

PeopleSoft

Termination Checklist

HR/Payroll/Benefits

This checklist highlights the Menu Items, Components, and Pages necessary for basic initial processing. The checklists focus on the most common general situations. For specific detail see relevant manual.

HR/Payroll Checklist for Termination

(Navigation: HR/Payroll Page>Payroll Administrator Tile>Employee Data>Job Data)

Termination (work location tab)

- Insert an effective dated row **(day after last day worked)**
- Enter appropriate Action
- Enter appropriate Reason
- Save!

The screenshot displays the 'Work Location' tab in the PeopleSoft HR/Payroll system. The interface includes a navigation bar with tabs for 'Work Location', 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. The main content area shows the 'EMP' record for an employee with ID '0' and 'Empl Rcd #' '0'. The 'Work Location' section is active, showing 'HR Status: Inactive' and 'Payroll Status: Terminated'. The 'Effective Date' is set to 04/15/2006, and the 'Termination Date' is 04/14/2006. The 'Action / Reason' is 'Termination' with a sub-reason of 'Resignation'. The 'Position Number' is 00000051, and the 'Position Entry Date' is 03/28/2003. The 'Last Date Worked' is 04/14/2006. The 'Regulatory Region' is USA, 'Company' is ND (State of North Dakota), 'Business Unit' is 11000 (Office of Mgmt & Budget), and 'Department' is 110110 (Office of Management & Budget). The 'Date Created' is 09/15/2006. The bottom of the screen features a navigation bar with links for 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation', along with buttons for 'Save', 'Return to Search', 'Notify', 'Previous tab', 'Next tab', 'Refresh', 'Update/Display', and 'Include History'.

Payroll:

(Navigation: HR/Payroll Page>Payroll Administrator Tile>Hire/Update Employee Process>Request Direct Deposit)

The Suppress DDP Advice Print box needs to be unchecked upon termination. The employee will then receive a printed DDP Advice.

Add an effective dated row
(1st day of the termination month)
Uncheck the box for
Suppress DDP Advice Print
Save

Direct Deposit

Person ID: [REDACTED]

Deposit Information Find | View All First 1 of 2 Last

'Effective Date: 04/01/2006 *Status: Active Suppress DDP Advice Print

Distribution Information Find | View All First 1 of 1 Last

'Account Type: Checking

'Deposit Type: Balance

% Net Pay/\$ Amount: [REDACTED]

Bank ID: [REDACTED] Prenotification Required

Account#: [REDACTED] Prenote Date:

Priority: 1 Prenotification Status: Completed

This data was last updated by System Data last updated on 01/23/2006

Save Return to Search Notify Refresh Update/Display Include History Correct History

BENEFITS

HR/Payroll Page > ND PERS Benefits Administrator Tile

- ❑ Once the termination is entered in PeopleSoft an overnight process will run to PERS Link and will terminate the employee in PERS.