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

<table>
<thead>
<tr>
<th>Screenshots</th>
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<td>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.</td>
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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).

**Approve pending timesheets** if applicable (if the employee is non-exempt).

**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: 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 6 (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 7: Once all checklist items are at the Briefing Status of Completed, click the Mark Complete button.
Step 8: Upon clicking the Mark Complete 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.