

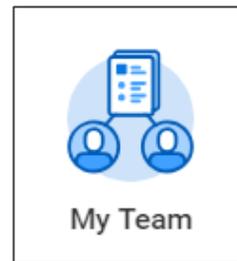
Terminate & Offboard

This job aid provides step by step instructions on how to Terminate an employee and complete the Offboarding process for a voluntary resignation. The employee (if they are resigning from state service), the employee’s Manager, or an HR Partner can initiate a termination. If the Manager initiates the termination, the HR Partner needs to review and approve it. If the HR Partner initiates the termination, the Manager needs to review and approve it. This job aid is based on the Manager initiating the termination process.



Caution: If the employee is moving to another state agency, **DO NOT** terminate them. Refer to the [Job Change](#) job aid.

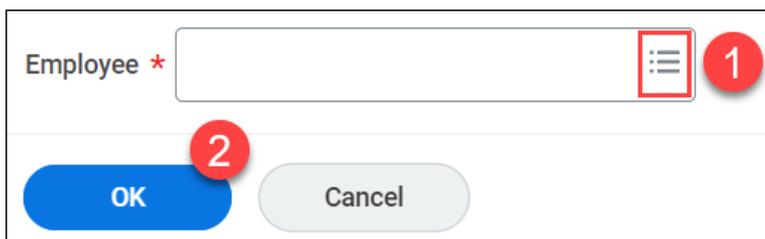
Step 1: Click the **My Team Management** application.



Step 2: From the *Actions* menu, click **Terminate**.



Step 3: Click on the menu prompt, **My Employees**, and then select **Employee** who is terminating, or type in their name and hit enter (1). Click **OK** (2).



Step 4: In the *Reason* section, click on the pencil icon at the top right to edit the section. Click on the menu prompt to select the **Primary Reason** for the termination.

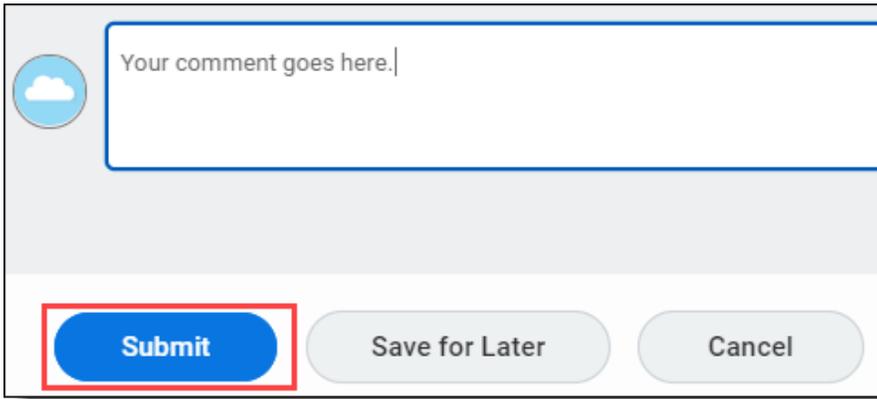
Step 5: Click on the pencil icon to enter the termination *Details*:

1. In the **Termination Date** field, select the date of the termination.
2. In the **Last Day of Work** field, select the date for the last day the employee will work.
3. In the **Pay Through Date** field, select the last date the employee should be paid through.
4. In the **Resignation Date** field, select the date of the employee resignation, if applicable.



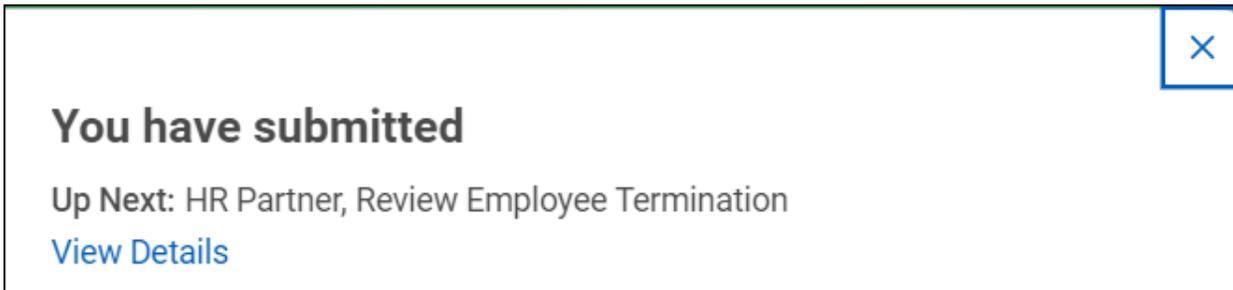
Note: In most cases, these four dates will be the same unless your HR Partner indicates another date needs to be entered based on specific circumstances.

Step 6: Enter any relevant *comments* and click **Submit**.

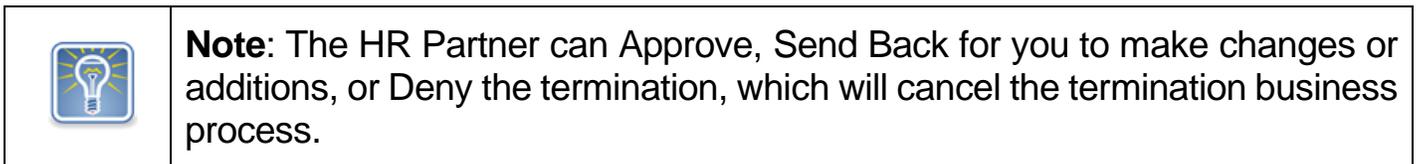


A screenshot of a comment input form. At the top left is a cloud icon. Below it is a text input field containing the placeholder text "Your comment goes here.". At the bottom of the form are three buttons: "Submit" (highlighted with a red box), "Save for Later", and "Cancel".

Step 7: Up Next displays the HR Partner has been sent a *Review Employee Termination* task. Click **Done**. Click on the X to close the message.



A screenshot of a notification message. The message has a close button (X) in the top right corner. The main text reads "You have submitted". Below this, it says "Up Next: HR Partner, Review Employee Termination" and includes a link "View Details".



A screenshot of a note icon (a lightbulb) followed by the text: **Note:** The HR Partner can Approve, Send Back for you to make changes or additions, or Deny the termination, which will cancel the termination business process.

Step 8: Once the Termination task has a final approval, the Manager will receive a termination message in their Workday *notifications*.



A screenshot of a Workday notification message. The text reads: "Terminate: [redacted] Termination [redacted] 26 minute(s) ago". There is a circular icon to the right of the text.

The termination message is a reminder of additional steps you may need to take outside of Workday (e.g. recover items, remove access, etc.).

Terminate: [Redacted] ☰ PDF ⚙️ ↗️

34 second(s) ago

Emailed: 2021 12 15 14 26 25 986 -0800

ATTENTION:

The "termination" process has been initiated in Workday. A link to the exit interview is being provided in a separate notification to the employee. While this is not required, exiting employees are encouraged to complete the exit interview and we are providing you the exit interview link as well to provide to the employee.

Exit survey

Additionally below are reminder items to ensure necessary steps are taken to recover items and remove access from the employee who is leaving:

- o Ensure employee has completed or reassigned inbox items related to their job.
- o Has someone removed the employee's access to all computer systems?
- o Has someone recovered the employee's identification badge?
- o Has someone recovered any assigned mobile equipment (e.g. laptop; cell phone)?
- o Is the employee scheduled for an exit conversation (if applicable)?
- o Has someone recovered any other agency-assigned property from the employee?
- o Has someone discussed this with Payroll to coordinate a final paycheck?

Details [Terminate:](#) [Redacted]

Employees who voluntarily resign will receive a Workday notification and an email with a link to an **Exit Survey**. The message also contains a reminder to ensure all their inbox items have been completed. Employee's incomplete items will route to the Manager to manage. See this [job aid](#) for assistance.

Below you will find a link to a short exit survey to complete regarding your experience while employed with state government. While this is not required, we encourage you and appreciate your feedback. This survey is an opportunity for the agency to gather valuable information about perceptions, what the agency did well, and areas we can improve. Thank you for your contribution to the agency and we wish you the best of luck.

[Exit survey](#)

Or copy and paste the text below in your web browser:

<https://wd5.myworkday.com/oregon/d/wday/vps/SurveySSOSite/survey/6700792356a301eaa5a531165801c02d/null.html>

Additionally we'd like to remind you to ensure any inbox items have been completed or reassigned. In the event there are inbox items remaining they will be routed to your supervisor to manage.

Business Process: Terminate: Destiny Hegeman
 Details: Terminate for [Redacted] effective on 12/31/2021

Managers will also receive a termination email which contains a link to the Exit Survey should they need to share/forward to an employee with no access, or who might need it again.

The "termination" process has been initiated in Workday. A link to the exit interview is being provided in a separate notification to the employee. While this is not required, exiting employees are encouraged to complete the exit interview and we are providing you the exit interview link as well to provide to the employee.

[Exit survey](#)

Additionally below are reminder items to ensure necessary steps are taken to recover items and remove access from the employee who is leaving:

- o Ensure employee has completed or reassigned inbox items related to their job.
- o Has someone removed the employee's access to all computer systems?
- o Has someone recovered the employee's identification badge?
- o Has someone recovered any assigned mobile equipment (e.g. laptop; cell phone)?
- o Is the employee scheduled for an exit conversation (if applicable)?
- o Has someone recovered any other agency-assigned property from the employee?
- o Has someone discussed this with Payroll to coordinate a final paycheck?

Business Process: Terminate: Destiny Hegeman
 Details: Terminate for [Redacted] effective on 12/31/2021

Reminder – Employees have access to their Workday accounts for 90 days after the end of their employment. Exit Survey URL:

<https://wd5.myworkday.com/oregon/d/wday/vps/SurveySSOSite/survey/6700792356a301eaa5a531165801c02d/null.html>