



CHARTER SCHOOL PEOPLESOFT TRAINING MANUAL

Palm Beach County School District—HRIM Team

Terminations

DIVISION OF HUMAN RESOURCES

Compensation and Employee Information Services

3300 Forest Hill Blvd., Suite A-152

West Palm Beach, FL 33406

Termination Processing Checklist

This checklist contains the information that will be needed to complete the termination process in the Palm Beach County School District's HR PeopleSoft Job Data pages.

Name/Employee ID number			
Job Record Number(s)			
If the employee has more than one job with your school and the employee is leaving both jobs, then BOTH jobs will need to be terminated in PeopleSoft.			
Effective Date of Termination			
The Effective Date of Termination is the day AFTER the last day worked.			
Action:			
Choose <i>Termination</i>			
Reason:			
See choices below (must choose a Reason in PeopleSoft)			
<i>Do not use the "CC" Reasons which may appear within the PeopleSoft pages. They are for District Use Only.</i>			
Attendance			Failure to Return from Leave
Certification Issues			Family Reasons
Completed Contract			Lack of Opportunity for Advancement
Created Record in Error			Never Started
Criminal Background Check			Non Reappointment
Death			Other Resignation
Disciplinary Action			Personal Reasons
Dissatisfied with job			Relocation
Dissatisfied with Pay			Return to Continue Education
Dissatisfied with Supervisor			Term During Probationary Period
Elimination of Position			Unsatisfactory Performance

How to Terminate an Employee

(or to terminate a Record created in error)

1. In **Human Capital Management**, in **Job Data**, on the **Work Location** section, click on the **plus sign (+)** button to add a new row.
2. In the **Effective Date** field, enter the termination date.
(Note: If you are terminating a Record that was created in error and you are using the same date from the prior row, you will need to choose the next number in the Effective Sequence field. Example: If prior Effective Sequence was "0" you'll need to choose "1.")
3. In the **Action** field, click on the **drop down arrow** and select "termination."
4. In the **Reason** field, select the appropriate reason.
(Note: If you are terminating a Record that was created in error, choose "Created Record in Error" for the Reason).
5. Click the **Save** button at the bottom of the page.

The screenshot displays the 'Work Location' section of the Human Capital Management system for an employee named Tommy, a Teacher with Empl ID 1234567. The form includes several input fields and dropdown menus. The 'Effective Date' is set to 04/05/2018, and the 'Effective Sequence' is 0. The 'Action' is set to 'Termination' and the 'Reason' is 'Other Resignation'. The 'Job Indicator' is 'Primary Job'. A red box highlights the 'Go To Row' button with a plus sign, and a red arrow points to it. A yellow callout box explains that the Effective Date is the day after the employee's last day of work. Another yellow callout box advises not to select options starting with 'cc.'

Field	Value
*Effective Date	04/05/2018
Effective Sequence	0
HR Status	Inactive
Payroll Status	Terminated
*Action	Termination
Reason	Other Resignation
*Job Indicator	Primary Job
Position Number	
Position Entry Date	
*Regulatory Region	USA
Company	CHT
*Business Unit	SDPBC
*Department	1234
Department Entry Date	08/11/2015
*Location	1234
Establishment ID	SDPBC
Last Start Date	08/11/2015
Expected Job End Date	
Last Date Worked	04/04/2018
Termination Date	04/04/2018
End Job Automatically	<input type="checkbox"/>
Override Last Date Worked	<input type="checkbox"/>