

Beyond - How to Deactivate and Reactivate Employee Records

Last Modified on 04/18/2024 3:41 pm CDT

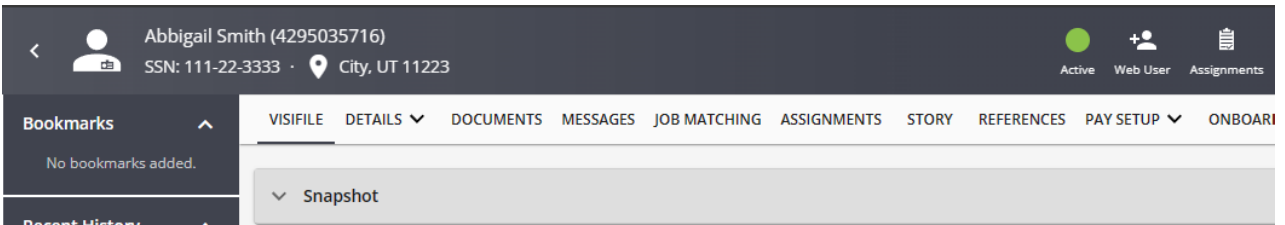
Deactivating vs Deleting

For data integrity purposes, Beyond does not allow you to truly "delete" employee records from the system. Instead, you are able to deactivate employee records. Deactivating a record will ensure that it does not show up in your every day searches and reports.


Note The user must have permission to log a message with the deactivate or reactive message action codes in order to log these messages. Beyond permissions are managed in Security Groups. To learn more, check out [Message Action Security Groups](#).

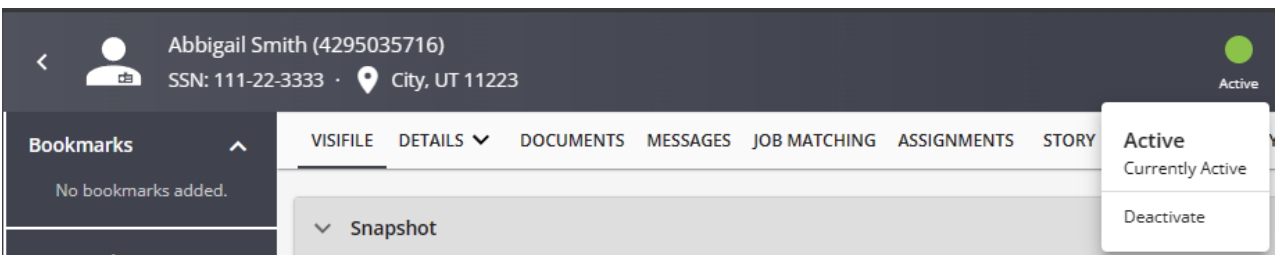
How to Deactivate Employee Records

Begin by navigating to the visifile of the employee record you wish to deactivate. The "Status" charm in the charms section of the employee record indicates whether the record is active or inactive. **If the "Status" charm is green, the record is *active*.**

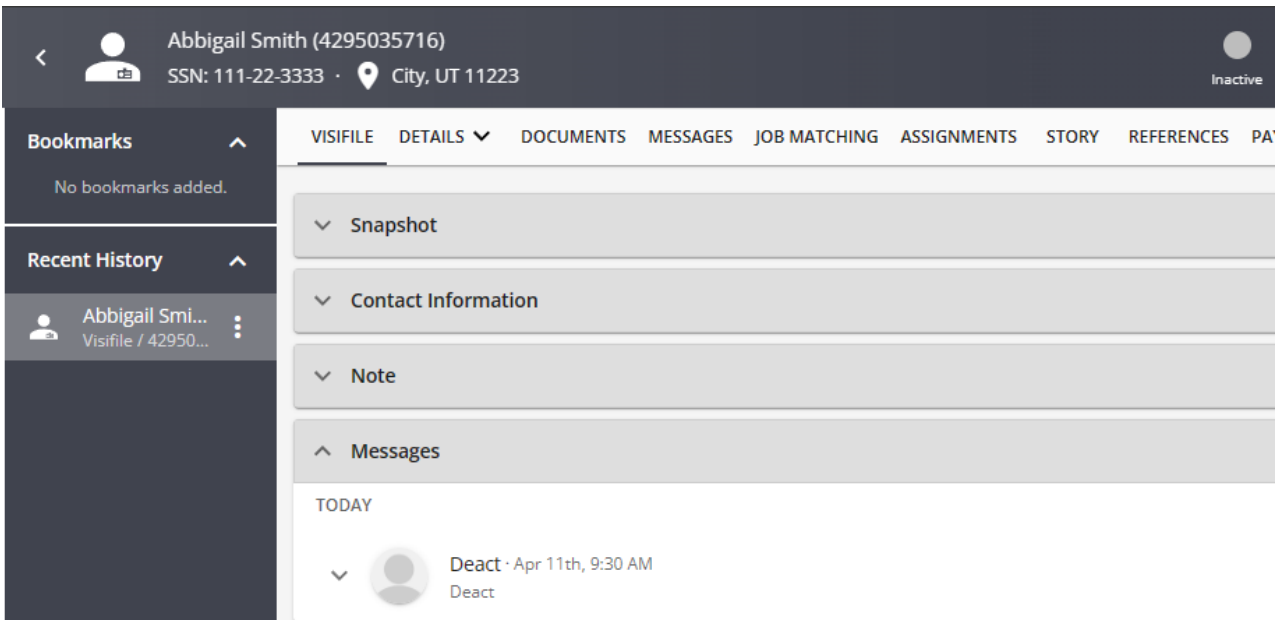



Note If the employee currently has an open assignment, the assignment must be ended before you can deactivate the employee's record.

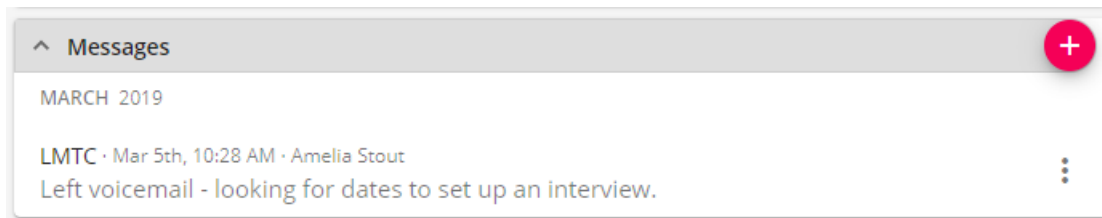
Select the "Status"  charm and then select "Deactivate":



Once selected, a "Deactivate" message will automatically be logged on the employee profile, and their Status will be updated to "Inactive":



Alternatively, in the 'Messages' card on the visifile, select the  button to open the "Compose Message" wizard:



Enter the reason for the deactivation under the message section and select the "Deactivate" action code.

Compose Message

Message

Moved away to Ireland

Action

Deactivate

Create a task

SAVE AS DRAFT

CANCEL

SUBMIT

Note Message action codes are customizable so you may have a different action code you need to select in order to deactivate. Talk with your system admin if you are unsure which action code to use.

Deactivating Employees from Search Results

Employees are able to be deactivated, en masse, from the Employee search results.

Begin by navigating to an Employee search within Beyond, searching for the employees that you would like to Deactivate, ensuring the Status is currently set to "Active" within the search:

BASIC					ADVANCED						
Last Name	First Name	Employee Id	Government Id								
Al	First										
Assigned	Status	Branch	Service Representative								
Either	Active	All	All								
<input type="button" value="RESET"/> <input type="button" value="SEARCH"/>											
Search returned 91 results											
<input type="checkbox"/>	Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned	Last Message	ZIP	Resume on file	Phone	Cell Phone
<input type="checkbox"/>	5026	Alabama	Morgan	Memphis NE	✓		React	35893	✓	(651) 235-8235x123	
<input type="checkbox"/>	4295037184	Alaska	Ally	Minneapolis	✓	✓	Placed	55123		6514520366	6514520366
<input type="checkbox"/>	16438	Alaska	Joe	Minneapolis	✓		Offered	45056	✓	6125550919	612555123
<input type="checkbox"/>	5027	Alaska	Joe	Minneapolis	✓	✓	Customer Interview	9950		(651) 236-8236x123	
<input type="checkbox"/>	4294973045	Alaska	Joe	Minneapolis	✓	✓	ACA Exchange Notific...	19131	✓	(215) 878-7877	
<input type="checkbox"/>	4295027073	Albers	Pete	Minneapolis	✓	✓	ACA Exchange Notific...	55123			
<input type="checkbox"/>	4295059137	Albertson	Ted	New Brighton	✓	✓	Order Candidate	55402			846156145

Highlight the group of Employees that are to be Deactivated:

BASIC				ADVANCED							
Last Name AI		First Name First		Employee Id				Government Id			
Assigned Either		Status Active		Branch All				Service Representative All			

RESET [SEARCH](#)

Search returned 91 results

5 selected employees [Clear Selection](#)

<input type="checkbox"/>	Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned	Last Message	ZIP	Resume on file	Phone	Cell Phone
<input checked="" type="checkbox"/>	5026	Alabama	Morgan	Memphis NE	✓		React	35893	✓	(651) 235-8235x123	
<input checked="" type="checkbox"/>	4295037184	Alaska	Ally	Minneapolis	✓	✓	Placed	55123		6514520366	6514520366
<input checked="" type="checkbox"/>	16438	Alaska	Joe	Minneapolis	✓		Offered	45056	✓	6125550919	612555123
<input checked="" type="checkbox"/>	5027	Alaska	Joe	Minneapolis	✓	✓	Customer Interview	9950		(651) 236-8236x123	
<input checked="" type="checkbox"/>	4294973045	Alaska	Joe	Minneapolis	✓	✓	ACA Exchange Notific...	19131	✓	(215) 878-7877	
<input type="checkbox"/>	4295027073	Albers	Pete	Minneapolis	✓	✓	ACA Exchange Notific...	55123			
<input type="checkbox"/>	4295059137	Albertson	Ted	New Brighton	✓	✓	Order Candidate	55402			846156145

Either Right-Click or select the dropdown menu next to the "# selected employees", select the "Log Message for # Recipients" and select the option for "Deactivate":

BASIC				ADVANCED							
Last Name AI		First Name First		Employee Id				Government Id			
Assigned Either		Status Active		Branch All				Service Representative All			

RESET [SEARCH](#)

Search returned 91 results

5 selected employees [Clear Selection](#)

<input type="checkbox"/>	Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned	Last Message	ZIP	Resume on file	Phone	Cell Phone
<input checked="" type="checkbox"/>	5026	Alabama	Morgan	Memphis NE	✓		React	35893	✓	(651) 235-8235x123	
<input checked="" type="checkbox"/>	4295037184	Alaska	Ally	Minneapolis	✓	✓	Placed	55123		6514520366	6514520366
<input checked="" type="checkbox"/>	16438	Alaska	Joe	Minneapolis	✓		Offered	45056	✓	6125550919	612555123
<input checked="" type="checkbox"/>	5027	Alaska	Joe	Minneapolis	✓	✓	Customer Interview	9950		(651) 236-8236x123	
<input checked="" type="checkbox"/>	4294973045	Alaska	Joe	Minneapolis	✓	✓	ACA Exchange Notific...	19131	✓	(215) 878-7877	
<input type="checkbox"/>	4295027073	Albers	Pete	Minneapolis	✓	✓	ACA Exchange Notific...	55123			
<input type="checkbox"/>	4295059137	Albertson	Ted	New Brighton	✓	✓	Order Candidate	55402			846156145
<input type="checkbox"/>	15850	Albin	Jamie	Memphis NE	✓		React	43078	✓	(937) 408-7243	

✉ Email 4 Recipients

📧 Log Message for 5 Recipients

👤 Make Candidates

📄 Make Job Offers

📄 Assign

🔗 Merge Record
Select up to 2 records to merge

Onboarding

Assign a New Workflow...
Assign a pre-configured workflow and optionally set the starting step or additional pages.

Assign Pages Ad Hoc...
Assign a manually-specified set of pages that are separate from existing workflows.

Message Action

Available

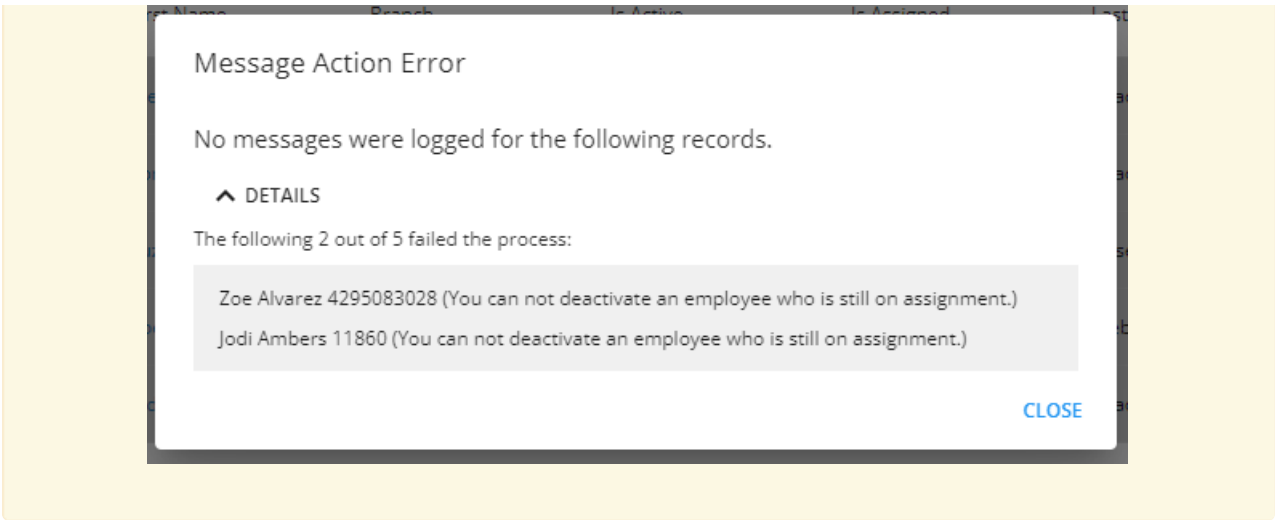
Left Message To Call

Reactivate

Deactivate

Compose other...

Note Employees that are currently Assigned are unable to be Deactivated. In the event this is attempted, you will be prompted with a message stating how the Employee records were not Deactivated and the reason why:



Once the Deactivation is complete, a message will appear at the bottom of the screen indicating the amount of records that have been successfully Deactivated:

Search returned 7607 results

3 selected employees Clear Selection

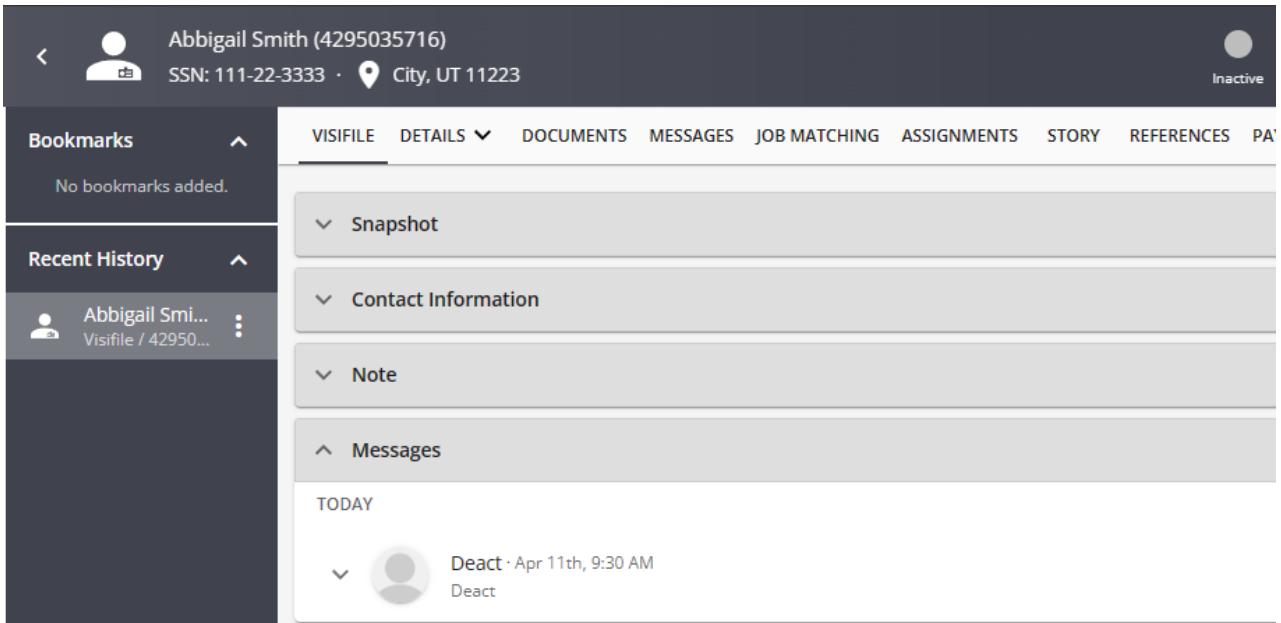
<input type="checkbox"/>	Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned	Last Message
<input checked="" type="checkbox"/>	4294971762	Altstatt	Megan	Memphis NE	✓		React
<input checked="" type="checkbox"/>	4294972294	Alvarado	Lorenzo	Minneapolis	✓		React
<input checked="" type="checkbox"/>	4295093620	Alvaran	Luz	New Brighton	✓		Absent (excused)
<input type="checkbox"/>	4295083028	Alvarez	Zoe	Eagan	✓	✓	WebMessage
<input type="checkbox"/>	11860	Ambers	Jodi	Memphis NE	✓	✓	React
<input type="checkbox"/>	4295048935	Ameliabedelia	Ameliabedelia	Minneapolis	✓		React
<input type="checkbox"/>	4295081730	Amendt	Kate	Minneapolis	✓	✓	Refused
<input type="checkbox"/>	4295083424	America	John	Minneapolis	✓		
<input type="checkbox"/>	4295079870	America	John	New Brighton	✓	✓	Order Candidate
<input type="checkbox"/>	4295083583	amia	mam	Minneapolis	✓		Placed
<input type="checkbox"/>	4295014363	Amons	Tori	Memphis NE	✓	✓	React
<input type="checkbox"/>	17309	Amons	Royal	Memphis NE	✓		React
<input type="checkbox"/>	4295081282	Anaya	Ailen				Placed

3 Deact messages logged

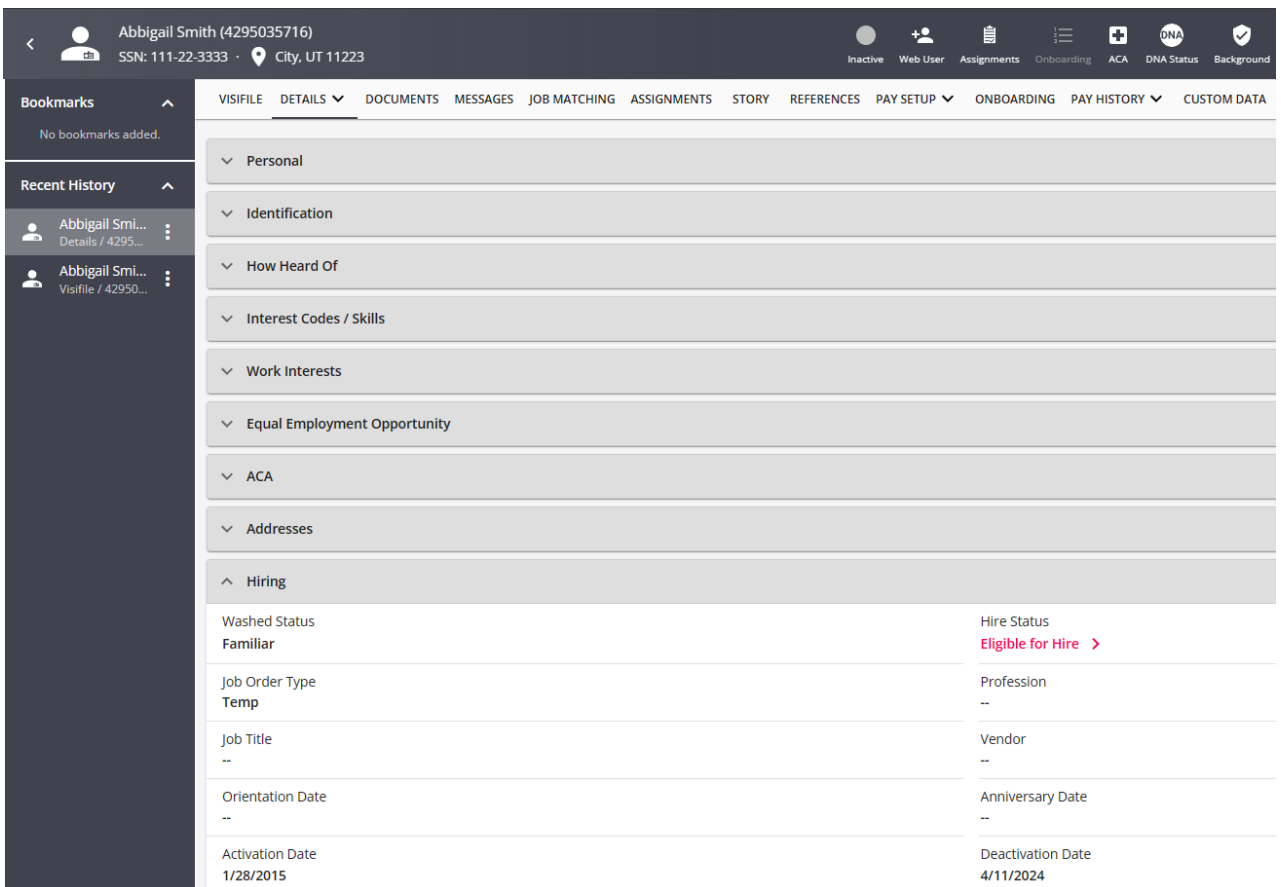
Note The Employee Search results will need to be reloaded for the employees to be removed from the list.

What Happens When a Deactivation Message is Submitted?

The activation charm status will change to *inactive and grey*.



The 'Deactivation Date' field will be populated in the hiring card of the employee records 'DETAILS' tab:



The employee will be listed as *inactive* in search results.

Note You may not assign an inactive employee. When attempting to assign an inactive employee to an order,

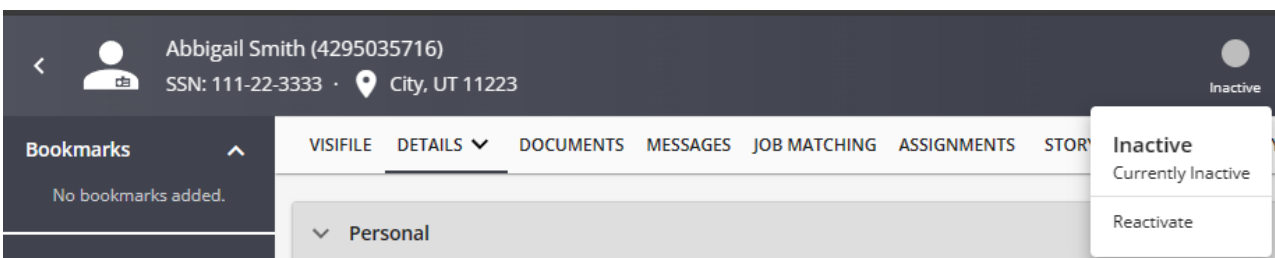
a hard stop assignment restriction will prevent you from completing the process. Before you are able to proceed with creating the assignment record, you will need to reactivate the employee record.

How to Reactivate an Employee Record

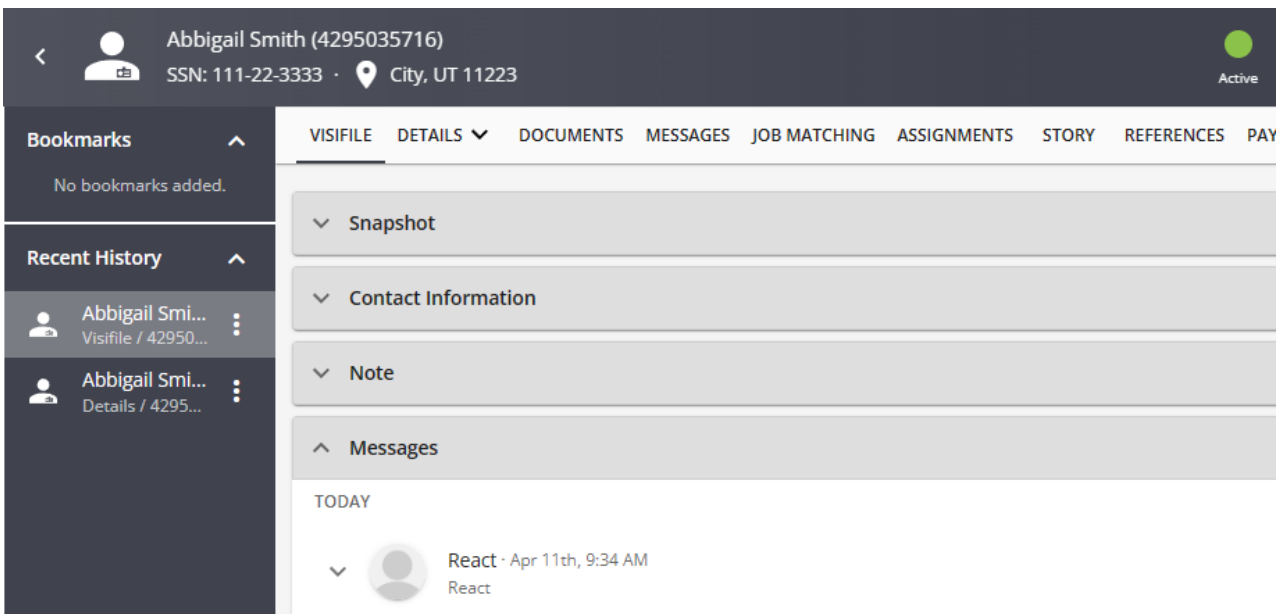
To reactivate an employee record simply follow the same steps taken to deactivate the record.

Begin by navigating to the visifile of the employee record you wish to deactivate.

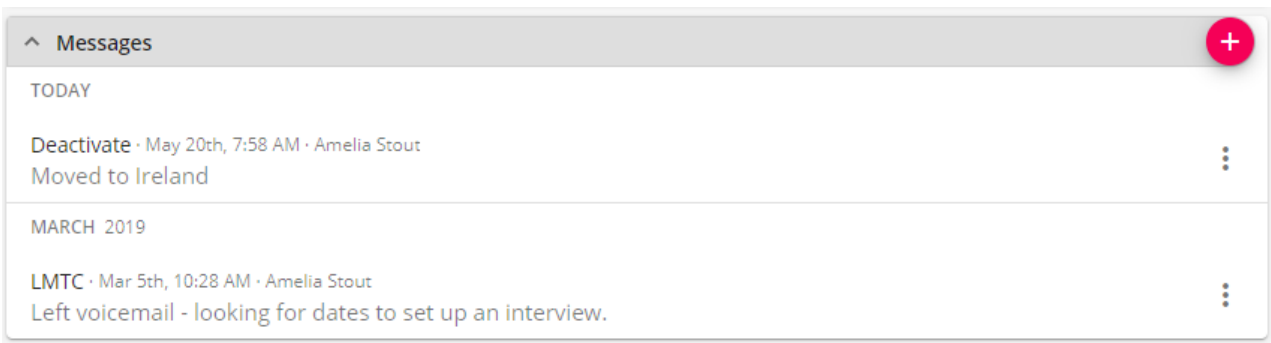
Select the "Status"  charm and then select "Reactivate":



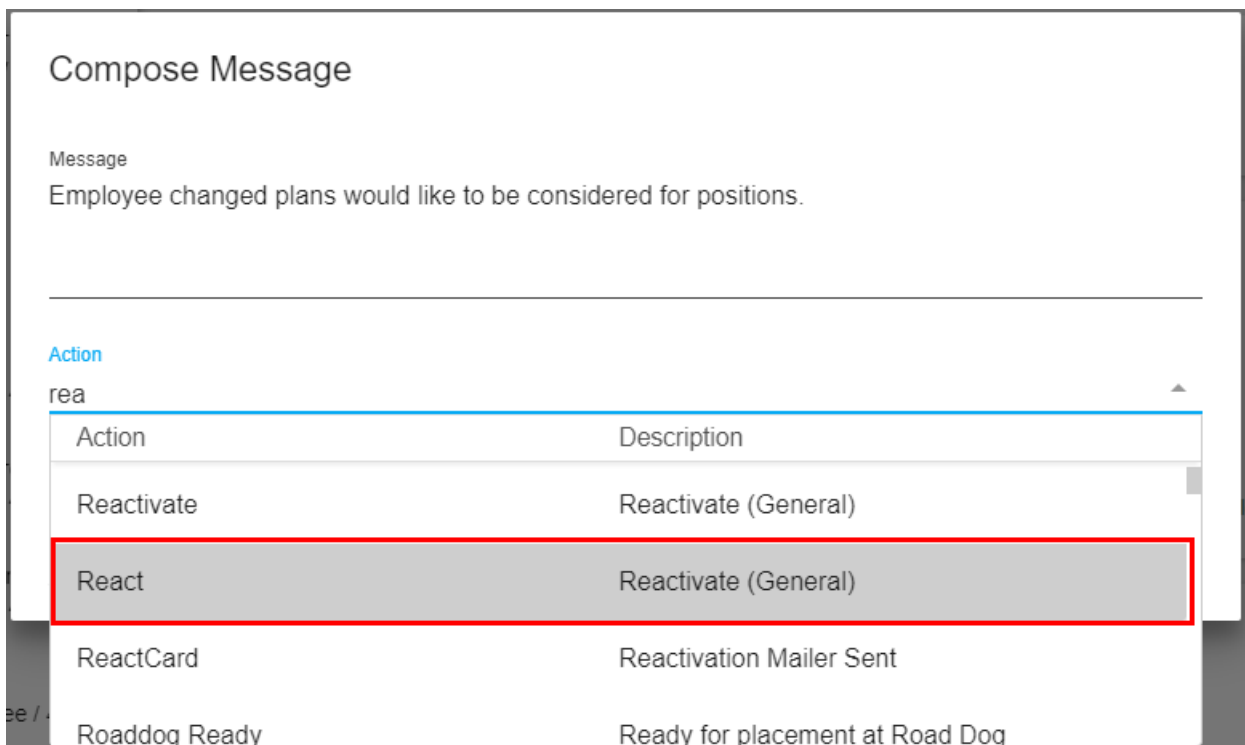
Once selected, a "Reactivate" message will automatically be logged on the employee profile, and their Status will be updated to "Active":



Alternatively, in the 'Messages' card, select the  button to open the "Compose Message" wizard:



This time, choose an *action code* that starts with "react" and fits the reason as to why you are reactivating the employee's record. You may also expand on this by entering more information into the body of your message:



Reactivating Employees from Search Results

Employees are able to be Reactivated, en masse, from the Employee search results.

Begin by navigating to an Employee search within Beyond, searching for the employees that you would like to Reactivate, ensuring the Status is currently set to "Inactive" within the search:

BASIC				ADVANCED			
Last Name Ca	First Name First	Employee Id	Government Id	Assigned Either	Status Inactive	Branch All	Service Representative All

RESET SEARCH

Search returned 66 results

Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned	Last Message	ZIP	Resume on file	Phone	Cell Phone
11908	Cable Company	Cable company	Memphis NE			Deact	55121		651-580-4580	651-703-3
4295003672	Cafferty	Luke	Minneapolis			Deact	60804			
4295038667	Cain	Claire	Minneapolis			Deactivate	97303		5039103533	503910353
4294972516	Cain	Rogelio	Minneapolis				55123			
4295015421	California	John	New Brighton			Deact	98254			
4294971767	Callahan	Norman	Memphis NE			Deact	55121			

Highlight the group of Employees that are to be Reactivated:

BASIC				ADVANCED			
Last Name Ca	First Name First	Employee Id	Government Id	Assigned Either	Status Inactive	Branch All	Service Representative All

RESET SEARCH

Search returned 66 results

5 selected employees Clear Selection

Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned	Last Message	ZIP	Resume on file	Phone	Cell Phone
11908	Cable Company	Cable company	Memphis NE			Deact	55121		651-580-4580	651-703-3
4295003672	Cafferty	Luke	Minneapolis			Deact	60804			
4295038667	Cain	Claire	Minneapolis			Deactivate	97303		5039103533	503910353
4294972516	Cain	Rogelio	Minneapolis				55123			
4295015421	California	John	New Brighton			Deact	98254			
4294971767	Callahan	Norman	Memphis NE			Deact	55121			
5217	Callahan	Rachel	Memphis NE				55123	✓	651-426-4426	651-549-3

Either Right-Click or select the dropdown menu next to the "# selected employees", select the "Log Message for # Recipients" and select the option for "Reactivate":

BASIC				ADVANCED			
Last Name Ca	First Name First	Employee Id	Government Id	Assigned Either	Status Inactive	Branch All	Service Representative All

RESET SEARCH

Search returned 66 results

5 selected employees Clear Selection

Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned	Last Message	ZIP	Resume on file	Phone	Cell Phone
11908	Cable Company	Cable company	Memphis NE			Deact	55121		651-580-4580	651-703-3
4295003672	Cafferty	Luke	Minneapolis			Deact	60804			
4295038667	Cain	Claire	Minneapolis			Deactivate	97303		5039103533	503910353
4294972516	Cain	Rogelio	Minneapolis				55123			
4295015421	California	John	New Brighton			Deact	98254			
4294971767	Callahan	Norman	Memphis NE			Deact	55121			
5217	Callahan	Rachel	Memphis NE				55123	✓	651-426-4426	651-549-3
17345	Calway	Etie	Memphis NE				55123		(952) 368-5555	(952) 201-5

5 selected employees

- Email
- Log Message for 5 Recipients**
- Make Candidates
- Make Job Offers
- Assign
- Merge Record
Select up to 2 records to merge

Onboarding

- Assign a New Workflow...
- Assign Pages Ad Hoc...

Message Action

- Available
- Left Message To Call
- Reactivate**
- Deactivate
- Compose other...

Once the Reactivation is complete, a message will appear at the bottom of the screen indicating the amount of records that have been successfully Reactivated:

Search returned 15053 results

5 selected employees Clear Selection

<input type="checkbox"/>	Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned
<input checked="" type="checkbox"/>	4295037857	Candidate	Mister	Minneapolis		
<input checked="" type="checkbox"/>	4294972436	Cannon	Davion	Minneapolis		
<input checked="" type="checkbox"/>	4295015911	Cannon	Skylar	Minneapolis		
<input checked="" type="checkbox"/>	4295038797	Capone	Allen	Minneapolis		
<input checked="" type="checkbox"/>	4295026940	Car	Carol	Minneapolis		
<input type="checkbox"/>	16134	Carbajal	Sharmaine	Minneapolis		
<input type="checkbox"/>	16444	Carbondale	Elizabeth	Minneapolis		
<input type="checkbox"/>	4295015761	Cardwell	Becky	Memphis NE		
<input type="checkbox"/>	4295003620	Caril	Ryan	Minneapolis		
<input type="checkbox"/>	4294971696	Carleo	Malik	Memphis NE		
<input type="checkbox"/>	4295037338	Carley	Monica	Minneapolis		
<input type="checkbox"/>	12628	Carlton	Jesse	Minneapolis		
<input type="checkbox"/>	15843	Carpenter	Kelley	Minneapolis		

5 React messages logged

Note The Employee Search results will need to be reloaded for the employees to be removed from the list.

What Happens When a Reactivation Message is Submitted?

The "Status" charm status will change to *active and green*.

Abbigail Smith (4295035716)
SSN: 111-22-3333 · City, UT 11223

Active

Bookmarks
No bookmarks added.

Recent History

- Abbigail Smi...
Visifile / 42950...
- Abbigail Smi...
Details / 4295...

VISIFILE DETAILS DOCUMENTS MESSAGES JOB MATCHING ASSIGNMENTS STORY REFERENCES PAY

Snapshot

Contact Information

Note

Messages

TODAY

React · Apr 11th, 9:34 AM
React

The employee will be listed as *active* in search results.

Searching For Employees By Status

If you need to find an employee record that may be active or inactive, you can toggle your options in a basic employee search.

BASIC ADVANCED

Last Name
Last

First Name
First

Employee Id

Government Id

Assigned
Either

Status
Active

Branch
All

Service Representative
All

RESET SEARCH

In Advanced Searching, you can also indicate whether you want active employees by adding the Is Active rule. True would mean only active employees and False would mean only inactive.

NOT AND OR

Is Active

IS TRUE

IS TRUE

IS FALSE

Show in results

RULE / GROUP

SAVE

To learn more about searching, check out [Beyond - Advanced Searching](#)

Related Articles
