

# Termination Form

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## When to use

Complete a Termination form when there is a need to formally end an employee's employment with the University, whether the employee is resigning voluntarily or the employee is let go for cause. A Termination form should be completed in advance of the employee's last day of work, and prior to the [payroll deadline](#), in order to both prevent overpayment and ensure the vacation payout is in the employee's final paycheck.

 **Note:** If the employee is moving to a non-compensated position, or another position within Boston University, do not submit a Termination form. If you are unsure how to proceed, please contact HR Compensation ([hrcomp@bu.edu](mailto:hrcomp@bu.edu)) for staff employees or the Provost's Office for faculty. For example, if a faculty member obtains an Emeritus rank they are to move into a faculty non-comp position rather than being terminated.

 **Warning:** This form cannot be completed if the employee is eligible for retirement (age 55 or older with 10 or more years of adjusted service at the University). The system will automatically check retirement eligibility and you will receive an error if the employee is eligible. If the employee is eligible for retirement, cease processing this form and process the [Retirement form](#) instead.

 **Information:** Once the Termination form is processed, no other forms can be processed for the employee. If the employee will need to move into a temporary overlap position, hold off on processing the Termination form until the [Position Change form](#) completes workflow to move the employee into the temporary overlap position.

## Before you begin

Ensure you have a copy of the employee's resignation or termination letter. You are required to attach this to the form.

If you are terminating a faculty member, you will need to include the date the **Exit Survey** was sent to the faculty member. Contact your Faculty Actions Manager or the Provost's Office to obtain this information.

You will need the following information for all employees:

- Effective date of action
- Action Reason

Incorrect information will result in longer processing times and may cause your form to be returned or rejected.

To prevent late payment to an employee, pay careful attention to the [form deadlines](#) and plan accordingly.

**Vacation payout** For staff employees who are exempt (monthly paid), the form displays estimated accrued vacation hours as per last day worked entered on the form. The SAP system will calculate and pay the actual accrued vacation hours on the termination date automatically. The Labor Distribution report (PA15) can give you information about actual payout after the termination.

For staff employees who are non-exempt (hourly paid), the form does not display accrued vacation hours. In order for a vacation payout to occur, the following must happen:

- Termination is processed
- Final week of time has been entered and approved
- Time Evaluation has run after final payroll approval

 **Note:** Use transaction PT50 in WebGUI to view vacation balances for exempt and non-exempt employees.

**Additional assignments  
(Faculty only)**

Upon termination of the faculty member's main assignment, all active additional assignments will be terminated as of the effective date. If the additional assignment being terminated is not in the same org unit as the main assignment, an email will automatically be sent to the respective payroll coordinator(s).

 **Note:** If a faculty member has an additional assignment, a popup will appear to confirm the other org units confirmed all appointments should end. If this is not the case, cease processing and confirm with the respective payroll coordinator(s). If the employee needs to remain active on payroll, do not process the Termination form. Instead, contact HR Information Systems ([hrs@bu.edu](mailto:hrs@bu.edu)) and request the additional assignment be changed to the employee's main assignment.

 **References**

- Click [here](#) for the Data Dictionary

# Termination Form: Step-by-Step

Step	Action						
1	<p>Initiate the <b>Termination</b> form.</p> <p> <b>Warning:</b> Forms must be completed one at a time; do not open multiple forms in multiple tabs.</p> <p> <b>Reference:</b> <a href="#">Initiate a Personnel Administration (PA) Form</a></p>						
2	<p>Enter the employee's last day in the <b>Termination Date (Last Day Worked)</b> field in mm/dd/yyyy format. If preferred, click the <b>Calendar Lookup</b> icon to select the effective date of hire from the calendar.</p> <p> <b>Note:</b> The Termination Date must reflect the employee's last day working (for example, an employee's Termination Date cannot be a vacation day).</p>						
3	<p>Click the <b>Continue Editing Form</b> button.</p> <p> <b>Result:</b> Employee information is displayed as of date of intended termination, the <b>Termination Date (Last Day Worked)</b> field becomes read only, and additional fields appear depending on the type of employee:</p> <table border="1" data-bbox="289 1083 834 1493"> <thead> <tr> <th data-bbox="289 1083 477 1136">IF...</th> <th data-bbox="477 1083 834 1136">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="289 1136 477 1314">Staff</td> <td data-bbox="477 1136 834 1314"> <ul style="list-style-type: none"> <li>• Termination Reason</li> <li>• Accrued Vacation Pay</li> <li>• Attachments</li> <li>• Comments</li> </ul> </td> </tr> <tr> <td data-bbox="289 1314 477 1493">Faculty</td> <td data-bbox="477 1314 834 1493"> <ul style="list-style-type: none"> <li>• Termination Reason</li> <li>• Exit Survey</li> <li>• Attachments</li> <li>• Comments</li> </ul> </td> </tr> </tbody> </table> <p> <b>Note:</b> If you need to edit the effective date, click the <b>Change Effective Date</b> button and return to Step 2.</p>	IF...	THEN...	Staff	<ul style="list-style-type: none"> <li>• Termination Reason</li> <li>• Accrued Vacation Pay</li> <li>• Attachments</li> <li>• Comments</li> </ul>	Faculty	<ul style="list-style-type: none"> <li>• Termination Reason</li> <li>• Exit Survey</li> <li>• Attachments</li> <li>• Comments</li> </ul>
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4	<p>Select the option that best describes the employee's termination from the <b>Action Reason</b> dropdown menu.</p>						

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5	<p>Confirm the <b>Employee Information as of (date)</b> is as anticipated.</p> <table border="1" data-bbox="289 331 1442 653"> <thead> <tr> <th data-bbox="289 331 797 384">IF...</th> <th data-bbox="797 331 1442 384">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="289 384 797 474">The information is accurate <u>AND</u> a staff member is being terminated</td> <td data-bbox="797 384 1442 474">Proceed to Step 9</td> </tr> <tr> <td data-bbox="289 474 797 564">The information is accurate <u>AND</u> a faculty member is being terminated</td> <td data-bbox="797 474 1442 564">Proceed to the next step</td> </tr> <tr> <td data-bbox="289 564 797 653">The information is not accurate</td> <td data-bbox="797 564 1442 653">Cease processing and contact HR Information Systems (<a href="mailto:hrrsys@bu.edu">hrrsys@bu.edu</a>)</td> </tr> </tbody> </table>	IF...	THEN...	The information is accurate <u>AND</u> a staff member is being terminated	Proceed to Step 9	The information is accurate <u>AND</u> a faculty member is being terminated	Proceed to the next step	The information is not accurate	Cease processing and contact HR Information Systems ( <a href="mailto:hrrsys@bu.edu">hrrsys@bu.edu</a> )
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6	<p> <b>Note:</b> This section will only appear for faculty; this will not appear for staff. If you are terminating a staff member, skip to Step 9.</p> <p><b>Additional Assignment Pop Up (Faculty with CE Assignments)</b>                      If a faculty member has an additional assignment, a popup will appear to confirm the other org units confirmed all appointments should end. If the answer is “No” the form will close and you will need to reach out to the other payroll coordinator(s) to confirm termination of the CE assignment(s).</p> <p> <b>Warning:</b> If the employee needs to remain active on payroll, do not process the Termination form. Instead, contact HR Information Systems (<a href="mailto:hrrsys@bu.edu">hrrsys@bu.edu</a>) and request the additional assignment be changed to the employee’s main assignment.</p>								
7	<p> <b>Note:</b> This section will only appear for faculty; this will not appear for staff. If you are terminating a staff member, skip to Step 9.</p> <p>In the <b>Exit Survey</b> section, select Yes or No to indicate whether the exit survey has been sent. Contact your Faculty Actions Manager or the Provost’s Office to obtain this information. They will also provide you with the applicable date if the answer is Yes.</p>								
8	<p> <b>Note:</b> This section will only appear for faculty; this will not appear for staff. If you are terminating a staff member, skip to Step 9.</p> <p>In the <b>Exit Survey</b> section, enter the <b>Job Location After Term date</b>. Contact your Faculty Actions Manager or the Provost’s Office for assistance.</p>								

Step	Action						
9	<p>Upload any relevant documentation in the <b>Attachments</b> section of the form. Please refer to the <a href="#">matrix</a> if you need assistance determining what is required for attachments.</p> <p> <b>Note:</b> The employee’s resignation or termination letter is required</p> <table border="1" data-bbox="284 430 1226 590"> <thead> <tr> <th data-bbox="284 430 748 485">IF...</th> <th data-bbox="748 430 1226 485">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="284 485 748 539">There are documents to attach</td> <td data-bbox="748 485 1226 539">Proceed to the next step</td> </tr> <tr> <td data-bbox="284 539 748 590">There are no documents to attach</td> <td data-bbox="748 539 1226 590">Proceed to Step 16</td> </tr> </tbody> </table> <p> <b>Warning:</b> do not include attachments containing sensitive information such as social security number, date of birth, etc.</p>	IF...	THEN...	There are documents to attach	Proceed to the next step	There are no documents to attach	Proceed to Step 16
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10	<p>Click the <b>Browse</b> button in the <b>Attachments</b> section.</p> <p> <b>Result:</b> The <b>Open</b> window appears.</p>						
11	<p>Navigate to the appropriate file on your computer.</p>						
12	<p>Click the title of the file.</p>						
13	<p>Click the <b>Open</b> button.</p> <p> <b>Result:</b> The filename appears in the <b>Select File:</b> field.</p>						
14	<p>Click the <b>Attach File</b> button.</p> <p> <b>Result:</b> The file now appears in the <b>Attachments</b> table.</p>						
15	<p>Repeat steps 10-14 for each attachment.</p>						
16	<p>Enter additional information in the <b>Comments</b> section for both future reference and to provide additional details to the approvers. This may include comments related to discussions with the manager, employee, etc.</p>						
17	<p>Click the <b>Review</b> button at the bottom of the page. This will check for errors on the form.</p> <p> <b>Result:</b> Error messages appear at the top of the form.</p>						
18	<p>Review the form for accuracy.</p>						

Step	Action	
19	<b>IF the form...</b>	<b>THEN...</b>
	Is accurate	Click the <b>Submit</b> button
	Requires updates	<ul style="list-style-type: none"> <li>• Click the <b>Back</b> button</li> <li>• Make any necessary updates</li> <li>• Return to step 17</li> </ul>
<p> <b>Result:</b> The form is submitted for approval via workflow. You can track the form progress through <a href="#">Request Tracker</a>. You will receive an email notification when the form is approved.</p>		
<p> <b>Warning:</b> Being able to submit the form does not mean the action is error free. A crash will show in the Request Tracker with the current agent “SAP” and a status of “Correction”. If an error exists, the form will crash and HR Information Systems will receive an automatic notification (ticket). No action is required on the part of the initiator; HRIS will follow up if additional information is needed. HR Information Systems will resolve the issue as soon as possible. Payroll critical items are handled first.</p>		