

Arkansas State

Employee Offboarding Process

Supervisor Guide

Contents

Overview	2
Employees, non-employees, and privatized employees	2
Department Initiators/Supervisors	2
Additional Information.....	2
Supervisor	3
Final E-mail Notification – Workflow Complete	5
To Check on the Status of a Workflow:	6
To Assign a Proxy:	8
To Delete a Proxy	9

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.

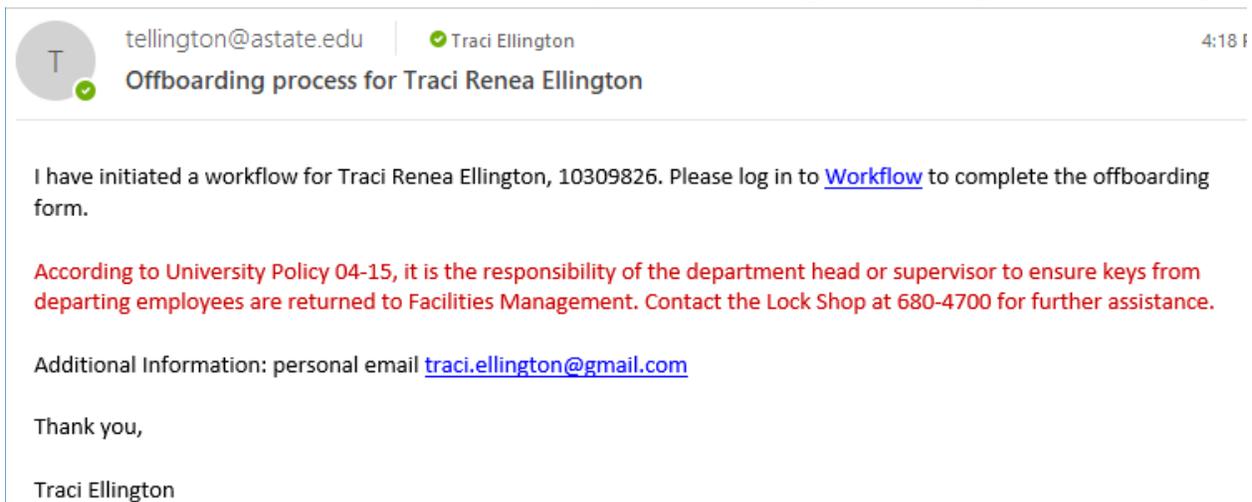
Supervisor

Typically, support personnel initiate offboarding workflows and supervisors will receive an email notification to review and approve. Supervisors may initiate the workflow and can access the Initiators guide online. Supervisors will receive email notifications after the initiator completes the workflow form to keep them apprised of the offboarding status.

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]”.



The screenshot shows an email interface. At the top left is a circular profile picture with the letter 'T' and a green checkmark. To its right, the sender's email is 'tellington@astate.edu' and the name is 'Traci Ellington'. The subject line is 'Offboarding process for Traci Renea Ellington'. The body of the email contains the following text: 'I have initiated a workflow for Traci Renea Ellington, 10309826. Please log in to [Workflow](#) to complete the offboarding form.' Below this is a red text block: 'According to University Policy 04-15, it is the responsibility of the department head or supervisor to ensure keys from departing employees are returned to Facilities Management. Contact the Lock Shop at 680-4700 for further assistance.' This is followed by 'Additional Information: personal email traci.ellington@gmail.com'. The email ends with 'Thank you,' and 'Traci Ellington'.

- 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

itatus	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.

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, 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

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', 'User Profile', and 'Workflow Alerts'. The main area displays a table with the following data:

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

Below the table are pagination controls: '1 - 1 of 1', 'First', 'Previous', 'Next', 'Last', and 'Go to page: 1'. A 'Show Reserved Items' link is also present.

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. The fields are filled as follows:

- Workflow Organization: [Dropdown]
- Workflow Specifics Name: %10276383%
- Business Process Name: ASU_TERMINATION_PROCESS
- Definition Organization: [Dropdown]
- Name and Version: [Dropdown]
- Start Date: [Date Picker] To [Date Picker]
- End Date: [Date Picker] To [Date Picker]
- Status: [Dropdown]

Buttons: Search, Clear Search, Reset.

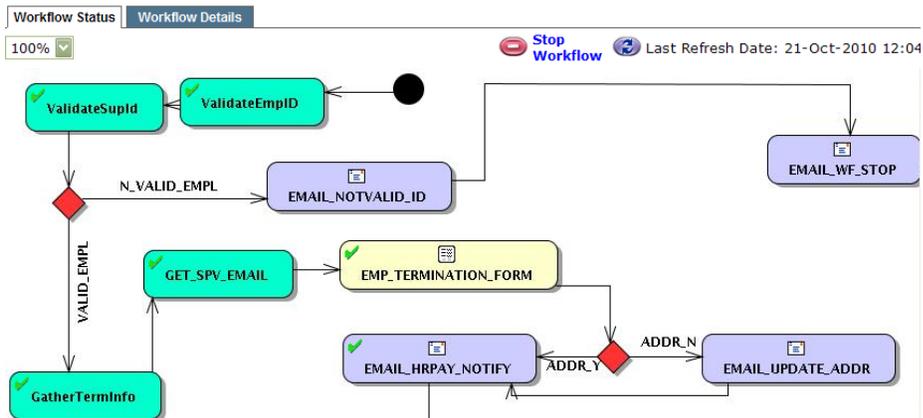
7. Click on the Workflow hyperlink to open the activity.

The screenshot shows the 'Workflow Status Search Results' table with the following data:

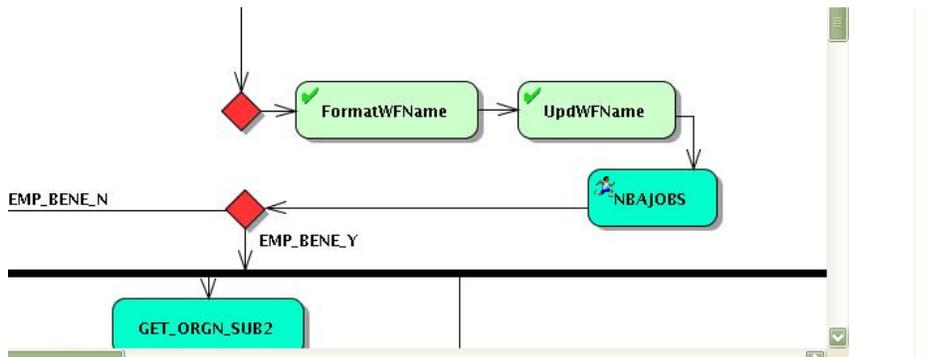
Organization	Workflow Specifics Name	Business Process Name	Status	Created	Completed
Root	10276383 Cassey L Tune 10-31-10	ASU_TERMINATION_PROCESS	Ready	21-Oct-2010 08:22:08 AM	

Below the table are pagination controls: '1 - 1 of 1', 'First', 'Previous', 'Next', 'Last', and 'Go to page: 1'.

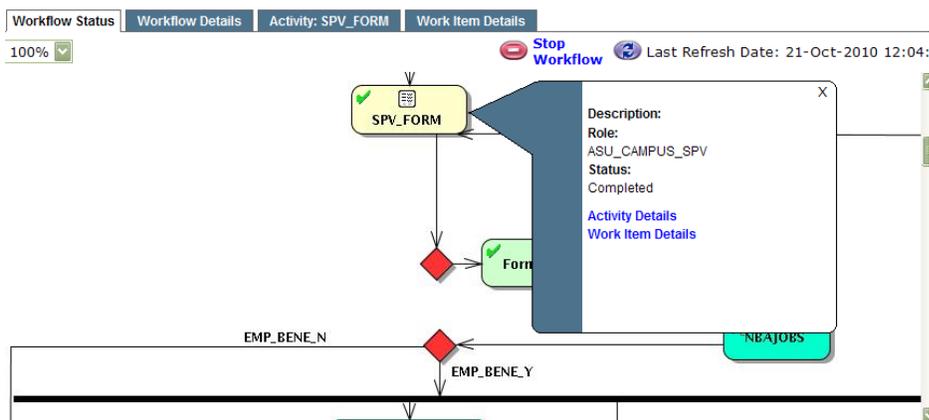
8. The workflow diagram displays. You can use the scroll bars to follow the diagram. If a green checkmark displays in the activity, the activity has been completed.



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:

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

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.

Organization - RoleName: Root - ASU_CAMPUS_INIT

User: aandrews

Effective From: 16 PM

Effective To:

Confidential:

Non-Confidential:

aandrews
ajones
aleggett
alloyd
along
amassie
angelad
anturner
bballard
bcoker
h davidson

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

Delete Selected Proxies

6. Click on the OK button.

