

**Purpose:**

This guide will show you how to process a termination for an employee leaving the university.

**Before You Begin:**

**Note!** This process is for **Voluntary Terminations** only. Please contact your HR Services manager for support with involuntary terminations. **You do not need to process a termination if an employee transfers or is promoted to another position.** If you have questions about transfers or promotions contact your HR Talent Acquisition Advisor.



**IMPORTANT!** Managers are accountable to ensure employees are terminated in a timely manner. To minimize any financial or reputational risks, the termination form must be **submitted at least four business days prior to the last day worked.**

**Information Security**

Removing system access for terminated employees is automatically initiated through the termination request. Managers can request access removal in advance of the termination date by submitting a Service Now ticket on the IT website. Go to [ucalgary.ca/IT](http://ucalgary.ca/IT) and select 'Order Something' then choose the appropriate service. Contact IT at (403)220-5555 if you have questions. On the IT website, managers may also wish to search for "How to Remove PeopleSoft Access from Employees and General Associates who Report to You".

All employee job records can be terminated using the Job Termination request, with the exception of all regular Academic and administrative **Academic appointments.**

Inactivating the position may be required if there is no longer budget available to support the position. Consult with your [finance partner](#) if you have questions about the inactivation process.

Refer to the [Offboarding Checklists](#) to ensure a smooth exit strategy.

**Audience:**

Employees with the Reports to Manager (or Delegate) security role in Human Resources PeopleSoft.

**Prerequisites:**

Must have the individual's employee ID and the date for 'last day worked' on hand.



**Manager Self Service**  
Navigate to self service information and activities for people reporting to you.

**Time Management**  
Manage schedules, view and approve reported and payable time, absence and overtime requests, exceptions, and more.

- Manage Schedules
- Approve Time and Exceptions

**Job and Personal Information**  
Manage job and personal information for your employees.

- Job Opening Request Form
- Job Change Requests
- Job Termination Request**
- 8 More...

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1. To **access the Job termination** form sign in to the **myUCalgary portal** and follow the menu path; **My work** < under People management select **Manager self service**. On the Manager Self Service page, under Job and Personal Information select **Job Termination Request**.

2. On the Job Termination Request page select the **Initiate New Transaction** tab.

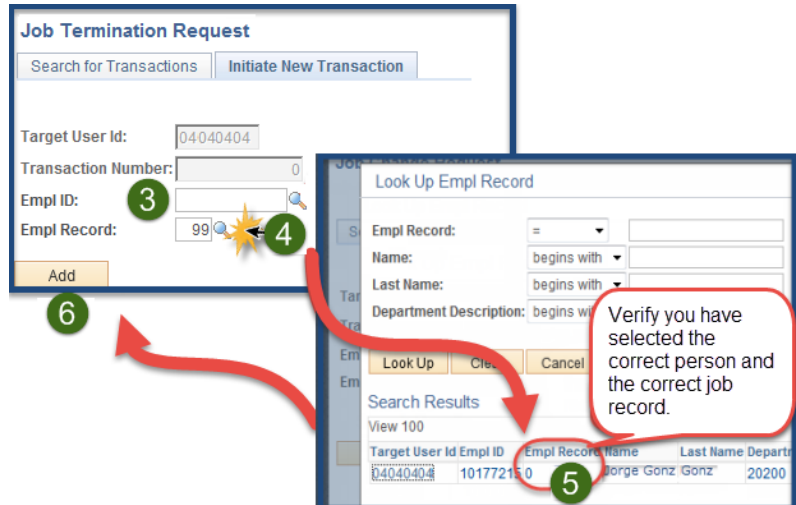


**Job Termination Request**

Search for Transactions **Initiate New Transaction**

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3. On the Job Termination Request page enter the **Employee ID**.
4. In the **Empl Record** field click the **look up** button (or magnifying glass).
5. A new window will open with the employee record Search Results. Double check the information belongs to the correct person and click on the appropriate **Empl Record**.
6. Click **Add** to bring the job record into the job Termination request form.



**Job Termination Request**

Search for Transactions **Initiate New Transaction**

Target User Id: 04040404

Transaction Number: 0

Empl ID: 3

Empl Record: 99 4

Add 6

**Look Up Empl Record**

Empl Record: =

Name: begins with

Last Name: begins with

Department Description: begins with

Look Up Cancel

Search Results

View 100

Target User Id	Empl ID	Empl Record Name	Last Name	Depart
04040404	101772150	Jorge Gonz	Gonz	20200

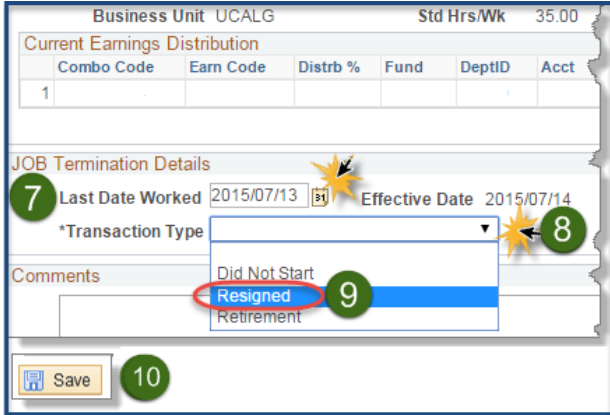
5

Verify you have selected the correct person and the correct job record.

# Initiate a Job Termination Request

## Quick Reference Guide

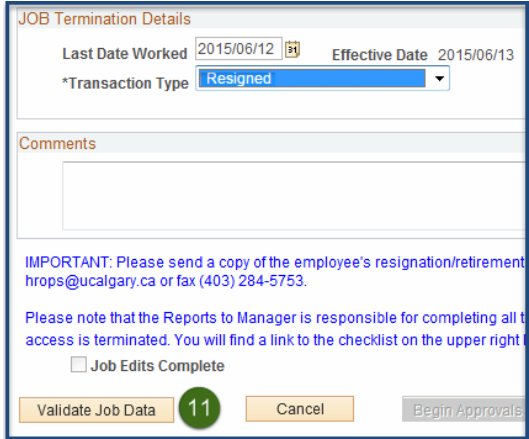
7. Under Job Termination Details enter the **Last Date Worked** by clicking on the calendar icon. The Effective Date of the termination is the day following the last date worked.
8. Select the **Transaction Type** by clicking on the **drop down** arrow
9. Select **Resigned** from the menu.
10. Click **Save**.



The screenshot shows the 'JOB Termination Details' form. At the top, it displays 'Business Unit UCALG' and 'Std Hrs/Wk 35.00'. Below this is a table for 'Current Earnings Distribution' with columns: Combo Code, Earn Code, Distrib %, Fund, DeptID, and Acct. The main section contains:
 

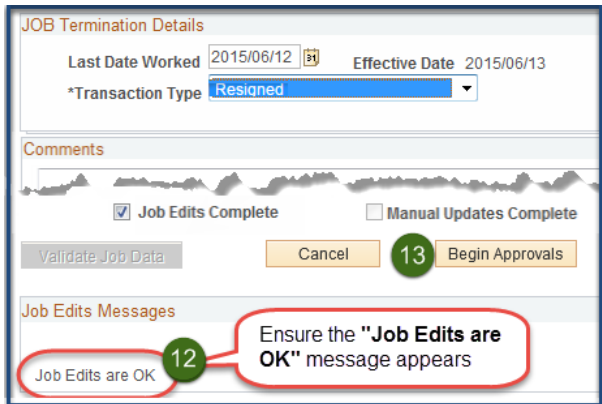
- 'Last Date Worked' with a calendar icon (step 7) and 'Effective Date' set to 2015/07/14.
- '\*Transaction Type' dropdown menu with 'Resigned' selected (step 8 and 9).
- 'Comments' section with options: 'Did Not Start', 'Resigned' (highlighted with a red circle and step 9), and 'Retirement'.
- 'Save' button (step 10).

11. Next click the **Validate Job Data** button.



The screenshot shows the 'JOB Termination Details' form after saving. It displays 'Last Date Worked' as 2015/06/12 and 'Effective Date' as 2015/06/13. The '\*Transaction Type' is set to 'Resigned'. Below the 'Comments' section, there is an important note: 'IMPORTANT: Please send a copy of the employee's resignation/retirement to hrops@ucalgary.ca or fax (403) 284-5753. Please note that the Reports to Manager is responsible for completing all the information before access is terminated. You will find a link to the checklist on the upper right.' There is a checkbox for 'Job Edits Complete'. At the bottom, the 'Validate Job Data' button is highlighted with a green circle and step number 11.

12. Ensure the Job Edits Message indicates "**Job edits are OK**".
13. Click the **Begin Approvals** button.



The screenshot shows the 'JOB Termination Details' form with the 'Job Edits Complete' checkbox checked. Below the 'Comments' section, there is a 'Job Edits Messages' section. A red circle highlights the message 'Job Edits are OK' (step 12). A callout box points to this message with the text: 'Ensure the "Job Edits are OK" message appears'. At the bottom right, the 'Begin Approvals' button is highlighted with a green circle and step number 13.

14. Ensure the workflow **Job Termination Request** box appears.

**Important!**



15. To complete the termination **send a copy of the resignation/retirement letter to [hrops@ucalgary.ca](mailto:hrops@ucalgary.ca)**.



16. Complete the [Offboarding Checklist for Managers](#) and send the employee the [Employee Offboarding Checklist](#).

End of process.