Employees we support: Exit and Offboarding

Employee Exits should be processed in Peoplesoft as possible once you area aware an employee is termination their employment.

- 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 an employee.

Who is responsible for submitting the termination?

- Employment Coaches have access submit exits for employees we support at their site.
- If an Employment Coach moves sites or takes responsibility for an additional site, this will need to be manually updated by People Systems. If you are not able to see the correct site, please email peopleexperience@endeavour.com.au

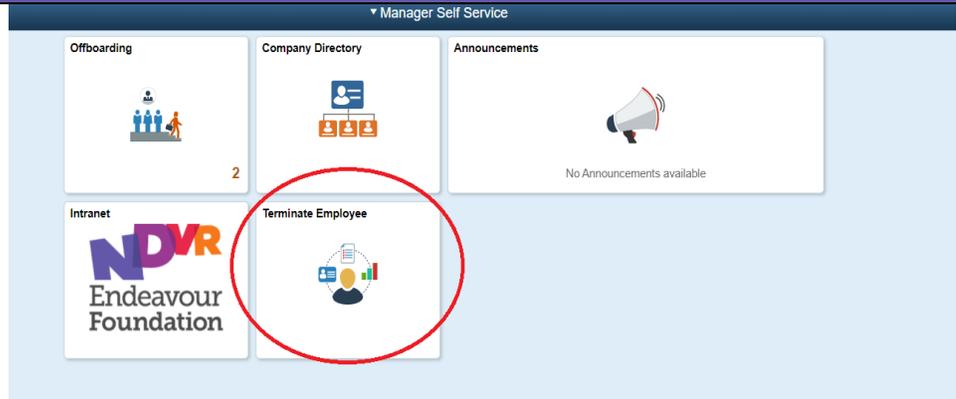**What information do I need to submit a termination?**

- The employees Last day of Work – the last official day of their employment with Endeavour Foundation This date might differ from details you provide on Client Exit Form. The termination in Peoplesoft relates to their employment only, not the service agreement.
- Reason for leaving, please note Peoplesoft is not to be used to advise of employee death – please speak to your People Partner.
- Whether or not notice is lieu is payable.

Tip: Check out Glossary for more information, including how to determine appropriate reason for leaving.
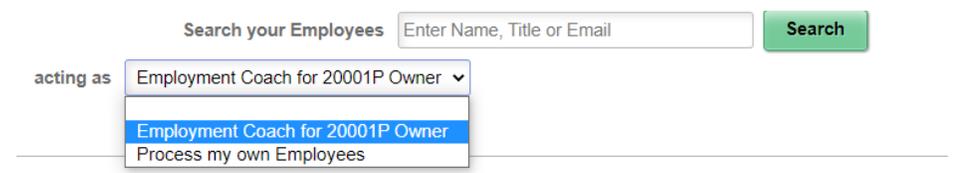
Submitting Termination in Peoplesoft: Employment Coach	

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.	▼ Manager Self Service **Offboarding** 2 **Company Directory** **Announcements** No Announcements available **Intranet** NDVR Endeavour Foundation **Terminate Employee**
Select Acting as Employment Coach… and the appropriate locations if you look after more than one site from the drop down menu	Search your Employees [Enter Name, Title or Email] **Search** acting as Employment Coach for 20001P Owner ▼ Employment Coach for 20001P Owner Process my own Employees
Search for, or select the Supported Employee from the list Click on their name	Search your Employees [Enter Name, Title or Email] Search acting as Employment Coach for 2 **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 ›
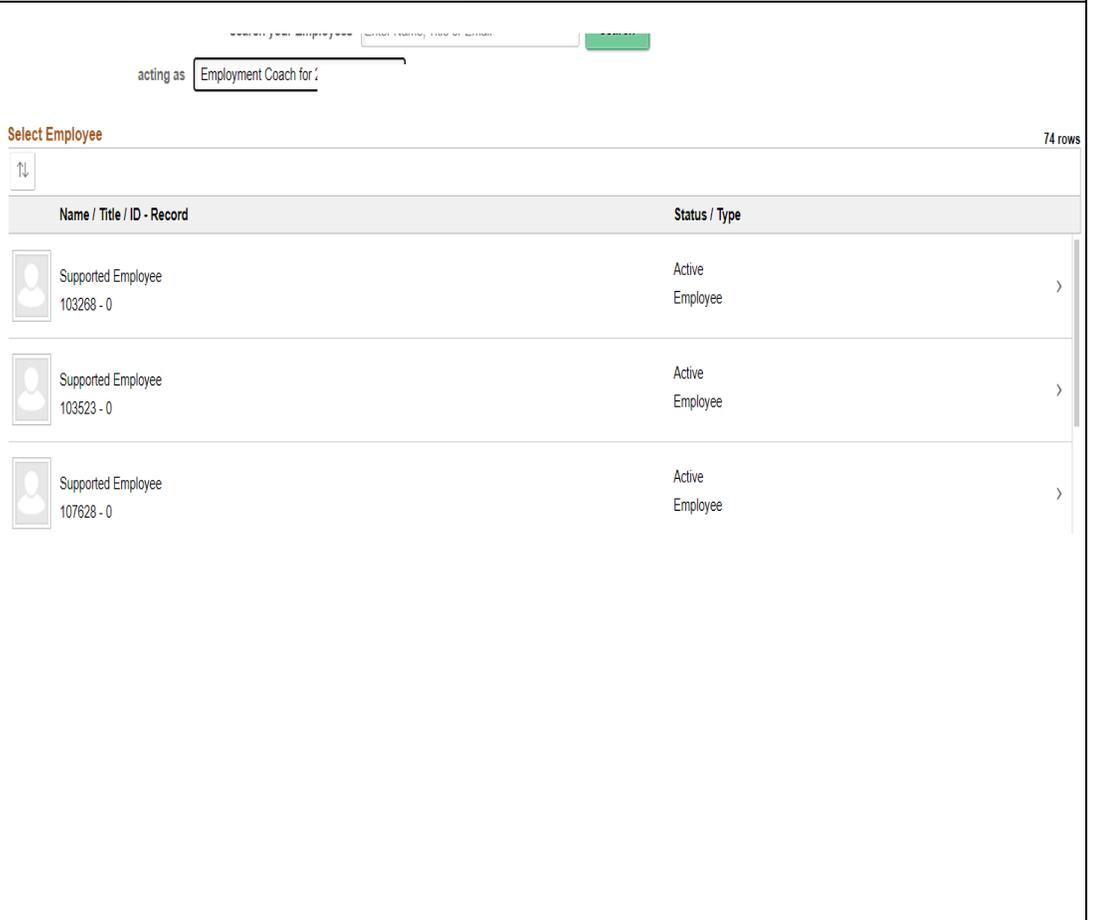
You will then be prompted to select whether the termination is voluntary (such as a resignation), or involuntary (such as an unsuccessful probation) and if Pay In Lieu of notice is required. Please note, pay in lieu is only required in rare circumstances, please contact People Experience if you are unsure.	Supported Employee Next ▶ **Questionnaire** Is the termination voluntary?　　　　　　　　　　Yes Is Pay in Lieu required?　　　　　　　　　　　　No
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. Click Next	**Work and Job Information** *Last Day of Employment　24/05/2021 *Reason　Open Employment Date Notice Given　10/05/2021 Notice Period to be Worked　Full period to be worked Other　John has given two weeks notice of resignation due to having found open employment elsewhere **Current Information** Position Title　Supported Employee　　0018038 Job Title　Supported Employee　　SUPEMP Reports To　Site Manager - Work　　0015996 Manager Name
Attach the resignation letter or supporting documents. Note: at least one attachment is mandatory. Submit the termination to the Manager. The Manager can then approve or push back the termination. If the termination is pushed back, incorrect information can be corrected by the Employment Coach and Resubmitted. People Services review before processing to Payroll.	**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** ➕ <table><tr><td>File Name</td><td>Description</td><td>DateTime Attached</td></tr><tr><td>Offboarding_screen_shots_.docx</td><td>Offboarding_screen_shots</td><td>20/05/21 5:01:20PM</td></tr></table>

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

Once the manager and People Services 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.

When you login to PeopleSoft, 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.
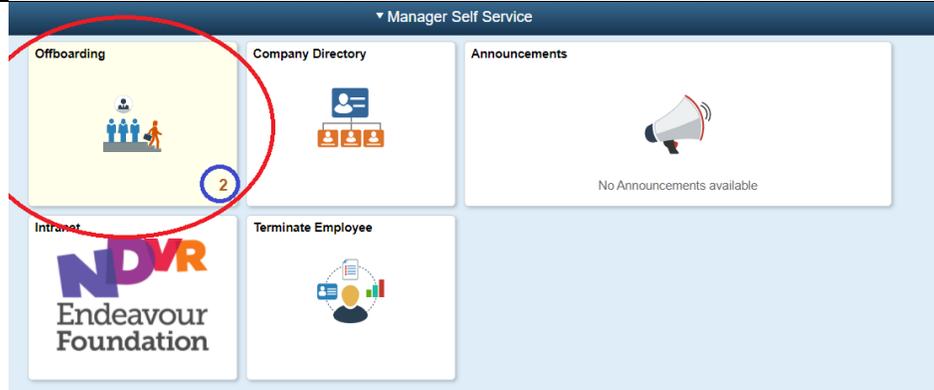
Click on the correct Supported Employee Record to proceed to the offboarding tasks.

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
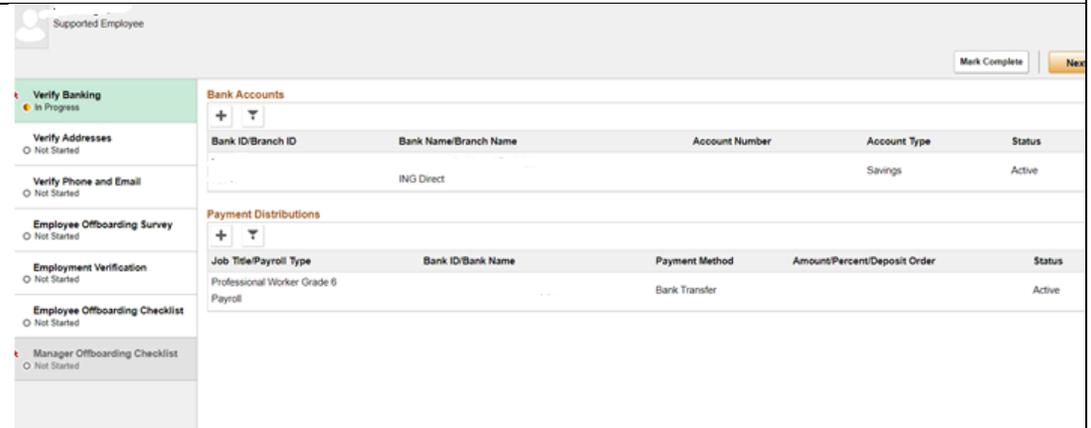
Once you have verified the bank details, click *Mark Complete*	
Click *Yes* then click *Next* Once you have marked as complete, the item on the list will change from "In Progress" or "Visited", to "Complete". You may exit and return to the offboarding survey at any time, and the answers you have completed 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*.	**‹ Previous Next ›** **Save Answers** k **Verify Banking** ⊘ Complete **Verify Addresses** ⊘ Complete **Verify Phone and Email** ⊘ Complete **Employee Offboarding Survey** ● Visited **Employment Verification** ○ Not Started **Employee Offboarding Checklist** ○ Not Started k **Manager Offboarding Checklist** ○ Not Started **Task: Employee Offboarding Survey** *1. We would appreciate you providing us with additional information on what you will be doing after you leave Endeavour Foundation Group: ☐ Study or Training ☐ Move to a similar role / industry ☐ Move to a different role / industry ☐ Promotion / Job Growth ☐ Better pay / conditions ☐ Relocation ☐ Retirement ☐ Extended period of leave ☐ Other 　　Please provide the other reason below *2. Would you like to remain on our database in the event that a future job opportunities become available? ○ Yes - Go to question 3
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*	**‹ Previous Next ›** **Save Answers** k **Verify Banking** ⊘ Complete **Verify Addresses** ⊘ Complete **Verify Phone and Email** ⊘ Complete **Employee Offboarding Survey** ⊘ Complete **Employment Verification** ● Visited **Employee Offboarding Checklist** ○ Not Started k **Manager Offboarding Checklist** ○ Not Started **Task: Employment Verification** *1. Do you require an Employment Separation Certificate to be completed for Services Australia? ○ Yes ● No *2. Do you require a Statement of Employment letter to be completed? ○ Yes ● No
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*	**‹ Previous** **Save Answers** ✱ **Verify Banking** ⊘ Complete **Verify Addresses** ⊘ Complete **Verify Phone and Email** ⊘ Complete **Employee Offboarding Survey** ⊘ Complete **Employment Verification** ⊘ Complete **Employee Offboarding Checklist** ● Visited ✱ **Manager Offboarding Checklist** ○ Not Started **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

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)
Explanation:	Please ensure yourself and the employee have completed your outstanding offboarding tasks prior to their last working date.
	- 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   1 row

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

Complete your manager off boarding tasks and click Save Answers.	**Task: Manager Offboarding Checklist** Save Answers
	*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

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

Glossary

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 Employee Relations for support with Involuntary Terminations. This includes employee Deaths.
Voluntary Termination	A termination that is initiated by the Employee, this includes when the employee resigns or retires or moves to Open Employment (see below). 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 Services.
Open Employment	For employees we support, either SE, SHE or SIE, that resign from Endeavour Foundation for the purpose of attaining an open employment role outside the organisation, these are considered an Open Employment Resignation. Additionally, if the employee resigns from Endeavour Foundation for the purpose of looking for an open employment role, this would also be counted an Open Employment Resignation.
Pushback	Pushes the termination back to the employee to fix something.
Approve	Sends to the next approver (such as the Manager or People Services)
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 Services.
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 Services. 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 Services on 07 3900 5460 or PeopleExperience@endeavour.com.au