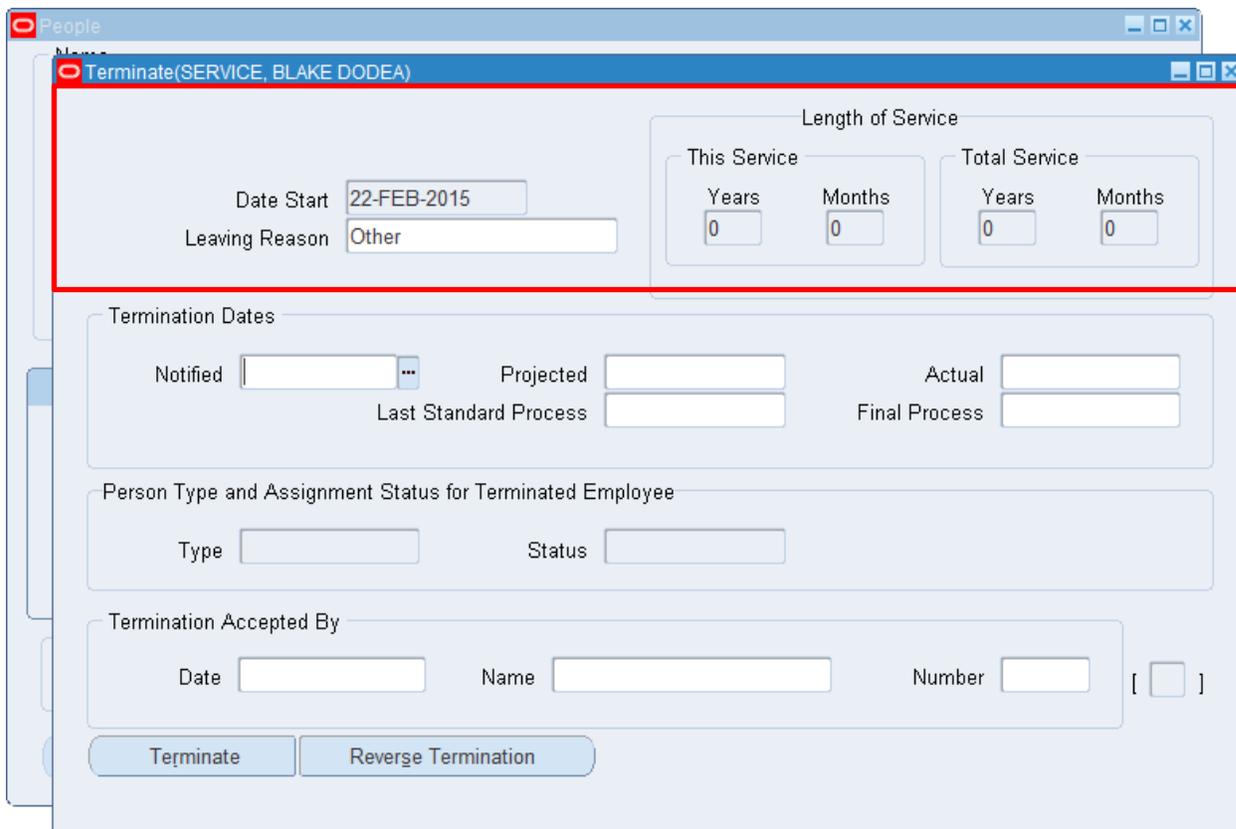


10. Click the **LOV** icon in the **Leaving Reason** field to view the reasons for leaving options.

| Reason for Leaving | Description |
|--------------------------|--|
| Deceased | Employee is deceased. |
| Employee Transfer | Employee is being transfer to a different Agency within the Department of Defense (DoD). |
| Gross Misconduct | Employee's behavior was not befitting the position. |
| Other | Employee resigned, or any other reason not specified within the list. |
| Retirement | Employee retired. |
| Work Refusal | Employee refused to do or complete work assignments. |

11. Click the **OK** button to close the **Leaving Reasons** form.

People - Terminate



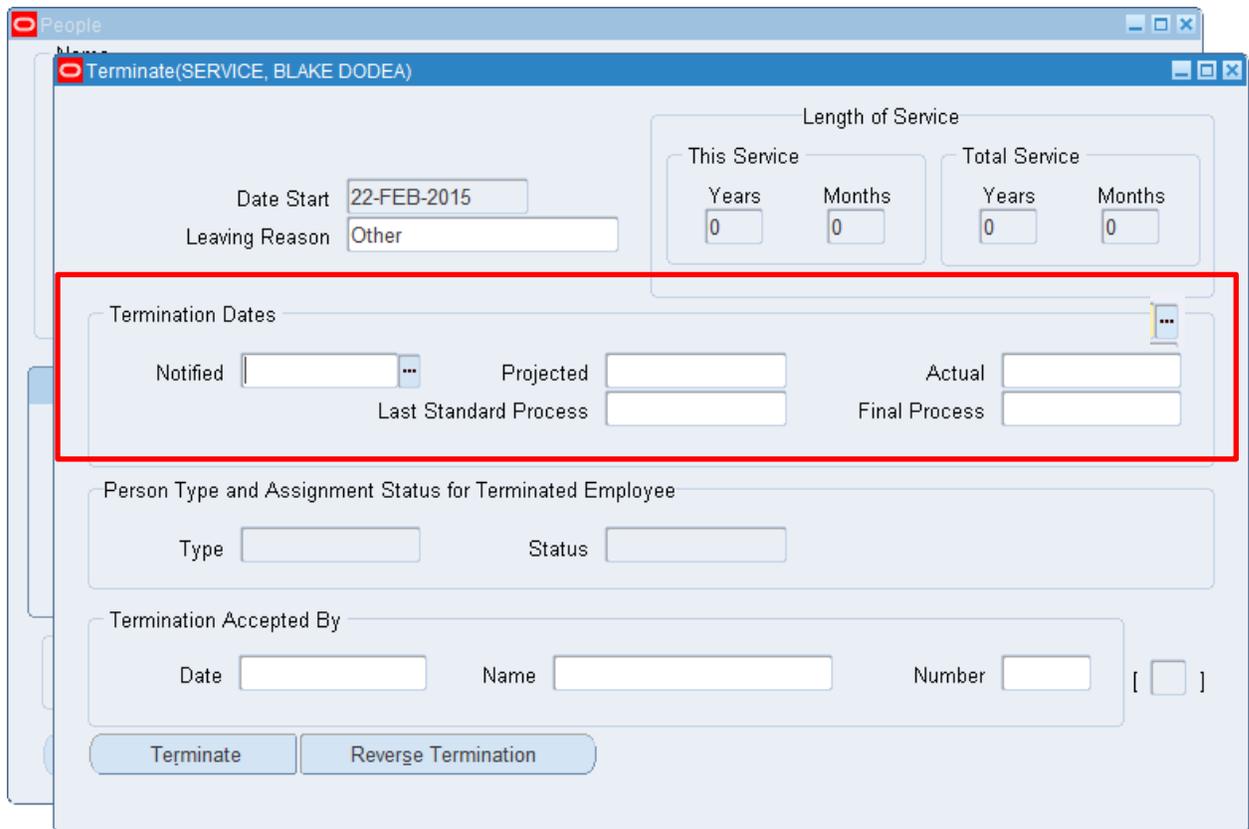
Header Section:

Date Start: (Read-Only) Displays the original start date of employment for the employee.

Leaving Reason: (Optional) Allows the HR CSR to select the reason for the employee being terminated within the DAI system.

Length of Service: (Read-Only) Is a summary set of fields that are not editable and will auto-populate the details from the current organization information within DCPDS.

People – Terminate – Actual Termination Dates



People

Terminate(SERVICE, BLAKE DODEA)

Date Start: 22-FEB-2015

Leaving Reason: Other

Length of Service

| This Service | | Total Service | |
|--------------|--------|---------------|--------|
| Years | Months | Years | Months |
| 0 | 0 | 0 | 0 |

Termination Dates

| Notified | Projected | Actual |
|-----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Last Standard Process | <input type="text"/> | Final Process |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Person Type and Assignment Status for Terminated Employee

| Type | Status |
|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> |

Termination Accepted By

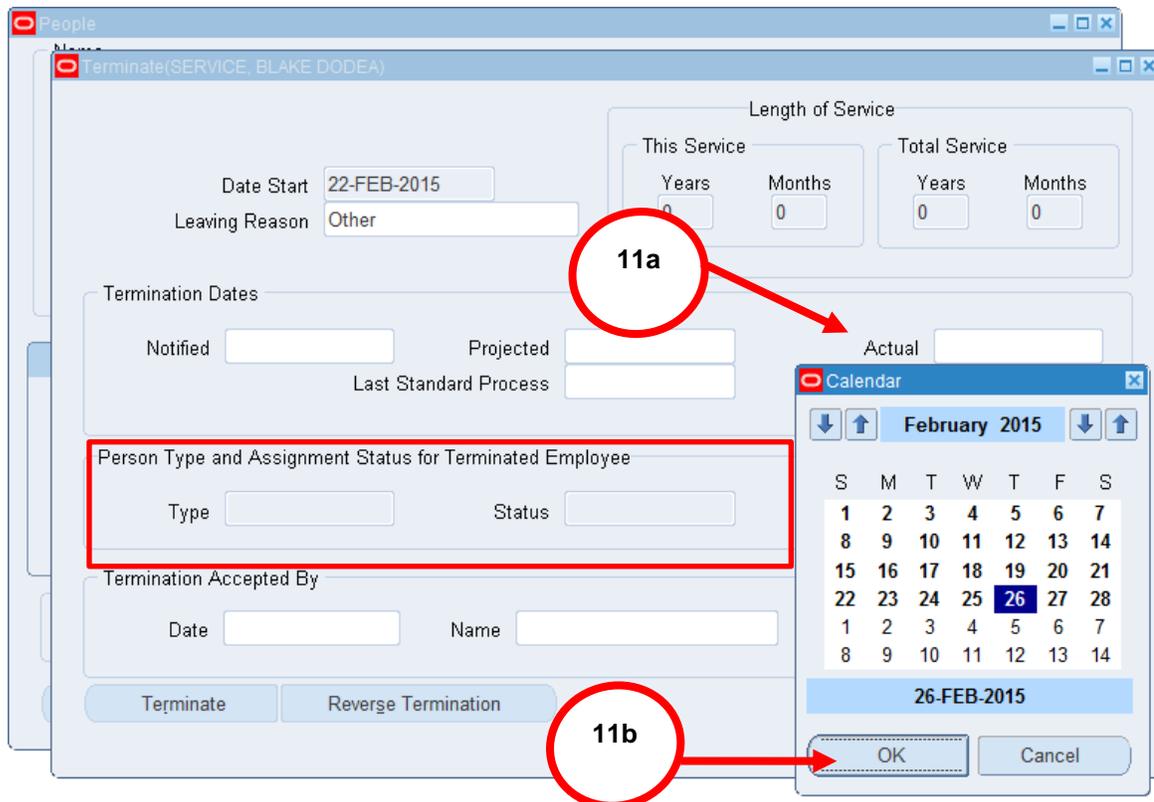
| Date | Name | Number |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Buttons: Terminate, Reverse Termination

Termination Date Section:

- **Notified:** (Optional) This date field provides the ability to record the date when the employee was made aware of their termination and is for information purposes only.
- **Projected:** (Optional) This date field provides the ability to record the date when the employee is anticipated to stop working and is for information purposes only.
- **Actual: (Required)** Although the **Actual** date field is not yellow (required by Oracle), it is required procedurally for **DAI**. This is the date when the employee's person type changes.
- **Last Standard Process:** (Optional) Date auto-populates with the date for the end of the payroll period and should not be changed.
- **Final Process:** (Optional) Date is *not* a date to be entered by the **HR CSR**.

People – Terminate – Enter Actual Date



- 11.
- a) Click the **LOV** icon in the **Actual** field to display the **Calendar** form. Select the actual date the employee is terminated. Upon entry of the date the **Type** of employee changes to **Ex-employee** and the **Status** changes to **P - Date of Separation**.
 - b) Click the **OK** button.

Note: Upon entry of the **Actual** date, the form will automatically update with the **Type** field showing **Ex-employee** and the **Status** field showing **P – Date of Separation**. Other options should be utilized as appropriate. These options are:

| Type |
|--------------------------|
| Ex-DAI Active Military |
| Ex-DAI Contingent Worker |
| Ex-employee |
| |

| Status |
|--------------------------|
| P – Date of Separation |
| S – Severance |
| X – Date of Death |
| Z – Severance (Deceased) |



People - Terminate – Termination Accepted By

Termination Accepted By: (All fields are Optional.)

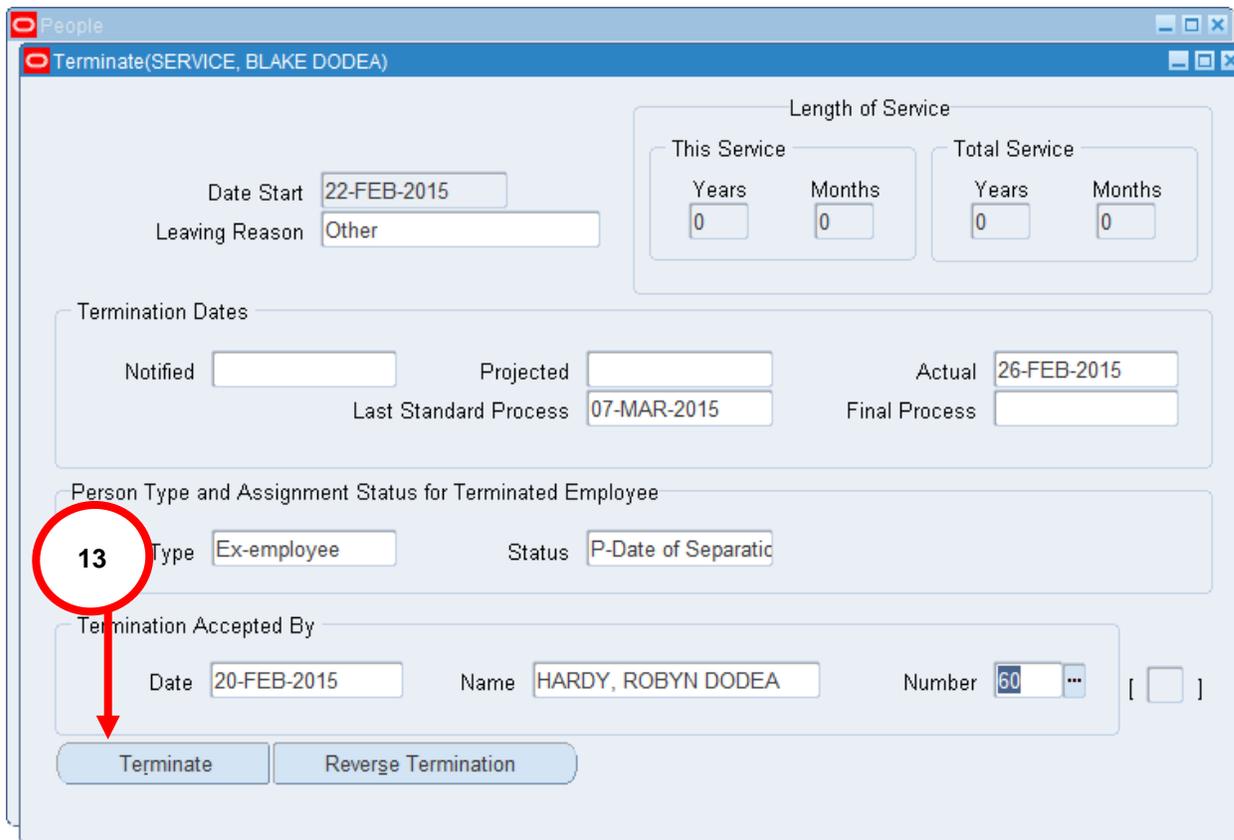
Date: The **Date** entered reflects the date the notification was accepted.

Name: The **Name** of the person who accepted the notification pertaining to the termination.

Number: The Employee **Number** for the person who accepted the notification pertaining to the termination.

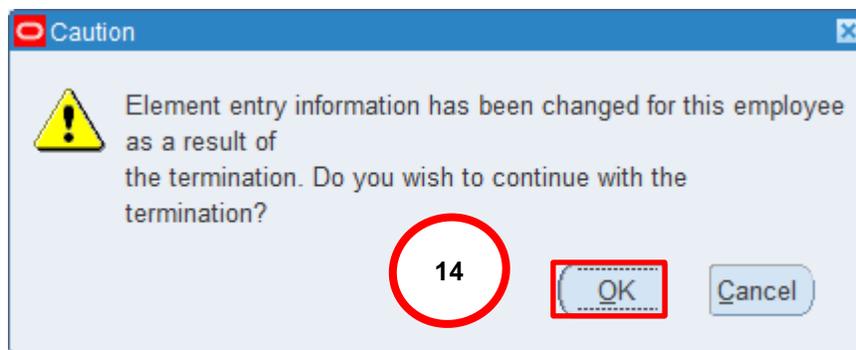
- 12. Enter the **Date**, **Name** and **Number** as explained above. The details are pertaining to the person who accepted the notice of termination. This information is optional. Refer to the guidance of your Agency HR department.

People – Termination - Terminate



13. Click the **Terminate** button to process the termination.

Caution



14. Click the **OK** button to agree with the question of continuing the termination.



View Completed Termination

People
Terminate(SERVICE, BLAKE DODEA)

Date Start: 22-FEB-2015
Leaving Reason: Other

Length of Service
This Service: Years 0, Months 0
Total Service: Years 0, Months 0

Termination Dates
Notified: [] Projected: [] Actual: 26-FEB-2015
Last Standard Process: 07-MAR-2015 Final Process: []

Person Type and Assignment Status for Terminated Employee
Type: Ex-employee Status: P-Date of Separatic

Termination Accepted By
Date: 20-FEB-2015 Name: HARDY, ROBYN DODEA Number: 60 []

Buttons: Terminate, Reverse Termination

FRM-40400: Transaction complete: 1 records applied and saved.
Record: 1/1

15

15. View the completion details at the bottom of the screen. A successful termination will show the **Transaction complete: 1 record applied and saved.**
- Optional Corrective step:** Reverse Terminate
- If for any reason an error has occurred while creating the **Termination** record, click the **Reverse Termination** button. Clicking **Reverse Termination** will erase the previously entered **Termination** data on the **Terminate** form. The employee will be placed back in an active status.

Result

Congratulations! You have successfully Terminated an employee's HR record in DAI.

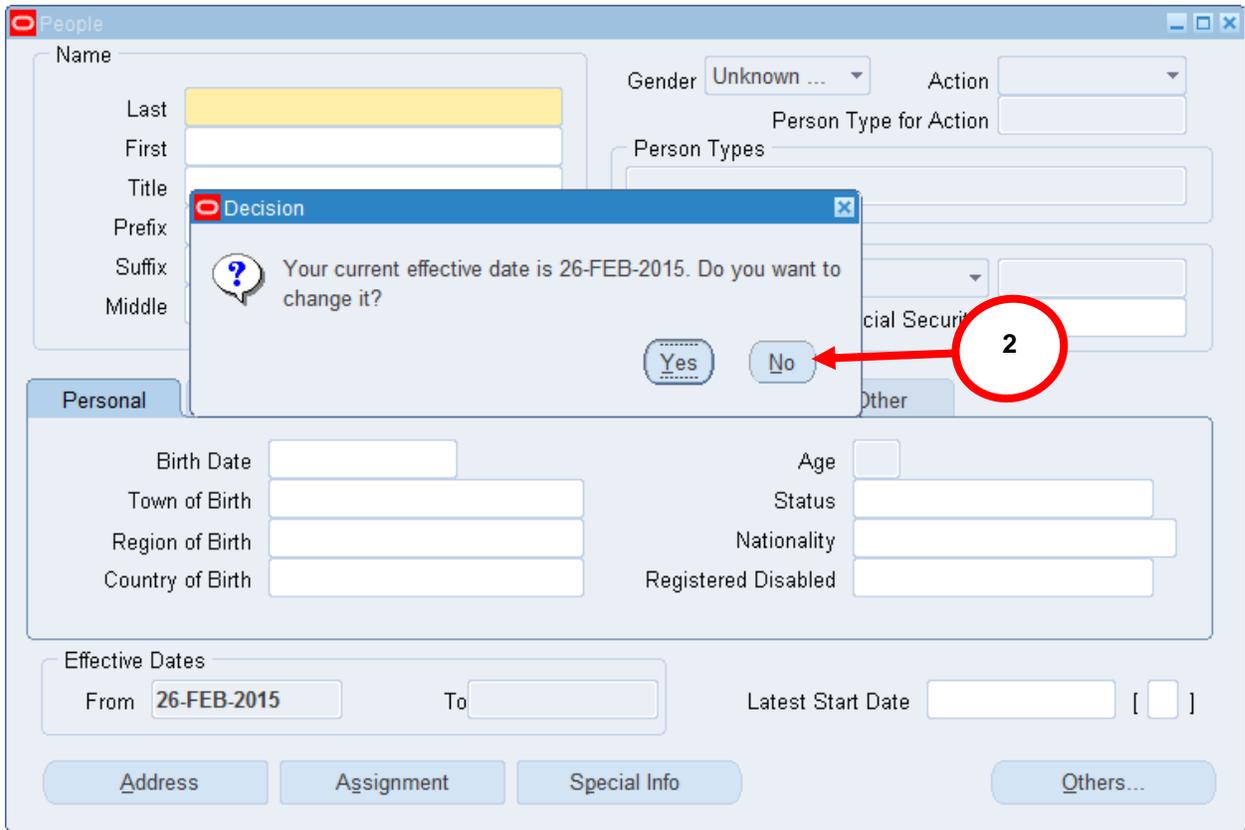


Reverse Terminate an Employee Record

1. Start the task using the responsibility and menu path to open the **People** form:
Responsibility: HR CSR – DODEA
Menu Path: People → Enter and Maintain



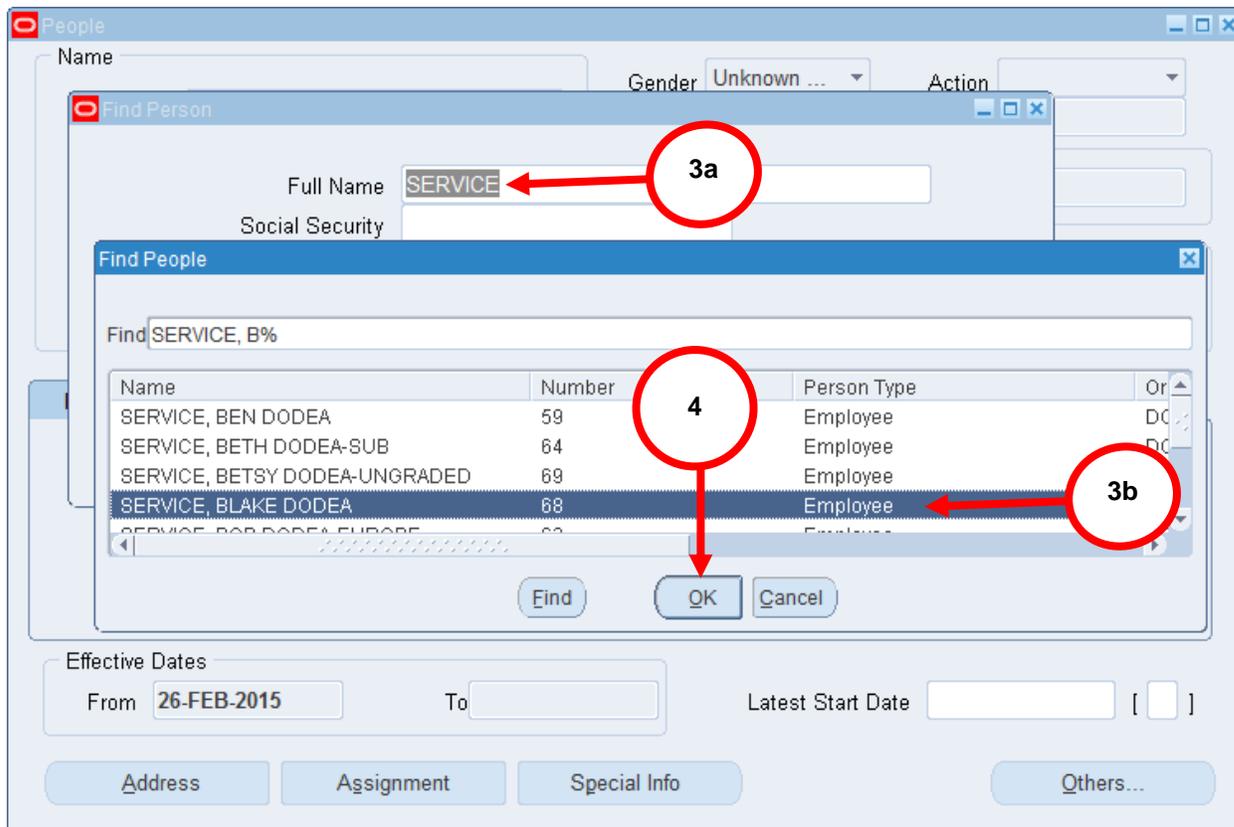
People – Decision on Effective Date



The screenshot shows the 'People' application window. A 'Decision' dialog box is open, asking: "Your current effective date is 26-FEB-2015. Do you want to change it?" with 'Yes' and 'No' buttons. A red circle with the number '2' is around the 'No' button, and a red arrow points to it from the right. The background shows the 'Personal' tab with fields for Birth Date, Town of Birth, Region of Birth, Country of Birth, Age, Status, Nationality, and Registered Disabled. The 'Effective Dates' section shows 'From 26-FEB-2015' and 'To' fields. There are also buttons for 'Address', 'Assignment', 'Special Info', and 'Others...'.

2. Click the **No** button on the **Decision** box. The date defaults to the last transaction date for the termination. The reverse termination should utilize the same date.

People – Find Person

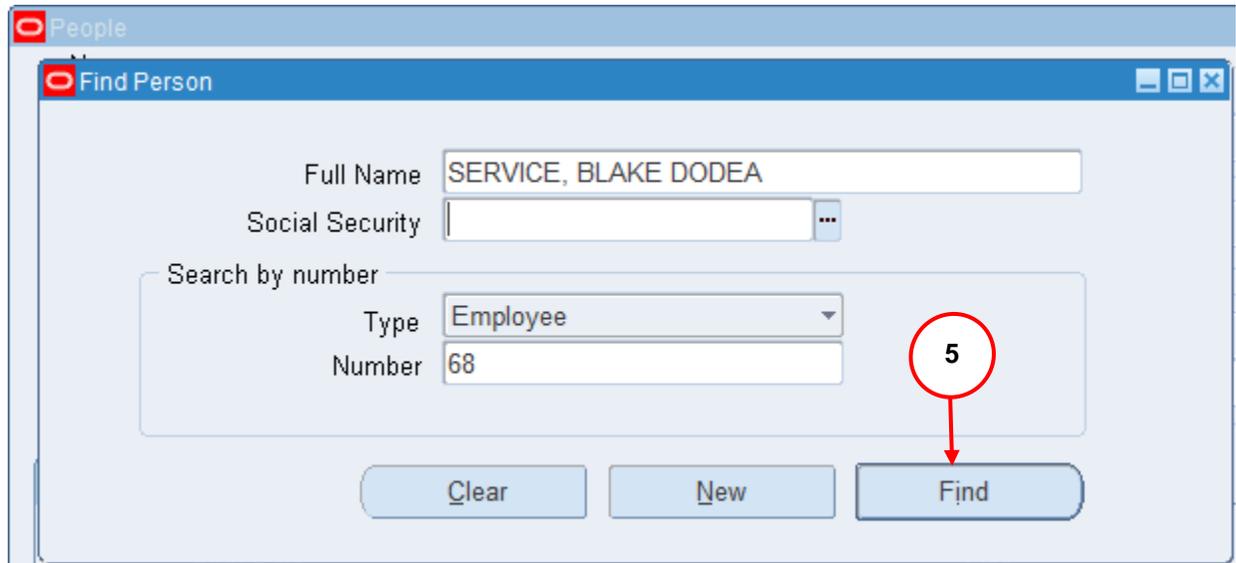


3.
 - a) Enter a **Partial Name** plus the wildcard (%) or **Full Name** in the **Full Name** field to search for the employee's record.
 - b) Select the **Full Name** from the **LOV** listing.

Note: Use wildcards and partial name searches (for example, **(SERVICE%)**) to limit the results. Additional search options are by **Social Security** or **Employee Number** if known.

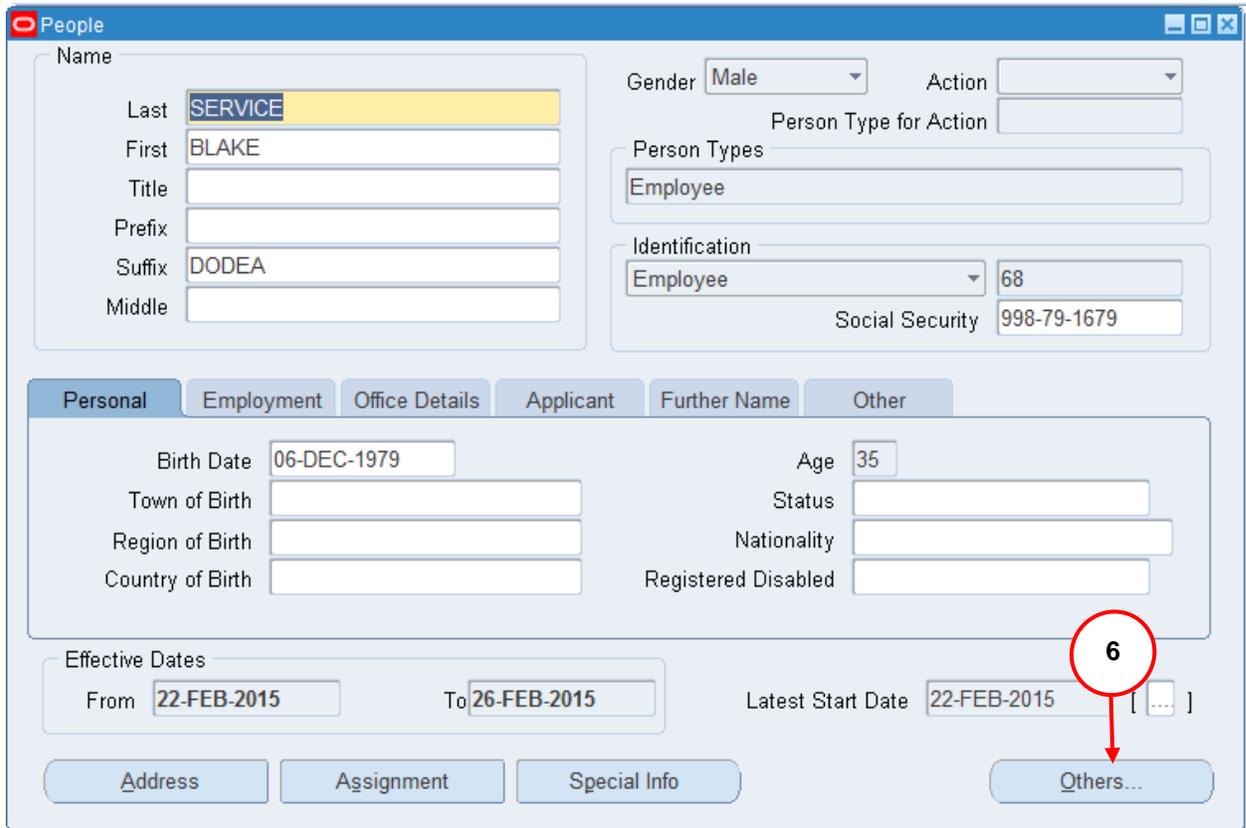
4. Click the **OK** button to search for the employee's record.

People – Find Person



5. Click the **Find** button to locate the employee's record.

People - Others

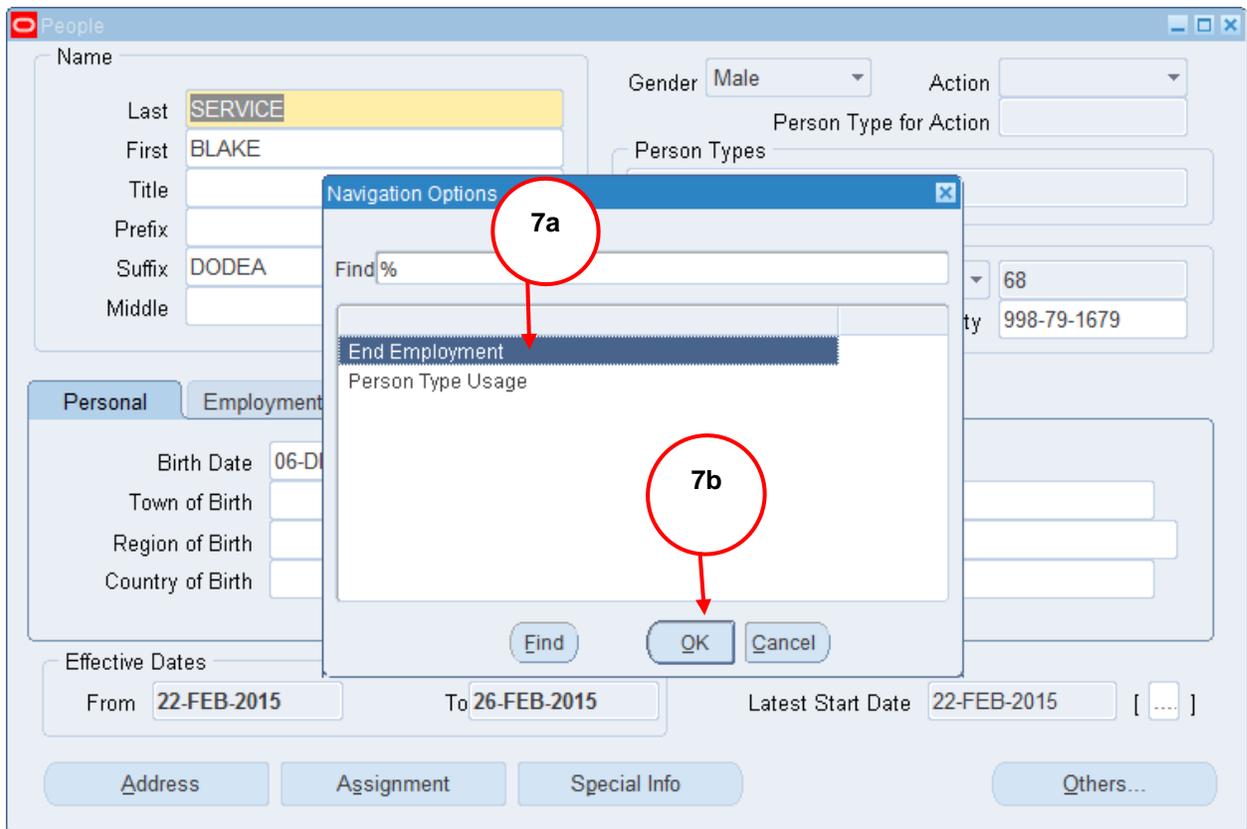


The screenshot shows a web form titled "People" with a blue header. The form is divided into several sections:

- Name:** Last (SERVICE), First (BLAKE), Title, Prefix, Suffix (DODEA), Middle.
- Gender:** Male (dropdown), Action (dropdown), Person Type for Action (dropdown).
- Person Types:** Employee (dropdown).
- Identification:** Employee (dropdown), 68 (text), Social Security (998-79-1679).
- Personal:** Birth Date (06-DEC-1979), Age (35), Town of Birth, Region of Birth, Country of Birth, Status, Nationality, Registered Disabled.
- Effective Dates:** From (22-FEB-2015), To (26-FEB-2015), Latest Start Date (22-FEB-2015).
- Navigation:** Address, Assignment, Special Info, Others... (circled with a red '6' and an arrow).

6. Click the **Others...** button to open the **Navigation Options** form for the selected employee's record.

People – Navigation Options

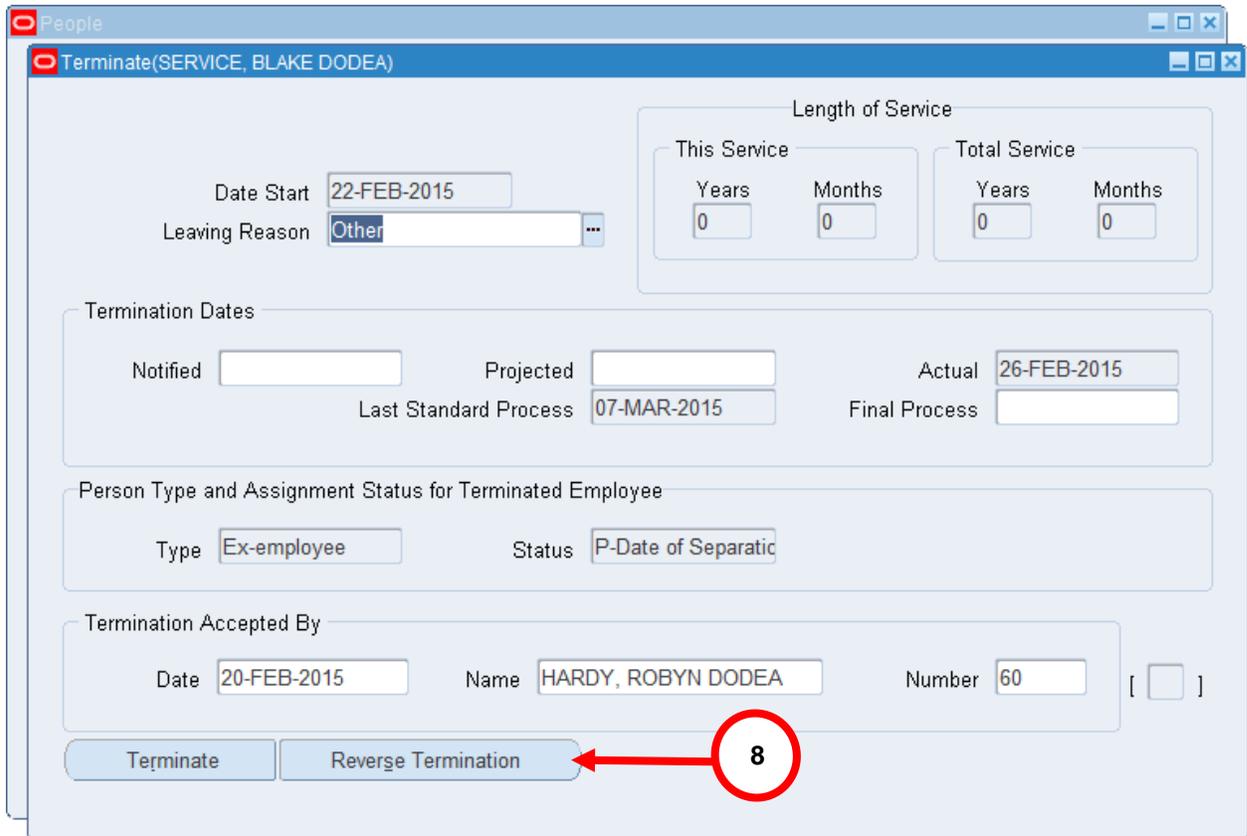


7.

- a) Click the **End Employment** option in the **Navigation Options LOV**.
- b) Click the **OK** button to close the **Navigation Options** form.

Note: Currently the **Person Type Usage** option is not being utilized within **DAI**. The **Terminate** form opens.

People – Terminate – Reverse Termination



People

Terminate(SERVICE, BLAKE DODEA)

Date Start: 22-FEB-2015
Leaving Reason: Other

Length of Service

| This Service | | Total Service | |
|--------------|--------|---------------|--------|
| Years | Months | Years | Months |
| 0 | 0 | 0 | 0 |

Termination Dates

| Notified | Projected | Actual |
|----------|-----------|-------------|
| | | 26-FEB-2015 |

Last Standard Process: 07-MAR-2015
Final Process:

Person Type and Assignment Status for Terminated Employee

Type: Ex-employee
Status: P-Date of Separatic

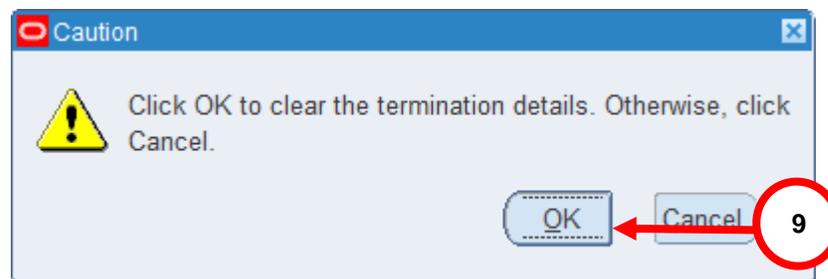
Termination Accepted By

Date: 20-FEB-2015
Name: HARDY, ROBYN DODEA
Number: 60

Buttons: Terminate, Reverse Termination (highlighted with 8)

8. Click the **Reverse Termination** button to reverse the employee's type to active employee.

Caution



9. Click the **OK** button to clear the termination details.



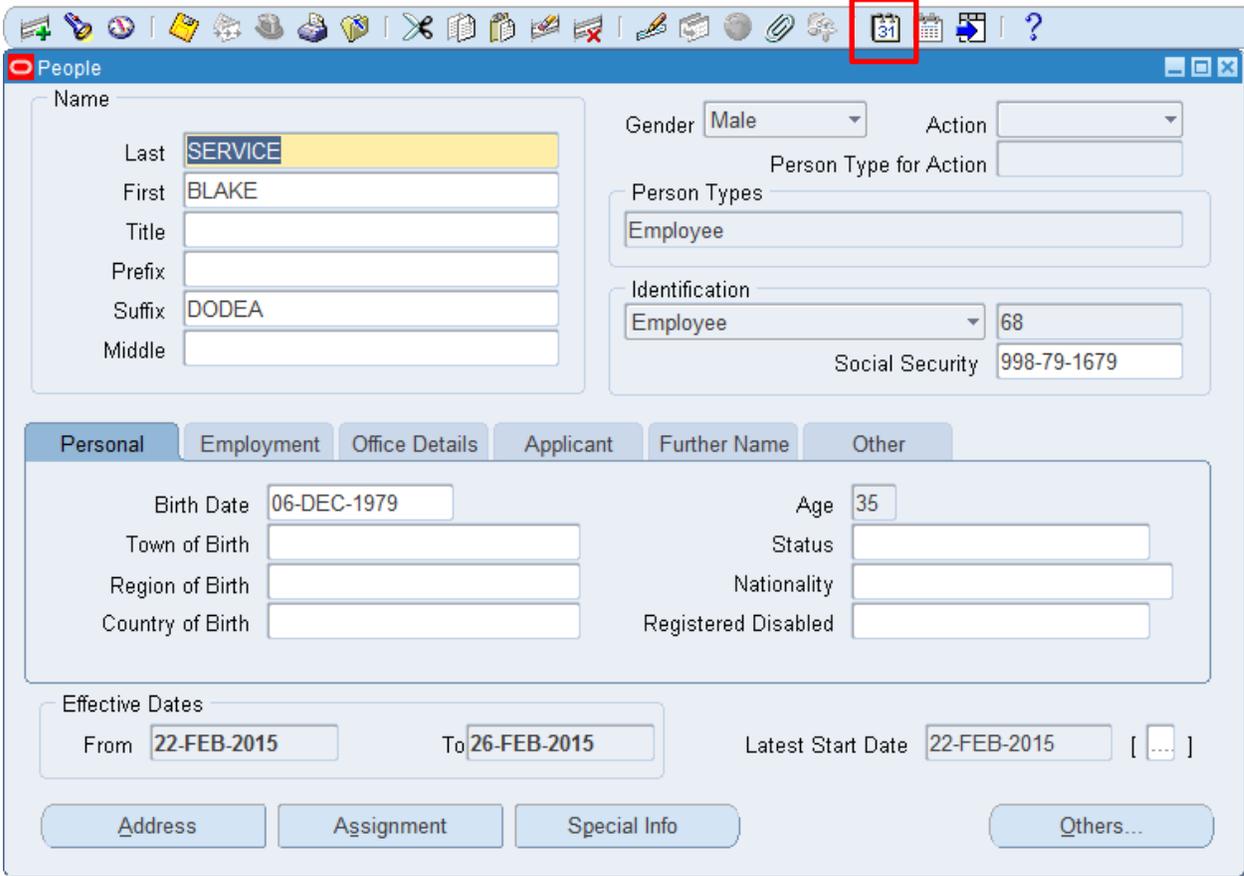
View Completed Reverse Termination

The screenshot shows a web application window titled "People" with a sub-window titled "Terminate(SERVICE, BLAKE DODEA)". The form contains several sections: "Length of Service" with "This Service" and "Total Service" each having "Years" and "Months" input fields (all showing 0); "Termination Dates" with "Notified", "Projected", "Actual", "Last Standard Process", and "Final Process" input fields; "Person Type and Assignment Status for Terminated Employee" with "Type" and "Status" input fields; and "Termination Accepted By" with "Date", "Name", and "Number" input fields. At the bottom, there are "Terminate" and "Reverse Termination" buttons. A red box highlights a status message at the bottom: "FRM-40400: Transaction complete: 1 records applied and saved. Record: 1/1 | ... | List of Valu... | <OSC>". A red circle with the number "10" is positioned to the right of this message.

10. View the **Reverse Termination** is complete. Close the **Terminate** form to return to the **People** form.

People - Active Employee

File Edit View Folder Tools Window Help



People

Name

Last: SERVICE
First: BLAKE
Title:
Prefix:
Suffix: DODEA
Middle:

Gender: Male
Action:
Person Type for Action:
Person Types: Employee
Identification: Employee 68
Social Security: 998-79-1679

Personal | Employment | Office Details | Applicant | Further Name | Other

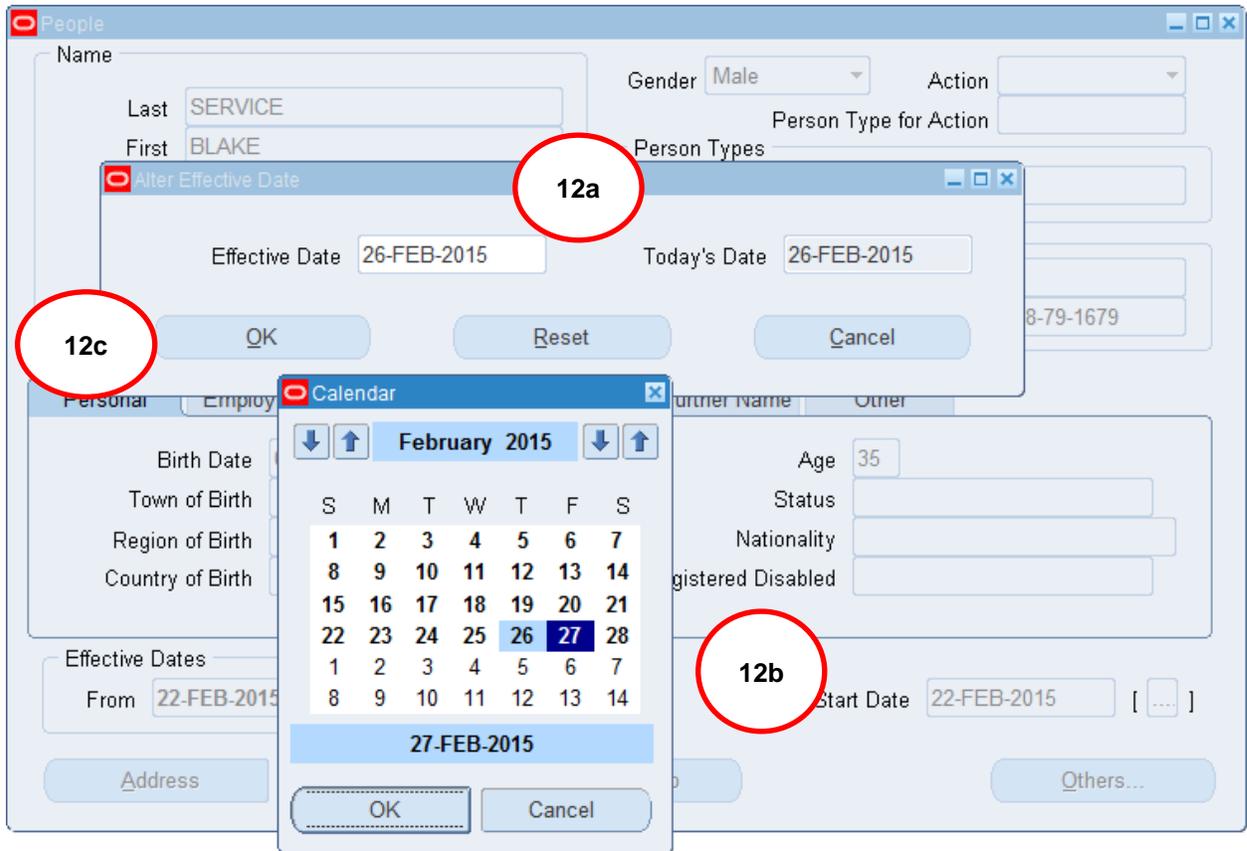
Birth Date: 06-DEC-1979
Town of Birth:
Region of Birth:
Country of Birth:
Age: 35
Status:
Nationality:
Registered Disabled:

Effective Dates
From: 22-FEB-2015 To: 26-FEB-2015
Latest Start Date: 22-FEB-2015 [...]

Address | Assignment | Special Info | Others...

11. Click the **Date Track** icon to change the record viewing date to a day after the date the **Reverse Termination** was processed. (termination date plus one) This will display the updated **People** form to show the person has now returned to an active employee.

People – Alter Effective Date - Calendar



12.

- a) Click on the **Calendar LOV** in the **Effective Date** field and select the date one day later than the **Effective Date** shown on the **Alter Effective Date** form.
- b) Click the **OK** button to enter the date selected.
- c) Click the **OK** button on the **Alter Effective Date** form.



People – View Active Employee

People: 27-FEB-2015

Name

Last

First

Title

Prefix

Suffix

Middle

Gender Action

Person Type for Action

Person Types

Identification

Social Security

Personal Employment Office Details Applicant Further Name Other

Birth Date Age

Town of Birth

Region of Birth

Country of Birth

Status

Nationality

Registered Disabled

Effective Dates

From To

Latest Start Date [...]

13. View the **People** form for the person that was **Reverse Terminated** displaying the **Person Types** as **Employee**.

Result

Congratulations! You have successfully **Reverse Terminated** an employee's HR record in DAI.



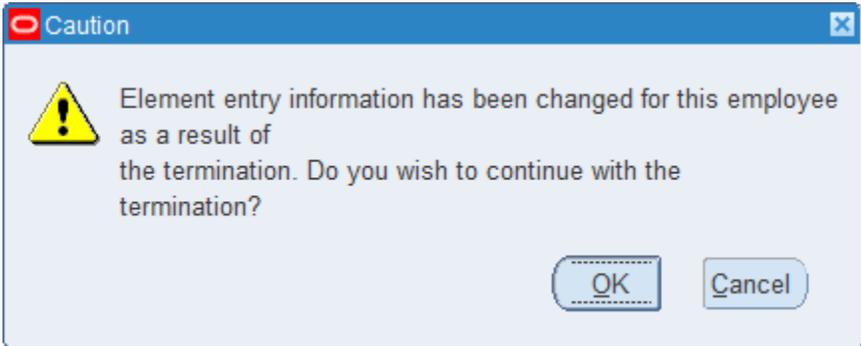
Exceptions while Terminating an Employee Record

1. **Exception 1** – The **Caution** message “**Employee will not be terminated.**” appears when no **Actual** termination date has been entered.

Though, the user may proceed by clicking the **OK** button, to truly Terminate an employee in DAI, click the **Cancel** button and enter the date of termination in the **Actual** field.

Corrective Action: Enter an **Actual** date of the termination and click the **Terminate** button again, which will complete the termination.

The screenshot displays the 'Terminate' form for employee BLAKE DODEA. The 'Date Start' is 22-FEB-2015 and the 'Leaving Reason' is 'Other'. The 'Length of Service' section shows 0 years and 0 months for both 'This Service' and 'Total Service'. In the 'Termination Dates' section, the 'Actual' date field is highlighted with a red box and is currently empty. A 'Caution' dialog box is overlaid on the form, containing a warning icon and the following text: 'APP-PAY-07804: Employee will not be terminated. You have not entered an Actual Termination Date so the employee will not be terminated. Choose OK if you want to save the information you have entered.' The dialog box has 'OK' and 'Cancel' buttons. At the bottom of the form, there are 'Terminate' and 'Reverse Termination' buttons.

| | |
|---|---|
| 2. | <p>Exception 2 – The Caution message “Element entry information has been changed for this employee as a result of the termination...” appears when certain future recurring pay codes are on the employee’s record. Contact the Agency DAI Help Desk to investigate and resolve the reason for this message.</p>  |
| Result | |
| Congratulations! You have successfully reviewed the Termination Exceptions . | |