The Manager's role in offboarding their employees in HCM PeopleSoft:
This job aid outlines the manager's tasks in successfully offboarding their employees.

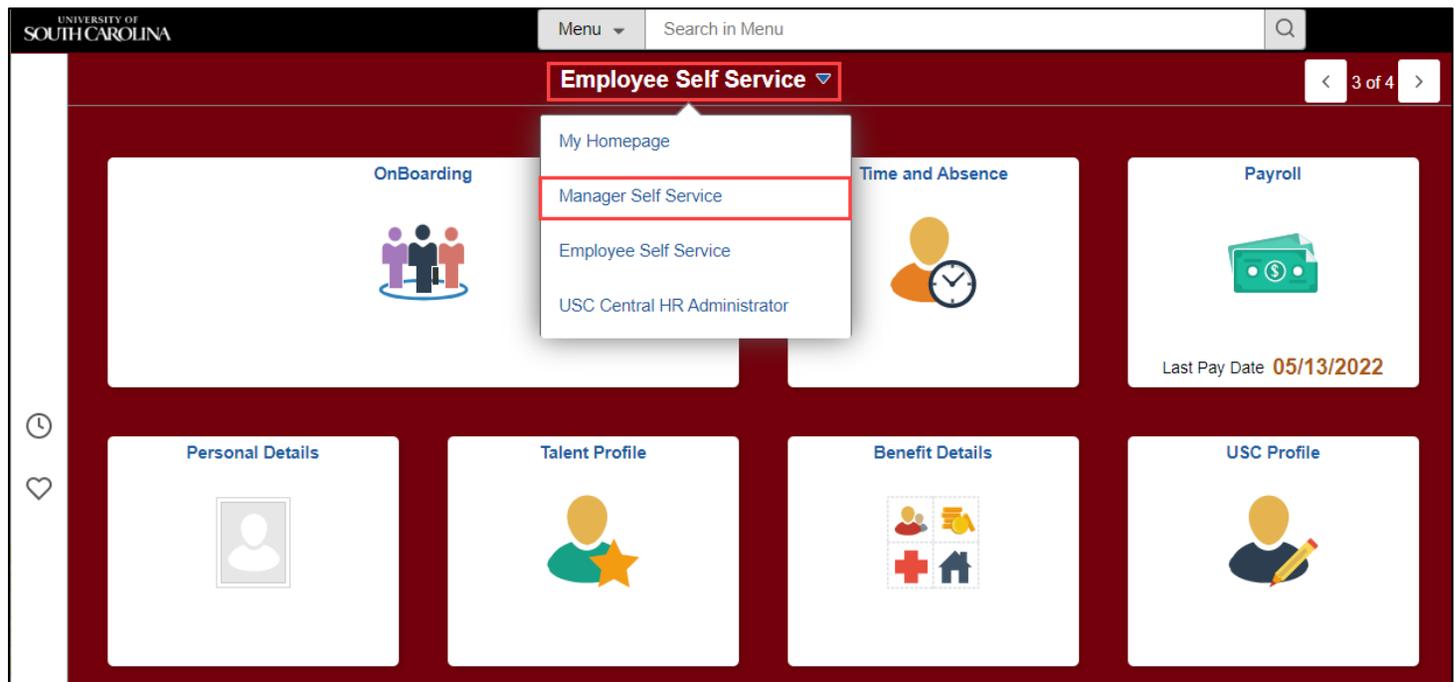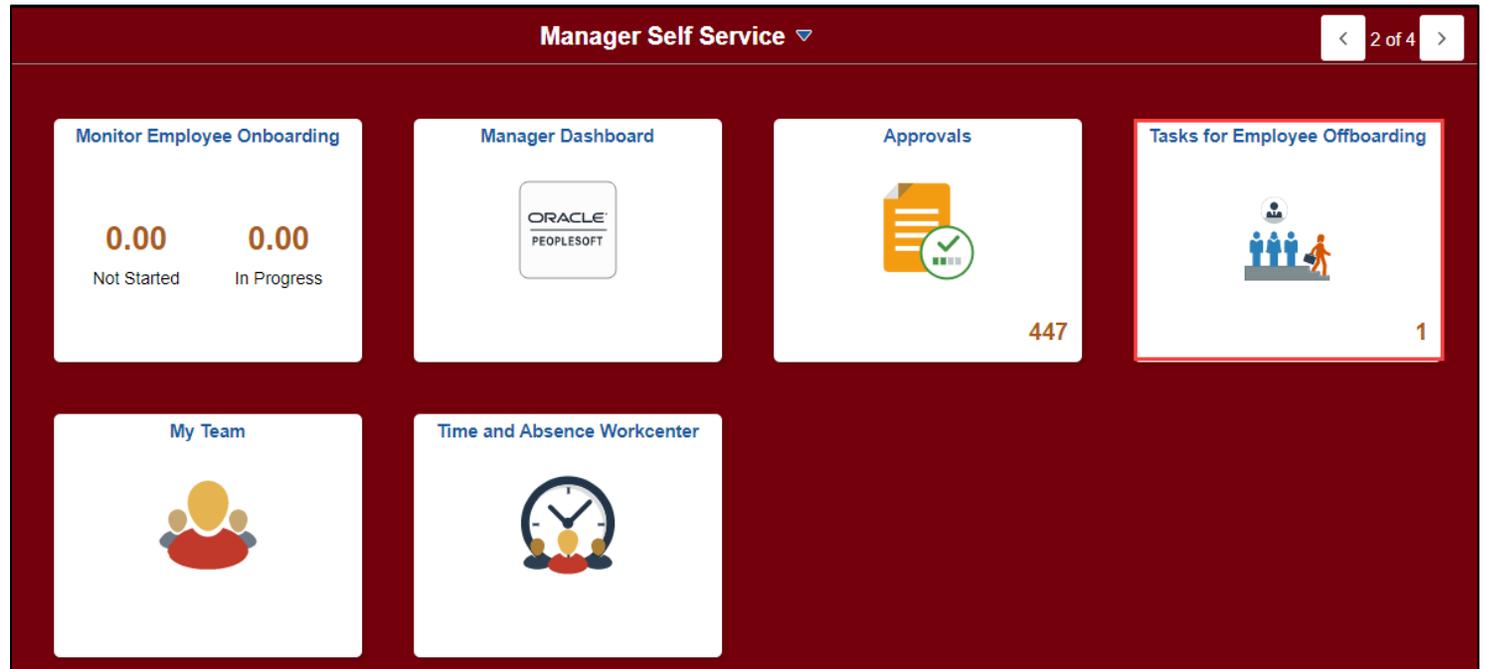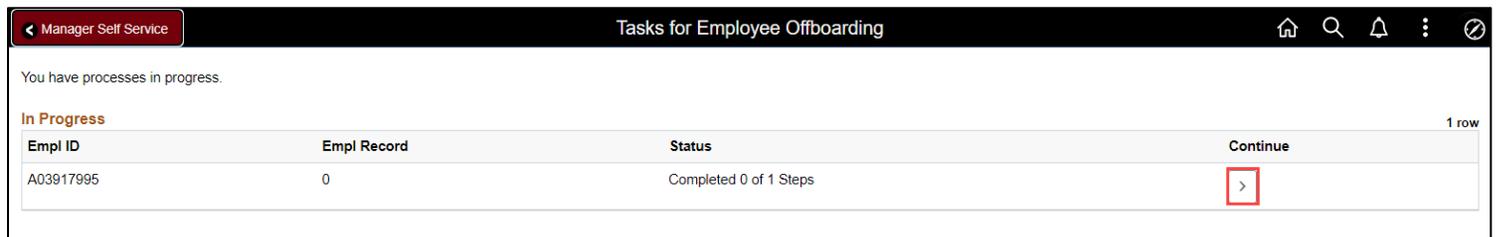| Processing Steps	Screenshots
Once your employee's separation action has been approved in the HCM PeopleSoft system they will receive an automatically generated email alerting them to the offboarding tasks that require their attention. As a manager, you also have a crucial role to play in successful offboarding of employees. **Step 1:** Click the **Employee Self Service** drop-down menu and select the **Manager Self Service** option from the list.	

Step 2: On the Manager Self Service homepage, click the **Tasks for Employee Offboarding** tile.	
Step 3: Click the Continue **>** button to begin the offboarding tasks.	

Step 4: The **Manager Checklist** covers vital offboarding functions under your purview:

Communicate the departure to the department, internal/external customers, stakeholders, etc.

Create a knowledge transfer plan for the departing employee to document processes/procedures for their replacement.
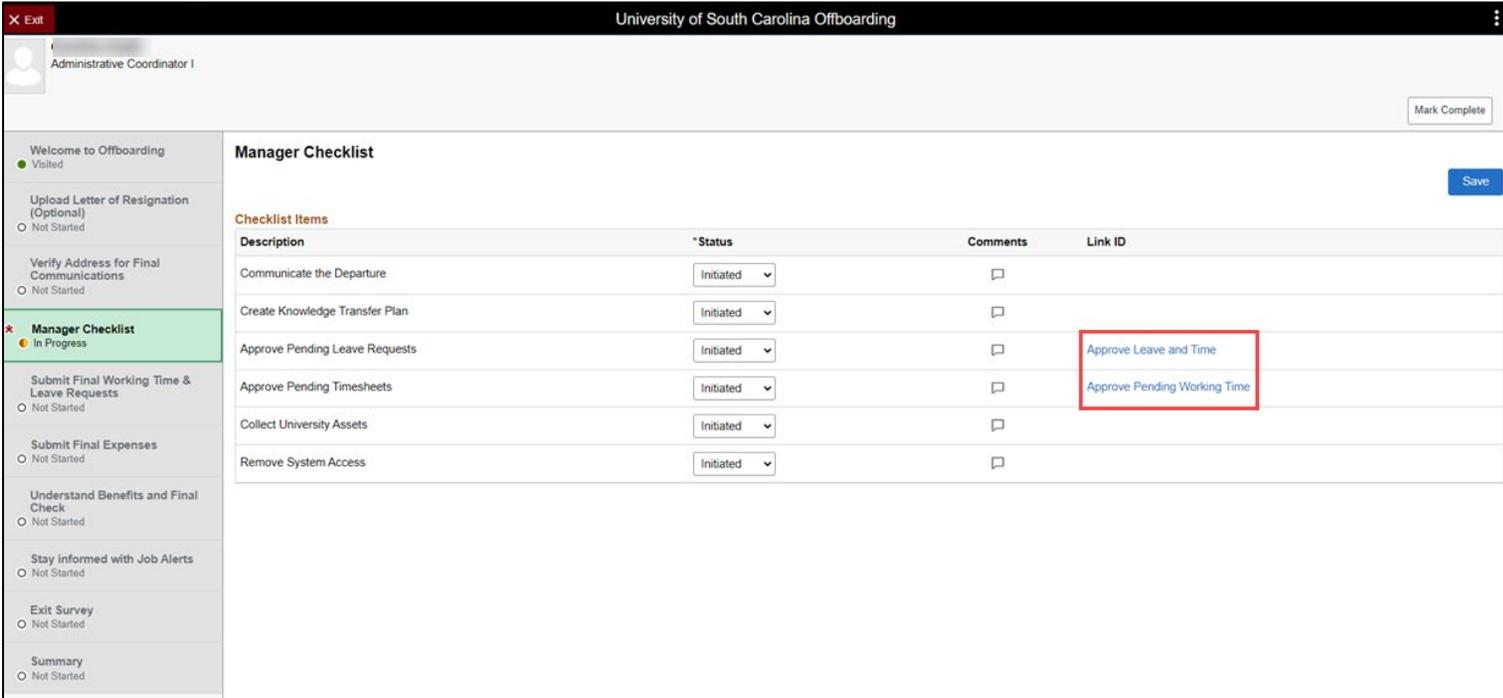
Approve pending leave requests if the department employee was in a leave earning position (including leave cancelations for any future dated leave beyond the date of separation). Simply click the link to access Time and Absence.

Approve pending timesheets if applicable (if the employee is non-exempt). Simply click the link to access Time and Absence.

Collect all university assets (laptop, cellphone, PCard, etc.).

Remove system access as applicable (i.e. HCM PeopleSoft, Finance PeopleSoft, PeopleAdmin, Banner).

For tips on how to offboard an employee, visit the **offboarding webpage.**

Step 5 (Optional): As applicable, you have the ability to add comments to each step in the checklist.	

Step 6: Once you've taken the appropriate action(s) for each of the checklist items, click the **Briefing Status** drop-down menu button and update to the status.

Step 7 (Optional): If you are updating some of the checklist items or need to come back to this page later, simply click the Save button to ensure your work is not lost.

Step 8: Once all checklist items are at the **Briefing Status** of **Completed**, click the **Save** button.

Manager Checklist
● Visited

Checklist

Checklist Items

1-6 of 6

Sequence	Checklist Item Code	Description	*Briefing Status
100	SC_COM	Communicate the Departure	Initiated ▾
200	SC_KT	Create Knowledge Transfer Plan	Completed / Initiated / Notified / Received
300	SC_LV	Approve Pending Leave Requests	Initiated
400	SC_TIM	Approve Pending Timesheets	Initiated
500	SC_COL	Collect University Assets	Initiated
600	SC_SYS	Remove System Access	Initiated

Save

Mark Complete

Manager Checklist
● Visited

Checklist

Checklist Items

1-6 of 6

Sequence	Checklist Item Code	Description	*Briefing Status
100	SC_COM	Communicate the Departure	Completed
200	SC_KT	Create Knowledge Transfer Plan	Completed
300	SC_LV	Approve Pending Leave Requests	Completed
400	SC_TIM	Approve Pending Timesheets	Completed
500	SC_COL	Collect University Assets	Completed
600	SC_SYS	Remove System Access	Completed

Save

Step 9: Upon clicking the Save button in the previous step, the Manager Checklist now appears as complete.

Thank you for taking the time to complete these crucial offboarding tasks! We wish you the best of luck in filling this vacancy.

Manager Checklist
✓ Complete

Checklist

Checklist Items

1-6 of 6

Sequence	Checklist Item Code	Description	*Briefing Status
100	SC_COM	Communicate the Departure	Completed
200	SC_KT	Create Knowledge Transfer Plan	Completed
300	SC_LV	Approve Pending Leave Requests	Completed
400	SC_TIM	Approve Pending Timesheets	Completed
500	SC_COL	Collect University Assets	Completed
600	SC_SYS	Remove System Access	Completed

Save