

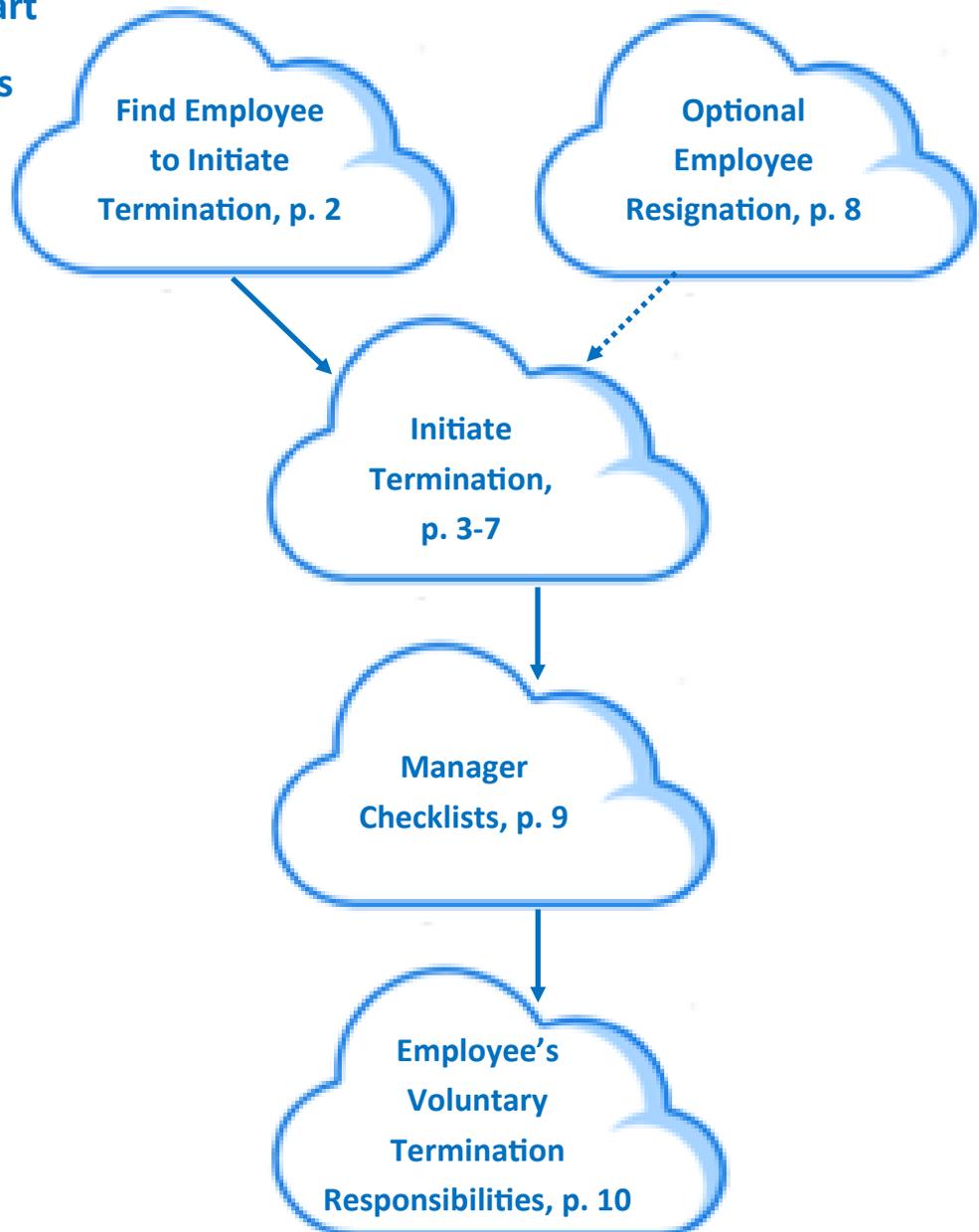


## Offboarding an Employee

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





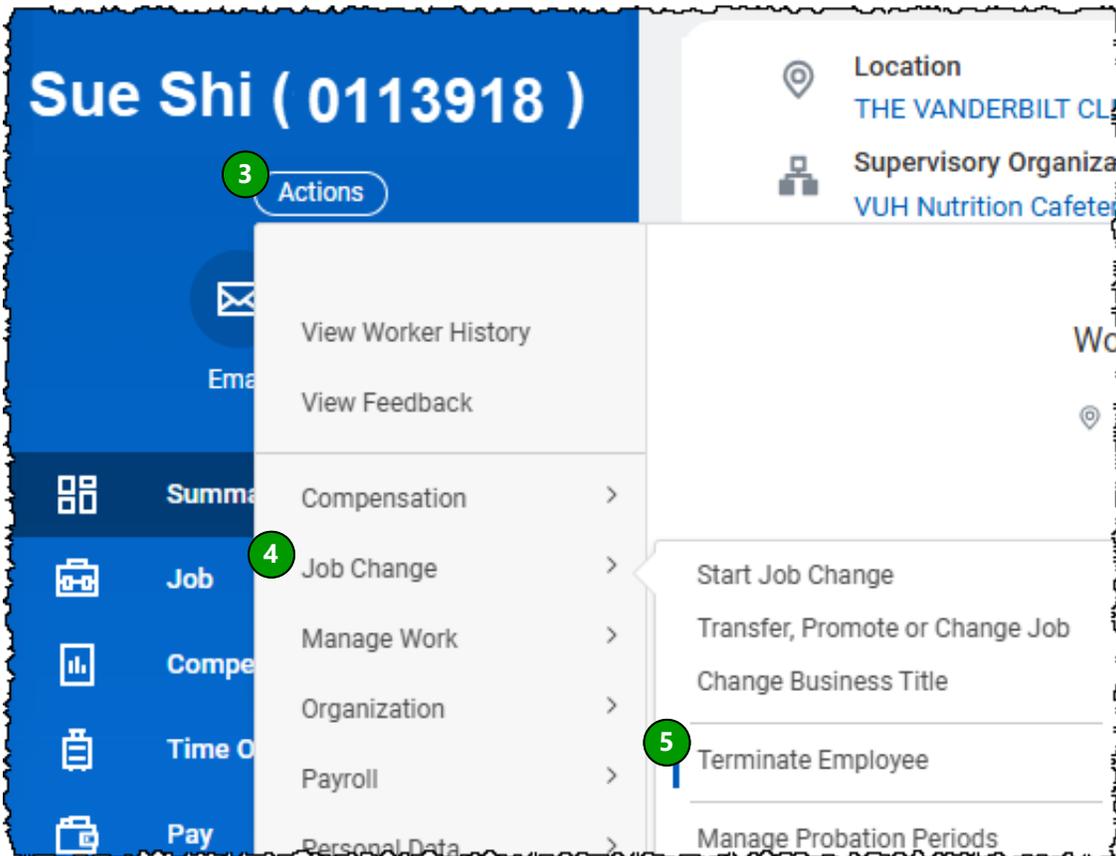
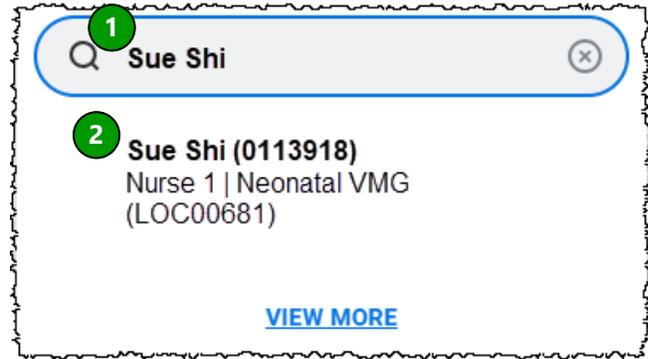
## Offboarding - Initiate Termination of an Employee

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

### Find and Select Employee

From any Workday page:

1. Search for **Employee**.
2. Select **Employee**.
3. Select **Actions**.
4. Hover over **Job Change**.
5. Select **Terminate Employee**.

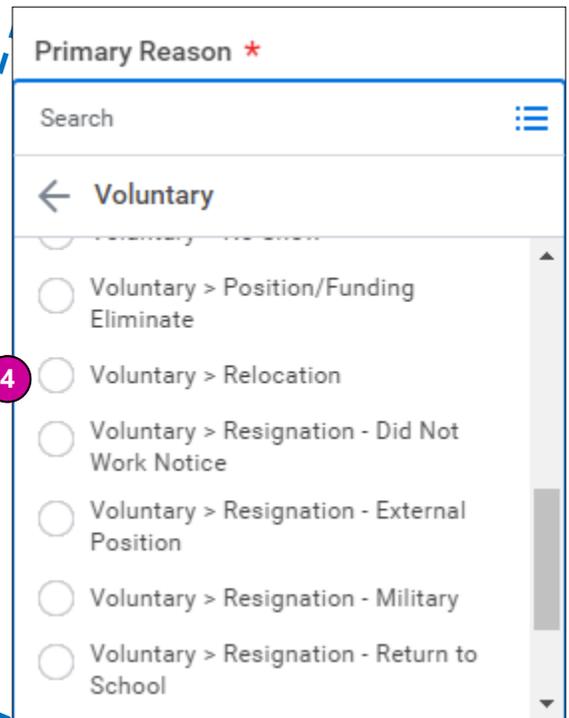
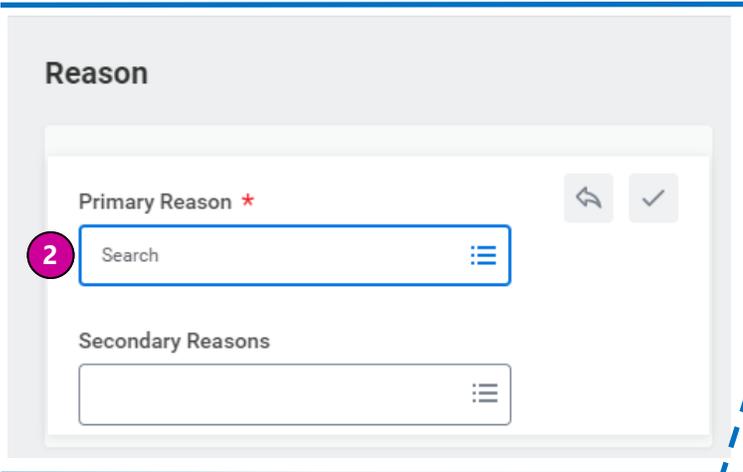
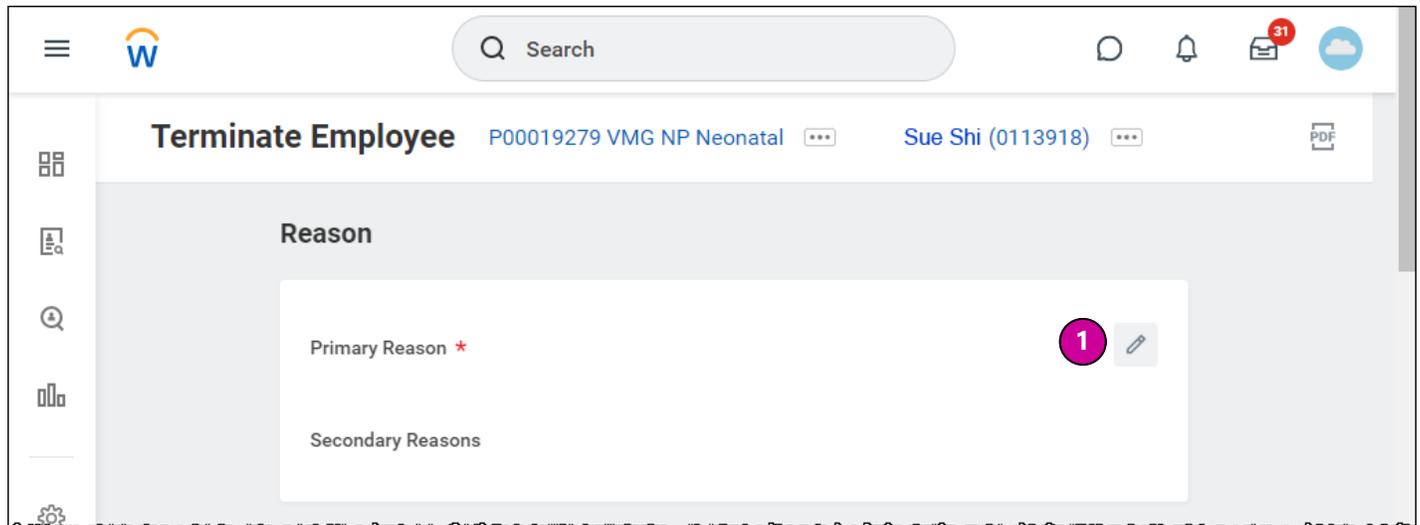




## Offboarding—Complete Reasons

### 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 your HR Partner when involuntarily terminating an employee.
4. A drop-down list of reasons appears. Select the appropriate **Voluntary Termination Reason**.





## Offboarding - Reasons and Details

### 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** and **Pay Through Date** should be 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.

**Note:** If you would like to pay an employee through to a later date, or you have a previously approved Severance worksheet, please reach out to your HR Business Partner.

### Details



## Offboarding - Complete Details and Submit

### 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

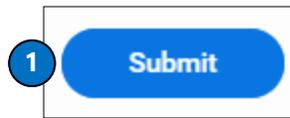
Is this position available for overlap?

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.





## Clawback and Forfeit (People Leaders)

When a termination occurs, you may see a Clawback Payments or Forfeit section (or both) within the termination task. This happens when an employee terminates and either a bonus payment (sign-on bonus, etc.) was paid or is scheduled to be paid in the future. Please reference the offer letter or payment agreement to determine if a bonus should be forfeited or clawed back. **Clawback Payments** refers to any bonuses already paid out that need to be collected. Under the Clawback Payment Process, when **Recover Manually** is indicated, the HR Team is notified to contact the employee for repayment. **Forfeit** refers to preventing any bonus payment that is scheduled to pay out to the employee in the future. When marked as Forfeit, this notifies the Payroll Department to not pay this bonus to the employee.

### Clawback and Forfeit (People Leaders)

1. Once the termination is submitted in Workday, if the employee has any bonuses on file, an Inbox Task will generate. Select **Open**.

**Note:** Only **Managers** or **HCM Business Assistants with Compensation** can complete this process

2. If the **Forfeit check box** is not checked, the manager will need to provide comments as to why this bonus payment should not be forfeited.

**Note:** If you receive the following Error, please proceed to step 6:

**Page Error**

Error running task: instance (xxxxxxxx) does not meet the restrictions defined for this task (xxxxxxxx).

3. Click inside the Clawback Payments box, and then select **Recovery Method**.

4. Select **Recover Manually**. (No other option should ever be selected.)

5. Select **Approve**.

6. Go to your My Task Inbox and select **Forfeit Future Dated One-Time Payment**.

**1** Open

**2** Forfeit

**3** Clawback Payments

Clawback For: Sign On Bonus: 20000 USD (07/01/2023)

Recovery Method

Do Not Clawback

Clawback Amount: (20,000.00)

Currency: USD

Scheduled Clawback: 02/02/2024

Clawback For: Sign On Bonus: 20000 USD (07/01/2023)

Recovery Method \*

Do Not Clawback

Send to Payroll

Recover Manually

**5** Approve Save for Later Close

**6** Awaiting Your Action

Forfeit Future Dated One-Time Payments: Walter Melon (0145879)

My Tasks - 16 day(s) ago



## Clawback and Forfeit (People Leaders) (con't)

### Clawback and Forfeit (People Leaders) (con't)

7. Select the **Settings** icon, and then select **Reassign**.
8. Enter the Previous Manager in the **Proposed Person** field.  
**Note:** You can retrieve this information under *Job -> Manager History*.
9. Enter the **Reassignment Reasoning** here.

**All Items** 2 items

Search: All Items

**7** **7** Reassign  
View Details

Sue Shi (0257089) P001437 Central Sterile Process Tech 1

This step is to either **CLAWBACK** previously paid one-time payments or **FORFEIT** existing future dated one-time payments for the terminated employee, not creating a new one-time payment.

- For **Previously paid one-time payments**, please change the **Clawback Recovery Method** to "Recover Manually,"
- For **Future dated one-time payments**:
  - Please review each payment below and check the **FORFEIT** checkbox to cancel the existing one-time payment.
  - If the **FORFEIT** checkbox is not checked, you need to add a comment explaining why the terminated employee should still receive this one-time payment as it will pay out after they have left VUMC.

**Future-Dated Payments**

**16** Approve Save for Later Close

**Reassign This Task**

To reassign a step, you must enter a reason in the Reassignment Reason field.

Business Process \* One-Time Payment: - P001437 Central Sterile Process Tech 1

My Tasks 1 item

Step	Business Process	Subject	Due Date	Proposed Person <b>8</b>	Reassignment Reason <b>9</b>
Request One-Time Payment	One-Time Payment: Walter Melon (01458790) - P001437 Central Sterile Process Tech 1	Terminate: Walter Melon	12/28/2024	<input type="text"/>	<input type="text"/>

**16** OK Cancel



## Offboarding - Employee Initiated Resignation

Workday offers an additional termination business process: employee ability to submit the resignation in Workday. If this occurs, the manager will receive an Inbox task to Review Resignation Request. After Approving a Resignation Request, the manager will return to their 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 their Inbox. 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 Inbox. The employee may make updates and resubmit.

Deny - This terminates the business process. The employee receives an Inbox notification that the resignation was denied.

Cancel - Your work is not saved and the request remains in your Inbox.

The screenshot shows the Workday interface. At the top, there is an 'Inbox' section with a 'Submit Resignation' task for 'Crystal Ball (0115748)' due on 06/30/2022. A green circle with the number '1' highlights this task. Below the inbox, the 'Review Resignation Request' form is displayed. The form includes fields for Notification Date (05/02/2022), Notice Period (28 Day(s)), Proposed Termination Date (06/28/2022), Primary Reason (Worker Resignation > Voluntary > Return to School), and Secondary Reasons (empty). It also shows the employee's position (P00020003 VMG NP Critical Care - Crystal Ball (0115748)), organization (In-Patient Nrs Practnrs 10 Department ( Warren Peace (0010795))), and manager (Warren Peace (0010795)). A comment box is present with the placeholder text 'enter your comment'. Below the form is a 'Process History' section showing two steps: 'Submit Resignation - Step Completed' by Crystal Ball (0115748) on 07/02/2022, and 'Review Resignation Request - Awaiting Action' by Warren Peace (0010795) on 06/30/2022. At the bottom of the form, there are four buttons: 'Approve' (highlighted with a green circle and the number '2'), 'Send Back', 'Deny', and 'Cancel'.



## Offboarding - Manager Termination Checklists

Managers will be assigned a series of 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.

The screenshot shows the 'Inbox' section of a Workday interface. On the left, under the 'Actions' tab, there is a list of four tasks, all due on 07/01/2022. The first task is highlighted: 'Cancel or exchange memberships and/or subscriptions as necessary: Terminate: Crystal Ball (Terminated) (0113918)'. Below it are 'Removal of account or access information from card access systems: Terminate: Crystal Ball (Terminated) (0113918)', 'Cancel voice mail and long distance calling cards (V-net, ATT): Terminate: Crystal Ball (Terminated) (0113918)', and 'Make arrangements with the employee for the disposal or collection of any VUMC information or VUMC Licensed Software: Terminate: Crystal Ball (Terminated) (0113918)'. On the right, the 'Complete To Do' details for the selected task are shown. It includes the title 'Cancel or exchange memberships and/or subscriptions as necessary', a star icon, a calendar icon, a PDF icon, a settings icon, and a share icon. The task is dated '8 day(s) ago - Effective 07/01/2022'. The 'For' field is 'Crystal Ball (Terminated) (0115748)'. The 'Overall Process' is 'Terminate: Crystal Ball (Terminated) (0115748)'. The 'Overall Status' is 'Successfully Completed'. The 'Due Date' is '07/24/2022'. The 'Instructions' are 'Cancel or exchange memberships and/or subscriptions as necessary.' At the bottom, there are three buttons: a three-dot menu, a 'Save for Later' button, and a 'Submit' button with a red circle containing the number '1' and a Workday logo.



## Offboarding - Employee Checklists

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### 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 Inbox 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.