Initiate a Job Termination Request

Quick Reference Guide

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 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. |

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.
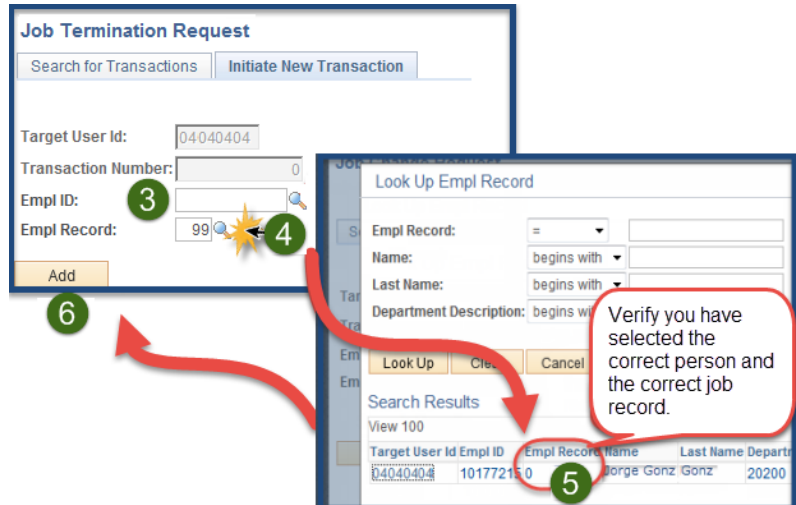

3. On the Job Termination Request page enter the **Employee ID**.

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.
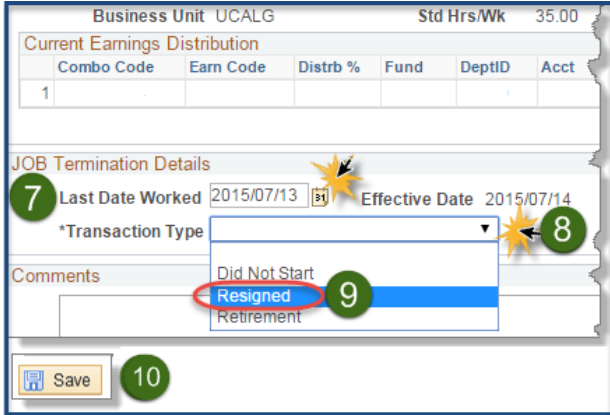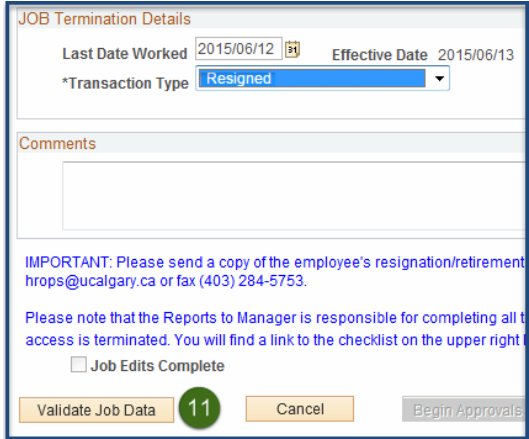
7. Under Job Termination Details enter the **Last Date Worked** by clicking on the calendar icon. The Effective Date of the termination is the day following the last date worked.

8. Select the **Transaction Type** by clicking on the **drop down** arrow

9. Select **Resigned** from the menu.

10. Click **Save**.
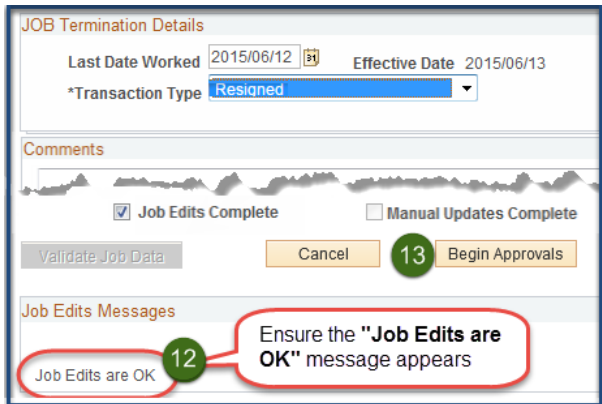
11. Next click the **Validate Job Data** button.

12. Ensure the Job Edits Message indicates "**Job edits are OK**".

13. Click the **Begin Approvals** button.

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.

16. Complete the Offboarding Checklist for Managers and send the employee the Employee Offboarding Checklist.

End of process.