

Terminate an Employee

Overview: This job aid provides guidance to Employee Administrators who need to terminate an employee from UltiPro. A termination includes both resignations and involuntary termination. All terminated employees – regardless of type – remain in UltiPro to maintain historical records and also to enable the re-hiring process should an employee return (for example, kettle workers and camp staff often return on a yearly basis). Before beginning the termination process, ensure that all necessary information is known, including: termination date, termination reason and last day worked. Terminations are approved by Employee Relations, either in DHQ or THQ and UltiPro will automatically send a notification to the correct person to approve.

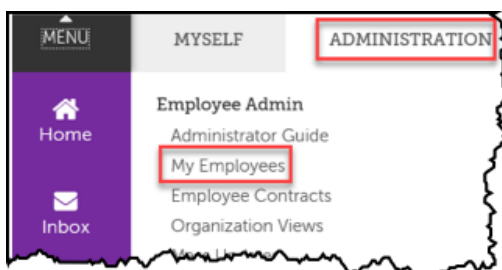
Important Notes!

- Before beginning the termination, check if the employee being terminated has any secondary jobs in place and if so, inform the secondary job manager prior to completing the termination. If the employee is being terminated from their primary job, but retaining a secondary one, follow the procedure to convert a secondary job to a primary one.
- If the reason code **Resignation** is not accepted by the system, select **Other**.
- Record of Employment (ROE) documentation is created and provided by Payroll. Employee Administrators do not generate these. After the final pay has been processed, Payroll will then generate the ROE. If an employee requests a ROE not related to a termination or Leave of Absence, direct the employee to Payroll.
- The terminated employee's time sheet will not display in Time & Attendance beyond the actual termination date however time sheets will be viewable up to and including the termination date.

The termination process involves two primary steps after locating the employee record : first, input the details of the employee termination and second, reassign any employees (if any) currently reporting to the person who is being terminated to another Supervisor.

LOCATE EMPLOYEE RECORD

1. Click **Menu** then select **My Employees** from the **Administration** tab.

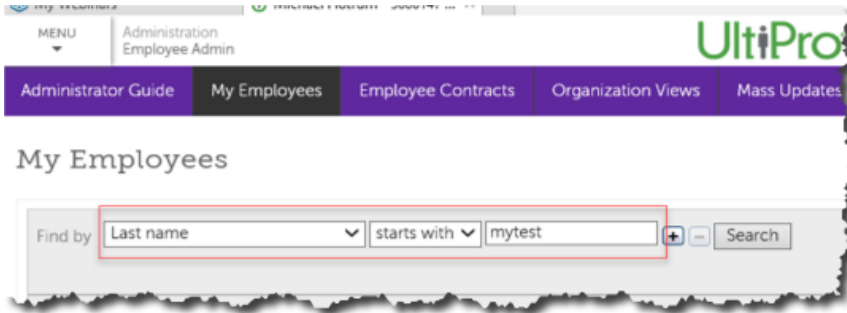




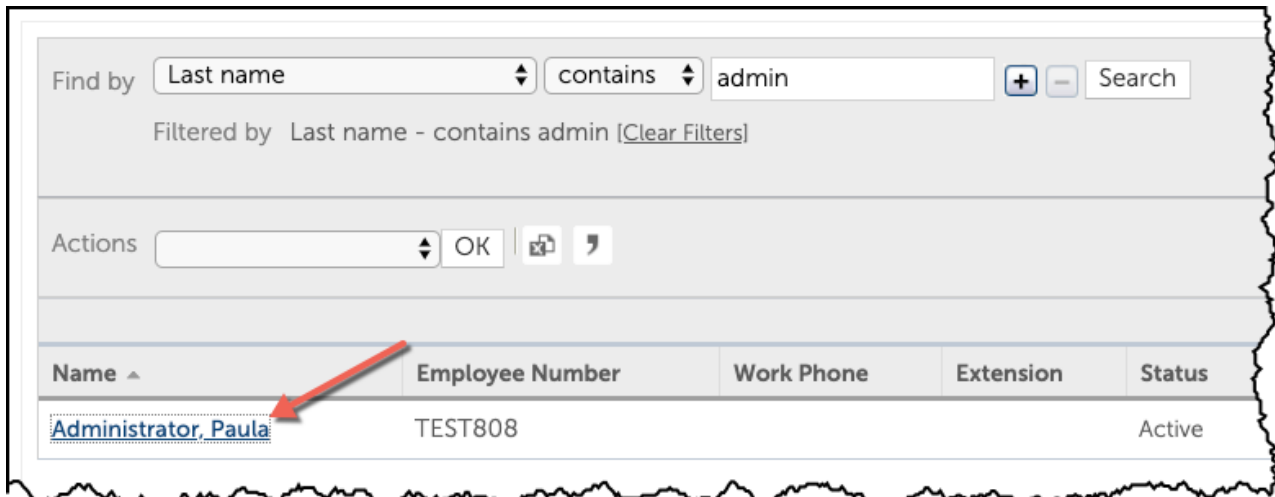
Giving
Hope
Today



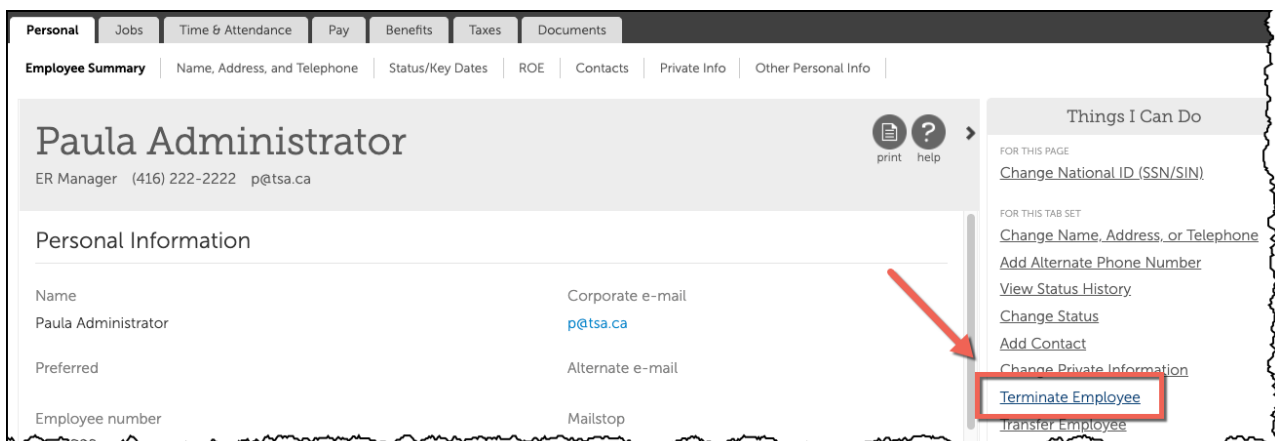
2. Locate the employee name by using the criteria listed in the **Find by** drop down list then click **Search**.



3. From the resulting list, click the employee name to open the record.

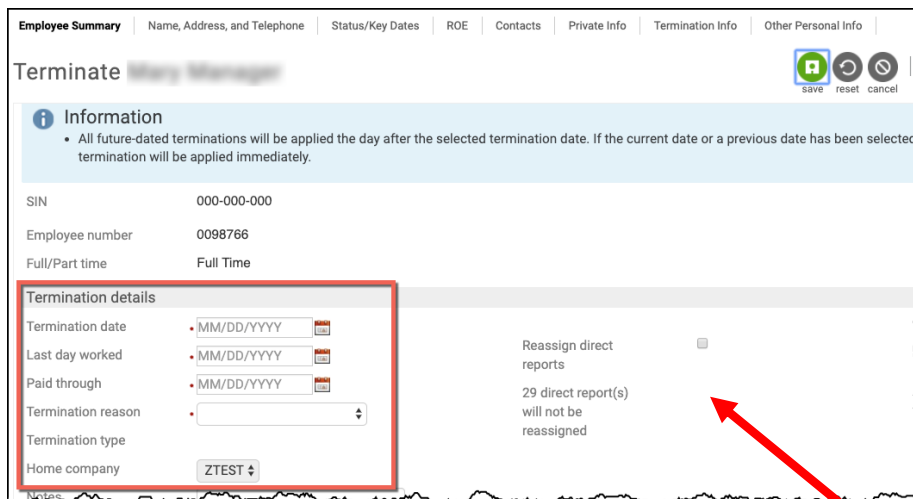


4. In the employee record, select **Terminate Employee** under the heading **Things I Can Do**.



COMPLETE TERMINATION DETAILS

1. Under the heading **Termination Details**, complete the following:
 - a) **Termination Date:** select the date of termination.
 - b) **Last Day Worked:** select the last date the employee worked.
 - c) **Paid Through:** select the last date the employee is to be paid to.
 - d) **Termination Reason:** select the appropriate circumstance.
 - e) **Termination Type:** this field will auto-populate based on the above selection.
 - f) **Home Company:** default selection is The Salvation Army.



Employee Summary | Name, Address, and Telephone | Status/Key Dates | ROE | Contacts | Private Info | Termination Info | Other Personal Info

Terminate **Wally Manganaro** save reset cancel

Information

- All future-dated terminations will be applied the day after the selected termination date. If the current date or a previous date has been selected termination will be applied immediately.

SIN 000-000-000
Employee number 0098766
Full/Part time Full Time

Termination details

Termination date

Last day worked

Paid through

Termination reason

Termination type

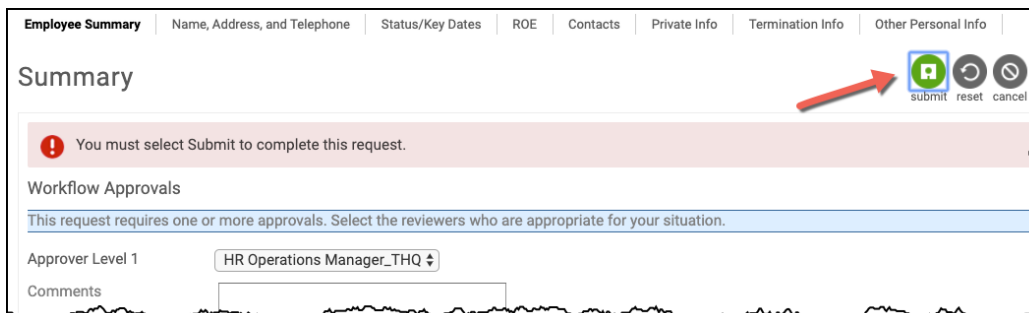
Home company

Reassign direct reports

29 direct report(s) will not be reassigned

- g) If the person being terminated has employees reporting to them (as indicated by the reassignment step, above) proceed to the **Reassign Employees** section on page 4. Note: this message will **only** display if the employee being terminated has direct reports. If no employees are listed, click **Save** to proceed.

2. In the **Summary** window, click **Submit** to proceed with the termination.



Employee Summary | Name, Address, and Telephone | Status/Key Dates | ROE | Contacts | Private Info | Termination Info | Other Personal Info

Summary submit reset cancel

! You must select Submit to complete this request.

Workflow Approvals

This request requires one or more approvals. Select the reviewers who are appropriate for your situation.

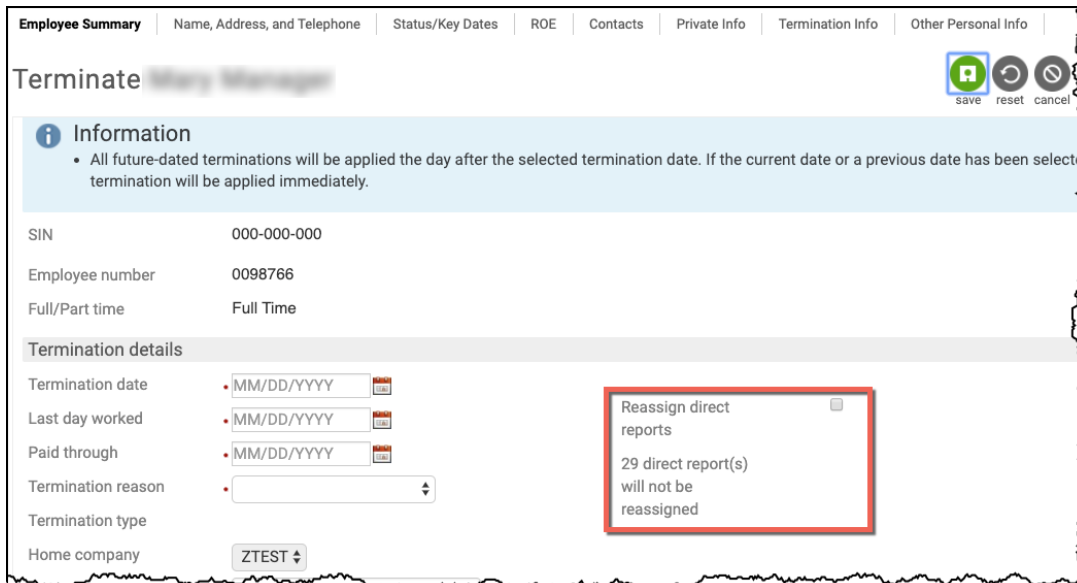
Approver Level 1

Comments

3. If the termination was a resignation, proceed to the **Documents** tab of the employee record and upload a copy of the resignation letter.

RE-ASSIGN EMPLOYEES (IF APPLICABLE)

1. If the employee being terminated has employees reporting to them, those employees must be reassigned to a new supervisor. This message will only display if the employee being terminated has direct reports.



Employee Summary | Name, Address, and Telephone | Status/Key Dates | ROE | Contacts | Private Info | Termination Info | Other Personal Info

Terminate **Mary Manager** save reset cancel

Information

- All future-dated terminations will be applied the day after the selected termination date. If the current date or a previous date has been selected, termination will be applied immediately.

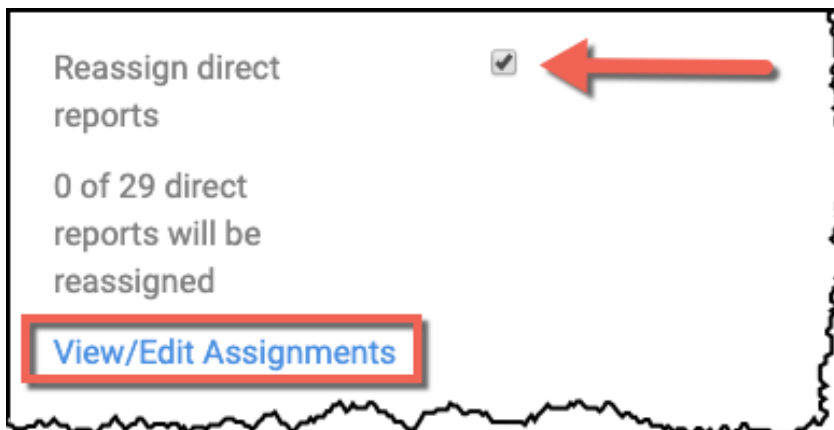
SIN: 000-000-000
Employee number: 0098766
Full/Part time: Full Time

Termination details

Termination date: MM/DD/YYYY
Last day worked: MM/DD/YYYY
Paid through: MM/DD/YYYY
Termination reason:
Termination type:
Home company: ZTEST

Reassign direct reports
29 direct report(s) will not be reassigned

2. To begin the reassignment procedure, place a checkmark in the **Reassign direct reports** checkbox. A **View/Edit Assignments** link will appear. Click the **View/Edit Assignments** link.



Reassign direct reports ←

0 of 29 direct reports will be reassigned

[View/Edit Assignments](#)

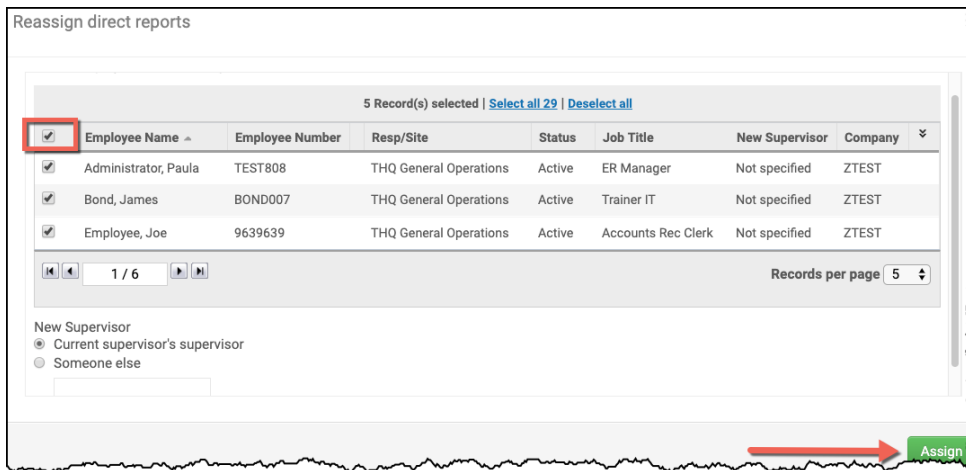


- 3. A **reassign direct reports** window will appear, listing all employees needing to be reassigned. This window allows for employees to be assigned individually or in groups to **either** the current Supervisor's Supervisor or to a specific individual. Employee reassignment will become effective on the day of the employee's termination.

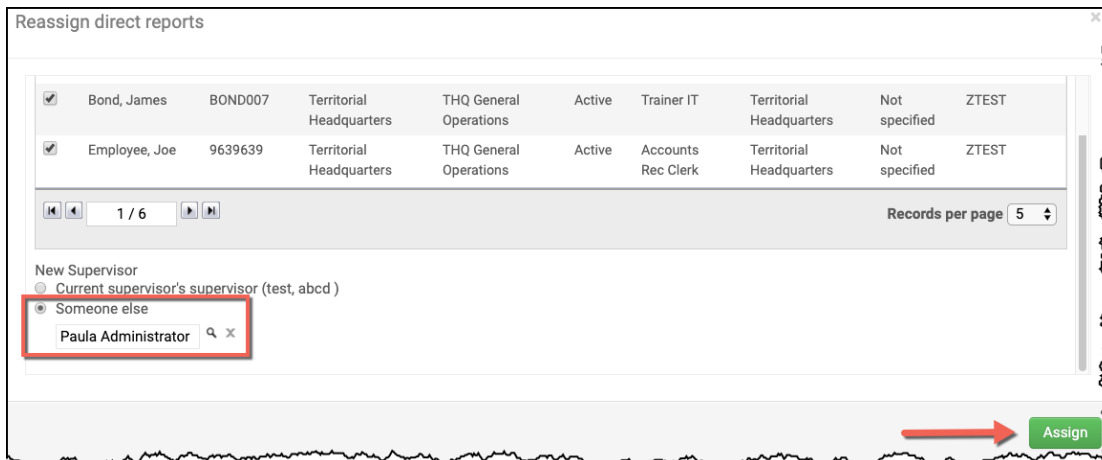
Tip! Employee Administrators may reassign employees ahead of a termination (if required), using the Mass Update feature in UltiPro. This allows employees to be reassigned immediately, in the event that a termination is occurring in the future.

Assign all or some employees to the **Current Supervisor's Supervisor**:

- a) Select all employees in one step by placing a checkmark in the checkbox at the top of the column or place a checkmark next to each person's name to individually select employees.
- b) Select **Current supervisor's supervisor** then click **Assign**.



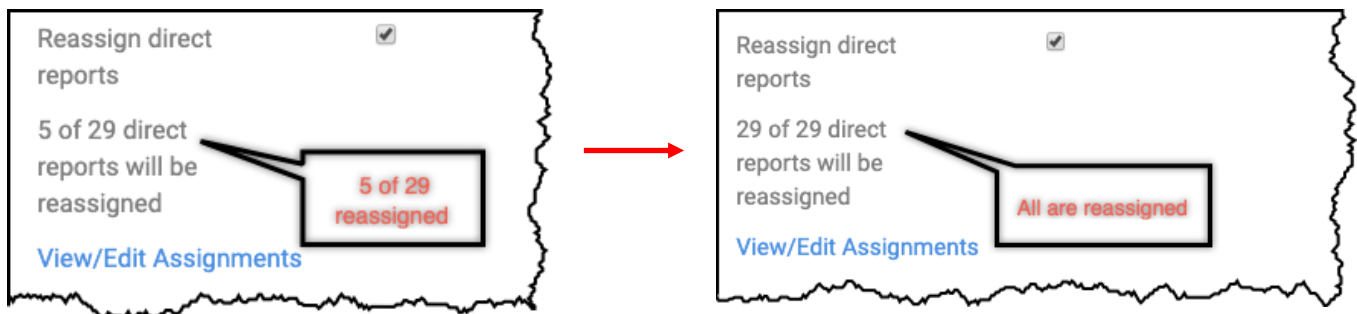
Assign all or some employees to **Someone else**:



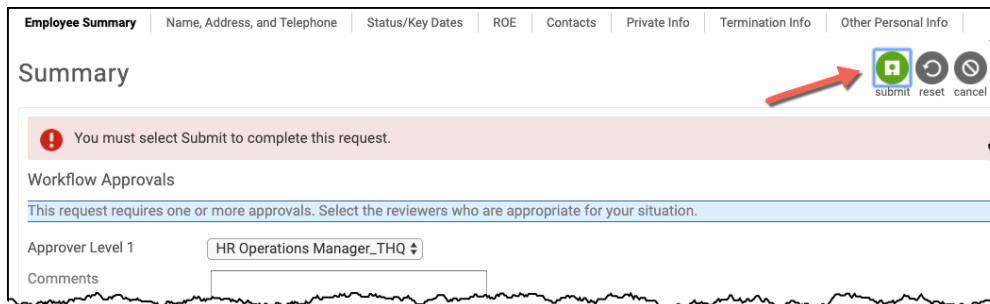


- a) Select all employees in one step, by placing a checkmark in the checkbox at the top of the column or place a checkmark next to each person's name to individually select employees.
 - b) Select **Someone else**, then click the magnifying glass to search for the name of the new supervisor.
 - c) Click the **Assign** button.
4. The **Termination** window will appear again, showing an updated status of the reassigned employees. If incomplete, click **View/Edit Assignments** to return to the assignments window and again click **Assign** when finished. When all employees have been successfully reassigned, the message will update accordingly.

Click **Save** to proceed to the Summary window.



5. In the **Summary** window, click **Submit** to proceed with the termination.



6. If the termination was a resignation, proceed to the **Documents** tab of the employee record and upload a copy of the resignation letter.