

Employee Termination Workflow Initiator Guide

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Overview

The Employee Termination Workflow should be submitted at least 2 weeks prior to the last work day for all employees leaving the University except for the following:

- Faculty who are teaching two or more consecutive semesters
- Overload Assignments
- **Employee transfers** - the new department should complete the [Assignment Change Form](#).

EMPLOYEES, NON-EMPLOYEES, AND PRIVATIZED EMPLOYEES

1. Return all university-owned property (including keys and ID card) 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

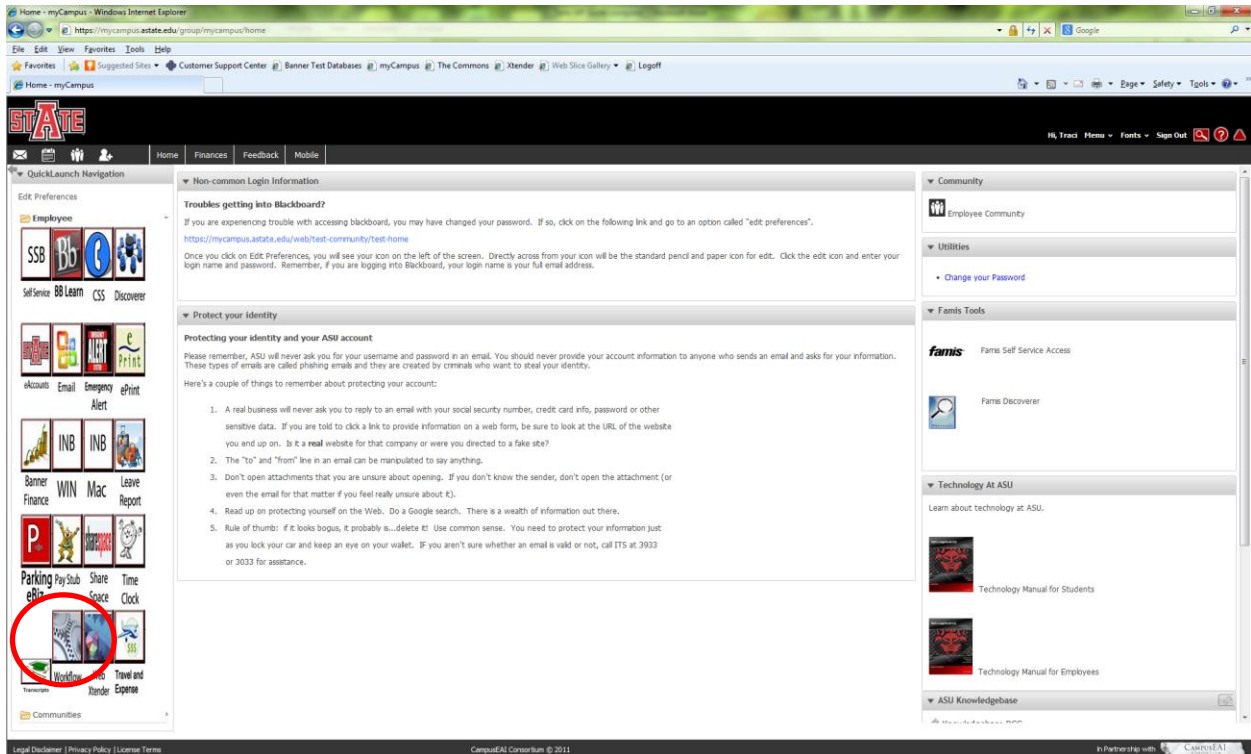
1. Ensure all university-owned property has been returned and leave time has been submitted.
2. Initiate the termination workflow via [myCampus](#).
3. Click on the Workflow Worklist icon in the Quicklaunch channel.
4. Under User Profile, click on My Processes and the ASU_TERMINATION_PROCESS link.
5. Review, complete, and approve the workflow.

ADDITIONAL INFORMATION

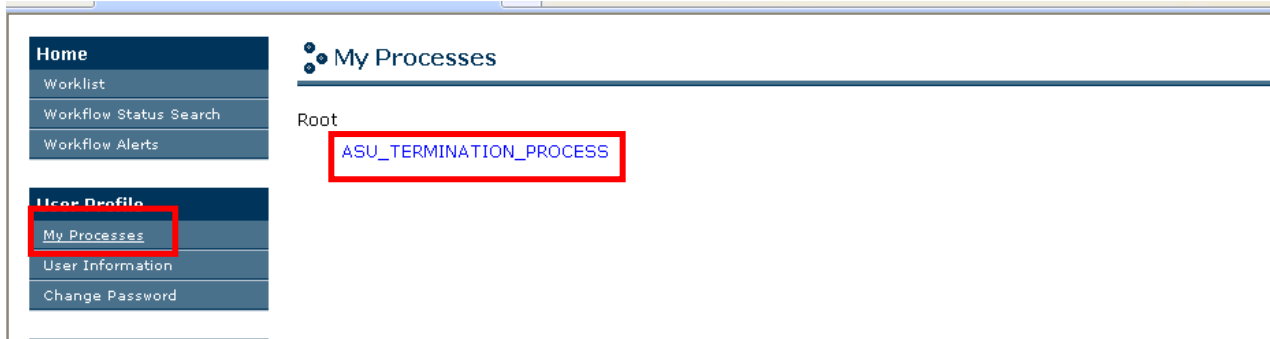
- Upon receiving the email notification for the employee's termination, Human Resources will begin the process for terminating benefits.
- Eligible employees who have accrued annual leave shall be issued a vacation payout check not to exceed 240 hours or the balance in the employee's annual leave account, 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 <http://mycampus.astate.edu/>.
2. Click on the Workflow icon in the Employee folder of the Quicklaunch Navigation list.



3. In Workflow, click on My Processes under the User Profile menu.
4. Click on the ASU Termination Process link.



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.

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.

The workflow was started successfully.
 OK

Note: 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.

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.

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

[Show Reserved Items](#)

11. Verify the Employee's information is accurate at the top of the Employee Termination 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 termination date and last paid date, click on the date button.
15. Click on the Complete button to submit the workflow.

Sample Termination Form

Worklist

Employee Termination Form

Name: Traci Renea Ellington
Employee ID: 10309826
ASU E-mail Address: tellington@astate.edu
Phone Number:
W-2 Mailing Address: 4721 Sanderson Ln Jonesboro, AR 72404-8372
Supervisor's E-mail Address: tellington@astate.edu
Department: BANNER Technical Support Office
Department Phone Number: (870) 972-3561
Home Organization: 311081
Position Number and Title: A00068 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: 3561

* Enter Dean/Department Head E-mail: tellington@astate.edu

* Enter the employee's last day of work: 24-AUG-13

* Enter Termination Date (last date in PAID status): 31-AUG-13

* Select Termination Reason: Vol-Eligible for Rehire

* Is employee transferring to another state agency within Arkansas?: No

* As a retiree, will the employee retain their e-mail address?: N/A

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

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

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

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

* Personal cell phone with ASU data plan?: No

* University cell phone?: N/A

* ASU ID card? (Employees must return ID or request new ID as student): Yes

* Business cards?: Yes

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

List the type of technology device and the asset tag number: iPad 292929; Laptop 278979

* Computer accessories or peripherals?: Yes

* Storage devices, such as jumpdrives, CDs, external harddrive, etc.?: Yes

* Artwork?: N/A

List the artwork being used by the employee:

* Work uniforms?: N/A

* Library property, such as books and media?: N/A

* P-Card?: N/A

* Building and room keys?: Yes

List other items here: Remove Delegate and Liaison access to BTSO P-Card.

Enter other comments: All outstanding items have been returned.

Employee Notification – List of Property

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

Subject: List of Property for Traci Renea Ellington

Please review the following responses in regards to the questions below. You are responsible for returning all university property by your last day of work 24-AUG-13. The initiator entered 31-AUG-13 as your termination date.

University Property Status:		
Maintain property through termination date?	Yes	
Personal cell phone with ASU data plan?	No	
University cell phone?	N/A	
ID card?	No	
Business cards?	Yes	
Technology devices?	No	iPad 292929; Laptop 278979
Computer accessories or peripherals?	No	
Storage devices?	No	
Artwork?	N/A	
Uniforms?	N/A	
Library property?	N/A	
P-Card?	N/A	
Building or room keys?	No	
Additional property?	Remove Delegate and Liaison access to BTSO P-Card.	

HR/Payroll Notification – Terminating the Job/Employee

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

University Accounts/HR Address Notification

When “No” is selected on the address question on the Initiator form, University Accounts and Human Resources will receive an email to update the address information in Banner.

LSDE Access Verification

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

ITS Notification – Inactivate/Terminate Access

Information Technology Services is notified after the Initiator completes the Employee Termination form or LSDE confirms if the employee needs to maintain access as an Academic Assistant.

Check Out Departments

The following departments will review the termination 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 email is sent to the initiator, employee, and supervisor for review.

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

Summary Property E-mail Notifications

Once the departments have finished reviewing the termination and determined if there is still property outstanding a summary email will be sent to the Initiator, employee and supervisor.

Property Still Outstanding

The Initiator, employee, and supervisor will receive this reminder email if any of the departments had to return the termination due to outstanding property.

Subject: Check out returned for termination of Traci Renea Ellington, 10309826

The following items must be returned and balance paid in full by the employee's last day of work **24-AUG-13**.

Employee Name: Traci Renea Ellington
Employee ID: 10309826
Department: BANNER Technical Support Office
Department Phone Number: (870) 972-3561
Position Number and Title: A00068 Project Program Specialist
Termination Date: 31-AUG-13

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:	
P-Card not returned:	Not Applicable
Advance amount owed:	\$125
Keys not returned:	Admin Bldg 4563; Finance Area 45989; Rm 229 554697

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

Property Returned

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

Subject: Check out review for Traci Renea Ellington, 10309826 completed

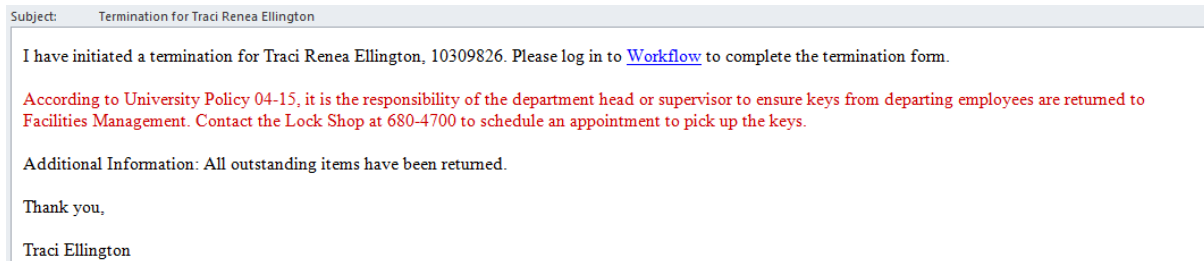
The check out portion of this termination has been completed. The workflow has routed to the supervisor for review.

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

Supervisor

An email notification with subject “Termination for [Employee Name]” will be sent to the supervisor that has been assigned to the employee in Banner HR.

Sample Email Notification with subject “Termination for [Employee Name]”:



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) receives an email notification once the workflow has been approved. ORTT is responsible for ensuring the employee properly takes care of any research labs or clinics prior to their departure.

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 Services/Benefits Office/University Accounts Procedures

Payroll will receive an email notification to calculate leave balances and/or hold the employee's 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 and 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 due.

Scenario 2: If the amount entered will only pay a portion of the amount due 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 disapprove 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 Notifications

The initiator, supervisor, dean or department head will receive the following email notification once the workflow is completed.

Termination completed for Traci Renea Ellington - Message (HTML)

From: workflow@astate.edu
 To: Traci Ellington
 Cc: Traci Ellington
 Subject: Termination completed for Traci Renea Ellington
 Sent: Wed 8/28/2013 11:08 AM

The termination 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:	A00068 Project Program Specialist
Department:	BANNER Technical Support Office
Last Day of Work:	24-AUG-13
Termination Date:	31-AUG-13
Termination Reason:	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
P-Card returned?	Not Applicable
Travel Services/AFC:	Traci Ellington, tellington@astate.edu
Advance amount owed:	\$125
Facilities Management:	Traci Ellington, tellington@astate.edu
Keys not returned:	
ID Center:	Traci Ellington, tellington@astate.edu
ID access removed:	West Parking Lot.
University Accounts:	Traci Ellington, tellington@astate.edu
Remaining Account Balance:	\$10

Note: The Vice Chancellors within the divisions of Academic Affairs and Research and Student Affairs will receive email notifications regarding employee terminations.

Check the Status of a Workflow

1. Log in to <http://mycampus.astate.edu/>.
2. Click on the Workflow icon in the Employee folder of the Quicklaunch Navigation list.
3. When 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 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, there is a pagination control: '1 - 1 of 1' with 'First', 'Previous', 'Next', and 'Last' buttons, and a 'Go to page: 1' dropdown. 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. It includes the following fields:

- Workflow Organization:
- Workflow Specifics Name:
- Business Process Name:
- Definition Organization: Name and Version:
- Start Date: To
- End Date: To
- Status:

At the bottom of the form are three buttons: 'Search', 'Clear Search', and 'Reset'.

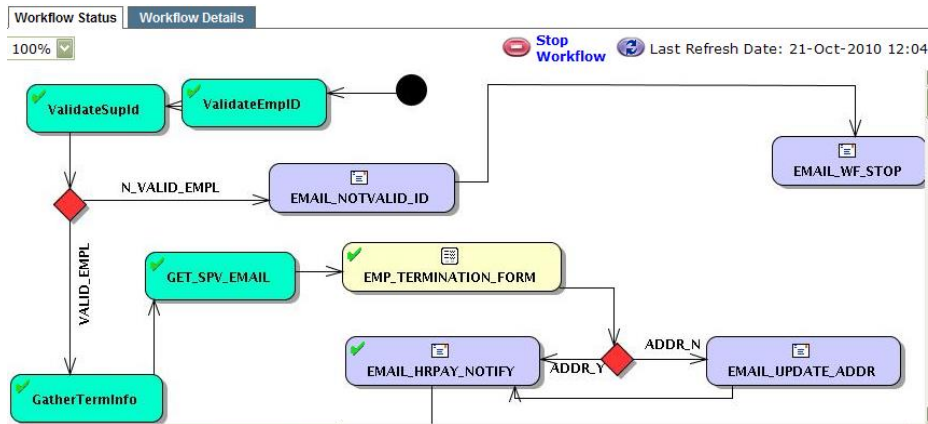
7. Click on the Workflow hyperlink to open the activity.

The screenshot shows the 'Workflow Status Search Results' page. It displays a table with the following data:

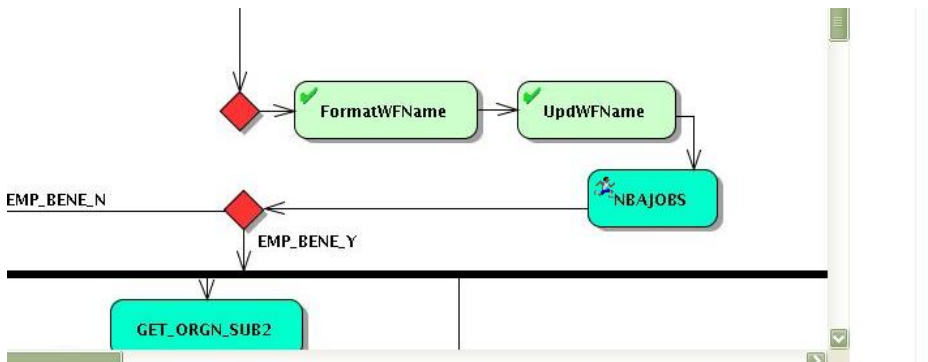
Organization	Workflow Specifics Name	Business Process Name	Status	Created	Completed
Root	10276383 Cassey L Tune 10-31-10	ASU_TERMINATION_PROCESS	Ready	21-Oct-2010 08:22:08 AM	

Below the table, there is a pagination control: '1 - 1 of 1' with 'First', 'Previous', 'Next', and 'Last' buttons, and a 'Go to page: 1' dropdown.

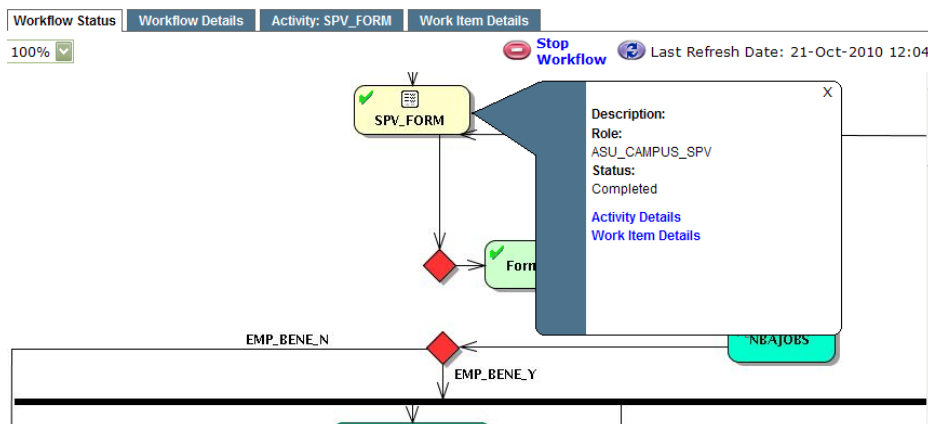
- The workflow diagram displays. You can use the scroll bars to follow the diagram. If a green checkmark displays in the activity, the activity has been completed.




- 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:

User Profile My Processes User Information Change Password	Workflow Status Workflow Details Activity: SPV_FORM Work Item Details																																												
Administration Business Component Catalog Enterprise Management User Management Role Management Business Events Work Calendars	<p style="text-align: right;"> Last Refresh Date: 21-Oct-2010 12:04:11 PM</p> <table border="1"><thead><tr><th colspan="4">Details</th></tr></thead><tbody><tr><td>Organization:</td><td>Root</td><td>Created:</td><td>21-Oct-2010 08:29:57 AM</td></tr><tr><td>Activity Name:</td><td>SPV_FORM</td><td>Completed:</td><td>21-Oct-2010 08:55:45 AM</td></tr><tr><td>Type:</td><td>Mandatory</td><td>Estimated Time:</td><td>00:00</td></tr><tr><td>Description:</td><td></td><td>Actual Time:</td><td>00:17</td></tr><tr><td>Ownership:</td><td></td><td>Elapsed Time:</td><td>00:25</td></tr><tr><td>Role:</td><td>ASU_CAMPUS_SPV</td><td>Lagging Date:</td><td></td></tr><tr><td>Activity Status:</td><td>Completed</td><td>Expected Completion Date:</td><td></td></tr><tr><td>Performer:</td><td>tellington</td><td></td><td></td></tr><tr><td>Directed User:</td><td>tellington</td><td></td><td></td></tr><tr><td>Activity ID:</td><td>4279888</td><td></td><td></td></tr></tbody></table>	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		
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