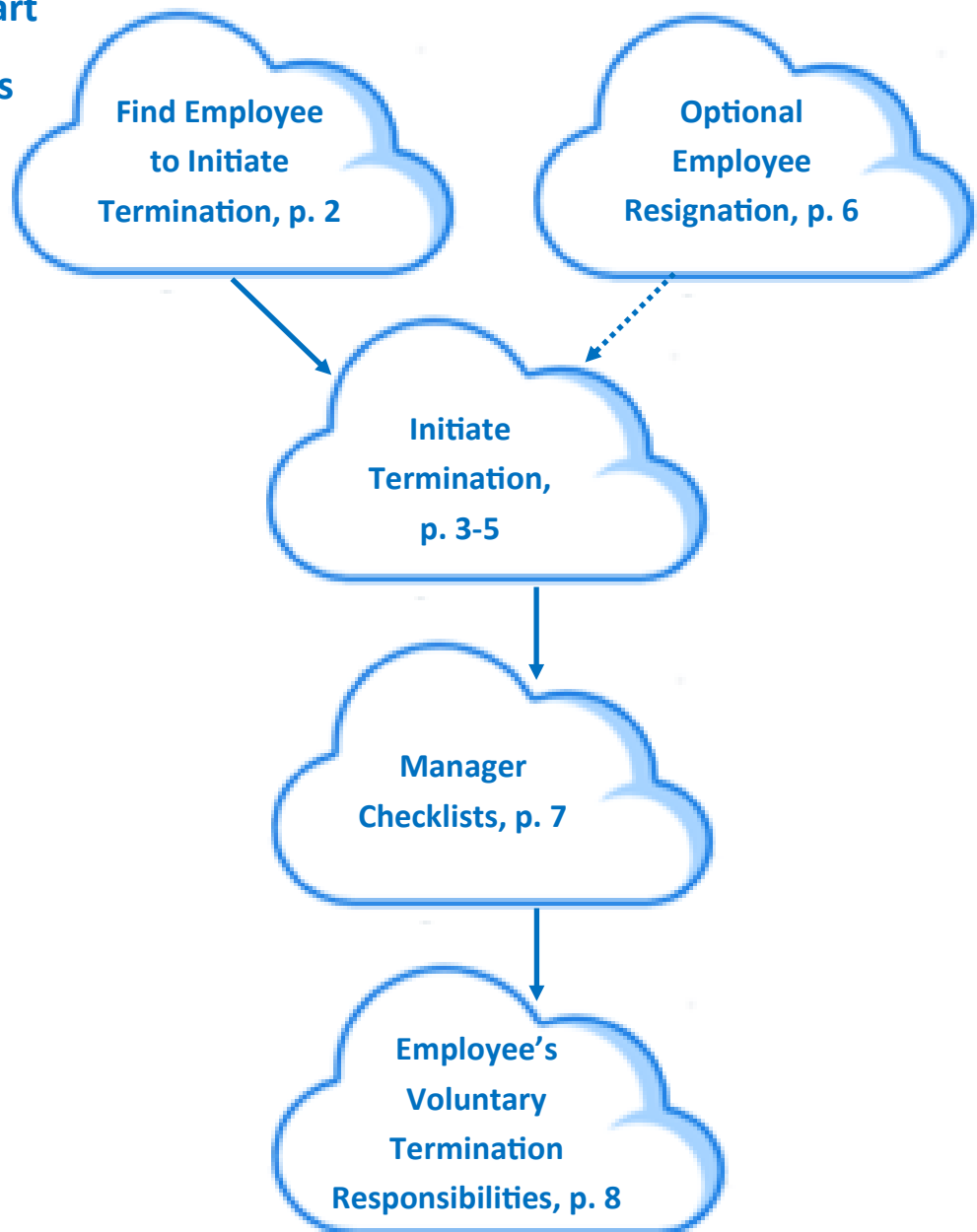




## Offboarding an Employee

Workday is automating and providing consistency to the employee termination and offboarding process that is currently a combination of paper and electronic processes. When an employee resigns, the manager is responsible for either initiating the termination in Workday or reaching out to HR to initiate the termination. If an employee initiates the resignation in Workday, the manager is still responsible for completing the Terminate Business Process in Workday. If a manager believes an employee should be involuntarily terminated, the manager should speak with their HR business partner in case the termination reason makes the employee ineligible for rehire.

### Offboarding Flowchart & Table of Contents





## Offboarding - Initiate Termination of an Employee - page 2

Follow the steps below to initiate an employee's termination.

### Find Employee

1. From the Workday homepage, select **Menu** to open Apps.
2. Select **My Team Management**.
3. Under Actions, select **More**.
4. Select **Terminate**
5. Select **Employee**.
6. Type the employee's name in the **Search**.
7. Select the Employee's name, and click **OK**.



## Offboarding—Complete Reasons —page 3

### Complete Reason

1. Select the **pencil** icon in the **Reason** box. Select the edit icon to edit information in each section.
2. Select **Search** to choose the **Primary Termination Reason**.
3. Select **Voluntary**. It is best practice to work with you HR Partner when involuntarily terminating an employee.
4. A drop-down list of reasons appears. Select the appropriate **Voluntary Termination Reason**.

The screenshot shows the 'Terminate Employee' interface. At the top, there's a search bar and navigation icons. Below, the 'Reason' section is visible, containing 'Primary Reason \*' and 'Secondary Reasons'. A pink circle with the number '1' is placed over the pencil icon next to the 'Primary Reason \*' field.

This close-up shows the 'Reason' section with the 'Primary Reason \*' field. A pink circle with the number '2' is placed over the search input field. There are also icons for undo and confirm next to the field.

This close-up shows the dropdown menu for the 'Primary Reason \*' field. The 'Voluntary' category is selected, and a pink circle with the number '4' is placed over the selection. The dropdown lists several options under 'Voluntary':

- Voluntary > Position/Funding Eliminate
- Voluntary > Relocation
- Voluntary > Resignation - Did Not Work Notice
- Voluntary > Resignation - External Position
- Voluntary > Resignation - Military
- Voluntary > Resignation - Return to School

This close-up shows the dropdown menu with the 'Voluntary' option selected. A pink circle with the number '3' is placed over the 'Voluntary' option. The dropdown also shows 'Involuntary' and 'Search' options.



## Offboarding - Reasons and Details - page 4

### Complete Reason, cont.

5. The **Secondary Reason** is not required in Workday, but if you wish to add one, follow the same steps taken to add the **Primary Reason**.
6. Select the **check mark** to save your reason(s).

### Reason

### Details

Enter the appropriate dates in the Details Section. The **Termination Date**, **Last Day of Work**, and **Pay Through Date** are the same dates in Workday.

In this example, the employee will be paid through their last day of work, which is July 1.

Adding a **Resignation Date** is optional.

1. Select the **check mark** to save the dates.

### Details



## Offboarding - Complete Details and Submit - page 5

### Position Details

Edit **Position Details** as needed.

**Close Position** - If the position will be filled, select **No**. If the position is ending and will not be filled, select **Yes**.

**Is this position available for overlap?** - If the employee will not remain after a replacement has been hired, select **No**. If the employee may remain in this position to train a replacement, select **Yes**.

### Position Details

Close Position 

No

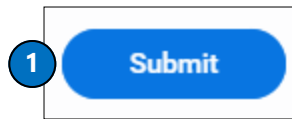
Is this position available for overlap?

Yes

### Submit Termination

1. Select **Submit** to initiate the termination.

After the termination is submitted, a task is sent to the manager's manager to approve the termination.





## Offboarding - Employee Initiated Resignation - page 6

Workday offers an additional termination business process: employee ability to submit the resignation in Workday. If this occurs, the manager will receive a My Task inbox task to Review Resignation Request. After approving a Resignation Request, the manager will return to their My Tasks inbox to complete and Submit the termination. The Termination will be the same as seen in this guide on pages 3-5, but fields will be populated on the termination based on the employee's submitted resignation. The manager may edit the termination as needed.

### Approve Resignation

1. If an employee submits the resignation in Workday, the manager will receive a task in My Task. Select the **Resignation** to view.

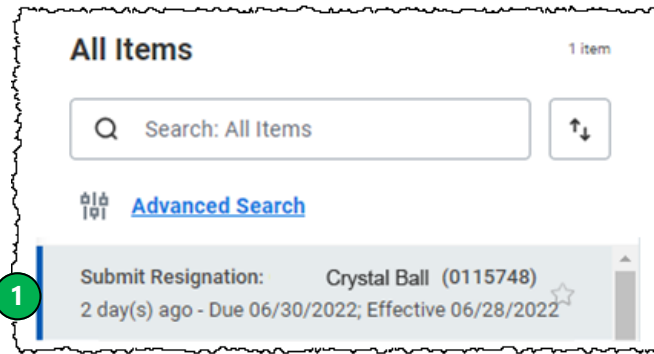
2. Review the **Resignation Request** for accuracy, understanding that edits may still be made to the Termination, and **Approve**.

If you are not prepared to approve the request, you may:

Send Back - A reason must be entered to send back. The employee will receive a Revise Resignation task in their My Tasks. The employee may make updates and resubmit.

Deny - This terminates the business process. The employee receives a my Task inbox notification that the resignation was denied.

Cancel - Your work is not saved and the request remains in your My Tasks inbox.



Review Resignation Request

Submit Resignation: Crystal Ball (0115748) ⋮

2 day(s) ago - Due 06/30/2022; Effective 06/28/2022

The Proposed Termination Date is either today or in the past. Submit only if this is intentional.

Notification Date	05/02/2022	
Notice Period	28 Day(s)	
Proposed Termination Date *	06/28/2022 <span>📅</span>	
Primary Reason	* Worker Resignation > Voluntary > Return to School	
Secondary Reasons	(empty)	

Position	P00020003 VMG NP Critical Care -	Crystal Ball (0115748)
Organization	In-Patient Nrs Practnrs 10 Department (	Warren Peace (0010795))
Manager	Warren Peace (0010795)	

☁

**Process History**

<span style="color: #0070c0;">☁</span>	Crystal Ball (0115748)	Due 07/02/2022
	Submit Resignation- Step Completed	
<span style="color: #0070c0;">☁</span>	Warren Peace (0010795)	Due 06/30/2022
	Review Resignation Request- Awaiting Action	

>

2 Approve

Send Back

Deny

Cancel



## Offboarding - Manager Termination Checklists - page 7

Managers will be assigned a series of My Task inbox To-Dos, or checklists, once HR completes steps in the Termination Business Process. These Termination Checklists are reminders to complete termination tasks. Some tasks will be completed outside of Workday. When a To-Do is submitted, it is an attestation that the action has been completed. Submitting the To-Do does not complete the work in the checklist. The employee's Termination Business Process is complete once the manager attests that they have completed their To-Dos.

### Termination Checklists

Managers may be required to complete several To-Dos, and some To-Dos will be completed outside of Workday.

1. Submit each To-Do AFTER the actions listed in the To-Do have been completed.

**All Items** 1 item

Search: All Items

[Advanced Search](#)

- Cancel or exchange memberships and/or subscriptions as necessary: Terminate: Crystal Ball (Terminated) (0113918) 8 day(s) ago - Effective 07/01/2022
- Removal of account or access information from card access systems: Terminate: Crystal Ball (Terminated) (0113918) 8 day(s) ago - Effective 07/01/2022
- Cancel voice mail and long distance calling cards (V-net, ATT): Terminate: Crystal Ball (Terminated) (0113918) 8 day(s) ago - Effective 07/01/2022
- Make arrangements with the employee for the disposal or collection of any VUMC information or VUMC Licensed Software: Terminate: Crystal Ball (Terminated) (0113918) 8 day(s) ago - Effective 07/01/2022

### Complete To Do

Cancel or exchange memberships and/or subscriptions as necessary

8 day(s) ago - Effective 07/01/2022

**For** Crystal Ball (Terminated) (0115748)

**Overall Process** Terminate: Crystal Ball (Terminated) (0115748)

**Overall Status** Successfully Completed

**Due Date** 07/24/2022

**Instructions** Cancel or exchange memberships and/or subscriptions as necessary.

Save for Later **1** Submit



## Offboarding - Employee Checklists - page 8

### Employee Voluntary Checklists

It is best practice for an employee to complete their checklists on or before their termination date. However, employees who have been voluntarily terminated will have limited access to Workday after their termination. In order to have access after their termination, the employee will need to update their personal contact information in Workday. After an employee's termination is approved by the manager's supervisor, the employee will have Workday My Tasks to complete. An employee's Inbox termination tasks will appear for them at the same time their manager is completing their checklists.

### Termination Complete

An employee's Termination is complete when the manager's supervisor has approved the termination.

### QUESTIONS?

Please email [BusinessEducation@vumc.org](mailto:BusinessEducation@vumc.org).