Time and Labor (OTL)

HR CSR
Terminate and Reverse Terminate
an Employee Record

DoDEA R12 Work Instructions

Document Control

Change Record

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16-Sep-2014	Robin Hardy	1.0	R12 Upgrade

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Distribution

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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.
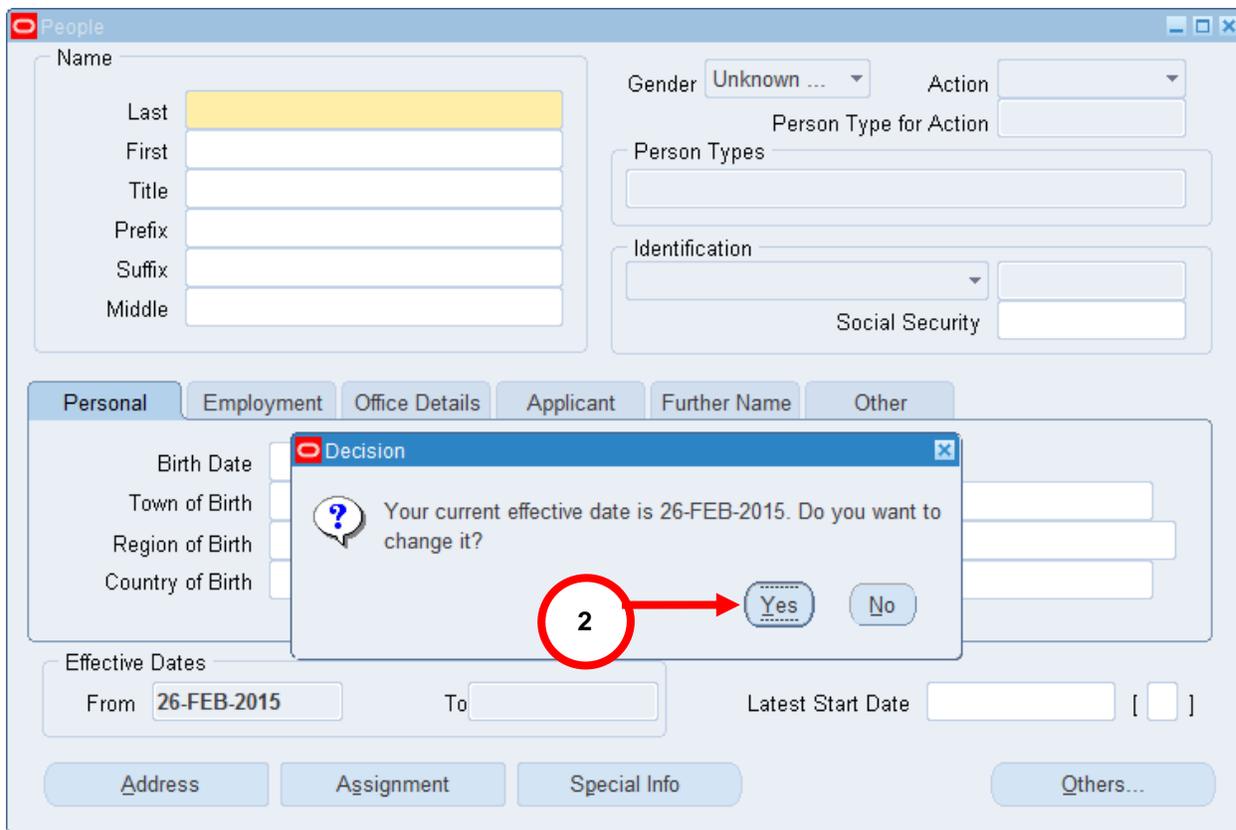
- People → Enter and Maintain

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	
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
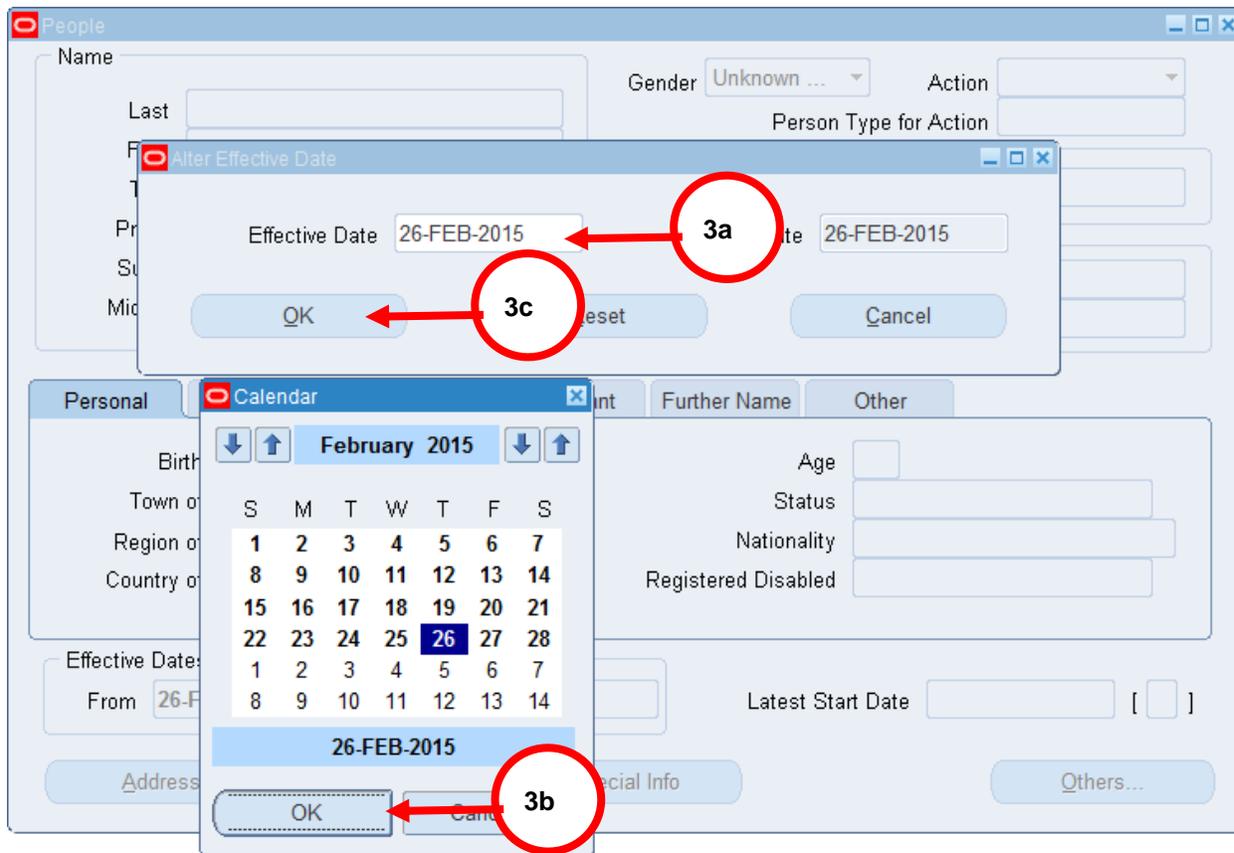
3.	
	a) Enter the **Effective Date** value directly into the field using the following format **DD-MON-YYYY**, or select the date using the List of Values (**LOV**) calendar.
	b) Click the **OK** button on the calendar form.
	c) Click the **OK** after selecting the effective date on the **Alter Effective Date** form.
	Note: The **Reset** button changes the **Effective Date** back to the current (today's) date.

People – Find Person

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

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

People – Find Person

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.

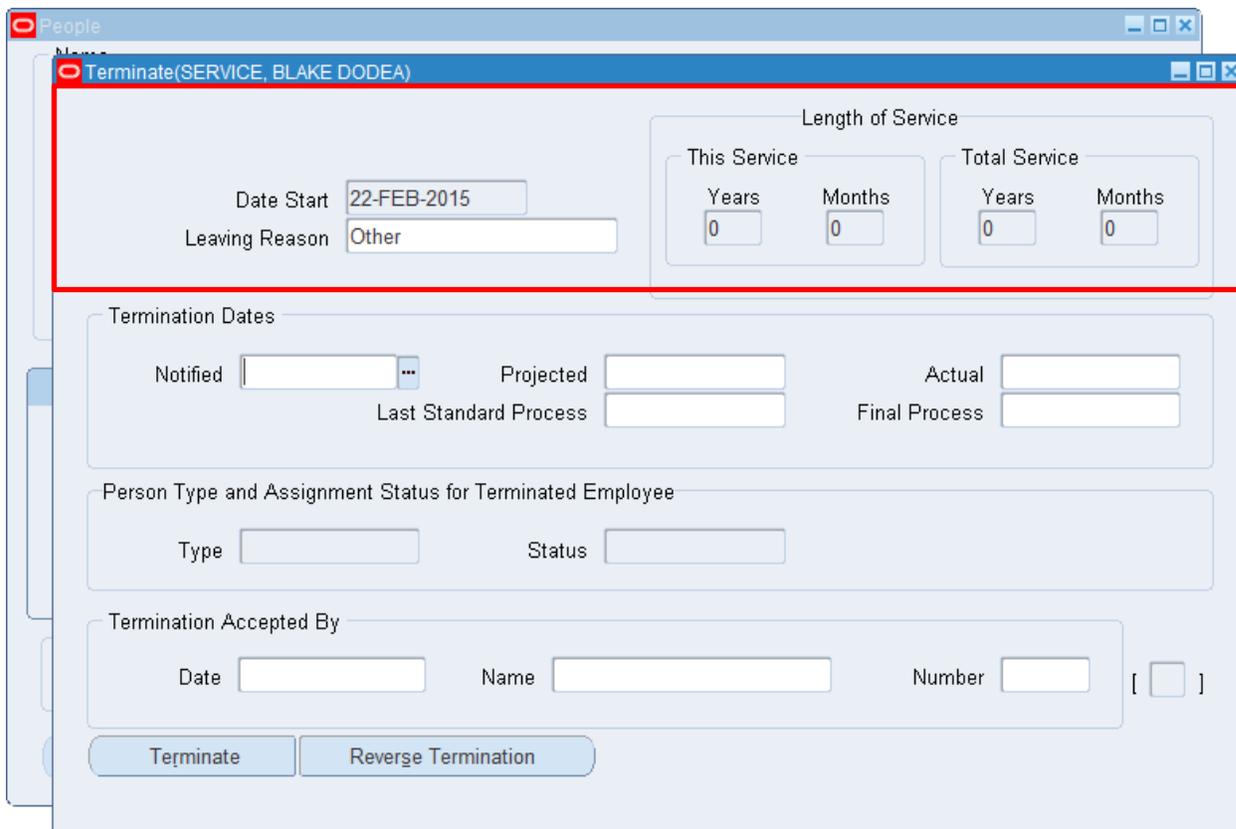**People – Terminate (employee name) – Leaving Reason**
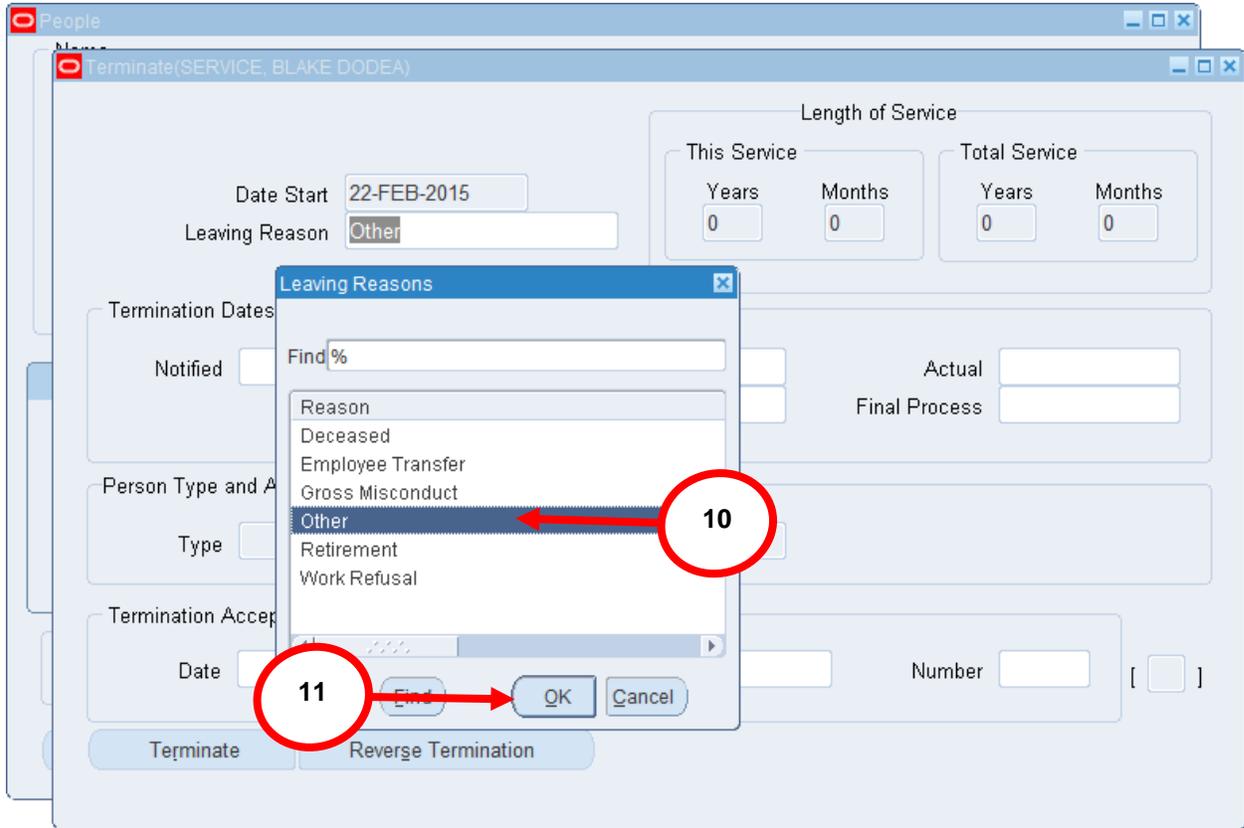
10.	Click the **LOV** icon in the **Leaving Reason** field to view the reasons for leaving options.

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

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
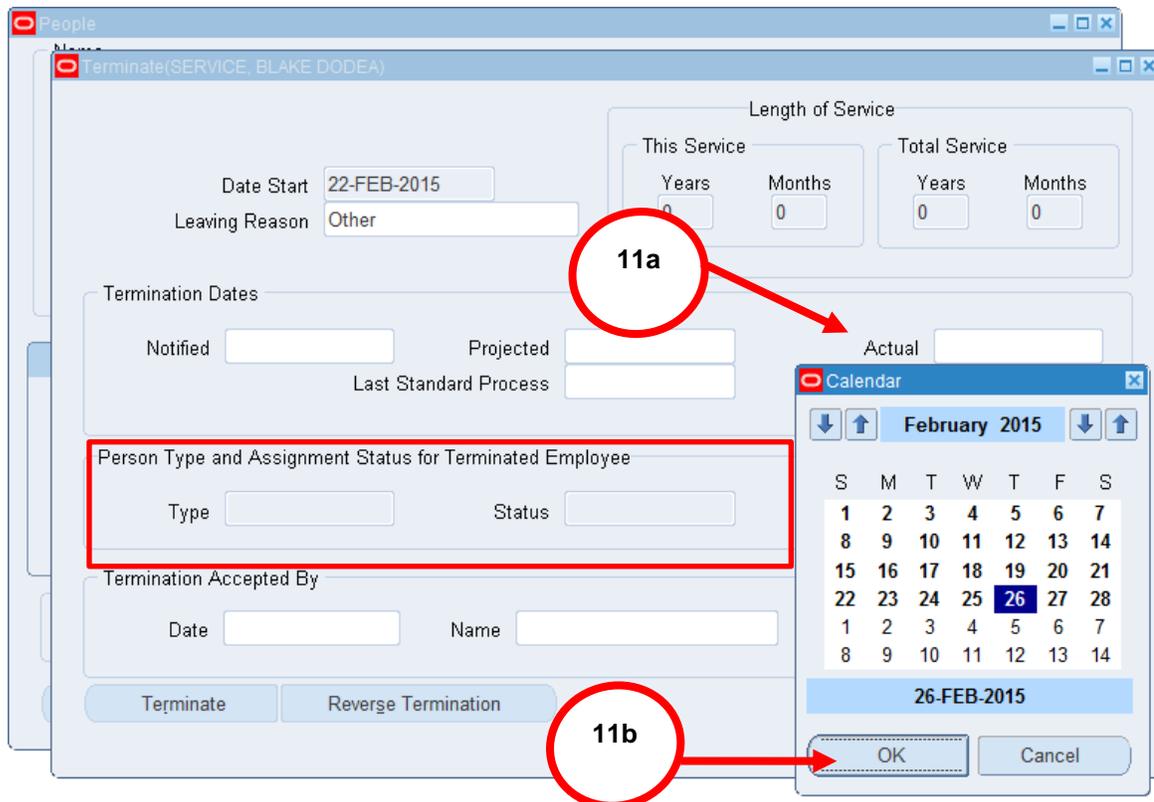
11.	
	a) Click the **LOV** icon in the **Actual** field to display the **Calendar** form. Select the actual date the employee is terminated. Upon entry of the date the **Type** of employee changes to **Ex-employee** and the **Status** changes to **P** - **Date of Separation**.
	b) Click the **OK** button.
	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	Status
Ex-DAI Active Military	**P – Date of Separation**
Ex-DAI Contingent Worker	**S – Severance**
Ex-employee	**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
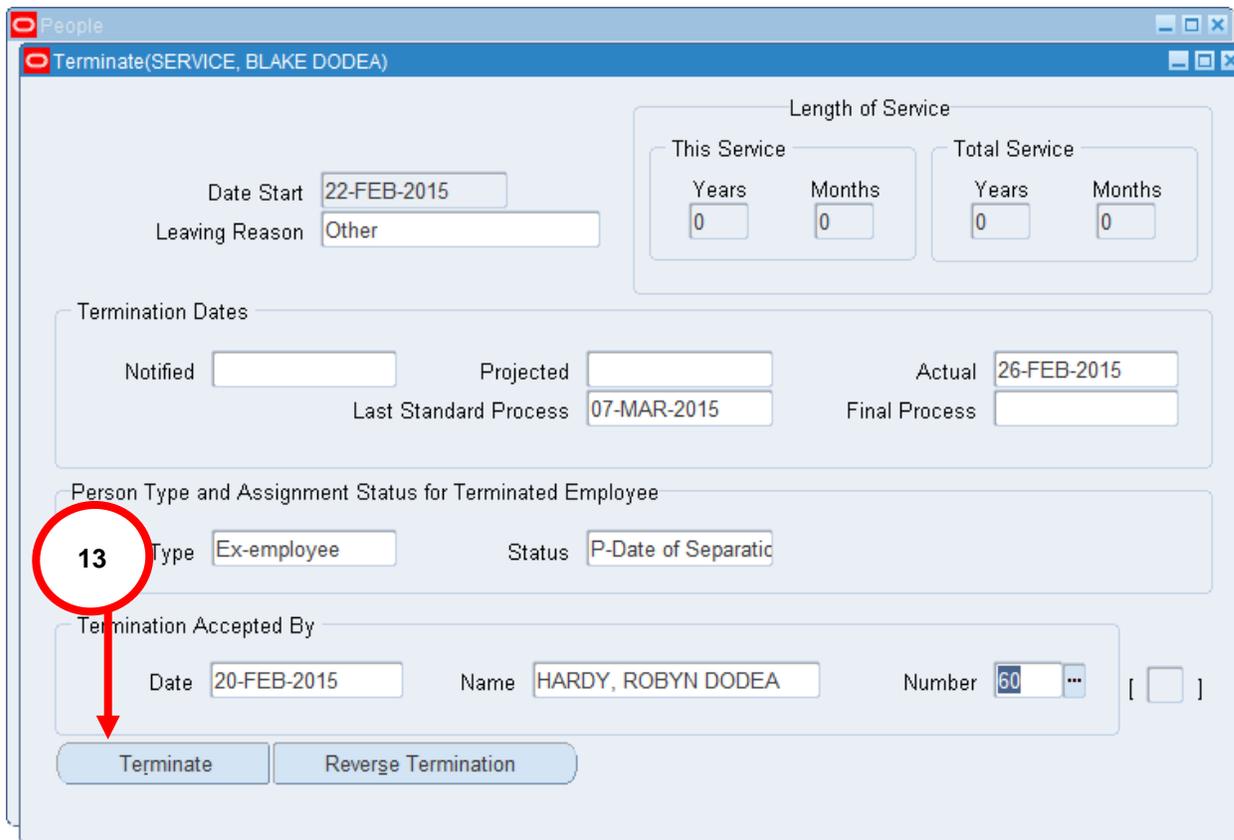
13.	Click the **Terminate** button to process the termination.

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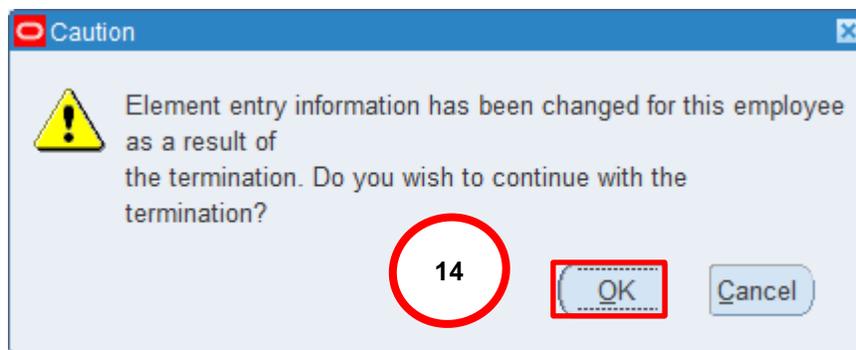
14.	Click the **OK** button to agree with the question of continuing the termination.

View Completed Termination

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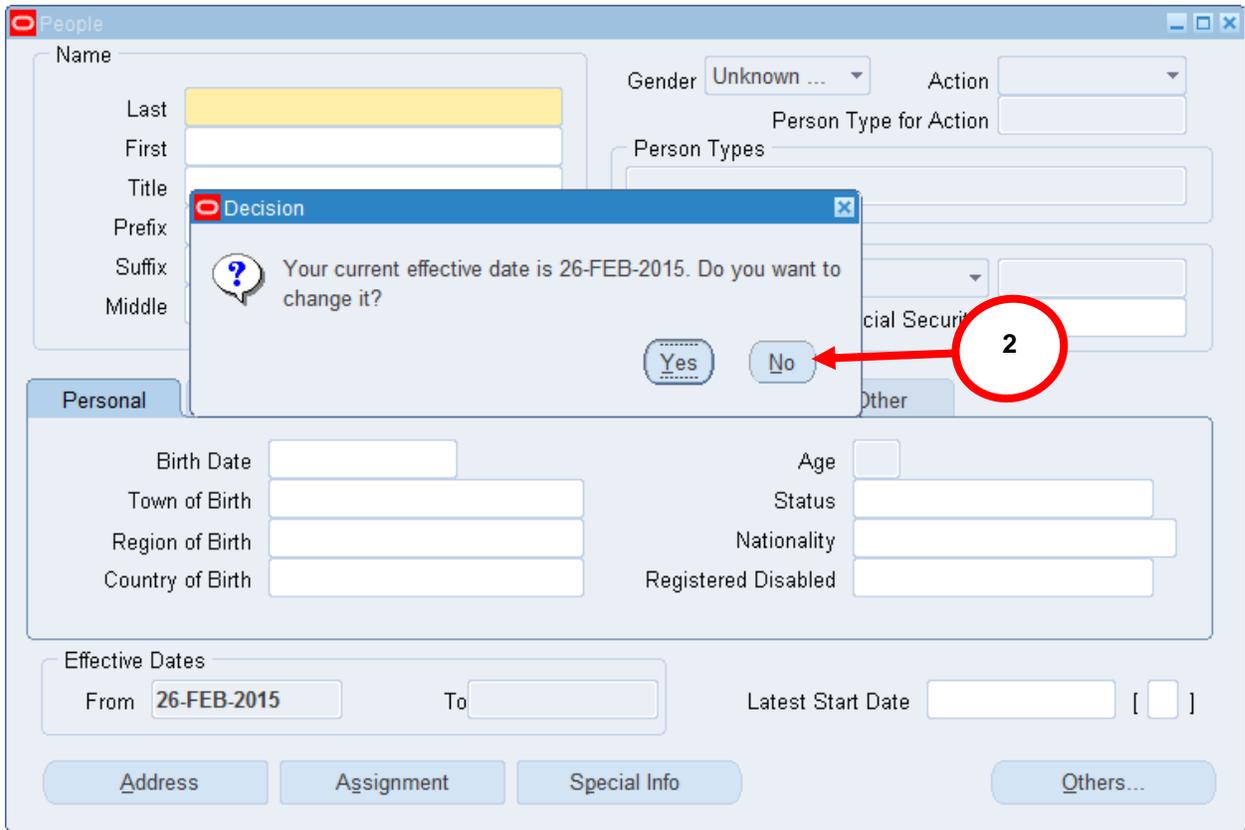
2.	Click the **No** button on the **Decision** box. The date defaults to the last transaction date for the termination. The reverse termination should utilize the same date.

People – Find Person
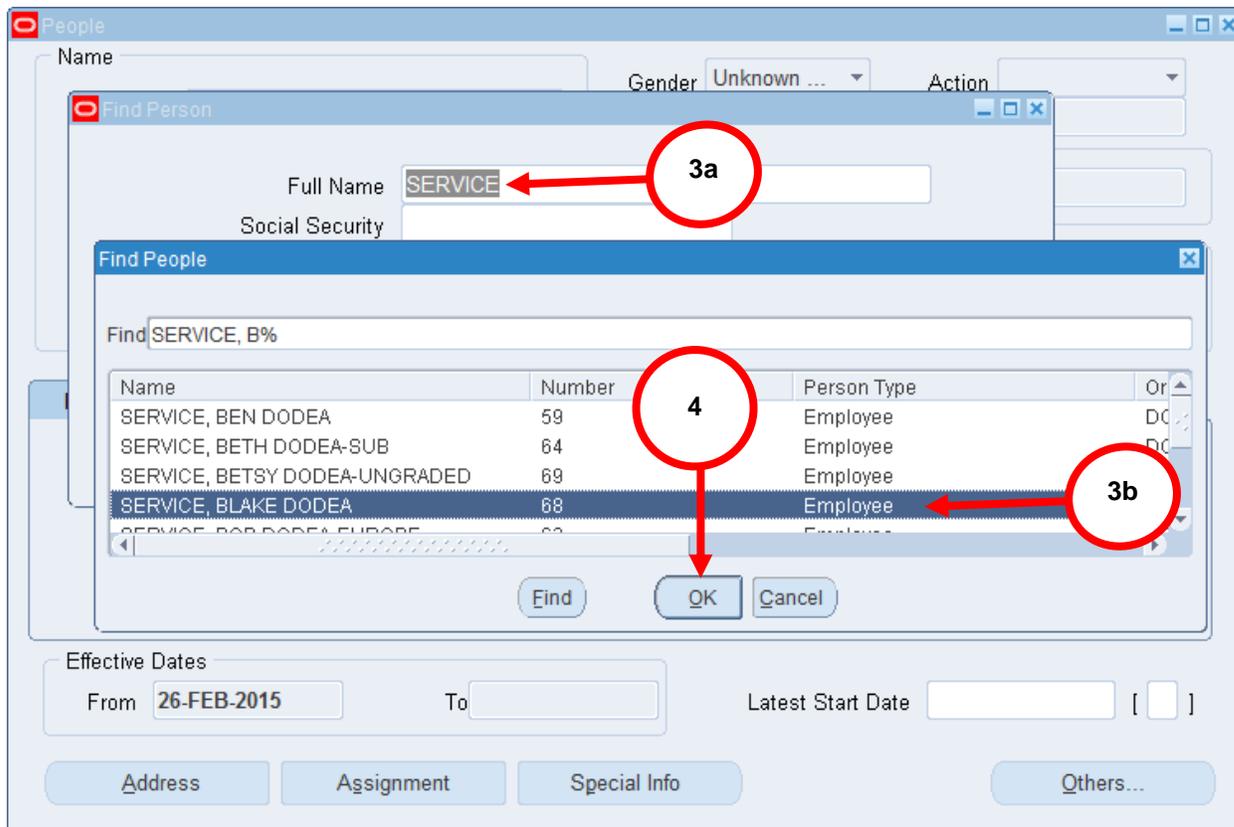
3.	
	a) Enter a **Partial Name** plus the wildcard (%) or **Full Name** in the **Full Name** field to search for the employee's record.
	b) Select the **Full Name** from the **LOV** listing.
	Note: Use wildcards and partial name searches (for example, (**SERVICE%)** to limit the results. Additional search 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
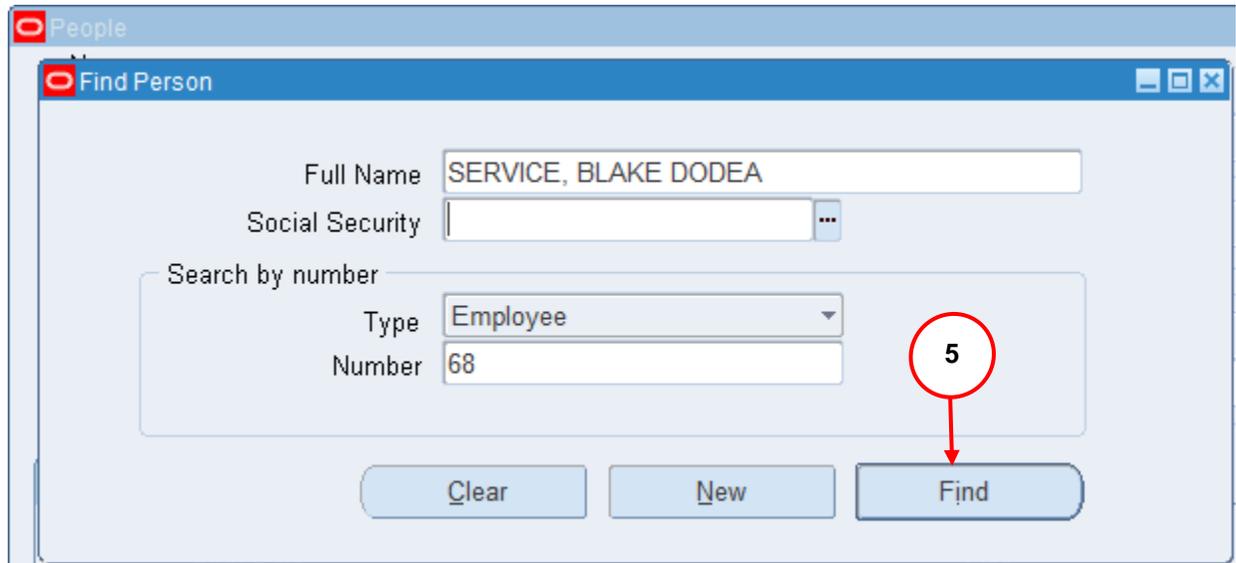
5.	Click the **Find** button to locate the employee's record.

People - Others

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

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

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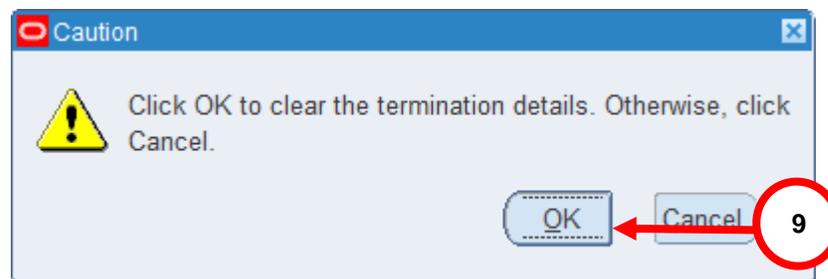
9.	Click the **OK** button to clear the termination details.

View Completed Reverse Termination

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

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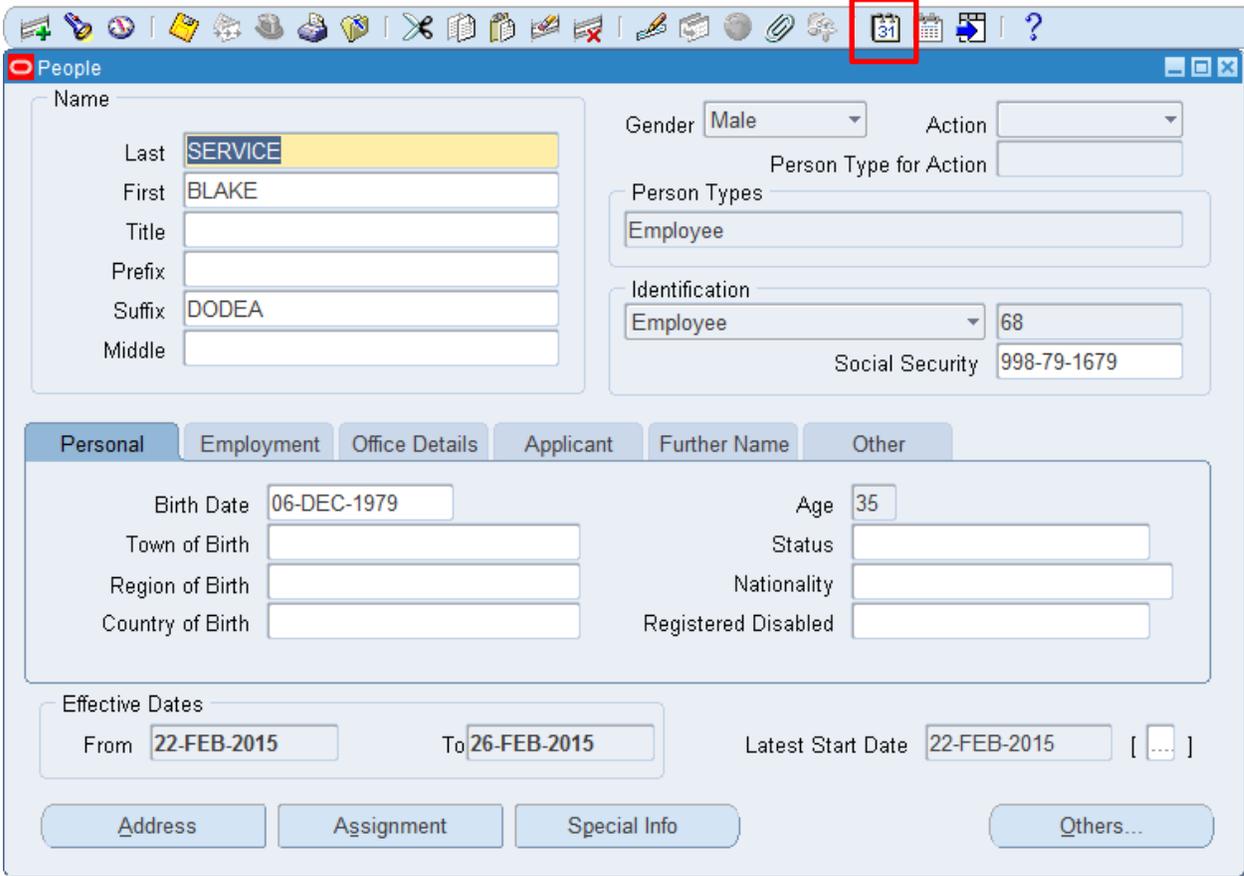
11.	Click the **Date Track** icon to change the record viewing date to a day after the date the **Reverse Termination** was processed. (termination date plus one) This will display the updated **People** form to show the person has now returned to an active employee.

People – Alter Effective Date - Calendar
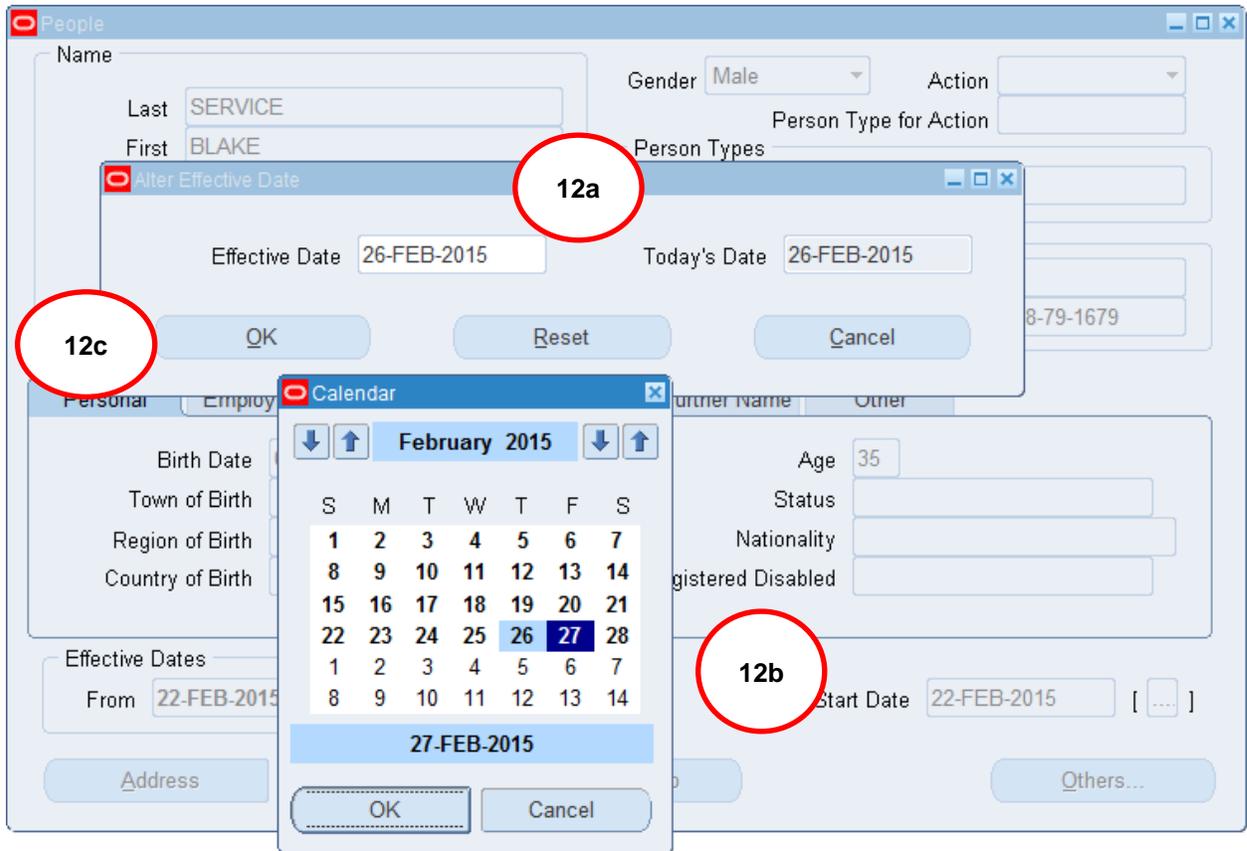
12.	
	a) Click on the **Calendar LOV** in the **Effective Date** field and select the date one day later than the **Effective Date** shown on the **Alter Effective Date** form.
	b) Click the **OK** button to enter the date selected.
	c) Click the **OK** button on the **Alter Effective Date** form.

People – View Active Employee

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

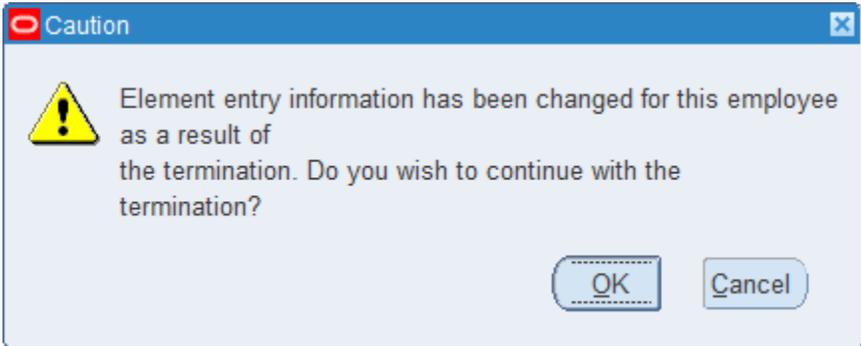| **Result** |
|---|
| Congratulations! You have successfully **Reverse Terminated** an employee's HR record in DAI. |

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. |

2.	**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.

Result
Congratulations! You have successfully reviewed the **Termination Exceptions**.