

Arkansas State

Employee Offboarding Process

User Guide

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Overview

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

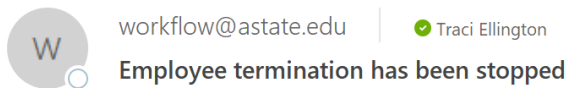
Organization	Workflow	Activity	Priority	Created
Root	Traci Ellington Ready	EMP TERMINATION FORM	Normal	20-May-2013 01:30:25 PM

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.



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

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

11

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.



tellington@astate.edu

Traci Ellington

Offboarding initiated for Traci Renea Ellington

A offboarding workflow has been initiated for Traci Renea Ellington.

Employee ID: 10309826

Department: Controller

Department Phone Number: (870) 972-3261

Initiator's Phone Extension:

Position Number: A00076

Last Day of Work: 31-OCT-23

Last Paid Date: 31-OCT-23

Reason for Leaving the University: Vol-Eligible for Rehire

Transferring to another state agency? No

Initiator Comments: personal email traci.ellington@gmail.com

Supervisor E-mail: mgoodwin@astate.edu

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	

The Compensation Manager will terminate the job and the Benefits/Deductions Coordinator will inactivate Payroll Accounts on GXADIRD.

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.

1. Click on the Workflow link in the email to log in.

Subject: Termination for Traci Renea Ellington - Academic Assistant access

Please log in to [Workflow](#) to confirm Traci Renea Ellington, 10309826, should retain access as an Academic Assistant.

2. If the employee will be teaching AOS courses in the current or future term, select Employee needs to maintain their system access.
3. If the employee will not be teaching AOS courses in the current or future term, select Employee does not need to maintain their system access.

Academic Assistant Access Verification

Name:	Traci Renea Ellington
Employee ID:	10309826
Department:	BANNER Technical Support Office
Last Day of Work:	24-AUG-13
Termination Date:	31-AUG-13

- *
- Employee needs to maintain their system access.
 - Employee does not need to maintain their system access

Comments:

4. Enter comments about access, if necessary
5. Click on Complete. Exit Workflow.

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.

 tellington@astate.edu |  Traci Ellington 10:17
Offboarding process initiated for Traci Renea Ellington

Traci Renea Ellington will be leaving employment with the University. The employee's access needs to expire effective 31-OCT-23. The employee's final date of employment is 31-OCT-23.

Employee ID: 10309826
Employee E-mail: tellington@astate.edu
Department: Controller
Department Phone Number: (870) 972-3261
Position Number: A00076
Maintain access as an Academic Assistant?
LSDE Comments:

University cell phone? N/A

Department Contacts:

Initiator: tellington@astate.edu
Initiator's Phone Extension:
Supervisor: mgoodwin@astate.edu

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.

Library

1. Click on the Workflow link in the email.

 tellington@astate.edu |  Traci Ellington 10:
Offboarding for Traci Renea Ellington - Check out review needed

Please log in to [Workflow](#) to complete the check out form for Traci Renea Ellington, 10309826. Any university property in the employee's possession must be returned by their last day of work 31-OCT-23.

Response submitted by initiator:

Has the employee returned all Library property? N/A

2. Enter your User ID (full email address) and Password.
3. Review the employee's information.

Library Check Out Form

Name:	Traci Renea Ellington
Employee ID:	10309826
Initiator's E-mail Address:	tellington@astate.edu
Supervisor's E-mail Address:	mgoodwin@astate.edu
Department:	Controller
Department Phone:	(870) 972-3261
Initiator's Phone Extension:	
Last Day of Work:	31-OCT-23
Last Paid Date:	31-OCT-23
Has the employee returned all Library property?	N/A
Maintain property through last day of work?	Yes

Enter the Library property checked out by employee:

Enter the Library property the employee has not returned:

*

- Employee has returned Library property.
 Employee has not returned Library property.
 Employee does not have Library property.

4. Enter the property that the employee checked out, if any.
5. Enter the property that the employee has not returned, if any.
6. If the property has been returned, select Employee has returned Library property.

7. If not, select Employee has not returned Library property.
 - a. An email will be sent to the initiator, employee and supervisor listing the property not returned.



tellington@astate.edu

Traci Ellington

2:3

Offboarding for Traci Renea Ellington - Reviewed by Library

The workflow for Traci Renea Ellington, 10309826, will not be completed until the following items are returned as of the last day of employment.

Library property not returned? Projector

Thank you,



Traci Ellington

8. If the employee did not check out any Library property, select Employee does not have Library property.
9. Click on Complete. Exit Workflow.

When the initiator recompletes the workflow form, you will receive a second notification to verify if the property was returned. If the property is still outstanding, email Andrea so they can enter the amount for the unreturned property in Voyager. All fines are fed from Voyager to Banner on a nightly basis.

Procurement

1. Click on the Workflow link in the email.

 tellington@astate.edu |  Traci Ellington 10:18 AM
Offboarding process for Traci Renea Ellington - Check out review needed ▼

Please log in to [Workflow](#) to complete the check out form for Traci Renea Ellington, 10309826. Any university property in the employee's possession must be returned by their last day of work 31-OCT-23.

Response submitted by initiator:

Has the employee returned assigned P-Card? N/A

2. Enter your User ID (full email address) and Password.
3. Review the employee's information.

Worklist


Procurement Check Out Form

Name:	Traci Renea Ellington
Employee ID:	10309826
Initiator's E-mail Address:	tellington@astate.edu
Supervisor's E-mail Address:	mgoodwin@astate.edu
Department:	Controller
Department Phone:	(870) 972-3261
Initiator's Phone Extension:	
Last Day of Work:	31-OCT-23
Last Paid Date:	31-OCT-23
Has the employee returned or destroyed assigned P-Card?	N/A
Maintain property through last day of work?	Yes

* P-Card Approvals

- Employee has returned assigned P-Card.
- Employee has not returned assigned P-Card.
- Employee is not responsible for a P-Card.

4. If the P-Card has been returned, select Employee has returned assigned P-Card.
5. If not, select Employee has not returned assigned P-Card.
 - a. An email will be sent to the initiator, employee, and supervisor to notify them the P-Card still needs to be turned in.

 tellington@astate.edu |  Traci Ellington
Offboarding process for Traci Renea Ellington - Reviewed by Procurement

The workflow for Traci Renea Ellington, 10309826, will not be completed until the following items are returned as of the last day of employment.

P-Card not returned? No

Thank you,

Traci Ellington

6. If the employee is not responsible for the P-Card, select Employee is not responsible for a P-Card.
7. Click on Complete. Exit Workflow.

When the initiator recompletes the form, you will receive a second notification to verify if the P-Card was returned.

Travel Services/Athletic Finance Control

1. The email notification will include the employee's department. Use this to determine who should process the termination.
2. Click on the Workflow link in the email.



tellington@astate.edu

Traci Ellington

10:18 A

Offboarding process for Traci Renea Ellington - Check out review needed

Please log in to [Workflow](#) to complete the check out form for Traci Renea Ellington, 10309826. Any university property in the employee's possession must be returned by their last day of work 31-OCT-23.

Response submitted by initiator:

Has the employee returned or destroyed assigned Travel Card/Department Card? Yes

Department orgn: 311011

Department: Controller

3. Enter your User ID (full email address) and Password.
4. Review the employee's information.

Worklist

Travel/AFC Check Out Form

Hide Menu Logoff

Name:	Traci Renea Ellington
Employee ID:	10309826
Initiator's E-mail Address:	tellington@astate.edu
Supervisor's E-mail Address:	mgoodwin@astate.edu
Department:	Controller
Department Phone:	(870) 972-3261
Initiator's Phone Extension:	
Last Day of Work:	31-OCT-23
Last Date Paid:	31-OCT-23
Has the employee returned or destroyed assigned Travel Card/Department Card?	Yes
Maintain property through last day of work?	Yes

Check Concur to make sure traveler has not open Expense Reports or outstanding card transactions. Have department contact cpi-security@astate.edu to add a delegate to submit on employees behalf.

* Travel Card/Department Card Approvals

- Employee has returned or destroyed assigned Travel Card/Department Card
- Employee has not returned or destroyed assigned Travel Card/Department Card
- Employee is not responsible for a Travel Card/Department Card

*

- Employee does not owe a previous travel advance
- Employee owes a previous travel advance

Enter travel advance owed by employee:

5. If the T-Card/Dept Card has been returned or destroyed, select Employee has returned/destroyed assigned T-Card/Dept Card.
6. If not, select Employee has not returned/destroyed assigned T-Card/Dept Card.
 - a. An email will be sent to the initiator, employee, and supervisor to notify them the T-Card/Dept Card still needs to be turned in or destroyed.
 - b. Dept Cards can be reassigned to another individual in the department, as well.

7. If the employee is not responsible for a T-Card/Dept Card, select Employee is not responsible for a Travel Card/Department Card.
8. If the employee does not owe a travel advance, select Employee does not owe a pervious travel advance.
9. If the employee owes a travel advance, select Employee owes a previous travel advance.
 - a. An email will be sent to the initiator, employee, and supervisor to notify them of the advance amount owed.



tellington@astate.edu | ✔ Traci Ellington

Offboarding process for Traci Renea Ellington - Review by Travel/AFC

3:51

The employee has not returned or destroyed a travel card/department card or owes a previous travel advance. The amount will be charged to the employee's account. Payment can be made in Self-Service prior to the employees last day or at the Cashier's Window.

Travel Card/Department Card not returned or destroyed? No

Advance amount owed: \$125


10. Enter the amount of the travel advance.
11. Click on Complete. Exit Workflow.

When you acknowledge there is an amount owed, University Accounts will receive an email notification. They will set up the charge for the amount owed on the employee's account.

University Accounts-Apply Travel Advance Charge

If the employee owes a Travel Advance you will receive an email from Travel or Athletics to apply the charge to the employee's account balance. Do NOT start this process until documentation has been received from Travel.

1. Click on the Workflow link in the email.



tellington@astate.edu | ✔ Traci Ellington

Offboarding process for Traci Renea Ellington - Reviewed by Travel/AFC

Please log in to [Workflow](#). Enter the following charge using 'U500' for Traci Renea Ellington, 10309826.

Amount of travel advance:\$125


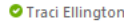
Thank you,

Traci Ellington

2. Enter your User ID (full email address) and Password.
3. Banner will automatically open. Exit TOADEST.
4. On TSAAREV, enter the charge as a miscellaneous deduction.
5. Click on the Workflow Submit button. Exit Banner and Workflow.

Facilities Management

1. Click on the Workflow link in the email.

 tellington@astate.edu |  Traci Ellington 10:17 AM
Offboarding process for Traci Renea Ellington - Check out review needed

Please log in to [Workflow](#) to complete the check out form for Traci Renea Ellington, 10309826. Any university property in the employee's possession must be returned by their last day of work 31-OCT-23.

Response submitted by initiator:
Has the employee returned assigned keys? No

2. Enter your User ID (full email address) and Password.
3. Review the employee's information.

Worklist

Facilities Management Check Out Form


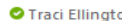
Hide Menu  Logoff 

Name:	Traci Renea Ellington
Employee ID:	10309826
Initiator's E-mail Address:	tellington@astate.edu
Supervisor's E-mail Address:	mgoodwin@astate.edu
Department:	Controller
Department Phone:	(870) 972-3261
Initiator's Phone Extension:	
Last Day of Work:	31-OCT-23
Last Paid Date:	31-OCT-23
Has the employee returned assigned keys?	No
Maintain property through last day of work?	Yes
Employee/Department Comments?	personal email traci.ellington@gmail.com

Enter the keys the employee has not returned:

- *
- Employee has returned assigned keys.
 - Employee has not returned assigned keys.
 - Employee was not issued keys.

4. Enter the keys the employee has not returned, if any.
5. If the employee returned all assigned keys, select Employee has returned assigned keys.
6. If not, select Employee has not returned assigned keys.
 - a. An email will be sent to the initiator, employee, and supervisor to notify them of the keys that need to be returned.

 tellington@astate.edu |  Traci Ellington
Offboarding process for Traci Renea Ellington - Reviewed by Facilities Management

Please return all ASU keys to Facilities Management, except for filing cabinet, personal office desk, and pad lock keys.

The following keys are issued in your name and have not been returned: Admin Bldg stairwell and Rm 231

Please contact the Lock Shop at 680-4700 for further assistance.

Thank you,

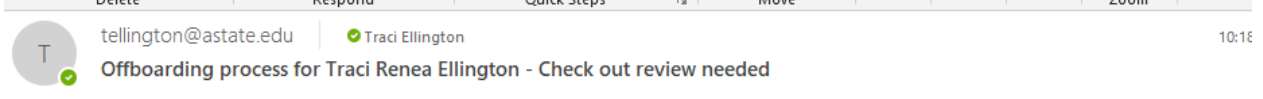
Traci Ellington

- If the employee was not issued keys, select Employee was not issued keys.
- Click on Complete. Exit Workflow.

When the initiator recompletes the form, you will receive a second notification to verify if the keys were returned.

ID Center

- Click on the Workflow link in the email.



Please log in to [Workflow](#) to complete the check out form for Traci Renea Ellington, 10309826. Any university property in the employee's possession must be returned by their last day of work 31-OCT-23.

- Enter your User ID (full email address) and Password.
- Review the employee's information.

Worklist



Name:	Traci Renea Ellington
Employee ID:	10309826
Initiator's E-mail Address:	tellington@astate.edu
Supervisor's E-mail Address:	mgoodwin@astate.edu
Department:	Controller
Department Phone:	(870) 972-3261
Initiator's Phone Extension:	
Last Day of Work:	31-OCT-23
Last Paid Date:	31-OCT-23

List building, door, and gate access:

* Employee has access as listed above.
 Employee has no access to remove.

- Enter the access the employee has on their ID card, if any.
- If the employee has access, select Employee has access as listed above.
- If not, select Employee has no access to remove.
- Click on Complete. Exit Workflow.

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.

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

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

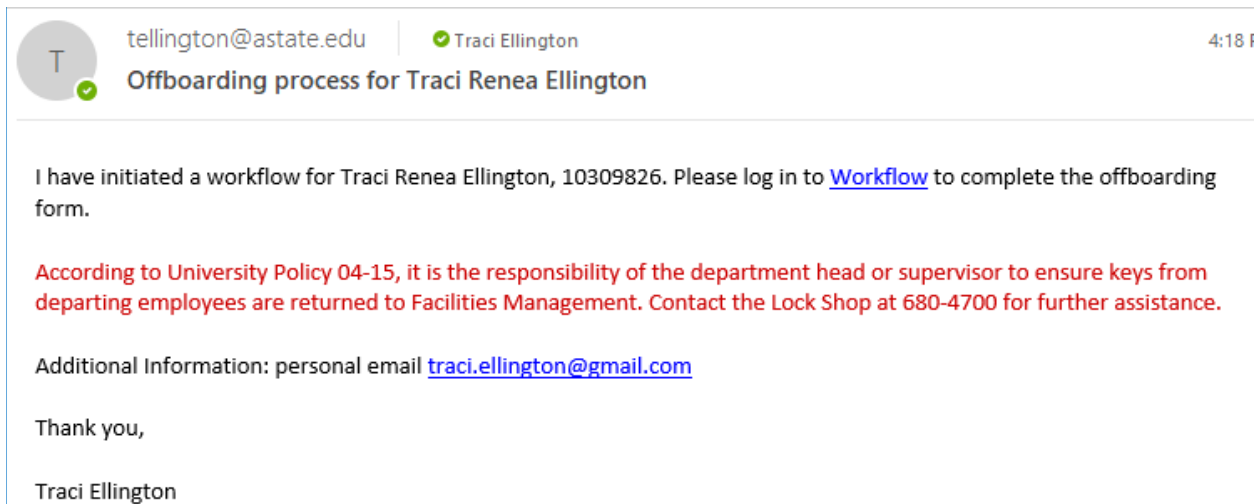
The workflow is now ready for the Supervisor's review and approval.

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.

1. You will receive an email with the subject “Offboarding process for [Employee Name]”.



- a. If you can’t locate the email check your Junk Mail folder. Mark the email as not junk and move to your inbox.
 - b. If you delete the email, you can access Workflow by logging into <https://my.astate.edu/>. Click on the Workflows icon.
2. Click on the Workflow link in the e-mail.
 3. Enter your User ID (full email address) and Password.
 - a. Your password for Banner and my.AState (network password) MUST be the same or you will receive an error that the password is invalid.

If you logged into Workflow through my.AState you will have to click on the Supervisor’s form in the Worklist to open the form up.

Worklist Logout

Status	Organization	Workflow	Activity	Priority	Created	View Details
	Root	TEST Performing	SPV_FORM	Normal	30-Oct-2023 04:17:26 PM	

4. Review the information and make any changes necessary. Approve any outstanding leave the employee has submitted.

Worklist

Supervisor Approval 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: tellington@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

Review the information below and make any necessary changes.

Enter your 4 digit extension:

* Enter Dean/Department Head E-mail:

* Enter the employee's last day of work:

* Enter the employee's 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 asset 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:

5. Click on the Complete button.

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.



tellington@astate.edu

Traci Ellington

Offboarding process for Traci Renea Ellington - Research Lab

This employee is responsible for a research lab or clinic:

Employee ID: 10309826

Employee Name: Traci Renea Ellington

Department: Controller

Department Phone Number: (870) 972-3261

Initiator's Phone Extension:

Last Day of Work: 31-OCT-23

Last Paid Date: 31-OCT-23

Supervisor: Traci Ellington

Check for Account Balance-Banner

Behind the scenes the workflow will check TSAAREV to see if the employee owes a balance. If the employee has a credit balance an email notification is sent to start the refund process and the workflow continues on to send out the final completion e-mails and ends.



Offboarding process for Traci Renea Ellington - Refund credit balance

Please initiate a refund of \$125 for Traci Renea Ellington, 10309826

If the employee has a zero balance an email notification is sent and the workflow continues on to send out the final completion e-mails and ends.




Offboarding process for Traci Renea Ellington - Account balance zero

Traci Renea Ellington, 10309826, has an account balance of zero.

If the employee owes a balance, see “University Accounts-Check Balance” below.

University Accounts-Check Balance

1. Click on the Workflow link in the email.


tellington@astate.edu | Traci Ellington
Offboarding process for Traci Renea Ellington - Check employee balance

Please log in to [Workflow](#). Review the account balance and complete the check out form. Add notes if a current payroll deduction(s) exists.

2. Enter your User ID (full email address) and Password.
3. Banner will automatically open. Exit TOADEST.
4. On TSAAREV, next block and note the employee's balance.
5. Click on the Submit button. Exit Banner and return to the Workflow page.

Detail Code *	Description *	Term *	Charge	Payment	Balance	Study Path	Source *	Effective Date *
P530	PR Ded/Res Prk NS -03/31/23	202310		18.75	0.00		T	03/30/2023
P580	PR Ded/F/S Meal -03/15/23	202310		37.50	0.00		T	03/14/2023

6. Click on "Here" in the "Click Here to view your worklist." link in the workflow window or refresh the Worklist.

You have completed your activity and can close this window.

Click [Here](#) to view your worklist.

7. Click on the UA APPR FORM activity.

Organization	Workflow	Activity	Priority	Created
Root	10309826 Traci Renea Ellington 31-AUG-13 Ready	UA APPR FORM	Normal	28-Aug-2013 10:50:44 AM

- The employee's balance will default into the Current Account Balance field. This amount can be changed, if necessary.

Worklist

University Accounts Check Out Form

Name:	Traci Renea Ellington
Employee ID:	10309826
Initiator's E-mail Address:	tellington@astate.edu
Supervisor's E-mail Address:	tellington@astate.edu
Department:	Controller
Department Phone:	(870) 972-3261
Initiator's Phone Extension:	
Last Day of Work:	31-OCT-23
Last Paid Date:	31-OCT-23

* Current Account Balance:

Enter Comments:

- If the employee is benefited, payroll will calculate the vacation/sick payout to see if HR can set up a deduction to pay off the account balance. If the employee is non-benefited, they are ineligible for a vacation/sick payout, but a deduction can still be set up if the employee is owed a regular check.
- Enter Comments, if necessary.
- Click on the complete button. Exit Workflow. Please do NOT email HR about a deduction. The workflow is routed to Payroll.

Payroll/Benefits Office/University Accounts Procedures

Payroll will receive an email 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. You will receive the following email:





Offboarding process for Traci Renea Ellington - Zero balance

The Benefits Office has set up the deduction amount of \$76.84 for Traci Renea Ellington, 10309826.

Original Account Balance: \$76.84

University Accounts Comments:


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 billing.

 tellington@astate.edu |  Traci Ellington
Offboarding process for Traci Renea Ellington - Outstanding balance

Please log in to [Workflow](#) to complete the acknowledgment form. Traci Renea Ellington has an outstanding balance.

Employee ID: 10309826
Account Balance: \$76.84
Deduction Amount: \$50
Payroll Comments:

Scenario 3: If the employee is not receiving 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.

 Offboarding process for Traci Renea Ellington - Outstanding balance

Please log in to [Workflow](#) to complete the acknowledgment form. Traci Renea Ellington has an outstanding balance.

Employee ID: 10309826
Account Balance: \$76.84
Payroll Comments:

Acknowledge Remaining Balance

For Scenario 2 and 3 follow these steps.

1. Click on the Workflow link in the email.
2. Enter your User ID (full email address) and Password.

University Accounts Acknowledgment

Name:	Traci Renea Ellington
Employee ID:	10309826
Last Day of Work:	24-AUG-13
Termination Date:	31-AUG-13
Account Balance	\$40
Payroll Deduction Amount:	\$30

* Remaining Account Balance:

Comments:

I acknowledge the employee has a remaining balance.

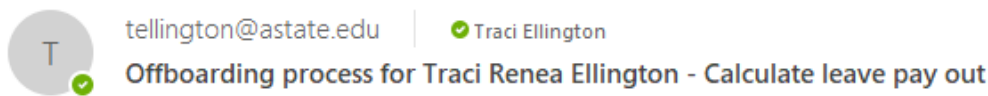
3. On the Acknowledgment form, enter the remaining account balance and comments. Contact the employee if they still owe a balance.

- a. If the employee pays off the remaining balance after HR sets up the deduction, call HR to remove the deduction.
4. Click on Complete. Exit Workflow.

Payroll – Calculate Vacation and/or Sick Pay Out

Payroll Services will receive an email notifying them to calculate the leave balance and submit a gross estimated pay out or a final check amount. If the employee is non-benefited, University Accounts may request to hold the last regular check.

1. Click on the Workflow link in the email.



Please log in to [Workflow](#). Calculate the employee's leave pay out or final check and complete the form.

Employee Name: Traci Renea Ellington
 Employee ID: 10309826
 Employee Position: A00076
 Does this employee receive benefits? Y
 Student Worker? N
 Is any portion of the employee's salary paid from a grant? No
 Account Balance: \$76.84
 University Accounts Comments:

2. Enter your User ID (full email address) and Password.
3. Banner will automatically open to PEALEAV.
4. Filter for the VACA and SICK leave (if applicable), and write down the hours.
5. Click on the magnifying glass in the menu pane and enter NBAJOBS in the search box that appears.
6. Navigate NBAJOBS to find the rate of pay and write it down. Exit NBAJOBS.
7. Click on the Workflow Submit icon. Exit Banner

The screenshot shows the Banner PEALEAV system interface. At the top, there's a navigation bar with buttons like 'RELEASE', 'SUBMIT', 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. Below that, the employee ID '10309826' and name 'Mrs Traci Renea Ellington' are displayed, along with 'Leave Category: AD FT Administrative'. A 'Start Over' button is visible. The main section is titled 'LEAVE BALANCE TOTALS' and includes a table with columns for Leave Code, Description, Date Available, Day or Hour, Begin Balance Hours, Accrued Hours, Taken Hours, and Current Balance. The table shows one entry for 'VACA' (Vacation) with a date of 12/15/2006, 200.80 begin balance hours, 52.50 accrued hours, and 26.50 taken hours. There are also filter options and a 'Filter Again' button.

Leave Code *	Leave Code Description	Date Available *	Day or Hour	Begin Balance Hours *	Accrued Hours *	Taken Hours *	Curr
VACA	Vacation	12/15/2006	H	200.80	52.50	26.50	

- Click on "Here" in the "Click Here to view your worklist." link in the workflow window or refresh the Worklist.

You have completed your activity and can close this window.

Click [Here](#) to view your worklist.

- Calculate the amount of vacation and/or sick payout.
- Click on the PAYROLL PAYOUT BAL FORM activity.

Organization	Workflow	Activity	Priority	Created
Root	10309826 Traci Renea Ellington 31-AUG-13 Ready	PAYROLL PAYOUT BAL FORM	Normal	28-Aug-2013 10:56:27 AM

- If the employee is ineligible and a regular check has been processed, select Employee will not receive a final check and enter the appropriate comments for UA to view.
OR
- If the employee is due a vacation/sick leave payout or a final check, select Employee will receive a final check and enter the amount.

Pay Out Form

Name: Traci Renea Ellington
Employee ID: 10309826
Department: BANNER Technical Support Office
Department Phone: (870) 972-3561
Initiator's Phone Extension: 3561
Last Day of Work: 24-AUG-13
Termination Date: 31-AUG-13

*
 Employee will not receive a final check.
 Employee will receive a final check.



Estimated gross amount of final check:

Comments:

- Click on Complete.

HR – Setting Up the Deduction

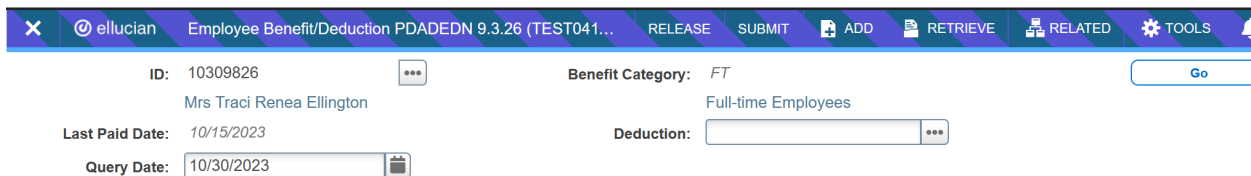
The HR Benefits/Deductions Coordinator will receive an email notification when Payroll selects Employee will receive a final check on the Payout Form. The coordinator will check the current deductions and set up the new one.

 tellington@astate.edu |  Traci Ellington
Offboarding process for Traci Renea Ellington - Enter deduction

Please log in to [Workflow](#) to set up the deduction and complete the workflow.

Employee Name: Traci Renea Ellington
Employee ID: 10309826
Last Day of Work: 31-OCT-23
Last Paid Date: 31-OCT-23
Account Balance: \$76.84
Estimated Gross Amount: \$50
University Accounts Comments:

1. Click on the workflow link in the email.
2. Enter your User ID (full email address) and Password.
3. Banner will automatically open to display PDAEDN.
4. Enter the deduction and save.
5. Click on the Workflow Submit icon. Exit Banner.



The screenshot shows the Banner system interface. At the top, there is a navigation bar with icons for 'ellucian', 'Employee Benefit/Deduction PDAEDN 9.3.26 (TEST041...', 'RELEASE', 'SUBMIT', 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. Below the navigation bar, the employee information is displayed: ID: 10309826, Mrs Traci Renea Ellington, Last Paid Date: 10/15/2023, and Query Date: 10/30/2023. The 'Benefit Category' is set to 'FT' (Full-time Employees). There is a 'Deduction' input field with a value of 0.00 and a 'Go' button.

6. Click on “Here” in the “Click Here to view your worklist.” link in the workflow window or refresh the Worklist.

You have completed your activity and can close this window.
Click [Here](#) to view your worklist.

7. Click on the HR DEDN FORM activity.

Organization	Workflow	Activity	Priority	Created
Root	10309826 Traci Renea Ellington 31-AUG-13 Ready	HR DEDN FORM	Normal	28-Aug-2013 11:05:36 AM

8. Enter the deduction amount. Click on Complete.

Deduction Form

Name: Traci Renea Ellington
Employee ID: 10309826
Last Day of Work: 24-AUG-13
Termination Date: 31-AUG-13

* Enter the deduction amount:

Complete

Save & Close

Cancel

University Accounts Notification of Balance

If the deduction covers the entire account balance owed, University Accounts will receive this e-mail and Workflow will send the final completed e-mails and end:



Offboarding process for Traci Renea Ellington - Zero balance

The Benefits Office has set up the deduction amount of \$76.84 for Traci Renea Ellington, 10309826.

Original Account Balance: \$76.84

University Accounts Comments:

If a deduction was setup but the amount will not cover the entire account balance, University Accounts will receive this e-mail and must acknowledge the remaining balance:



tellington@astate.edu

Traci Ellington

Offboarding process for Traci Renea Ellington - Outstanding balance

Please log in to [Workflow](#) to complete the acknowledgment form. Traci Renea Ellington has an outstanding balance.

Employee ID: 10309826

Account Balance: \$76.84

Deduction Amount: \$50

Payroll Comments:

Final E-mail Notifications - Workflow Complete

Payroll/HR Notification



workflow@astate.edu

Traci Ellington

Offboarding process completed for Traci Renea Ellington

Name:	Traci Renea Ellington
ID Number:	10309826
Position Number and Title:	A00076 Project Program Specialist
Phone Number:	(870) 210-0748
Department:	Controller
Department Phone Number:	(870) 972-3261
Initiator's Phone Extension:	
Last Day of Work:	31-OCT-23
Last Paid Date:	31-OCT-23
Reason for leaving University:	Vol-Eligible for Rehire
Transferring to another state agency?	No
Student Worker?	N
Benefited Employee?	Y
Initiator:	Traci Ellington, tellington@astate.edu
Supervisor:	Traci Ellington, tellington@astate.edu

Checkout Review:	
Library:	Traci Ellington, tellington@astate.edu
Library property assigned:	
Library property not returned:	
Procurement Services:	Traci Ellington, tellington@astate.edu
Purchasing Card returned or destroyed?	Yes
Travel Services/AFC:	Traci Ellington, tellington@astate.edu
Travel Card/Department Card returned or destroyed?	Yes
Advance amount owed:	\$
Facilities Management:	Traci Ellington, tellington@astate.edu
Keys not returned:	
ID Center:	Traci Ellington, tellington@astate.edu
ID access removed:	
University Accounts:	Traci Ellington, tellington@astate.edu
Remaining Account Balance:	\$15

Initiator/Supervisor and Dean/Department Head Notification



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, tellington@astate.edu
Check Out Review:	
Library:	Traci Ellington, tellington@astate.edu
Library property assigned:	
Library property not returned:	
Procurement Services:	Traci Ellington, tellington@astate.edu
Purchasing Card returned or destroyed?	Yes
Travel Services/AFC:	Traci Ellington, tellington@astate.edu
Travel Card/Department Card returned or destroyed?	Yes
Advance amount owed:	\$
Facilities Management:	Traci Ellington, tellington@astate.edu
Keys not returned:	
ID Center:	Traci Ellington, tellington@astate.edu
ID access removed:	
University Accounts:	Traci Ellington, tellington@astate.edu
Remaining Account Balance:	\$15

Other Departmental Notifications

The following departments will receive this notification when the offboarding workflow is complete.

- Sponsored Programs Accounting – if the position was grant funded
- Graduate School – if the employee was a GA
- Immigration Office for International Employees

- International Programs for International Students
- Vice Chancellors Office for Academic Affairs/Student Affairs – if employees home department is in either area.



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
Supervisor:	Traci Ellington, tellington@astate.edu

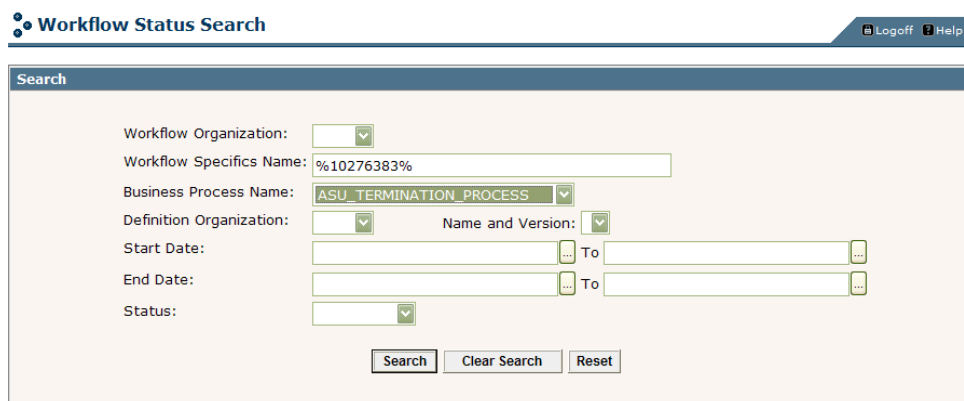
To Check on the Status of a Workflow:

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



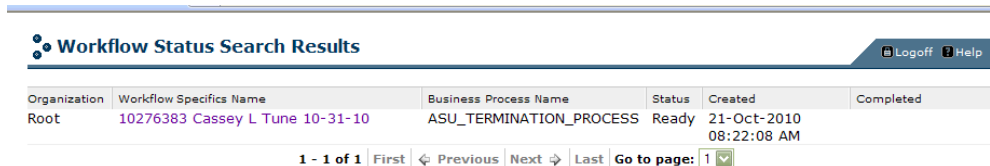
The screenshot shows the 'Worklist' interface. On the left is a navigation menu with 'Home' (Worklist, Workflow Status Search, Workflow Alerts) and 'User Profile' (My Processes, User Information, Change Password). The main area displays a table with columns: Organization, Workflow, Activity, Priority, and Created. A single entry is shown: Organization: Root, Workflow: 10276383 Cassey L Tune 10-31-10, Activity: NBAJOBS, Priority: Normal, Created: 21-Oct-2010 08:55:58 AM. Below the table are navigation controls: '1 - 1 of 1', 'First', 'Previous', 'Next', 'Last', and 'Go to page: 1'. A 'Show Reserved Items' link is on the right.

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.



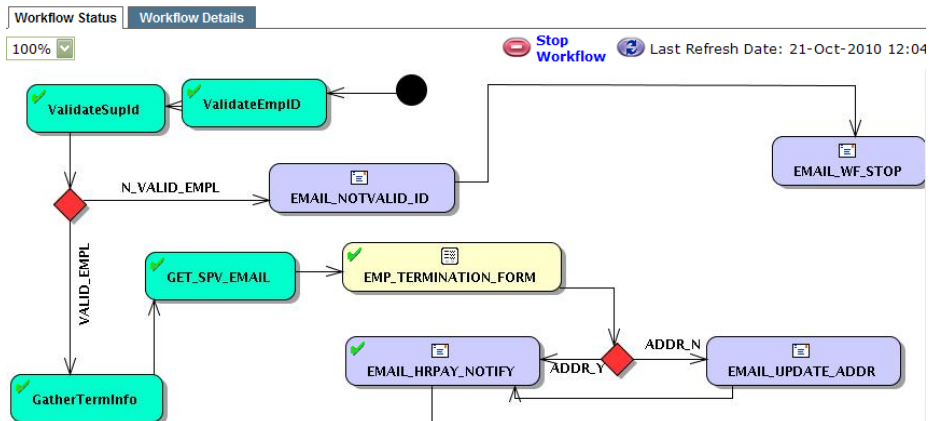
The screenshot shows the 'Workflow Status Search' form. It includes fields for: Workflow Organization (dropdown), Workflow Specifics Name (text input with '%10276383%' entered), Business Process Name (dropdown with 'ASU_TERMINATION_PROCESS' selected), Definition Organization (dropdown), Name and Version (dropdown), Start Date (text input with '...' and 'To' dropdown), End Date (text input with '...' and 'To' dropdown), and Status (dropdown). At the bottom are 'Search', 'Clear Search', and 'Reset' buttons.

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

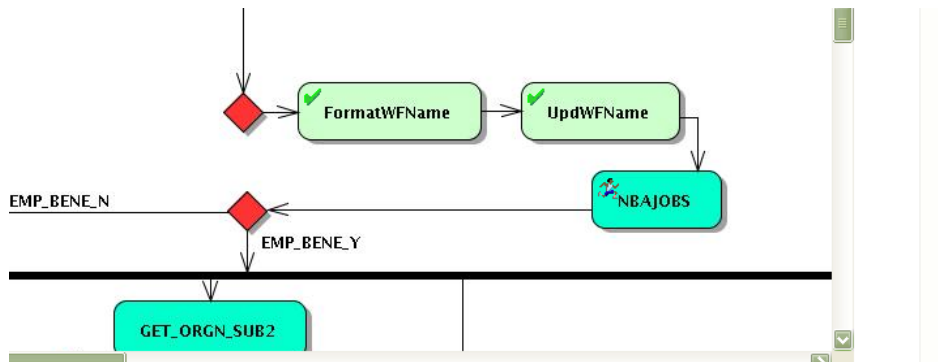


The screenshot shows the 'Workflow Status Search Results' interface. It features a table with columns: Organization, Workflow Specifics Name, Business Process Name, Status, Created, and Completed. The data row is: Organization: Root, Workflow Specifics Name: 10276383 Cassey L Tune 10-31-10, Business Process Name: ASU_TERMINATION_PROCESS, Status: Ready, Created: 21-Oct-2010 08:22:08 AM, Completed: (empty). Below the table are navigation controls: '1 - 1 of 1', 'First', 'Previous', 'Next', 'Last', and 'Go to page: 1'.

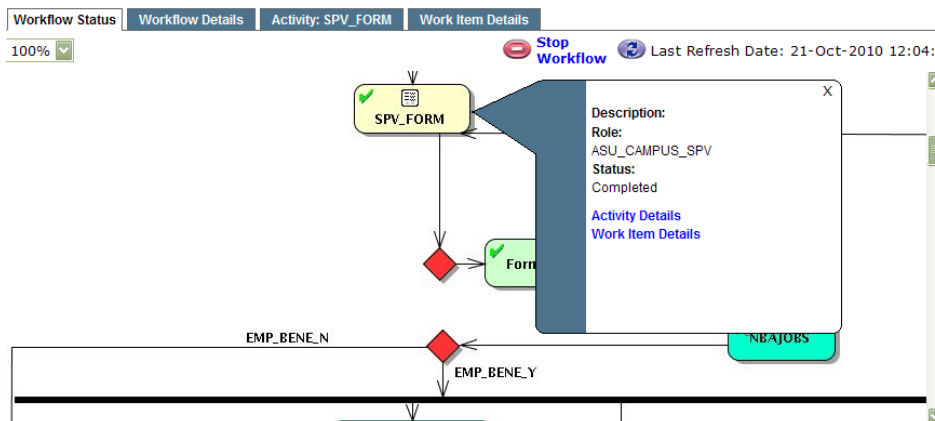
- The workflow diagram displays. You can use the scroll bars to follow the diagram. If a green checkmark displays in the activity, the activity has been completed.



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



- 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:

Workflow Status | Workflow Details | **Activity: SPV_FORM** | Work Item Details

Last Refresh Date: 21-Oct-2010 12:04:11 PM

Details			
Organization:	Root	Created:	21-Oct-2010 08:29:57 AM
Activity Name:	SPV_FORM	Completed:	21-Oct-2010 08:55:45 AM
Type:	Mandatory	Estimated Time:	00:00
Description:		Actual Time:	00:17
Ownership:		Elapsed Time:	00:25
Role:	ASU_CAMPUS_SPV	Lagging Date:	
Activity Status:	Completed	Expected Completion Date:	
Performer:	tellington		
Directed User:	tellington		
Activity ID:	4279888		

To Assign a Proxy:

1. Log in to <https://my.astate.edu/>.
2. Click on the Workflows icon.
3. Click on User Information under the User Profile menu.

Home | Worklist | Logoff | Help

Organization	Workflow	Activity	Priority	Created
Root	10276383 Cassey L Tune 10-31-10	NBAJOBS	Normal	21-Oct-2010 08:55:58 AM

Ready

1 - 1 of 1 | First | Previous | Next | Last | Go to page: 1

Show Reserved Items

4. Click on the Add Proxy link next to the appropriate role.

Logon ID: tellington
Last Name: Ellington
First Name: Traci
Middle Name:
Email: tellington@astate.edu
Effective From: 30-Jan-2007 08:38:29 AM
Effective To:

Notifications

Launching

Save User Profile

Reset

My Roles					
Organization	Role Name	Effective From	Effective To	Type	Proxy Assignment
Root	ASU_ACCTBAL_NTFY	13-Oct-2010 03:02:24 PM		Primary	Add Proxy

5. Select the drop-down arrow to choose the person's user id.
6. Enter the Effective To Date (future date).
7. Select the Non-Confidential checkbox.
8. Click on Save.

To Delete a Proxy

1. Log in to <https://my.astate.edu/>.
2. Click on the Workflows icon.
3. Click on User Information under the User Profile menu.
4. Select the checkbox next to the User's name in the My Proxies section.
5. Click on the Delete Selected Proxies button.

Root	ASU_STU_ACCT_INIT	17-Sep-2010 03:46:46 PM	Primary	Add Proxy
Root	ASU_STU_ACCT_ISSUER	17-Sep-2010 03:47:09 PM	Primary	Add Proxy
Root	ASU_STU_ACCT_VOIDER	17-Sep-2010 03:47:15 PM	Primary	Add Proxy
Root	ASU_TERM_OWNER	05-Oct-2010 01:32:12 PM	Primary	Add Proxy
Root	ASU_TRVL_COP_APPR	10-Sep-2010 02:36:52 PM	Primary	Add Proxy
Root	ASU_UA_COP_APPR	10-Sep-2010 02:37:04 PM	Primary	Add Proxy
Root	SysAdmin	10-Sep-2010 09:27:20 AM	Primary	Add Proxy

User	Role	Organization	Confidential	Non-Confidential	Effective From	Effective To	
<input type="checkbox"/>	ctune	ASU_CAMPUS_INIT	Root	Yes	No	21-Oct-2010 12:29:16 PM	22-Oct-2010 12:30:30 PM

6. Click on the OK button.

