

People Soft Supported Employee Exit and Offboarding Guide

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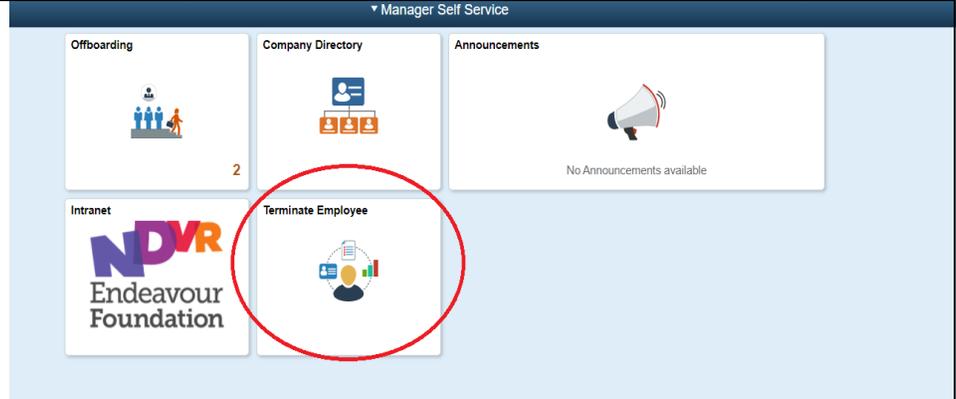
Key Hints and Tips:

- Employment Coaches are now able to submit exits on behalf of the Supported Employees at the Sites they are responsible for.
- The new Supported Employee Exit Process and Offboarding Survey replaces the old paper QF 5275.01 Employee Exit Form
- If an Employment Coach moves sites or takes responsibility for an additional site, this will need to be manually updated by the People Soft System Administrator. If you are not able to see the correct site, please email peopleexperience@endeavour.com.au
- 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 Supported Employees are paid their statutory entitlements promptly. Failing to submit exits in time means we risk over or under paying Supported Employees.

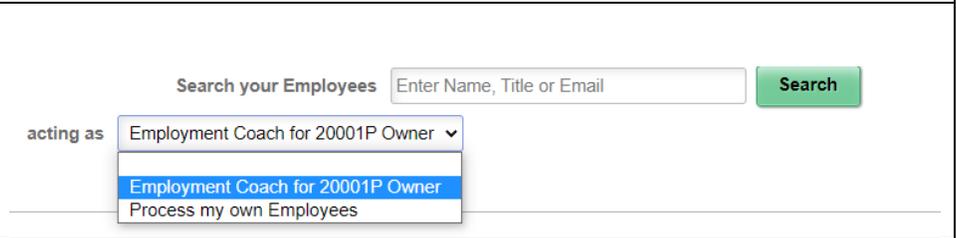
Steps for Employment Coach to submit a Supported Employee Exit in People Soft

NOTE: Exits must be entered in PeopleSoft within 24 hours of notice of a Supported Employee's exit.

Select Manager Self Service from your drop down menu, then select Terminate Employee tile.



Select Acting as Employment Coach... and the appropriate locations if you look after more than one site from the drop down menu



Search for, or select the Supported Employee from the list
Click on their name

acting as

Select Employee 74 rows

Name / Title / ID - Record	Status / Type
Supported Employee 103268 - 0	Active Employee
Supported Employee 103523 - 0	Active Employee
Supported Employee 107628 - 0	Active Employee

<p>You will then be prompted to select whether the termination is voluntary (such as a resignation), or involuntary (such as an unsuccessful probation) and if Pay In Lieu of notice is required. Please note, pay in lieu is only required in rare circumstances, please contact People Experience if you are unsure.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <div style="display: flex; justify-content: space-between; align-items: center;">  Supported Employee </div> <div style="text-align: right; margin-top: 10px;"> Next > </div> <hr/> <p style="color: #A52A2A; font-weight: bold;">Questionnaire</p> <div style="margin-top: 20px;"> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Is the termination voluntary? Yes </div> <div style="border: 1px solid #ccc; padding: 5px;"> Is Pay in Lieu required? No </div> </div> </div>												
<p>Populate the information including Last day of Employment, Termination Reason, the date notice was given, whether the employee is working their notice period and any other comments.</p> <p>Click <i>Next</i></p>	<div style="border: 1px solid #ccc; padding: 10px;"> <p style="color: #A52A2A; font-weight: bold; margin-bottom: 10px;">Work and Job Information</p> <div style="margin-bottom: 10px;"> <p>*Last Day of Employment <input type="text" value="24/05/2021"/> </p> <p>*Reason <input type="text" value="Resignation"/> </p> <p>Date Notice Given <input type="text" value="10/05/2021"/> </p> <p>Notice Period to be Worked <input type="text" value="Full period to be worked"/> </p> <p>Other <input type="text" value="John has given two weeks notice of resignation due to having found open employment elsewhere"/> </p> </div> <p style="color: #A52A2A; font-weight: bold; margin-bottom: 10px;">Current Information</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%;">Position Title</td> <td style="width: 50%;">Supported Employee</td> <td style="width: 30%;">0018038</td> </tr> <tr> <td>Job Title</td> <td>Supported Employee</td> <td>SUPEMP</td> </tr> <tr> <td>Reports To</td> <td>Site Manager - Work</td> <td>0015996</td> </tr> <tr> <td>Manager Name</td> <td></td> <td></td> </tr> </table> </div>	Position Title	Supported Employee	0018038	Job Title	Supported Employee	SUPEMP	Reports To	Site Manager - Work	0015996	Manager Name		
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Add the resignation letter or supporting documents to attachments and/or comments

Note: at least one attachment is mandatory to progress to the next stage

You can then submit the termination to the Manager.

The Manager can then approve or push back the termination. It should only be denied where the employee is no longer exiting.

If the termination is pushed back, incorrect information can be corrected by the Employment Coach and Resubmitted.

It will be approved first by the Manager, then by People Experience.

Review and Submit

Last Day of Employment 24/05/2021
Reason Resignation

Current Information

Position Title Supported Employee 0018038
Job Title Supported Employee SUPEMP
Reports To Site Manager - Work 0015996
Manager Name

Comments

Attachments

File Name	Description	Date Time Attached
Offboarding_screen_shots_docx	Offboarding_screen_shots	20/05/21 5:01:20PM

Steps for Employment Coach's to complete Offboarding Tasks in Peoplesoft

Once the manager and People Experience have approved the Termination Request, you will be prompted to complete Offboarding tasks on behalf of the Supported Employee.

You will be notified by email.

This can take 24 hours after a termination in approved.

You will continue to receive reminder emails until all mandatory OffBoarding tasks are complete.

OffBoarding tasks require your attention

 dummy@endeavour.com.au
To

OffBoarding tasks require your attention

Message 1: OffBoarding tasks require your attention (20001,524)
Dear

OffBoarding tasks associated to the following position are available for your review and updates:

Explanation: Supported Employee

Please ensure completion of your assigned tasks prior to

Thank you.

Process Name: EOEN_ALERT

Category: CUSTOMEMAIL

Query Name: EF_TERM_OFB_INIT_EC

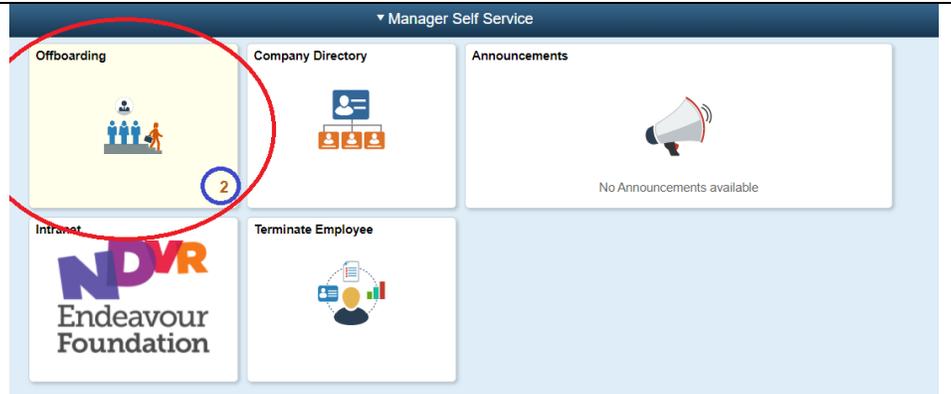
Go To: [Notification Detail](#)

Go To: [Transaction Detail](#)

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When you login to People soft, you will see an offboarding tile appear under your Employee self-service home screen. Click on this tile to undertake your offboarding tasks.

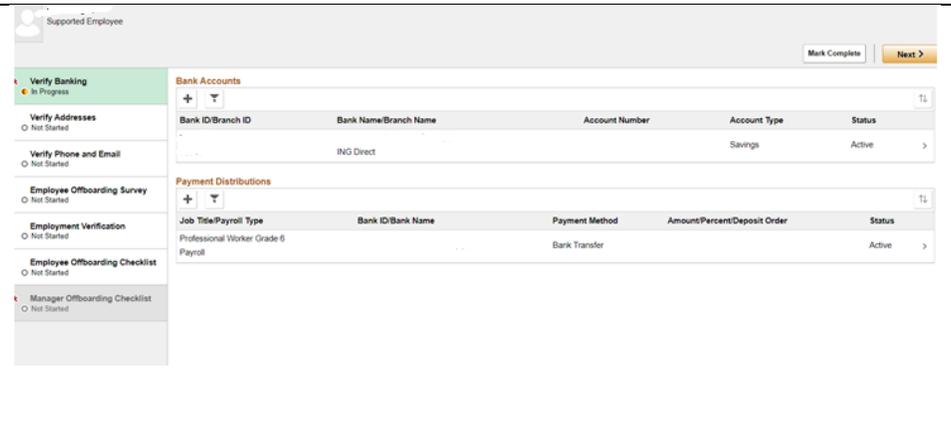
The number next to the offboarding task indicated how many Supported Employees you have outstanding offboarding tasks for.



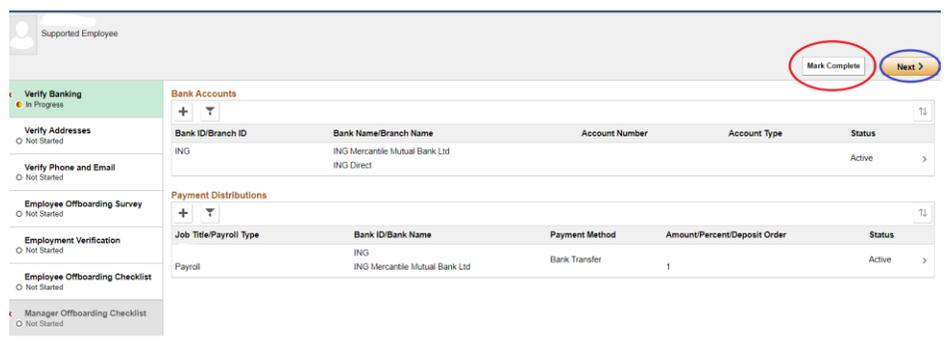
Click on the correct Supported Employee Record to proceed to the offboarding tasks.

Verify the Supported Employee's bank account details and payment distribution are correct for their final payment.

To update any details, please fill in and submit **QF 5202.27 BANK DETAILS** form and send to PeopleExperience@endeavour.com.au



Once you have verified the bank details, click *Mark Complete*



Click *Yes* then click *Next*



Once you have marked as complete, the item on the list will

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change from “In Progress” or “Visited”, to “Complete”.

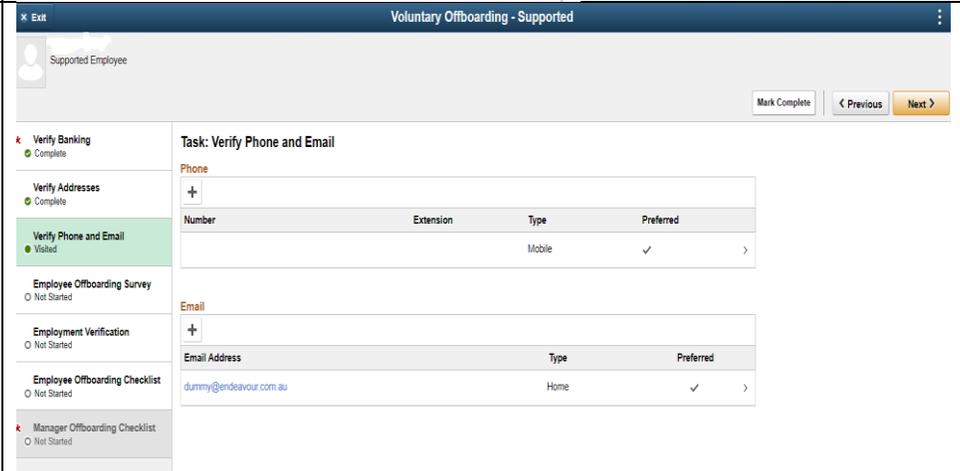
You may exit and return to the offboarding survey at any time, and the answers you have completed will be saved.



Next verify the Supported employee’s home and mailing address are correct.

If they require updating, complete Form No: 5102.05 Supported Employee Details and email to PeopleExperience@endeavour.com.au

Click *Mark Complete* and *Next*

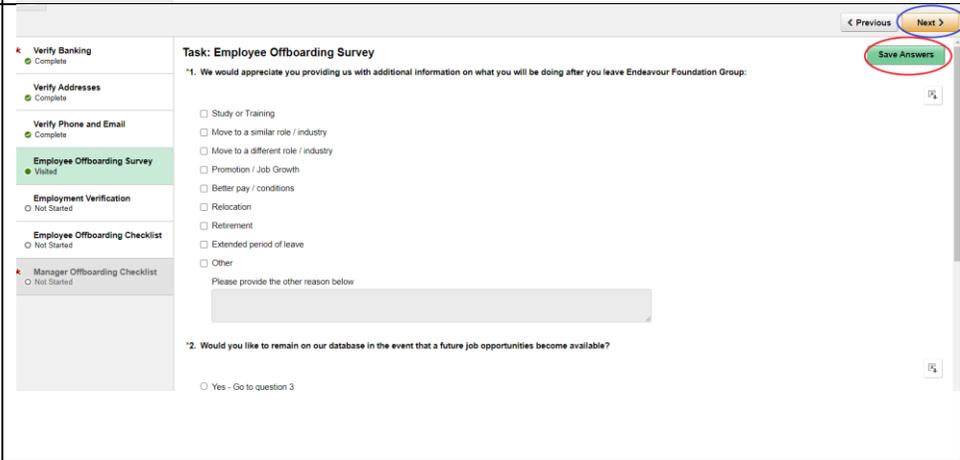


Next complete the employee offboarding survey on behalf of the Supported Employee

Note: Mandatory questions are marked with an Asterix *

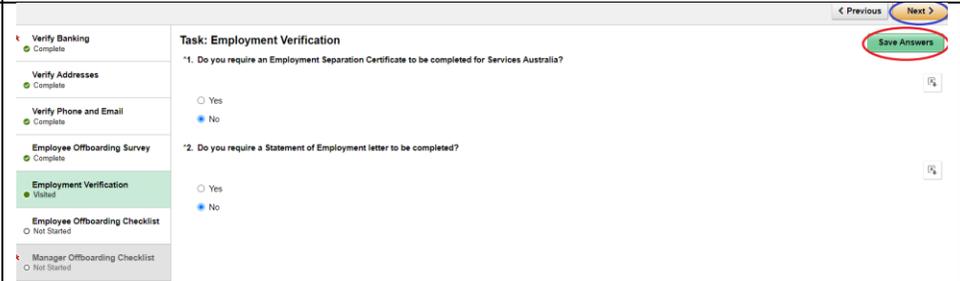
If the questions are not applicable to supported employees (e.g Salary packaging) click not applicable

Once you have answered the questions, click *Save Answers* and *Next*.



Next, confirm if the Supported Employee requires a Separation Certificate (for Services Australia e.g Centrelink) or if they require a statement of service from Endeavour Foundation.

Click *Save Answers* and Click *Next*



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Next complete the employee offboarding checklist with the supported employee, this contains all required steps that must be done prior to the employees final day of employment

Click *Save Answers*

Task: Employee Offboarding Checklist
Employee Checklist on Termination

1. Please confirm that you have submitted your final timesheet prior to your last day of employment.

Completed
 Not Applicable

2. Please confirm that you have submitted any outstanding Leave requests prior to your last day of employment.

Completed
 Not Applicable

3. Please confirm that you have submitted any final business related expenses prior to your last day of employment.

Completed
 Not Applicable

4. Please confirm that you have returned all outstanding Company Property to your Manager prior to departure on your last day of employment

Laptop
 Docking Station
 Monitor

Save Answers

Once all items on the list have been marked as complete, the offboarding tasks are complete, you can click *Exit*.

You will see the Manager Offboarding Checklist is greyed out. The Supported Employee's Manager can complete the remaining steps.

Exit

Supported Employee

Verify Banking
Complete

Verify Addresses
Complete

Verify Phone and Email
Complete

Employee Offboarding Survey
Complete

Employment Verification
Complete

Employee Offboarding Checklist
Complete

Manager Offboarding Checklist
Not Started

Steps for Manager's Offboarding Tasks for Supported Employees

Once the termination has been approved by People Experience, the Manager the supported employee reports to in PeopleSoft 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 daily 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](#)

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 the Employment Coach has completed for the Supported Employee however the details will be greyed out and not visible. You will be able to action the Manager Offboarding Survey

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

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<p>Complete your manager off boarding tasks and click Save Answers.</p>	<div style="border: 1px solid black; padding: 5px;"> <p>Task: Manager Offboarding Checklist</p> <p>*1. Should this position stay active?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>*2. Does the position have people reporting to it?</p> <p><input type="radio"/> Yes Which person should now be the manager of the direct reports? <input style="width: 100%;" type="text"/></p> <p><input type="radio"/> No</p> <p>*3. Would you rehire the employee?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>4. Do you require ICT to setup an Out of Office for their email?</p> <p><input type="radio"/> Yes</p> <p style="text-align: right;">Save Answers</p> </div>
<p>Once you have answered all mandatory questions, your Manager offboarding checklist will change from “In Progress” to “Complete” You can now select <i>Exit</i>.</p>	<div style="border: 1px solid black; padding: 5px; text-align: center;"> <p>Employee Offboarding Checklist</p> <p><input type="radio"/> Not Started</p> <p style="color: red; font-weight: bold; font-size: 1.2em;">✖ Manager Offboarding Checklist</p> <p><input checked="" type="radio"/> Complete</p> </div>

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 supported 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.

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