

# Manage Terminations (Including Retirement)

## Lesson Objective:

Upon completion of the Manage Terminations (Including Retirement) lesson, you will be able to:

### Objective

- Process an employee termination or retirement by reviewing required details and completing the employment separation correctly.



The termination process begins by identifying the employee and selecting the sections to be included. The termination notification date and termination date must be accurately entered and aligned to ensure correct processing.

The appropriate termination action and termination reason are selected to define the type of separation. Based on the action selected, the termination type is automatically determined by the system.

Final employment actions such as user access revocation, rehire recommendation, document uploads, and comments can be completed before submission. Once all required information is verified, the transaction is submitted to finalize the termination.

# FOCUS



- This lesson focuses on processing employee terminations, including retirement scenarios. It covers selecting the employee, choosing the required sections, and entering the needed dates. The focus is on ensuring termination details are captured accurately.
- The lesson highlights entering the termination notification date and ensuring it matches the termination date. It also includes reviewing the employee's assignment information for reference. This ensures date accuracy and alignment with the system requirements.
- Another key focus is selecting the termination action, termination type, and termination reason. These selections determine how the termination is processed in the system. The focus is on applying the correct values for each termination case.

# Navigation

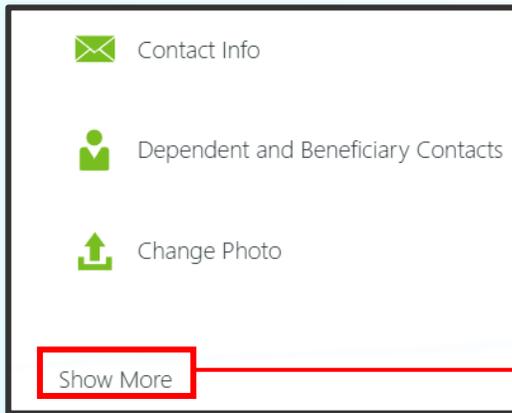
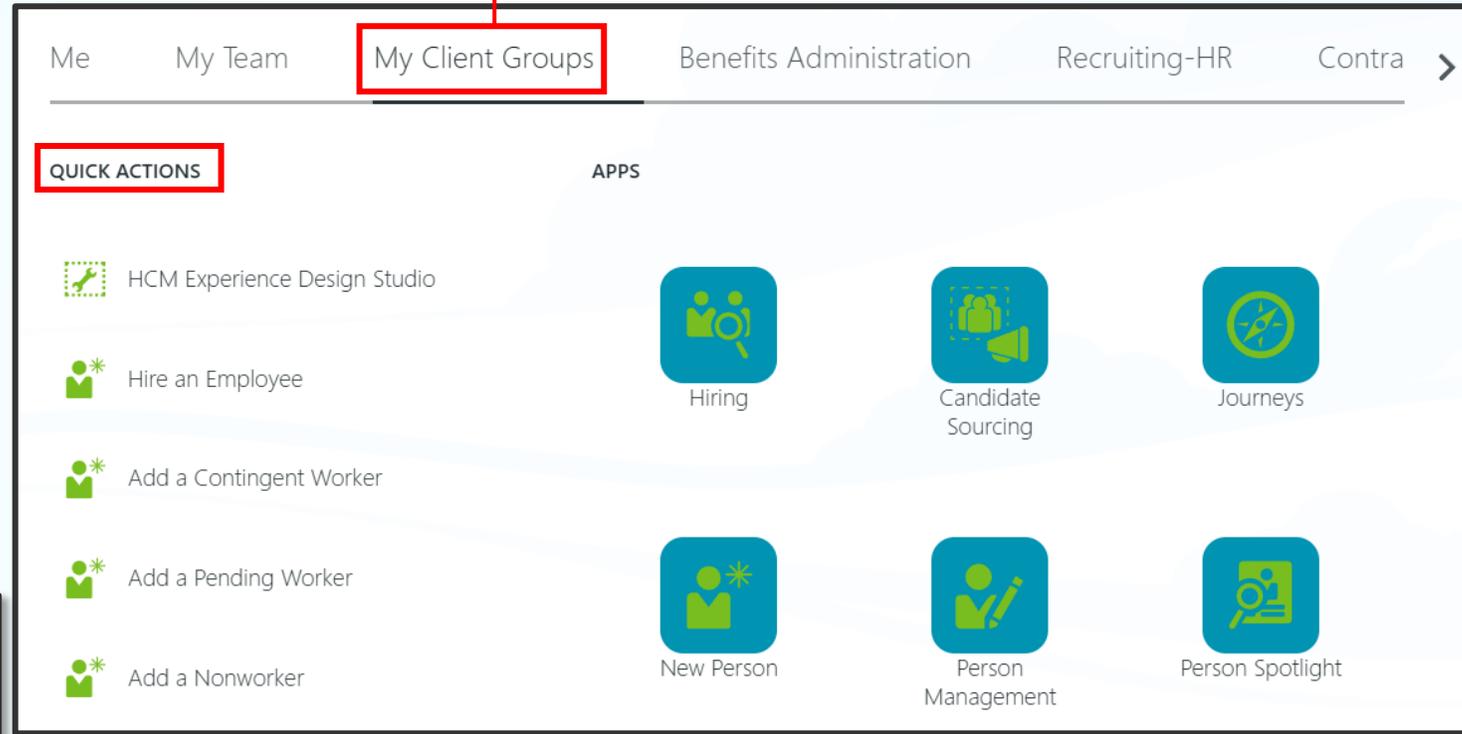


**My Client Groups →**  
**Quick Actions →**  
**Show More →**  
**Employment →**  
**Terminate Employment**

# Manage Terminations (Including Retirement)

1

Select the My Client Groups tab



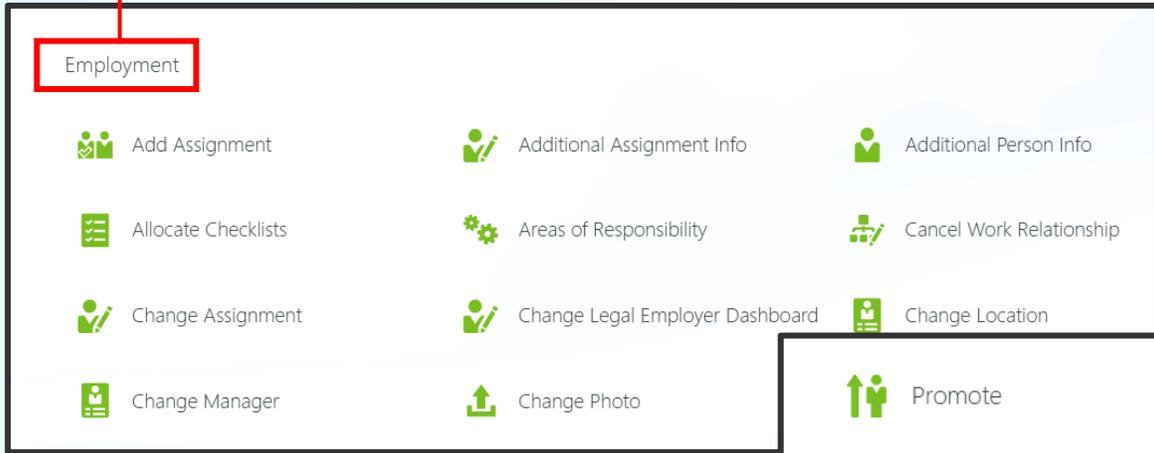
2

From the Quick Actions section, select the Show More link from the drop-down list

# Manage Terminations (Including Retirement)

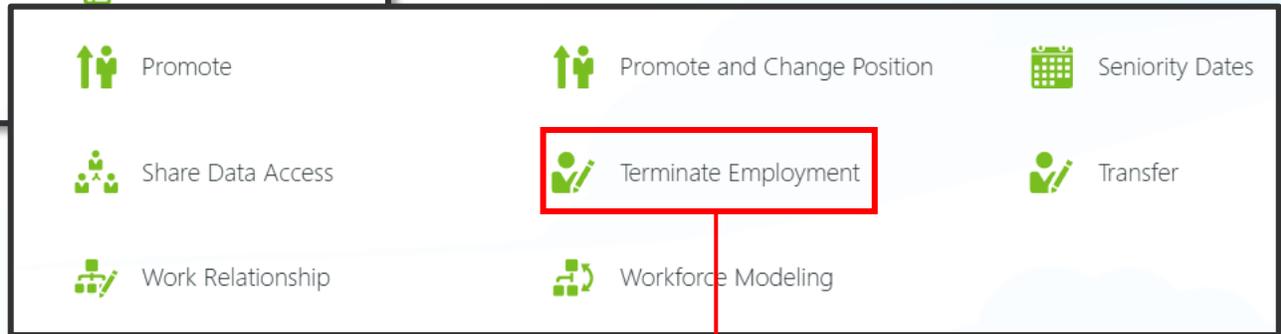
3

Locate the Employment section



Employment

- Add Assignment
- Additional Assignment Info
- Additional Person Info
- Allocate Checklists
- Areas of Responsibility
- Cancel Work Relationship
- Change Assignment
- Change Legal Employer Dashboard
- Change Location
- Change Manager
- Change Photo



- Promote
- Promote and Change Position
- Seniority Dates
- Share Data Access
- Terminate Employment**
- Transfer
- Work Relationship
- Workforce Modeling

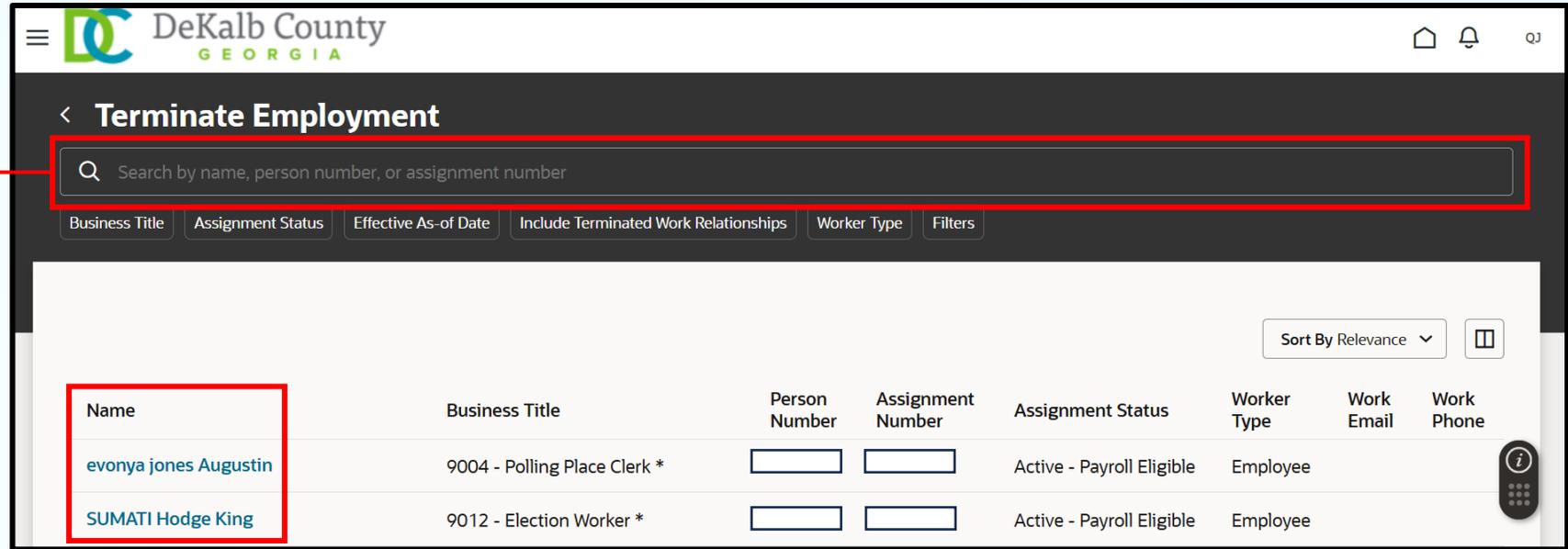
4

Select Terminate Employment under the Employment section

# Manage Terminations (Including Retirement)

5

In the Search field, key in the employee's name, person number, or assignment number.



Name	Business Title	Person Number	Assignment Number	Assignment Status	Worker Type	Work Email	Work Phone
evonya jones Augustin	9004 - Polling Place Clerk *	<input type="text"/>	<input type="text"/>	Active - Payroll Eligible	Employee		
SUMATI Hodge King	9012 - Election Worker *	<input type="text"/>	<input type="text"/>	Active - Payroll Eligible	Employee		

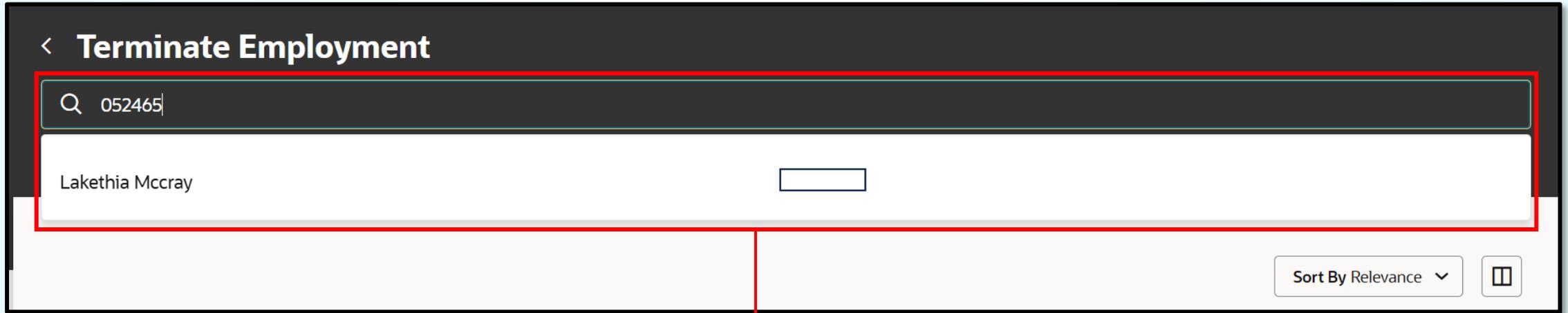


The Coordinator can select the employees directly from the **Terminate Employment** page instead of using the search



Apply filters under search bar to ease the search to find an employee

# Manage Terminations (Including Retirement)



< Terminate Employment

Q 052465

Lakethia Mccray

Sort By Relevance ▾



Select the **Employee**  
from the search result

# Troubleshooting



If the expected employee does not display in the search list, double-check the spelling of the name, or confirm that the correct person number or assignment number is being used. The system will only return exact or close matches based on these identifiers.

# Manage Terminations (Including Retirement)

7

Check the boxes for the sections to be included in the process under Info to Include page

Terminate Employment

LM Info to include  
Lakethia Mccray, 32130 - Detention Sergeant

**Document records**  
Add document records and associated attachments.

**Comments and attachments**  
Add additional comments and attachments for approver.

Cancel **Continue** Submit

1 | 6

Info to include

When and why

Work relationship termination info

Document records

Comments and attachments

Need help? Contact us.

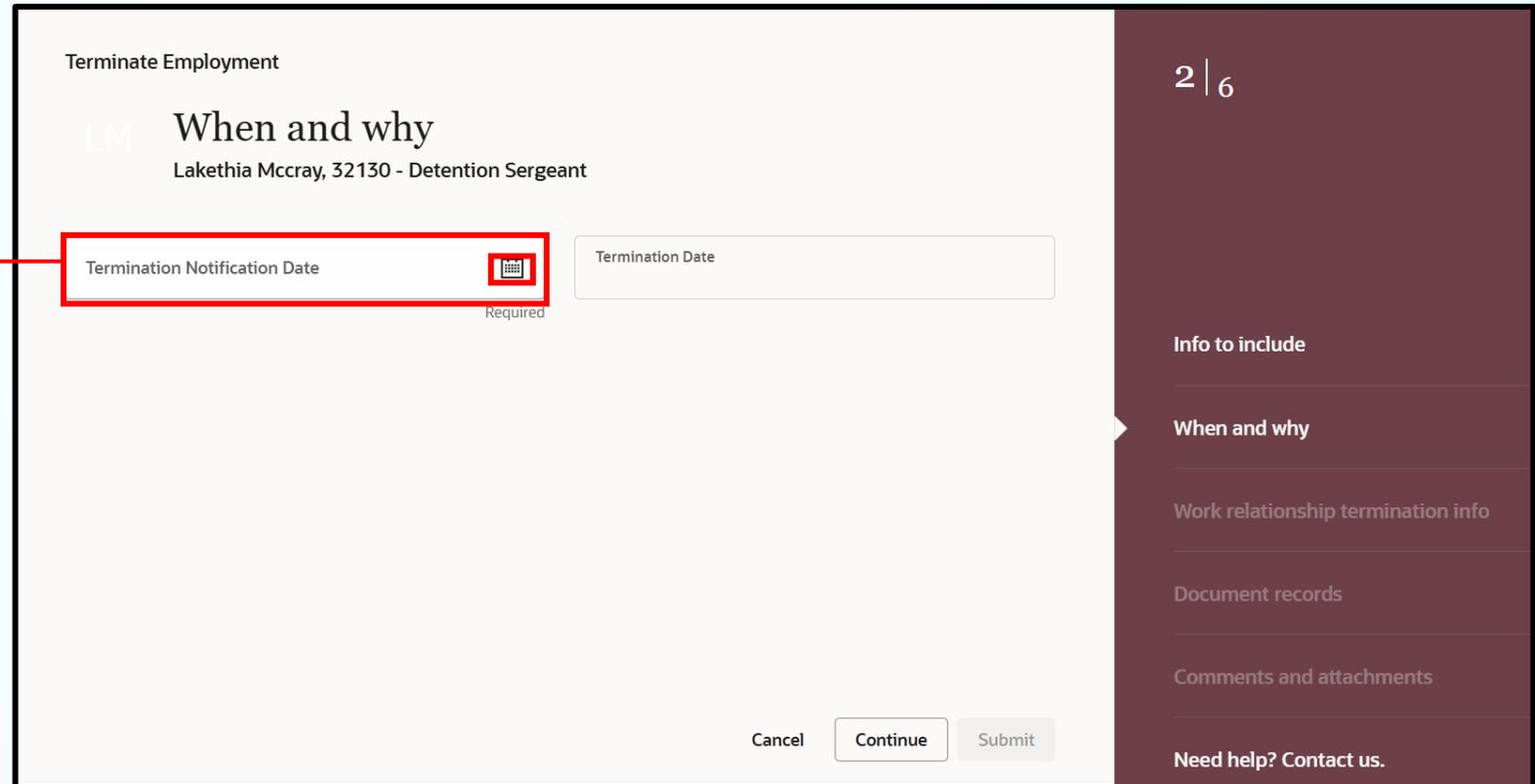
8

Click on **Continue** to move to the next section

# Manage Terminations (Including Retirement)

9

Key in the date for  
"Termination Notification  
Date" field



Terminate Employment

LM When and why  
Lakethia Mccray, 32130 - Detention Sergeant

Termination Notification Date  Required

Termination Date

Cancel Continue Submit

2 | 6

Info to include

When and why

Work relationship termination info

Document records

Comments and attachments

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The calendar icon may also be selected, and the date selected from the calendar

# Manage Terminations (Including Retirement)

Terminate Employment

LM **When and why**  
Lakethia Mccray, 32130 - Detention Sergeant

2 | 6

**Information** X

The employee can see their termination details when the termination type is voluntary.

Termination Notification Date 11/28/25  Termination Date 11/28/25 

What are you terminating?

Work relationship

**DeKalb County GA**

> 32130 - Detention Sergeant

Termination Action  
Voluntary Termination ▼

Termination Type  
Voluntary

Termination Reason  
▼

Required

Cancel Continue Submit

Info to include

When and why

Work relationship termination info

Document records

Comments and attachments

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! The Termination Date for the termination should be the same as the termination notification date

# Manage Terminations (Including Retirement)

10

The Coordinator can view the Employee's assignment information here

### Terminate Employment

LM **When and why**  
Lakethia Mccray, 32130 - Detention Sergeant

**Information** ×  
The employee can see their termination details when the termination type is voluntary.

Termination Notification Date: 11/28/25 📅      Termination Date: 11/28/25 📅

What are you terminating?

Work relationship

**DeKalb County GA**  
➤ 32130 - Detention Sergeant

Termination Action: Voluntary Termination ▼      Termination Type: Voluntary

Termination Reason ▼  
Required

Cancel Continue Submit

2 | 6

**Info to include**

When and why

Work relationship termination info

Document records

Comments and attachments

**Need help? Contact us.**

# Manage Terminations (Including Retirement)

Terminate Employment

LM When and why  
Lakethia Mccray, 32130 - Detention Sergeant

2 | 6

**Information** ×  
The employee can see their termination details when the termination type is voluntary.

Termination Notification Date 11/28/25  Termination Date 11/28/25 

What are you terminating?  
 Work relationship

**DeKalb County GA**

> 32130 - Detention Sergeant

Termination Action  
Voluntary Termination 

Termination Type  
Voluntary

Termination Reason  Required

Cancel Continue Submit

Info to include

When and why

Work relationship termination info

Document records

Comments and attachments

Need help? Contact us.

11

Select the appropriate Termination Action from What's the way to terminate the employee? drop-down list

# Manage Terminations (Including Retirement)



The **Termination Type** field will be auto populated based on **Termination Action** field

12

Select the appropriate Termination Action from What's the way to terminate the employee? drop-down list

### Terminate Employment

LM **When and why**  
Lakethia Mccray, 32130 - Detention Sergeant

2 | 6

**Information** ×  
The employee can see their termination details when the termination type is voluntary.

Termination Notification Date: 11/28/25 📅      Termination Date: 11/28/25 📅

What are you terminating?  
 Work relationship

**DeKalb County GA**

> 32130 - Detention Sergeant

Termination Action: Voluntary Termination ▼      Termination Type: Voluntary

Termination Reason ▼ Required

Cancel    Continue    Submit

**Info to include**  
When and why  
Work relationship termination info  
Document records  
Comments and attachments  
Need help? Contact us.

# Manage Terminations (Including Retirement)

Terminate Employment

LM When and why  
Lakethia Mccray, 32130 - Detention Sergeant

2 | 6

**Information** ×  
The employee can see their termination details when the termination type is voluntary.

Termination Notification Date 11/28/25  Termination Date 11/28/25 

What are you terminating?  
 Work relationship

**DeKalb County GA**

> 32130 - Detention Sergeant

Termination Action  
Voluntary Termination

Termination Type  
Voluntary

Termination Reason   
Required

Cancel **Continue** Submit

**Info to include**

When and why

Work relationship termination info

Document records

Comments and attachments

Need help? Contact us.

13

Select the appropriate reason in the Termination Reason field

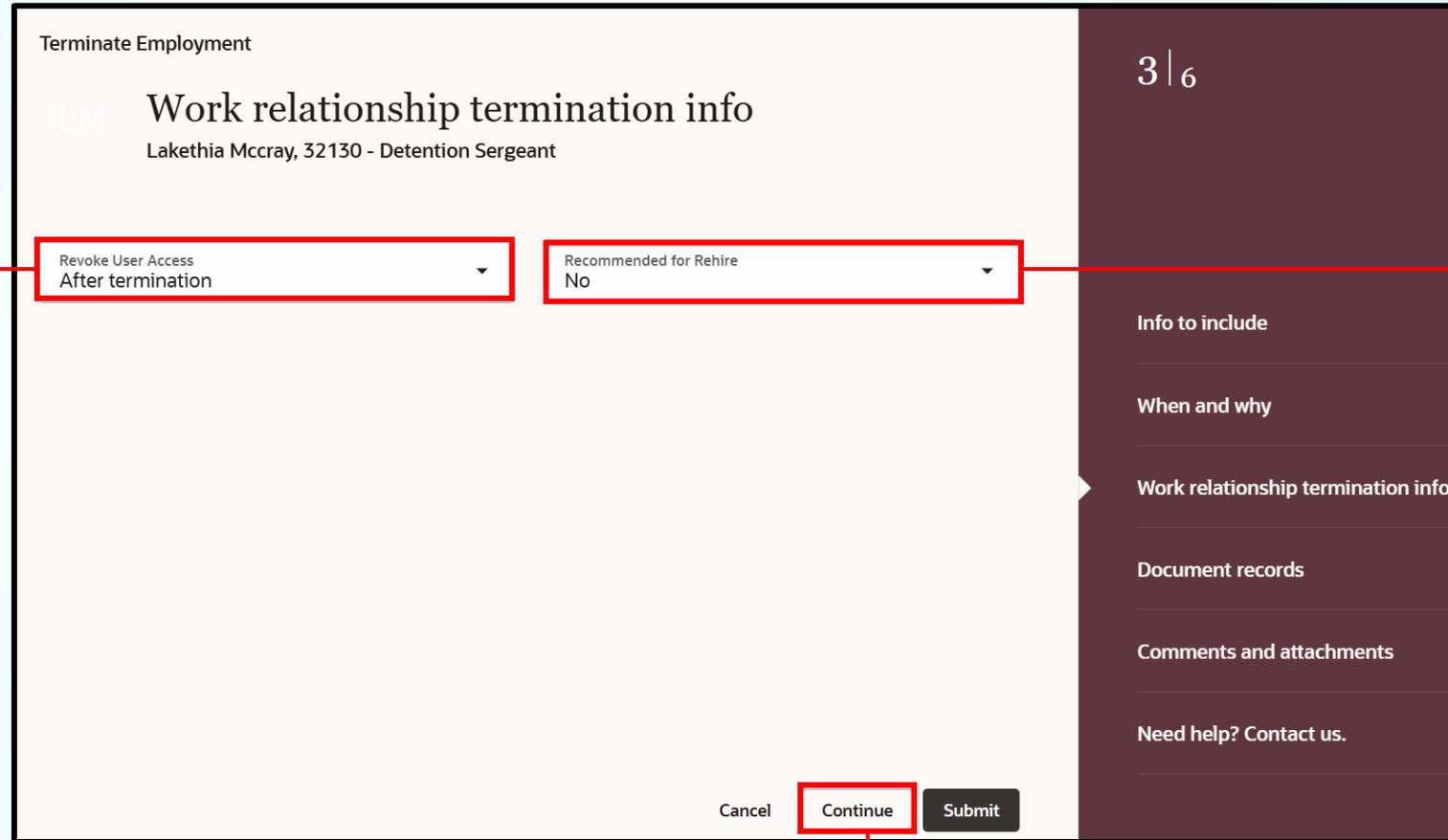
14

Click on the Continue button.

# Manage Terminations (Including Retirement)

15

Select the **Appropriate Response for Revoke User Access** from the drop-down list



Terminate Employment

LM Work relationship termination info  
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3 | 6

Revoke User Access After termination

Recommended for Rehire No

Info to include

When and why

Work relationship termination info

Document records

Comments and attachments

Need help? Contact us.

Cancel Continue Submit

16

Select the **Appropriate Value** from the **Recommended for Rehire** drop-down list

17

Click on the **Continue** button

# Manage Terminations (Including Retirement)

Terminate Employment

LM Document records  
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**+ Add**

After you add a document record, you can view it here.

Cancel **Continue** Submit

4 | 6

- Info to include
- When and why
- Work relationship termination info
- Document records
- Comments and attachments
- Need help? Contact us.

Terminate Employment

LM Document records  
Lakethia Mccray, 32130 - Detention Sergeant

**+ Add**

Document Type Required

Cancel **Save**

- The Coordinator can add Documents from Document records page
- Click **Add(+)** to add the new Document Record
- Select the **Document Type** from the List of Values and click **Save** after adding the Document
- Click **Continue** to move to the next section

# Manage Terminations (Including Retirement)



18

The Coordinator can add required Comments on **Comments** page

Terminate Employment

LM Comments and attachments  
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Comments

0/500  
Required

Cancel Continue **Submit**

5 | 6

- Info to include
- When and why
- Work relationship termination info
- Document records
- Comments and attachments**
- Need help? Contact us.

Click on **Submit** to complete the transaction

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## Conclusion



- The learner can now identify and select the employee for termination. They understand how filters and direct selection support finding the employee. This ensures the correct employee record is used.
- The learner understands how to enter the termination notification date. They know that the termination date must match this date. This ensures compliance with the process requirement.
- The learner can now review the employee's assignment information during termination. They understand how this helps confirm relevant employment details. This ensures accuracy before proceeding.
- The learner understands how to choose the termination action, type, and reason. They recognize how these fields guide the termination process. This ensures the correct termination classification is applied.
- The learner knows how to handle user access and rehire recommendation settings. They understand how these values affect post-termination status. This ensures proper handling of access and future eligibility.