

Leader Guide – Employee Exits and Offboarding – For Managers

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1. Key Hints and Tips

- The new Employee Exit Process and Offboarding Survey replaces the old paper QF 5275.01 Employee Exit Form
- Voluntary exits including Resignations or Retirements should be submitted directly by the employee via Employee Self Service. If the employee is unable to submit their exit their Manager can submit it on their behalf.
- Involuntary Exits such as terminations within probation, misconduct or performance related can be submitted by the Manager through Manager Self Service
- Involuntary terminations must be supported by the People Experience team. Please visit the [intranet for leader guides](#) on Managing Performance and Misconduct
- We have obligations under the Fair Work Act to pay employee's termination payments promptly, within 7 days for some awards. Therefore, it's very important to submit an exit in Peoplesoft as soon as you are aware of it, to ensure Employees are paid their statutory entitlements promptly. Failing to submit exits in time means we risk over or under paying our staff.
- Supported Employee's Exits can be initiated by the Employment Coach for that Site. Please review the Supported Employee Exit Guide for further information.
- If you have any questions about the employee exit process, please contact People Experience on 07 3900 5460 or PeopleExperience@endeavour.com.au

2. Steps to submit your Employee's Exit in Peoplesoft

Click on the *Terminate Employee* tile, under *Manager Self Service*

The dashboard contains several tiles: Company Directory, Intranet (NDVR Endeavour Foundation), Approvals (19), Team Snapshot, Alerts (Licenses Expired: 0, Licenses Expiring in 30 Days: 0, Licenses Expiring in 60 Days: 0, FTC Expires in 30 Days: 0, Probation Expires in 30 Days: 1), My Team, Team Time and Leave (202 Exceptions), Team Talent Profile, Update Team Information, View Compensation History, Team Calendar, Announcements (No Announcements available), Business Partner Teams, and Terminate Employee (circled in red).

Find the employee who is exiting in your team list, and click the arrow next to their name

Search your Employees

Select Employee 5 rows

Name / Title / ID - Record	Directs / Total	Status / Type	
Professional Worker Grade 5 110663 - 1		Active Employee	
Professional Worker Grade 5 108982 - 0		Active Employee	
Professional Worker Grade 5 111116 - 0		Active Employee	

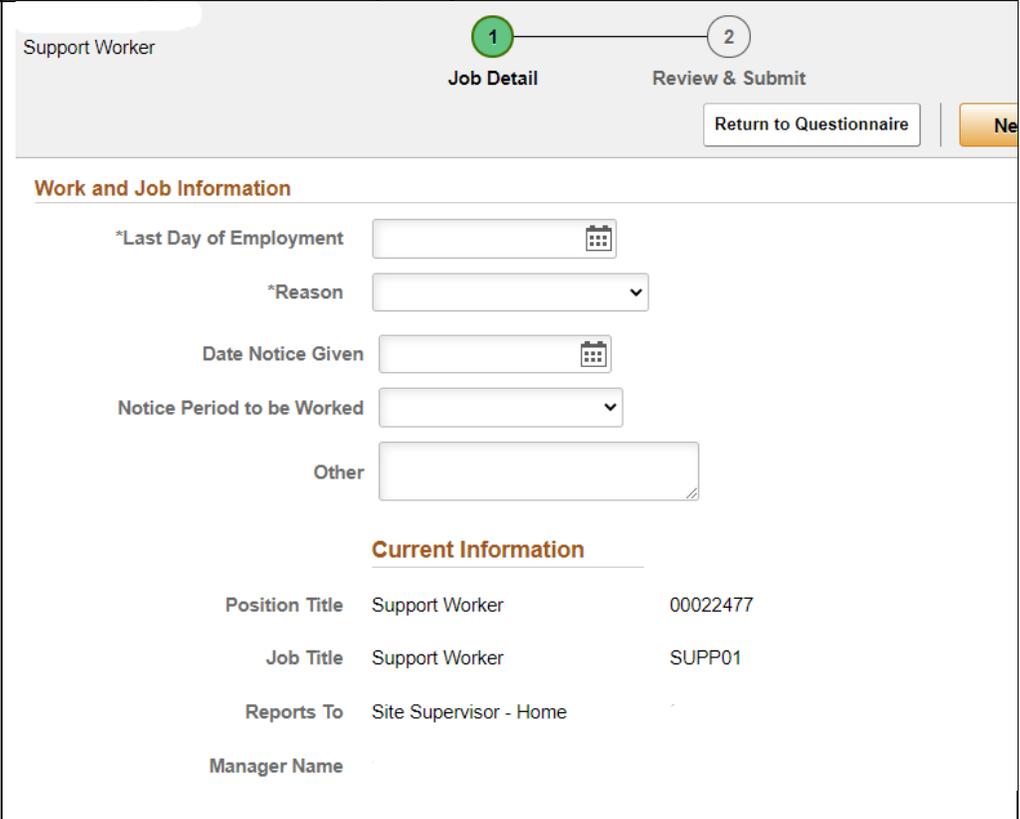
You will then be asked if the termination is voluntary and if payment in lieu of notice is required then Click *Next*

Questionnaire

Is the termination voluntary? No

Is Pay in Lieu required? Yes

** Note: Voluntary termination includes resignation, retirement. This includes resignation following a performance or disciplinary matter, or due to ill health. Involuntary termination includes unsuccessful probations, misconduct etc. If you are unsure, please contact People Experience.*

	<p><i>Pay in Lieu means the employee will be paid in lieu of their notice period instead of working out their notice period. This is only required in certain circumstances, if you are unsure please contact People Experience.</i></p>
<p>You will now need to enter or select from the calendar the employees Last Day of Employment. This could be the date of their last shift, or the last day of their notice period. If they are not serving a notice period, it will be the day that notice was provided.</p>	
<p>Once you have entered the last day of employment, you will be notified that this has pay impacts. Check the last day is correct and click OK</p> <p>If it is incorrect, select the correct last day of employment.</p>	<p>Final Date of Employment has pay impacts. Do you wish to proceed?</p> <p>The Last Date of Employment should be the employees final working day with Endeavour Foundation. Please review to ensure that it is correct as there will be a flow on consideration for the employee's final pay. Do you wish to proceed?</p> <p style="text-align: center;"><input type="button" value="OK"/></p>

You will then need to select the reason for the employee exit from the drop-down list.

Note: The options available to select relate to your selections on the first page (is the termination voluntary or involuntary, and whether pay in lieu is required.) If you have selected the wrong termination type, you can select "Return to Questionnaire" and select the correct termination type.

Work and Job Information

*Last Day of Employment 24/05/2021

*Reason

Date Notice Given

Notice Period to be Worked

Other

- Casual No Longer Req'd
- End of Fixed-Term Contract
- Gross Misconduct
- Medically Unfit
- Performance Conduct Issue
- Probation Unsuccessful

Next advise the date notice was given, and select whether the notice period is to be worked, or to be paid, or "other" if it is to be partially paid and partially worked. List these arrangements in the "other" section.

Once you have completed this section, click *next*.

Support Worker

1 Job Detail 2 Review & Submit

Return to Questionnaire

Work and Job Information

*Last Day of Employment 24/05/2021

*Reason Probation Unsuccessful

Date Notice Given 31/05/2021

Notice Period to be Worked Full period to be paid

Other

Current Information

Position Title Support Worker 0002

Job Title Support Worker SUPP01

Reports To Site Supervisor - Home 00C

Manager Name

You will then be prompted to review and submit. You can also include *Comments* which will be visible to the people experience team.

If you need to correct anything, click *Previous*. If the information is correct, click *Submit*

Terminate Employee

Support Worker

1 Job Detail 2 Review & Submit

Return to Questionnaire Previous Submit

Review and Submit

Last Day of Employment 31/05/2021

Reason Probation Unsuccessful

Current Information

Position Title	Support Worker	000.
Job Title	Support Worker	SUPP01
Reports To	Site Supervisor - Home	000.
Manager Name	Cheryle McCabe	

Comments

When the termination has been successfully submitted, you will receive this screen.

Terminate Employee

Guided Self Service

✓ Your transaction request for [redacted] has been successfully submitted for approval.

Support Worker

Termination Approval Chain

▼ : Pending

Termination Approval Chain

Pending

Multiple Approvers

User List for HR Admin Term

You will receive an email notification when People Experience have approved the termination. If there are any errors in the termination, People Experience may push back the termination to you to re-submit.

Saved - Termination - - Your request was saved

 endeavour.com.au Reply Reply All Forward Tue 1/06/2021 8:25 AM

Your request successfully saved to the database:

Transaction Name: Termination
Employee Name:
Employeee Id:

https://pjuat.efhris.com.au/psp/EPJUIAT/EMPLOYEE/HRMS/c/EL_MANAGER_FL_HR_MSS_CT_VW.GBL?Action=U&ACTION_DT_SS=2021-05-31&EFFSEQ=5&EMPLID=108401&EMPL_RCD=0

This communication was sent via Oracle Workflow Technology. Please do not reply to this email.

3. Completing your manager offboarding tasks in People Soft

Once the termination has been approved by People Experience, you will receive an email notification. You will then have access to complete your manager offboarding tasks. This may take up to 24 hours. You will continue to receive these reminder emails until all tasks have been completed

Outstanding Offboarding Tasks

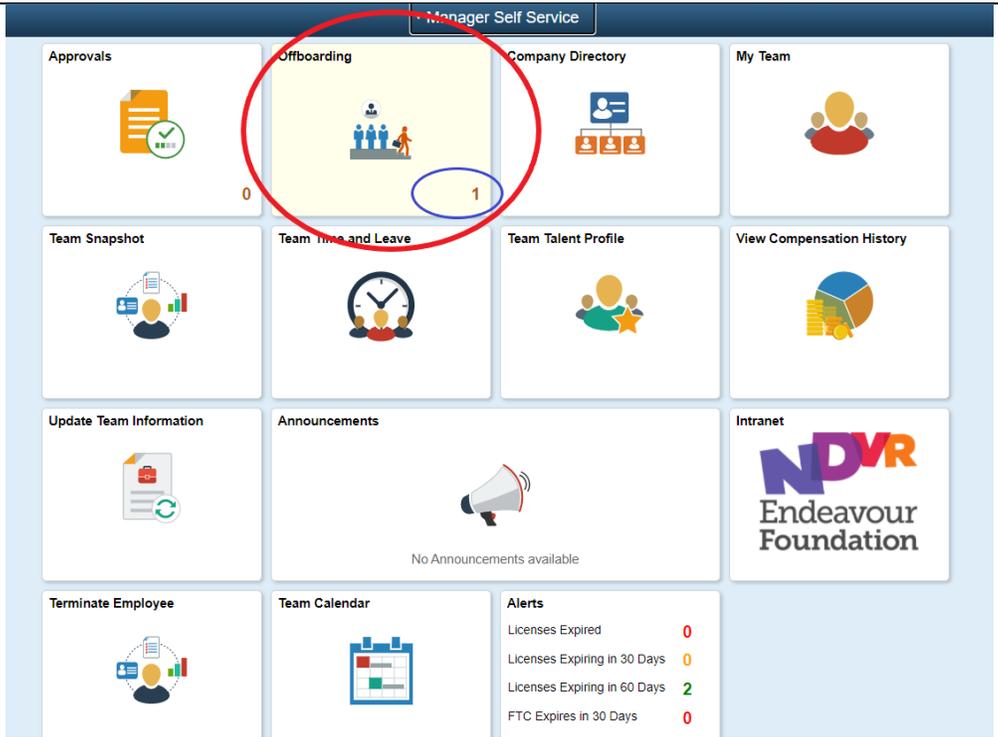
Message 1: Outstanding Offboarding Tasks (20001,518)
Please ensure yourself and the employee have completed your outstanding offboarding tasks prior to their last working date.

Explanation:
- Employee ID
- Employee Name.
- Termination Date: 2021-06-01

Process Name: EOEN_ALERT
Category: CUSTOMEMAIL
Query Name: EF_TERM_OFB_REMIND_MGR
Go To: [Notification Detail](#)
Go To: [Transaction Detail](#)

Log into Manager Self Service in People Soft, and click on the *Offboarding Tile*.

The number next to the tile indicates how many exiting employees you have to complete outstanding Offboarding tasks for.



The screenshot shows the Manager Self Service dashboard with various tiles. The 'Offboarding' tile is highlighted with a red circle and contains the number '1' in a blue circle. Other tiles include Approvals (0), Team Snapshot, Team Time and Leave, Team Talent Profile, View Compensation History, Update Team Information, Announcements (No Announcements available), Intranet (NDVR Endeavour Foundation), Terminate Employee, Team Calendar, and Alerts (Licenses Expired: 0, Licenses Expiring in 30 Days: 0, Licenses Expiring in 60 Days: 2, FTC Expires in 30 Days: 0).

Select the employee ID and click the arrow next to details

You have processes in progress.

In Progress			
Empl ID	Empl Record	Status	Continue
100731	0	Completed 0 of 1 Steps	>

You will be able to see what Offboarding tasks your employee has completed, however the details will be greyed out and not visible. You will be able to action the Manager Offboarding Survey

Where the termination is involuntary, the employee with have no tasks to complete, and managers will instead see additional tasks to complete on their behalf.

Support Worker

- * Verify Banking
 - Not Started
- Verify Addresses
 - Not Started
- Verify Phone and Email
 - Not Started
- * Employee Offboarding Survey
 - Not Started
- Employment Verification
 - Not Started
- * Acknowledgement on Confidentiality
 - Not Started
- Employee Offboarding Checklist
 - Not Started
- * **Manager Offboarding Checklist**
 - In Progress

Complete your manager off boarding tasks and click Save Answers.

Task: Manager Offboarding Checklist

*1. Should this position stay active?

Yes
 No

*2. Does the position have people reporting to it?

Yes
Which person should now be the manager of the direct reports?

No

*3. Would you rehire the employee?

Yes
 No

4. Do you require ICT to setup an Out of Office for their email?

Yes

Save Answers

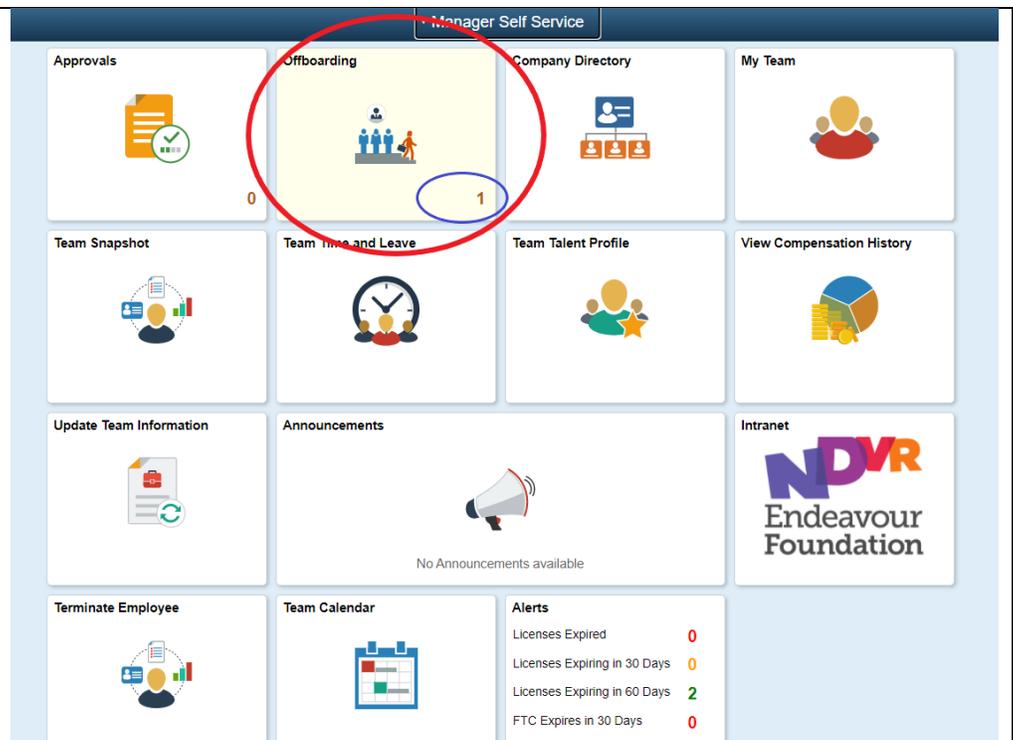
Once you have answered all mandatory questions, your Manager offboarding checklist will change from "In Progress" to "Complete" You can now select Exit.

Employee Offboarding Checklist

- Not Started
- * **Manager Offboarding Checklist**
 - Complete

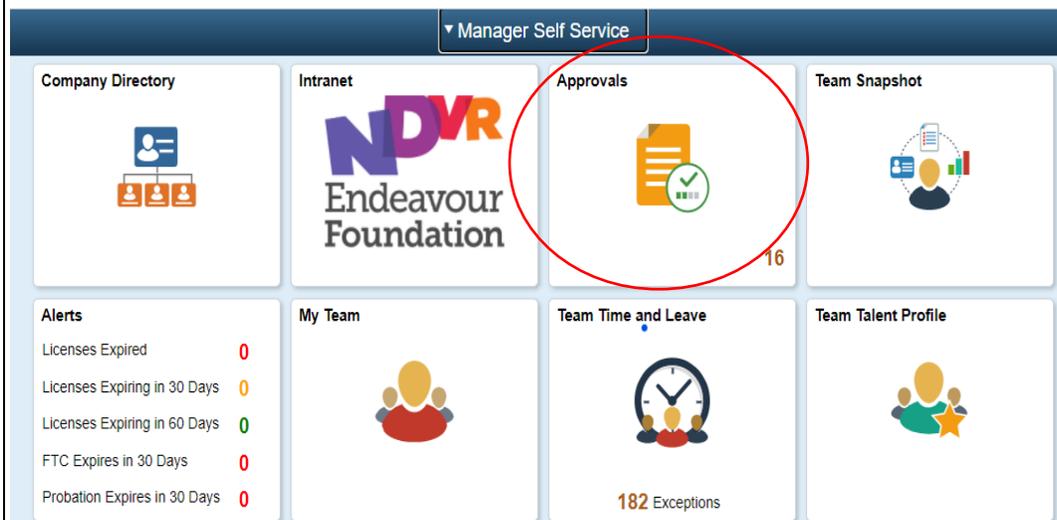
When you go to Manager Self-service. You will see the offboarding tile has either disappeared or has one less number next to it.

Please ensure your employee completes their tasks prior to their final day of work.

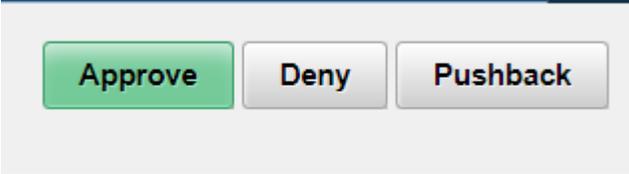


4. Steps to approve an Employee Resignation in Peoplesoft

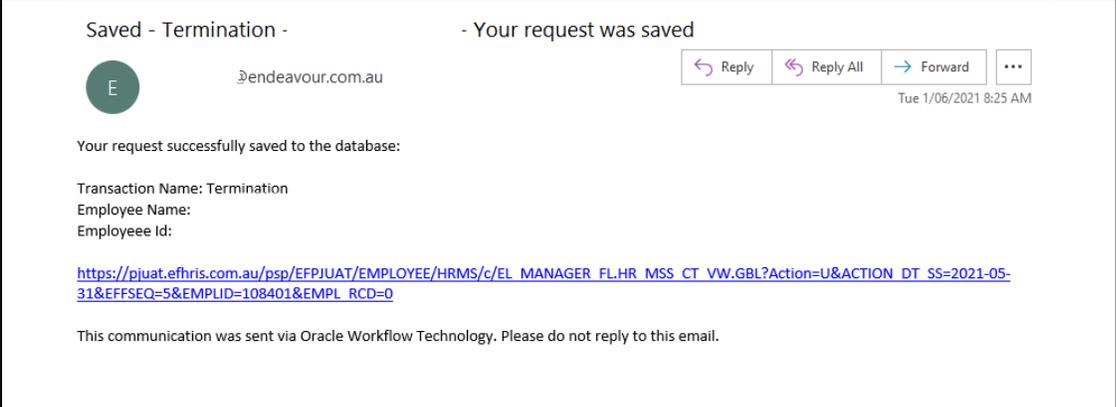
Click on the *Approvals* tile, under *Manager Self Service*



Within Approvals, click on *Employee Resignation*. This will then bring up a list of the employees in your team who have

<p>submitted their resignation.</p>	
<p>To view the details of the exit, click on the employees name.</p>	
<p>On the next screen, you will be able to see the employees exit date, exit reason, and any comments they have entered. If the employee has attached a resignation letter, this will be able to be viewed by clicking on “Attachments” You are welcome to enter comments on the exit – these will be seen by the People Experience team.</p>	
<p>Once you have reviewed the information and attachment the exit form, there are 3 options to move forward. Select the relevant one for the exit.</p>	<div style="text-align: center; margin-bottom: 10px;">  </div> <p>Approve – You should select this when all the information is correct, and you would like to exit to be processed by People Experience and Payroll</p> <p>Pushback – You should select this if there is something that needs to be amended or fixed up e.g. the last working date. This will push the exit back to the employee, who will be able to update it and resubmit.</p>

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<p>If selecting Pushback, ensure that you enter a comment to let the employee know what they need to fix.</p>	<p>Deny- You should only select this when you want to stop the exit process all together, for example the employee has withdrawn their resignation. Once denied, an exit will need to be completely re-submitted by the employee and will not be able to be seen by People Experience.</p>
<p>Once you have approved the exit, it will go to People Experience to Approve, or Pushback. Once it is approved by People Experience you will receive an email, and will then be able to complete your Manager Offboarding tasks (24 hours later)</p>	

GLOSSARY OF TERMS

Term	Definition
Involuntary Termination	A termination that has been initiated by Endeavour Foundation and includes termination for reasons such as Misconduct, Unsuccessful Probation, Medically Unfit. Terminations which are involuntary require a specific process to be followed to ensure legal risks are minimised. Please contact People Experience for support with Involuntary Terminations
Voluntary Termination	A termination that is initiated by the Employee, this includes when the employee resigns or retires or abandons employment. Please note, a termination is still voluntary even if the employee resigns during a performance management or disciplinary process. If you are not sure if a termination is voluntary or involuntary, please contact People Experience.
Pushback	Pushes the termination back to the employee to fix something.
Approve	Sends to the next approver (such as the Manager or People Experience)
Deny	Should only be used when the exit is no longer occurring, e.g the employee withdraws their resignation. Denied terminations cannot be seen by People Experience
Offboarding	Refers to the tasks required to be completed when an employee leaves the organisation
Pay in Lieu (of notice)	Pay in Lieu of notice is only required in certain circumstances of involuntary termination, or where this has been agreed with the employee. If the employee is working out a notice period, or you have agreed for the employee not to work their full notice period, pay in lieu is not required. If you are not sure if pay in lieu is required, please contact people experience. If the employee is being paid in lieu or part of their notice period, and working the other part, this can be indicated in the “other” comments in the Notice Period to be worked question in the termination.

If you have any questions about the employee exit process, please contact People Experience on 07 3900 5460 or PeopleExperience@endeavour.com.au