

# Arkansas State Employee Offboarding Process Initiator Guide

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# Overview

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The Employee Offboarding Workflow should be submitted for any employee who is leaving employment or has not worked in the past 90 days. It is highly recommended to submit the Workflow no more than 2 weeks prior to the last work day for all employees leaving the University.

**A workflow should not be submitted for the following:**

- Faculty who are teaching two or more consecutive semesters
- Overload Assignments – contact Payroll Services at 972-2293
- **Employee transfers** –transfers should be submitted in Taleo.

## Employees, non-employees, and privatized employees

1. Return all university-owned property to your supervisor as early as possible prior to your last day of work.
2. Submit all leave time.
3. Pay off any travel advances and/or other outstanding balances online or at the Cashier's Window.
4. Payroll Services will not release your last pay check until Items 1, 2, and 3 are completed.
5. Contact Human Resources for any questions regarding continuation of benefits through COBRA.

## Department Initiators/Supervisors

1. Ensure all university-owned property has been returned and leave time has been submitted.
2. Initiate the offboarding workflow via [my.AState](#).
3. Click on the Workflow icon.
4. Under User Profile, click on My Processes and the ASU\_TERMINATION\_PROCESS link.
5. Review, complete, and approve the workflow.

## Additional Information

- Upon receiving the email notification for the employee's offboarding, Human Resources will begin the process for terminating benefits.
- Eligible employees who have accrued annual leave shall be issued a vacation payout check not to exceed 240 hours or the balance in the employee's annual leave account, whichever is less. This check will be processed by Payroll and be issued within 30 days of completing the checkout process.

# Department Initiator

1. Log in to <https://my.astate.edu/>.
2. Click on the Workflows icon.
3. In Workflow, click on My Processes under the User Profile menu.
4. Click on the ASU Termination Process link.

Home

- Worklist
- Workflow Status Search
- Workflow Alerts

User Profile

- My Processes

My Processes

Root

[ASU\\_TERMINATION\\_PROCESS](#)

5. Enter the Employee's name in the Workflow Specifics Name field.
6. Enter the Employee's ID in the Required Parameters field.
7. Click on Start Workflow.

Start Workflow

Logoff Help

Organization: Root  
Workflow Name: ASU\_HPE\_TERMINATION\_PROCESS-8:5  
Workflow Specifics Name:   
Priority: Normal  
Workflow Note:   
Required Parameters  
\* Employee\_ID:   
Start Workflow Reset Cancel

8. Click OK.
9. Click on the Worklist icon in the Home menu to refresh the Worklist if the EMP TERMINATION FORM activity does not appear immediately.
10. Click on the activity link.

Worklist

Logoff Help

Organization	Workflow	Activity	Priority	Created
Root	Traci Ellington Ready	EMP TERMINATION FORM	Normal	20-May-2013 01:30:25 PM

Show Reserved Item

11. Verify the Employee's information is accurate at the top of the Employee Offboarding Form. This information is pulled from Banner and may require some changes.
12. Enter the 4 digit department extension number if the Department Phone Number field is blank OR if the Initiator's extension is different than Department Phone Number listed.
13. Complete the required fields marked with an asterisk.
14. To select the employee's late day of work date and last paid date, click on the date button.
15. Click on the Complete button to submit the workflow.

## Invalid ID Error

If the Employee ID entered is invalid, the initiator will receive an email notification stating the workflow has been stopped. The initiator must submit a new Workflow with the correct ID. Contact Payroll Services to confirm the ID, if necessary.



workflow@astate.edu

Traci Ellington

Employee termination has been stopped

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Traci,

The termination submitted for 01548795165 has been stopped because the ID is invalid.

Please verify the ID in Banner and submit a new [Workflow](#). Contact Human Resources at 972-3454 for assistance.

The workflow may also stall if the ID is valid but does not belong to the employee and the ID doesn't have any employment data. In this case, one of the Workflow Administrators may reach out to let the initiator know the ID was incorrect and to contact Payroll Services to get the correct ID.

# Sample Offboarding Form

Worklist

## Employee Offboarding Form

Hide Menu Logoff Help

**Name:** Traci Renea Ellington  
**Employee ID:** 10309826  
**ASU E-mail Address:** tellington@astate.edu  
**Phone Number:** (870) 210-0748  
**W-2 Mailing Address:** 3300 Willow Ln Paragould, AR 72450  
**Supervisor's E-mail Address:** mgoodwin@astate.edu  
**Department:** Controller  
**Department Phone Number:** (870) 972-3261  
**Home Organization:** 311011  
**Position Number and Title:** A00076 Project Program Specialist  
**Student Worker?** N  
**Benefited Employee?** Y  
**International?** N  
**Graduate Assistant?** N

**Complete the following fields:**

Enter your 4 digit extension:

\* Enter the Dean/Department Head's E-mail:

\* Enter the employee's last day of work:

\* Last day to be paid:

\* Select reason for leaving University:

\* Is employee transferring to another state agency within Arkansas?:

\* Is any portion of the employee's salary paid from a grant?:

\* Is the employee responsible for a research lab or clinic?:

\* Will the employee retain any university property through their last day of work?:

**Has the employee returned the following items? Select N/A if not applicable.**

\* University cell phone?:

\* Technology devices, such as Laptops and iPads?:

List the type of technology device and the ASU tag number:

\* Computer accessories or peripherals (examples include storage devices, computer/laptop mouse, keyboard, hot spot, etc):

\* Artwork?:

List the artwork being used by the employee:

\* Library property, such as books and media?:

\* Purchasing Card?:

\* Travel Card/Department Card?:

\* Building and room keys?:

List other items here:

Enter other comments:

Vol-Eligible for Rehire

No

No

No

No

No

No

No

No

No

No

No

Complete Save & Close Cancel

# What happens after submission

This section provides information about the departments and areas that are notified after the initiator completes the Offboarding form.

## Employee Notification – List of Property

The employee is notified when the workflow is initiated. This email lists the initiator’s responses in regard to university property. The employee is responsible for returning all property by their last day of work. This email also includes the initiator and employee’s supervisor.



workflow@astate.edu

Traci Ellington

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List of Property for Traci Renea Ellington

Please contact Payroll Services if the personal email or W2 address should be updated.

Employee personal email:	[REDACTED]
Employee W2 address:	[REDACTED]

Please review the following responses to the questions below. You are responsible for returning all university property and submitting all outstanding leave time by your last day of work 31-OCT-23. The initiator entered 31-OCT-23 as your last paid date.

University Property Status:		
Maintain property through last day of work?	Yes	
University cell phone?	N/A	
Technology devices?	No	Surface Pro H15786, docking station
Computer accessories or peripherals?	No	
Artwork?	N/A	
Library property?	N/A	
Purchasing Card?	N/A	
Travel Card/Department Card?	Yes	
Building or room keys?	No	
Additional property?	Key to office, outside doors	

## **HR/Payroll Notification – Terminating the Job/Employee**

Human Resources and Payroll Services are notified when the Initiator completes the Employee Offboarding form.

## **AOS Access Verification**

When the employee also works as an academic assistant for ASTATE online courses, AOS will be notified to confirm if the employee should retain system access or not.

## **ITS Notification – Inactivate/Terminate Access**

Information Technology Services and other areas responsible for access are notified after the Initiator completes the Employee Offboarding form or AOS confirms if the employee needs to maintain access as an Academic Assistant.

Communication Services will lock the Active Directory account.

Other areas in ITS responsible for access and security will lock the employee's Banner and other third party accounts.

## **Check Out Departments**

The following departments will review the check out form and notify the employee, initiator, and supervisor of any property that still needs to be returned:

- **Library**
- **\*Procurement Services**
- **\*Travel Services/Athletic Finance Control**
- **Facilities Management**
- **ID Center**

\*If the employee is a student worker, Procurement Services and Travel Services/Athletic Finance Control are bypassed.



When Library, Procurement Services, or Facilities Management acknowledges there is outstanding property, an e-mail is sent to the initiator, employee, and supervisor for review.

When Travel Services/Athletic Finance Control acknowledges a balance is owed, an email is also sent to University Accounts to apply the charge for the outstanding travel advance.

## Summary Property E-mails

Once the departments have finished reviewing their check out form and determined if there is still property outstanding a summary e-mail will be sent to the Initiator, employee, and supervisor.

---

 workflow@astate.edu |  Traci Ellington 3:59  
Check out returned for workflow of Traci Renea Ellington, 10309826

---

The following items must be returned and balance paid in full by the employee's last day of work 31-OCT-23.

Employee Name: Traci Renea Ellington  
Employee ID: 10309826  
Department: Controller  
Department Phone Number: (870) 972-3261  
Position Number and Title: A00076 Project Program Specialist  
Last Paid Date: 31-OCT-23

The initiator should not resubmit the workflow until all items have been returned. Contact Human Resources at 972-3454 immediately if the employee does not respond to returning the property.



Check Out Review:	
Library property not returned:	Projector
Purchasing Card not returned or destroyed:	No
Travel Card/Department Card not returned or destroyed:	No
Advance amount owed:	\$125
Keys not returned:	Admin Bldg stairwell and Rm 231

1. The initiator should log back into Workflow once the employee has returned the outstanding property.
2. Update the offboarding form with the items that have been returned and recomplete the form.
3. The departments that returned the workflow will receive a second notification to review and recomplete their forms.

## Property Returned

The Initiator and employee will receive this notification e-mail when the departments have completed their review and verified all property due has been returned and the ID card access was removed.

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 workflow@astate.edu |  Traci Ellington 4:17 P  
Offboarding review for Traci Renea Ellington, 10309826 completed

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The check out portion of this workflow has been completed. The workflow has routed to the supervisor for review.

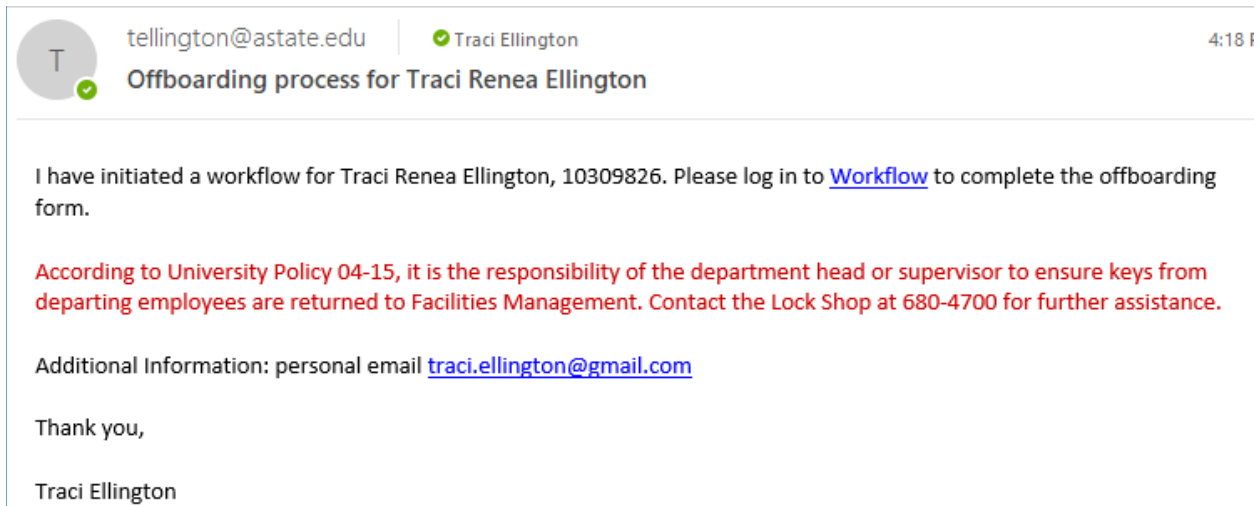
The workflow is now ready for the Supervisor's review and approval.



## Supervisor

The supervisor information is pulled from the employee's NBAJOBS record. The supervisor's email is displayed on the Employee Offboarding form. The workflow will become stalled if the supervisor is no longer employed with the university and their record has been inactivated. If the supervisor has left the university or is no longer a supervisor the workflow can be redirected by contacting Payroll Services.

For student workers, supervisors receive an email notification instead of having to review the Offboarding form.



The supervisor should review the information carefully to make sure the information is accurate; the employee has returned all university property, submitted time or leave, and paid their balance due to the university. The supervisor can make changes to the workflow form.

## ORTT Notification-Research Lab/Clinic

The Office of Research & Technology Transfer (ORTT) is notified that the offboarding employee may be responsible for a research lab or clinic. ORTT may begin their internal check out/offboarding procedures.

## Review Account Balances

The workflow automatically reviews the employee's account after the workflow is approved.

- An email notification will be sent to University Accounts when the employee owes a balance. The responsible person will review the charges and submit the appropriate amount to Payroll Services.
- When the employee has a credit balance, an email notification is sent to University Accounts to begin the refund process. The workflow process continues to send out the final e-mail notifications until it is completed.
- When the employee has a zero balance, an email notification is sent to University Accounts. The workflow process continues to send out the final e-mail notifications until it is completed.

## **Payroll/Benefits Office/University Accounts Procedures**

Payroll will receive an email notification to calculate leave balances and/or hold the last regular check.

**Scenario 1:** If the employee is benefited and there is an excess amount of vacation hours, Payroll will enter the amount and submit the workflow form. If the employee is non-benefited, but is still owed a last regular check, Payroll will enter the amount and submit the form. HR will receive an email notification to set up a deduction for the total amount owed.

**Scenario 2:** If the amount entered will only pay a portion of the amount owed to the University, HR will set up the maximum deduction amount allowed. University accounts will receive an email notification to acknowledge the outstanding balance and is responsible for future billings.

**Scenario 3:** If the employee is not eligible for a vacation payout or final check, Payroll will note this on the workflow form. University Accounts will receive an email notification to acknowledge the outstanding balance and is responsible for future billings.

Payroll will process a paper check for the final regular payment and will send the check to the Cashier's Office.

## Final E-mail Notification - Workflow Complete

The initiator, supervisor, dean or department head will receive the following email notification once the workflow is completed. The Vice Chancellors within the divisions of Academic Affairs and Research and Student Affairs will receive a separate email notification, as well.



workflow@astate.edu

✔ Traci Ellington

### Offboarding process completed for Traci Renea Ellington

The workflow for this employee is complete. For questions, please call Human Resources at 972-3454.

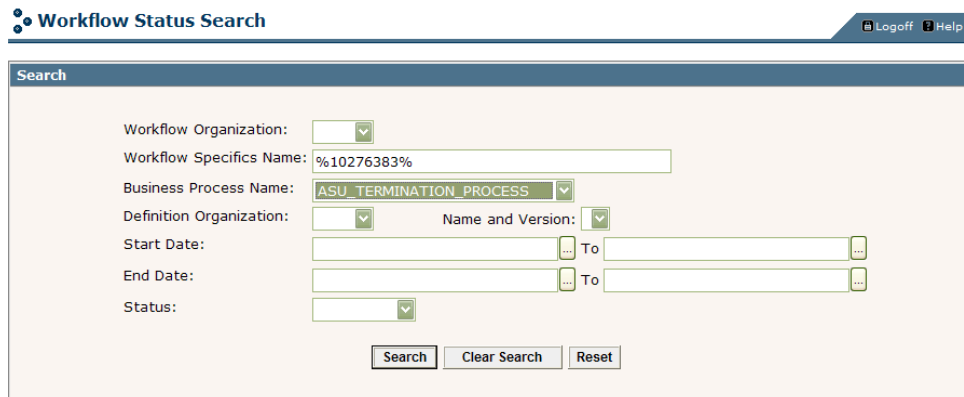
Name:	Traci Renea Ellington
ID Number:	10309826
Position Number and Title:	A00076 Project Program Specialist
Department:	Controller
Last Day of Work:	31-OCT-23
Last Paid Date:	31-OCT-23
Reason for leaving University:	Vol-Eligible for Rehire
Supervisor:	Traci Ellington, <a href="mailto:tellington@astate.edu">tellington@astate.edu</a>
<b>Check Out Review:</b>	
Library:	Traci Ellington, <a href="mailto:tellington@astate.edu">tellington@astate.edu</a>
Library property assigned:	
Library property not returned:	
Procurement Services:	Traci Ellington, <a href="mailto:tellington@astate.edu">tellington@astate.edu</a>
Purchasing Card returned or destroyed?	Yes
Travel Services/AFC:	Traci Ellington, <a href="mailto:tellington@astate.edu">tellington@astate.edu</a>
Travel Card/Department Card returned or destroyed?	Yes
Advance amount owed:	\$
Facilities Management:	Traci Ellington, <a href="mailto:tellington@astate.edu">tellington@astate.edu</a>
Keys not returned:	
ID Center:	Traci Ellington, <a href="mailto:tellington@astate.edu">tellington@astate.edu</a>
ID access removed:	
University Accounts:	Traci Ellington, <a href="mailto:tellington@astate.edu">tellington@astate.edu</a>
Remaining Account Balance:	\$15

# To Check on the Status of a Workflow:

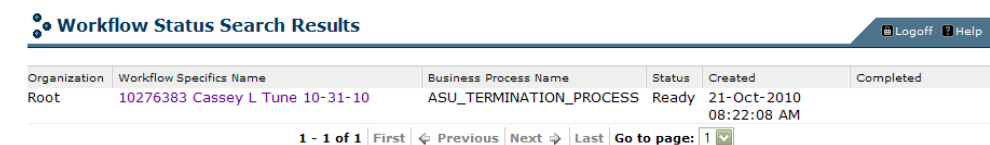
1. Log in to <https://my.astate.edu/>.
2. Click on the Workflows icon.
3. The Worklist window opens. Click on Workflow Status Search.



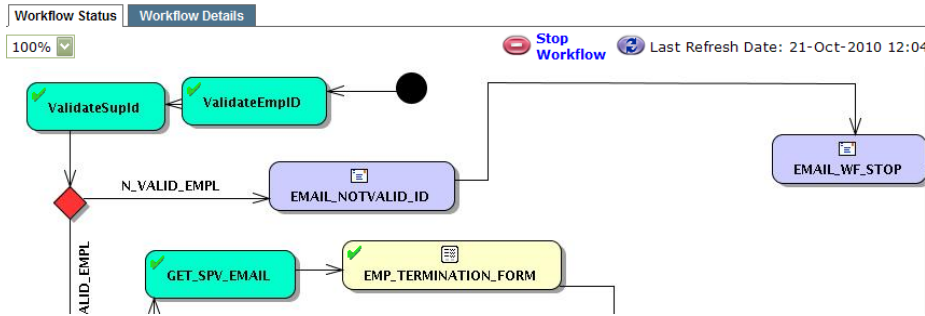
4. You may search by the employee's ID, name, or termination date. Enter the "%" before and after the text.
5. Select ASU\_TERMINATION\_PROCESS from the Business Process Name drop-down field.
6. Click on the Search button.



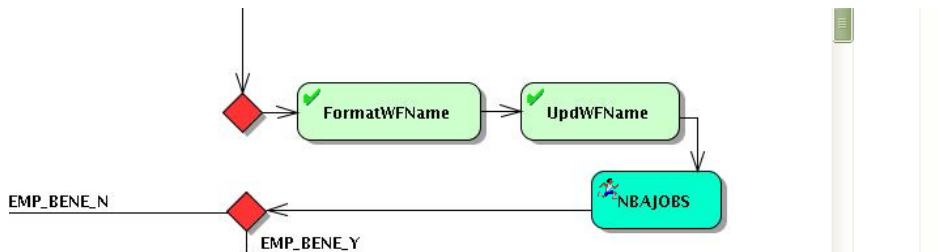
7. Click on the Workflow hyperlink to open the activity.



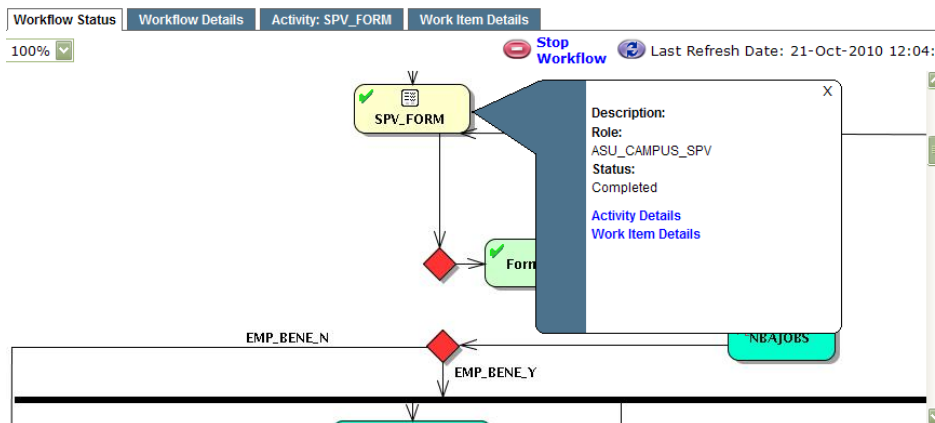
8. The workflow diagram displays. You can use the scroll bars to follow the diagram. If a green checkmark displays in the activity, the activity has been completed.



9. If a “running man” displays in the activity, the activity is waiting for that activity to be completed.



10. To see the performer of the task, click on the Item task, and a window will pop up. Click on Work Item Details.



Performer's ID:

User Profile		Workflow Status		Workflow Details		Activity: SPV_FORM		Work Item Details	
My Processes		100%		Stop Workflow		Last Refresh Date: 21-Oct-2010 12:04:11 PM			
User Information									
Change Password									
<b>Administration</b>		<b>Details</b>							
Business Component		Organization:		Root		Created:		21-Oct-2010 08:29:57 AM	
Catalog		Activity Name:		SPV_FORM		Completed:		21-Oct-2010 08:55:45 AM	
Enterprise Management		Type:		Mandatory		Estimated Time:		00:00	
User Management		Description:				Actual Time:		00:17	
Role Management		Ownership:				Elapsed Time:		00:25	
Business Events		Role:		ASU_CAMPUS_SPV		Lagging Date:			
Work Calendars		Activity Status:		Completed		Expected Completion		Date:	
		Performer:		tellington					
		Directed User:		tellington					
		Activity ID:		4279888					