# Change In Status (CIS) Terminations Form

The Change In Status – Terminations Form has moved to the web. You can now access and complete the termination process entirely online.

Follow the instructions below to complete the CIS Termination Form.

Before you begin you'll need the following information:

- Employee ID
- Effective Date of the Employee's Termination
- Effective Date of the Job's Termination
- Termination Reason
- Last Work Date
- Attachments –
    - Leave Record,
    - Resignation Letter and/or Letter to Employee
- Leave Balances, if necessary – for annual or sick leave

1. Getting to the new CIS Termination Form
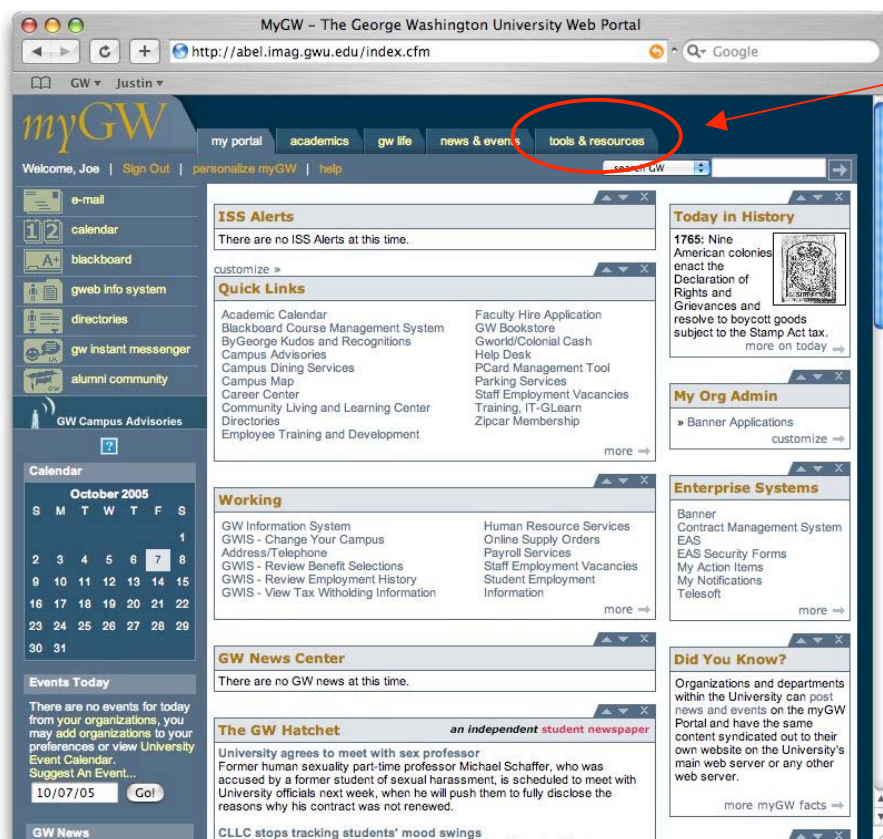
Log into the myGW portal. Click on **Tools & Resources** from the tab menu at the top of the screen.

2. Locating HR Forms

Under the HR Forms section in the right hand column, select **Change In Status – Terminations**. This will take you to the new CIS Terminations Form.

NOTE: If you do not see the form in the list provided, you can locate CIS by selecting the **More** button at the end of the list. Choosing More will give you a full list of HR Forms.

3. The Change In Status Form

This is the CIS Homepage. To begin the termination process, click **Create a Termination Form** under Terminations in the Main Menu.

4. Step 1 — Employee Information

Enter the employee's ID number in the space provided on the form. After you have entered the **Employee ID**, press the TAB key on your keyboard.

NOTE: After you enter the Employee ID, the system pulls data from Banner and populates the remaining fields of the form. (See next screen shot)

ERROR MESSAGE: If you don't have access to the employee and his/her jobs, you'll receive a Banner security access message with instructions on how to proceed.

5. Enter Employee ID

After you have entered the Employee ID, you must now choose an **Effective Date of Change**. This date is defaulted on future screens.

NOTE: Enter the Effective Date in the following format – (MM/DD/YY) or (MM/DD/YYYY). For example, June 27, 2006 would be entered as 06/27/06 or 06/27/2006.

When you have entered the correct Date of Change, click the **Save & Continue** button at the bottom of the screen.

6. Step 2 – Active Position Information

NOTE: Make sure you check the position box on the far left hand side of the screen.

In Step 2, you're asked to submit a **Job Change Reason**. Using the drop down menu, select one of the options.

NOTE: Make sure you have the correct **Termination Date** entered.

In this step you're terminating the position. **In Step 3,** you'll select the termination reason for the employee.

6. Step 2 – Labor Distribution

If you'd like to see the Labor Distribution for a position, click the **Labor Distribution** button to the right.

NOTE: Clicking the button will reveal the relevant Labor Distribution information for the position.

Press the **Save & Continue** button to proceed.

Employees with More than one Position

If an employee holds more than one position, you will see the secondary position (as in the example here) displayed as well. **However you will only see jobs for which you have access**.

You must select which job you want to terminate by putting a check mark in the appropriate boxes – here you have two options.

Select the job you wish to terminate and click **Save & Continue**.

Select the job(s) you wish to terminate.

Then choose a Job Change Reason from the drop down menu.

Click Save & Continue to proceed.

7. Part 3 – Employee Termination Information

In Part 3, you'll need to choose a **Termination Reason** (see next screen shot) from the drop down menu.

NOTE: Include outstanding **Annual and Sick Leave Balances** in the spaces provided. You will not be able to proceed if you leave these fields blank. These fields will not be visible for Faculty and non-benefited employees.

NOTE: This step terminates the employee record. You will not be able to terminate the employee without first terminating the Primary Job.

8. Choose a Termination Reason

Select a **Termination Reason** from the drop down list provided.

Again, be sure to enter the employee's **Leave Balances**.

Press the **Save & Continue** button to proceed.

Leave Balances are not required for Faculty or for non-benefited employees.

9. Step 4 – Attachments and Remarks

Step 4 asks that you include any relevant attachments to process the termination.

You have the option to upload or fax either a **Leave Record** or a **Resignation Letter**.

NOTE: Attachments are based on employee class, termination reason and benefit category. If the termination is a dismissal then an Employee Letter is requested.

10. Uploading a File

Choose the file type you wish to upload from the drop down menu. In this case, we've chosen the **Leave Record**.

To upload a file, select the appropriate record type from the drop down menu here.

Next use the **Choose File** button to locate the file you wish to upload on your computer.

Finally, be sure to click the **Add** button to complete the upload. You will notice the file is now present in the **Attachments** column under Last Paid Date. (See next screen shot).

Make sure your document has been up loaded correctly.

You'll see the document in the **Attachments** column with a check box to the right of the document if the upload was successful.

11. Faxing Leave or Resignation Letters

You may also choose the **Will Fax This Item** option.

Select the **Will Fax This Item** check box below the Choose File button.

Press the **Add** button to complete the transaction.

Make sure the **Will Fax** message appears in brackets in the Attachments column.

12. Including Remarks

You may wish to include remarks as well by clicking on the check box next to the appropriate remark. Human Resources is responsible for the maintenance of the list of remarks.

Again, be sure to click **Save & Continue** before you proceed.

13. Using the Print Fax Cover Option

Print Fax Cover will create a fax cover sheet with the needed information. (See screen shot below).

Using the Print Fax Cover feature will produce a printable record.

14. Step 5 – Approval and Notification Assignment

Step 5 requires that you notify the appropriate approvers for the termination transaction.

Use the **View** button to print a copy of the CIS Termination form for your records.

A supervisor approval is required for those positions that report to another position. "The reports to" supervisor Net ID will default into the first Supervisor Approval Field. If there is no one currently in the "reports to" position an Alternate Net ID will be required.

One way to simply notify the supervisor of the termination would be for the initiator to enter his/her own Net ID into the Alternate Net ID field.

If you'll need approval from a Dean or VP, use the drop down menu provided to route it to the correct person.

A Dean or VP Approval is only required for University Faculty. Other departments may choose to make this field required due to their procedures.

You may also elect to have notifications sent to other individuals or groups using the **Select Notifications** feature at the bottom of the screen.

When you've completed the CIS Terminations Form, be sure to click the Save & Exit button to complete your transaction.

Pressing **Save & Exit** will end your CIS Termination session and return you to the main menu. Save & Exit will allow you to save the form to return to later for modifications.

By pressing **Submit** the form will enter workflow for the approval and completion process. You will not be able to modify the form unless it is rejected by one of the approvers.

15. Options after CIS Submission

After completing the CIS Termination Form, you will be returned to the **CIS Main Menu**.

From the Main Menu screen you have the option to view **Saved, Rejected, or Submitted/Approved** Termination Forms by selecting the appropriate link under the Terminations menu.

See the screen shots below for examples of each.

Open Saved Termination Forms.

You can return to complete saved forms from a previous session.

Rejected Forms

You can view forms that you submitted for termination that were rejected by the approver.

Submitted / Approved Forms

You can view the termination forms that you submitted for approval.

If you check this checkbox **Completed forms** will appear as well.

You can check the status of each form and view the history of the submission as well.

Notifications

In Notifications you can view pending terminations that need your approval.