

# Human Capital Management (HCM): Step-by-Step Guide

## Terminating an Employee

This guide describes the process for entering a termination transaction in HCM. This procedure can be used to terminate one employee at a time. Group terminations can be done through ePAR Group Termination. Refer to *Entering Group Terminations Step-by-Step Guide* for more information. Some employees may be eligible for automatic termination through the Auto-Term process. Refer to *Auto Term Step-by-Step Guide* for more information.

### Contents

Terminating an Employee .....	1
Before You Begin .....	1
Entering a Termination Transaction .....	2
Next Steps: Checking Status, Completing Drafts or Pushbacks .....	4

## Before You Begin

Before terminating an employee, you should have the following information:

- Employee ID.
- If the employee has multiple jobs, you should know the job record, or records, that you are terminating.
- Effective date of the termination. The effective date is the first day the employee is no longer employed (not their last day of employment).
- Any campus-specific documentation. For example, UCCS requires the attachment of separation documentation for all terminations, except End of Appointment.

### Navigation tips:

#### ▼ HCM Community Users

Procedures in this guide begin from the HCM Community Users dashboard:

1. From the portal, click the **HCM** tile. The Employee Self Service dashboard appears.
2. Click **Employee Self Service**.
3. Click **HCM Community Users** to display the dashboard.



The NavBar displays options for accessing other systems. Through the NavBar, you can select CU Resources to access systems on the portal.



The magnifying glass is called a lookup and displays search results for you to select valid field values.



The book and checkmark button lets you spellcheck text boxes.



The down arrow lets you hide, or collapse, sections you do not want to view.

Click the  arrow to expand a section.

## Entering a Termination Transaction

Terminating an employee is a template based transaction (TBT). A TBT provides a template-driven method of streamlining data entry that lets HCM use the correct template to present pages and fields that are correct for the type of transaction you are initiating.

To terminate an employee:

1. From the HCM Community Users dashboard, click the **Transaction Launch Page** tile. The Transaction Launch Page appears. This page provides a single location for template based transactions.
2. In the Search Criteria section, type the **Empl ID**, or other personal identifying information you have.
3. From the **Search Option** list, select **Termination**. This is required. The search option helps determine which template pages to display that are correct for your transaction.
4. Click **Search**. The system searches HCM to find existing records of people (employees and POIs) in the database that you have permission to update. Existing records include those that are active, as well as any future-dated transaction records that have been approved. HCM displays the results in the HCM Data table.
5. From the HCM Data listing, select the checkbox of the employee (and job record, if applicable) that you are terminating.

**Caution:** Because employees may have more than one job, it's important to ensure you have the correct employee and job record, or records, before continuing. As only a few records are displayed at a time, you may need to page through the results to find the correct record, or search again using additional criteria.

**Transaction Launch Page**

**Search Criteria**

Empl ID

First Name

Last Name

Date of Birth  BY

National ID

National ID Last 4

Department

\*Search Option Termination

ATS Applicants								Personalize   Find   View All      First 1 of 1 Last			
Select	Source System	Applicant ID	Name	Date of Birth	National ID Last 4	Dept ID	Department Name	Position Number			
<input type="checkbox"/>											
<input type="button" value="Clear ATS Selection"/>											

HCM Data													Personalize   Find   View All      First 1-4 of 4 Last			
Select	Template Action	Empl ID	Empl Record	Name	Status	National ID Last 4	Effective Date	Unit	Dept ID	Department Name	Job Code	Job Title	Std Hrs	Date of Birth	Termination Date	
<input type="checkbox"/>	Termination	110667	0	Retiree (Non-Active) PERA	Active	6110	07/01/2019	UCB	10623	Retirees UCB	5106	Classified Retiree PERA	1.00	06/11/1956		
<input type="checkbox"/>	Termination	172710	0	Retiree (Active) P	Active	5775	07/01/2019	UCB	10018	Athletics-Business Affairs	2524	Athletics Manager	40.00	05/25/1979		
<input type="checkbox"/>	Termination	175656	0	Retiree (Active) P	Active	3383	07/01/2019	UCB	10018	Athletics-Business Affairs	2527	Athletics Senior Prof	40.00	04/25/1979		
<input checked="" type="checkbox"/>	Termination	181254	0	Retiree (Active) P	Active	2511	05/01/2019	USYS	51000	Employee Services	2268	Business Services Professional	32.00	08/30/1951	12/31/2007	
<input type="button" value="Clear HCM Selection"/>																
<input type="checkbox"/> Add a Person																
<input type="button" value="Submit"/>																

6. Click **Submit**. The Enter Transaction Details page appears.

7. Verify you have the correct employee.
  - a. Right-click the Related Actions wedge displayed next to the employee’s name, and click **CU Person Organizational Summary**. Additional information about the employee is displayed, including Person ID (Empl ID) and Department.
  - b. Close the window to return to the Transaction Details page.
8. Click the calendar displayed next to **Job Effective Date**, which for this transaction is the termination effective date, and select the effective date of the termination. The termination effective date is the first day the employee is no longer employed (not their last day of employment, but rather the day after).

Template Based Transactions

### Enter Transaction Details

The following transaction details are required.

Template	Direct Termination
Organizational Relationship	Employee
Country	United States
*Empl ID	<input type="text"/>
*Employment Record Number	0 (Business Services Professional) ▼
*Job Effective Date	01/24/2020
Action	Termination
*Reason Code	<input type="text"/>

9. From the **Reason Code** list box, select a reason code.

\*Reason Code ▼

- Cause
- Death
- Disability Retirement
- End of Appointment
- Exhaustion of Leave
- Job Abandonment
- Layoff
- Other - Comment Required
- ProbationaryRej-Classified
- Resignation
- Retirement

**Note:** When terminating an employee for cause there must be coordination among many departments and individuals. Visit the [Termination page](#) on the HCM Community website for more information, and consult your campus HR for guidance and approval requirements.


10. Click **Continue**. The Enter Transaction Information page appears.

**Note:** If you determine that you no longer want to continue with this transaction, close the browser tab and return to the Transaction Launch Page. Clicking Cancel only clears the Reason Code selected on the page. Closing the browser will cancel and clear the transaction.

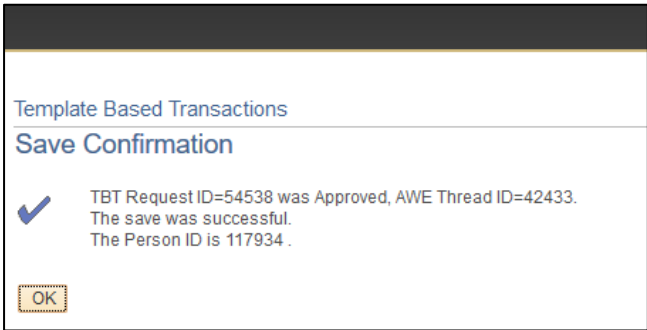
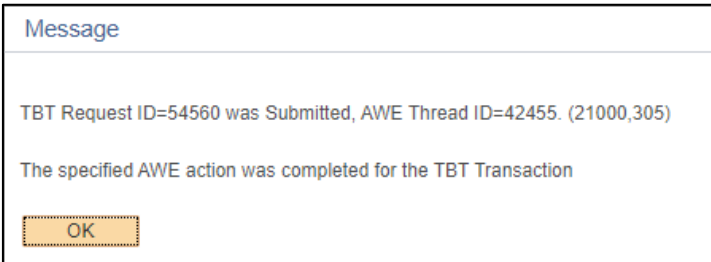
11. Review the Position and Job information on the page to make sure it is consistent with what you expect for this transaction.

12. In the Comments section, type **Job Notes**. When this transaction is approved, these comments populate Job Notes in Job Data.

13. If needed, attach documents:

1. Click **Add Attachment**.
2. In **Attachment Title** field, type a name for this document, such as resignation letter or other document name.
3. Click **Add** .
4. Click **Choose File**.
5. Select a file and click **Open**.
6. Click **Upload**.

14. Click **Save and Submit for Approval**. A message appears with the Request ID. Make a note of the request ID so you can find information about it later. The message will vary depending on whether your campus requires approval for the termination transaction. Below are examples of a messages, one for a transaction that is self-approved and one for a transaction that requires approval.

<p>Example of Save Confirmation message for self-approved termination transaction:</p> 	<p>Example of Message box indicating a termination transaction has been submitted for approval:</p> 
--	--

15. Click **OK** from the message box. If approval is required for the transaction, a Further Processing Required page appears.

16. Click **OK**. The system returns you to the Enter Transaction Details page.

## Next Steps: Checking Status, Completing Drafts or Pushbacks

If your transaction requires approval, you may want to check its status in the approval workflow. Additionally, if you saved a transaction as a draft, or if a transaction has been pushed back for more information, you can update it and submit it for approval. Refer to [Transaction Status, Drafts, and Pushbacks Step-by-Step Guide](#) for more information.