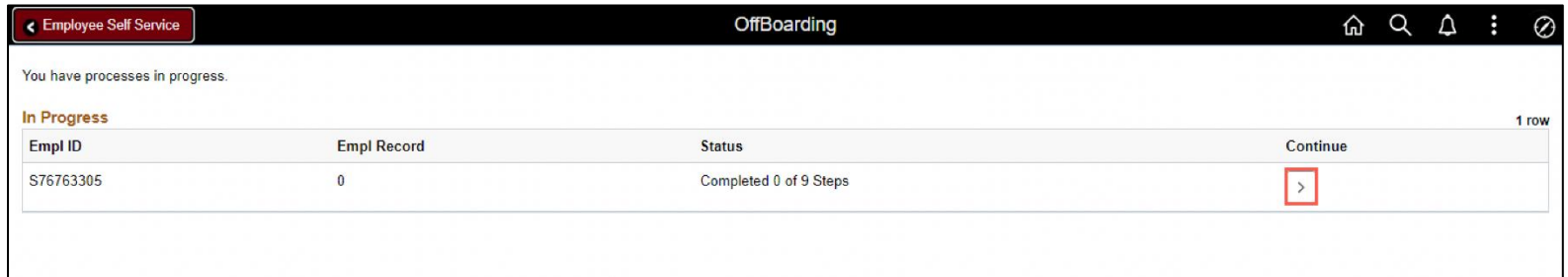| Employee offboarding (including exit interview) in HCM PeopleSoft: |
|---|
| This job aid outlines the process for employees to complete offboarding prior to separation from employment. Employee Self-Service log in. |

| Processing Steps | Screenshots |
|---|---|
| **Pre-Step: Offboarding Alert Email** Once your separation action has been approved in the HCM PeopleSoft system you will receive an automatically generated email alerting you to the offboarding tasks that require your attention. Pay close attention to the completion date in the email. | From: HUAT@mailbox.sc.edu <HUAT@mailbox.sc.edu> Sent: Monday, May 9, 2022 9:21 AM To: Subject: Offboarding tasks require your attention Importance: Low<br><br>Dear  Harry Potter<br><br>Offboarding tasks associated to the following position are available for your review and updates:<br><br>Harry Potter<br>Research Specialist I<br><br>Please ensure completion of your assigned tasks prior to 5/31/2022.  Select the link to begin the Offboarding process.<br><br>Failure to perform some of these Offboarding tasks could impact the accuracy of your final paycheck.<br><br>Thank you.<br><br>This is a system generated message.  Do not reply to this message. |

**Step 1:** On the main **Employee Self Service** homepage click the **Offboarding** tile.

| | |
|---|---|
| OffBoarding | Time and Absence |
| Payroll (Last Pay Date 05/13/2022) | Personal Details |

Employee Self Service ▽   2 of 2
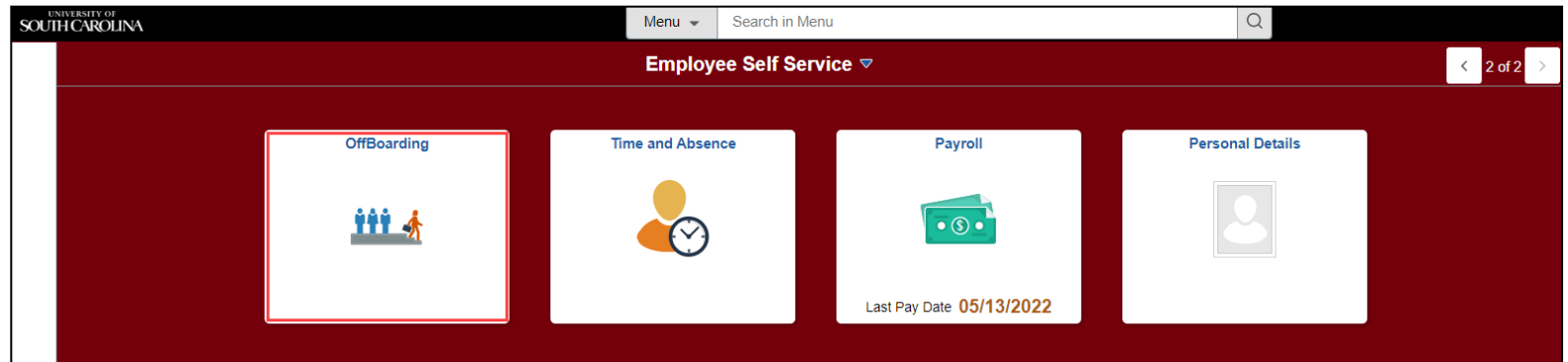
**Step 2:** Click the **>** button to continue to the offboarding task list.

**OffBoarding**

You have processes in progress.

**In Progress**

1 row

| Empl ID | Empl Record | Status | Continue |
|---|---|---|---|
| S76763305 | 0 | Completed 0 of 9 Steps | > |

**Step 3**: Upon clicking the **>** button in the previous step, you are brought into the Offboarding assignment.

Read all information on the **Welcome to Offboarding** page. If you wish to request a one-on-one exit interview, simply click the link to reach out to your area's assigned HR Service Team.

You will retain access to employee self-service for 45 days from your date of separation, so be sure to save any paystubs or tax documentation within this timeframe.

Click the **Next** button in the top right corner.

---

**UofSC Offboarding**

✕ Exit

Offboarding Employee 3
Academic Program Director

Mark Complete | Next ▸

Welcome to Offboarding
● Visited

Upload Letter of Resignation (Optional)
● Visited

Verify Address for Final Communications
● Visited

Manager Checklist
● Visited

Submit Final Working Time & Leave Requests
● Visited

Submit Final Expenses
● Visited

Understand Benefits and Final Check
● Visited

Stay informed with job alerts
● Visited

Exit Survey
● Visited

★ Summary
○ Not Started

**Welcome to Offboarding**

**South Carolina**

Offboarding Employee 3,

It has been a great pleasure to have you work at UofSC. We appreciate the time you've spent with us and are grateful for your many contributions. We wish you all the best!

**Offboarding Instructions:**

- **Prior to your last day:** Complete these Offboarding tasks to ensure a smooth departure. Failure to correctly perform some of these Offboarding tasks could impact the accuracy of your final paycheck.

  *Important: Mark each individual task as "Complete" to finalize this checklist.*

- **Exit Interviews:** In addition to the exit survey included in this Offboarding checklist, one-on-one exit interview conversations may occur at your campus/college/division/department and would be coordinated separately. To request a one-on-one exit interview conversation, contact your HR Service Team representative for more information. Please note that any disclosed concerns of discrimination, harassment, or sexual misconduct should, and will, be shared directly with the Office of Civil Rights and Title IX for appropriate follow-up. You are encouraged to contact them directly at 803-777-3854 or civilrights@mailbox.sc.edu.
- **Campus-specific Offboarding Activities:** These may happen concurrently and will be coordinated by your campus contacts.
- **Deadline to Access Self-Service and Offboarding:** Access to view your final check, print paystubs, and update your mailing address to receive your W-2, 1095-C, and other information will be available up to 45 days from your separation date.

**Step 4:** Upon clicking the next button in the previous step you are brought to the optional step to provide your letter of resignation.

If you wish to provide this attachment, click the **Add Attachment** button and follow the on-screen prompts to upload a document from your device.

Once you've uploaded your letter of resignation, or if you've decided to skip this step, proceed to click the **Mark Complete** button.

Click the **Next** button in the top right corner.

| | |
|---|---|
| Mark Complete | ‹ Previous   Next › |

Welcome to Offboarding
● Visited

Upload Letter of Resignation (Optional)
● Visited

**Upload Letter of Resignation (Optional)**

You have not added any attachment.

Add Attachment

**Step 5:** Upon clicking the next button in the previous step you are prompted to review your home and mailing address. It is imperative to update this information if you are moving from your current residence so that UofSC can send final communications (including the current year W2) to the correct address.

To edit the home address currently on file, click the row and enter your new address information. Click the **Save** button.

If you need to add a separate mailing address, click the **Add Mailing Address** button, and follow the steps to enter the address.

Click the **Mark Complete** button. Click the **Next** button in the top right corner.

**Step 6:** Upon clicking the next button in the previous step, you are reminded to submit final work time and/or leave requests as applicable.

Once you have submitted all outstanding timesheets and/or leave requests, click the **acknowledgement** button. Click the **Save** button.

Clicking the Save button in this step also marks the task as complete.

Click the **Next** button in the top right corner.

**Submit Final Working Time & Leave Requests**

**Prior to your last day:** Submit all remaining time and leave requests for approval. Failure to submit time and leave requests could incorrectly reflect time and leave balances in your final check.

For your convenience, Enter Working Time & Leave Request

☐ I acknowledge that all working time and leave requests have been submitted.

Save

---

**Submit Final Working Time & Leave Requests**

**Prior to your last day:** Submit all remaining time and leave requests for approval. Failure to submit time and leave requests could incorrectly reflect time and leave balances in your final check.

For your convenience, Enter Working Time & Leave Request

☐ I acknowledge that all working time and leave requests have been submitted.

Save

**Step 7:** Upon clicking the next button in the previous step, you are reminded to submit final expenses for travel or other reimbursable expenses. This task also outlines required processes for those who are PCard, Team Card, Travel Card, or Business Expense prepaid card holders.

Once you have submitted all outstanding reimbursable expenses and/or taken appropriate action for card holder status, click the **acknowledgement** button. Click the **Save** button.

Clicking the Save button in this step also marks the task as complete.

Click the **Next** button in the top right corner.

---

| | |
|---|---|
| ‹ Previous | Next › |

**Submit Final Expenses**

Welcome to Offboarding — Visited
Upload Letter of Resignation (Optional) — Complete
Verify Address for Final Communications — Complete
Manager Checklist — Visited
Submit Final Working Time & Leave Requests — Complete
Submit Final Expenses — Visited

**Prior to your last day:**

- Submit any outstanding travel or other reimbursable expenses. Failure to submit or approve travel or other reimbursable expenses could delay payment.
- If you are a PCard, Team Card, or Travel Card holder please submit any outstanding monthly statements/expense reports. If leaving in the middle of a billing cycle, be sure to provide all receipts to your business manager. Surrender your card if required.
- If you have a Business Expense prepaid card, please submit final settlement to cards@mailbox.sc.edu and be sure to destroy the card.

Failure to submit or approve travel or other reimbursable expenses could delay payment.

Travel - Office of the Controller | University of South Carolina (sc.edu)

☐ I acknowledge that all reimbursable expenses have been submitted.

[Save]

---

| | |
|---|---|
| ‹ Previous | Next › |

**Submit Final Expenses**

Welcome to Offboarding — Visited
Upload Letter of Resignation (Optional) — Complete
Verify Address for Final Communications — Complete
Manager Checklist — Visited
Submit Final Working Time & Leave Requests — Complete
Submit Final Expenses — Complete

**Prior to your last day:**

- Submit any outstanding travel or other reimbursable expenses. Failure to submit or approve travel or other reimbursable expenses could delay payment.
- If you are a PCard, Team Card, or Travel Card holder please submit any outstanding monthly statements/expense reports. If leaving in the middle of a billing cycle, be sure to provide all receipts to your business manager. Surrender your card if required.
- If you have a Business Expense prepaid card, please submit final settlement to cards@mailbox.sc.edu and be sure to destroy the card.

Failure to submit or approve travel or other reimbursable expenses could delay payment.

Travel - Office of the Controller | University of South Carolina (sc.edu)

☑ I acknowledge that all reimbursable expenses have been submitted.

[Save]

**Step 8:** Upon clicking the next button in the previous step you are provided detailed information to assist in understanding your benefits and final paycheck. Be sure to read all information provided.
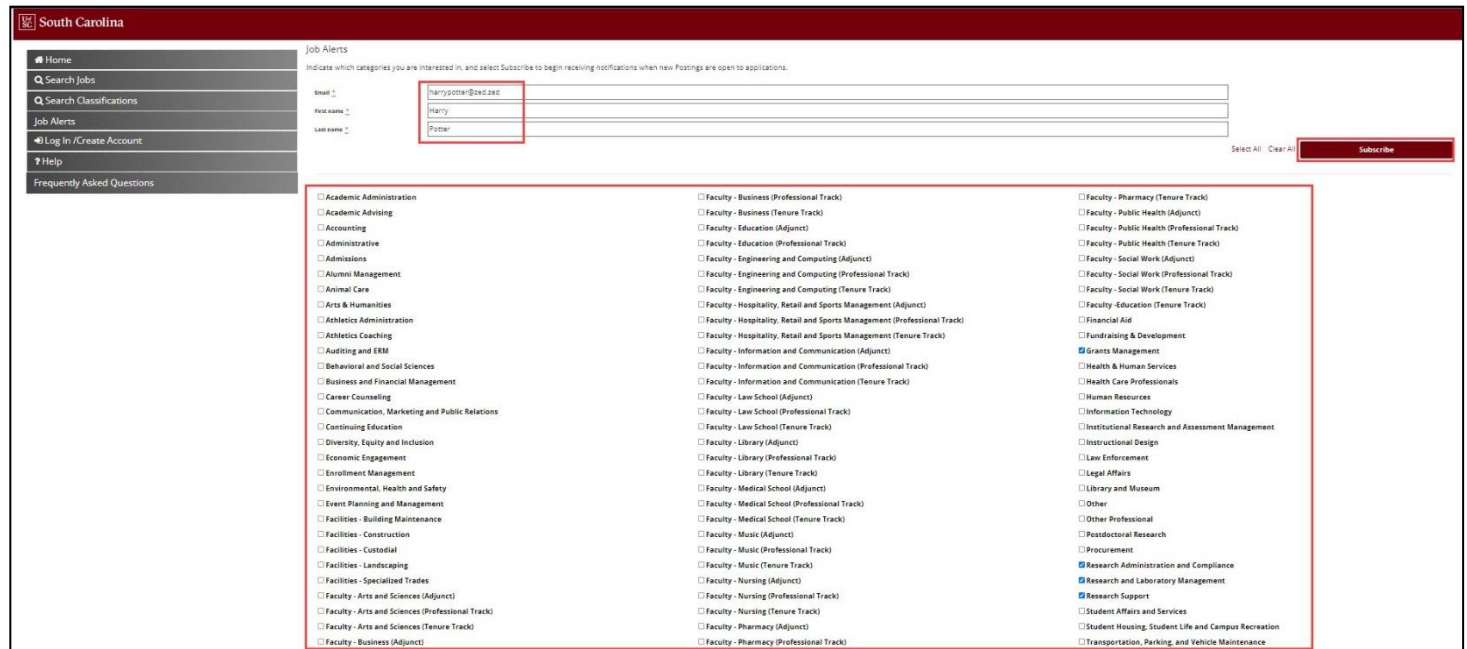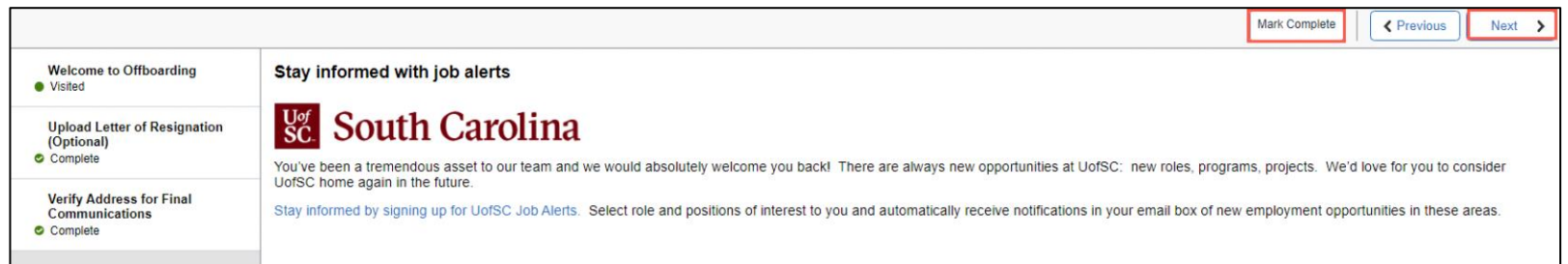
Click the **Mark Complete** button. Click the **Next** button in the top right corner.

| | Mark Complete | ‹ Previous | Next › |

Welcome to Offboarding
● Visited

Upload Letter of Resignation (Optional)
✓ Complete

Verify Address for Final Communications
✓ Complete

Manager Checklist
● Visited

Submit Final Working Time & Leave Requests
✓ Complete

Submit Final Expenses
✓ Complete

Understand Benefits and Final Check
● Visited

Stay informed with job alerts
● Visited

Exit Survey
● Visited

★ Summary
○ Not Started

**Understand Benefits and Final Check**

**U of SC South Carolina**

**When will I receive my final check?** Final checks are based on whether you are paid current or on a lag. There are two options to determine if you are paid current or on a lag.

1. Know your hire date. Employees hired before 04/01/2019 are paid current; employees hired after 04/01/2019 are paid on a lag.

2. Check your paystub for the pay group, located on the top center of the paystub. If your pay group has CUR at the end, you are paid current. If your pay group has LAG at the end, you are paid on a lag.

**Employees paid current** should receive final paychecks, including any annual leave payout, in the check cycle after their separation date.

**Employees paid on a lag** should receive their final paychecks, including annual leave payout, approximately one month after their separation date.

**When will my insurance end?** Your insurance will end the first of the next month following the last day worked. We will mail the COBRA packet to the address on file. These forms can be accessed from PEBA's website at www.peba.sc.gov.

**For Transfers To Other State Agencies**

**Will my benefits transfer to my new PEBA covered employer?** Your benefits will transfer to the new PEBA covered employer; however, your coverage will remain the same. It's important to inform your department and Benefits Office if you are transferring to properly transfer the benefits and leave to the new employer.

**Will my annual and sick leave transfer to my new employer?** You should work with your new employer for transfer of annual and/or sick leave from UofSC and submit the request to the Benefits Office at hrleave@mailbox.sc.edu. You should work with your new employer to determine if you are eligible to transfer your unused annual and/ or sick leave from UofSC. If applicable, your new employer should email a leave transfer request form to the Benefits Office at hrleave@mailbox.sc.edu.

Please note: You are ineligible to transfer your unused leave from and to a Research Grant or Time Limited Position.

**Step 9:** Upon clicking the next button in the previous step you are provided the option to stay informed about future opportunities at UofSC by signing up for UofSC Job Alerts. If you're interested in learning of future openings, click the link on this page.

| | |
|---|---|
| Mark Complete | ‹ Previous    Next › |

**Stay informed with job alerts**

Welcome to Offboarding
● Visited

Upload Letter of Resignation (Optional)
✔ Complete

Verify Address for Final Communications
✔ Complete

Manager Checklist
● Visited

Submit Final Working Time & Leave Requests
✔ Complete

Submit Final Expenses
✔ Complete

Understand Benefits and Final Check
✔ Complete

Stay informed with job alerts
● Visited

**South Carolina**

You've been a tremendous asset to our team and we would absolutely welcome you back! There are always new opportunities at UofSC: new roles, programs, projects. We'd love for you to consider UofSC home again in the future.

Stay informed by signing up for UofSC Job Alerts. Select role and positions of interest to you and automatically receive notifications in your email box of new employment opportunities in these areas.

**Step 9 (continued):** Clicking the link in the offboarding task brings you to USC Jobs to sign-up for Job Alerts. Enter your personal email address along with your first and last name. Click all categories that are of interest to you and then click the **Subscribe** button.

In the Offboarding tasks, click the **Mark Complete** button. Click the **Next** button in the top right corner.
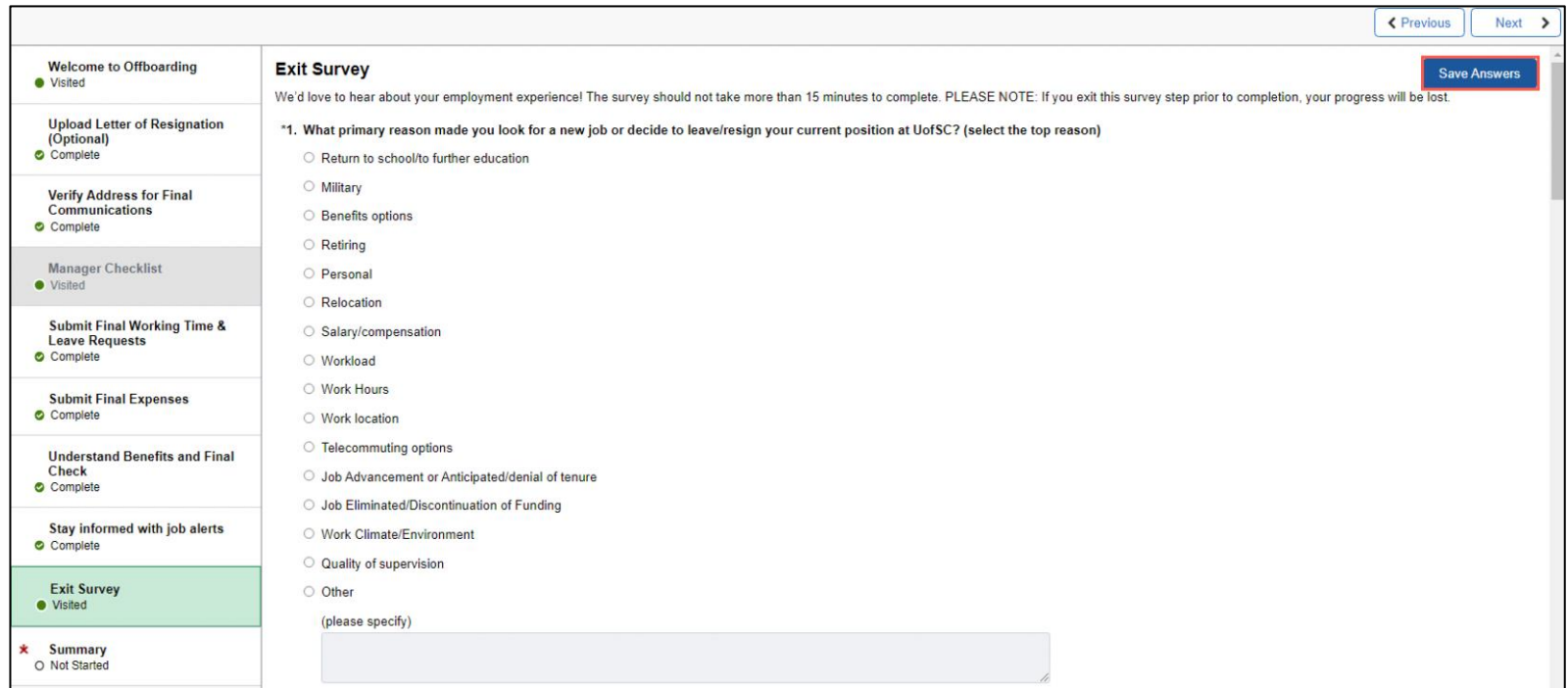
**Step 10:** Upon clicking the next button in the previous step you are brought into the exit survey which is the last offboarding task.

The exit survey is comprised of 14 required questions. This invaluable data is reviewed by central HR and used to inform decisions for future improvement to the employee experience.

**Note**: You cannot start and come back to this step. Prior to initiating this task, ensure you have 15 minutes you can dedicate to completion of this survey. Answers cannot be changed once the page is saved.
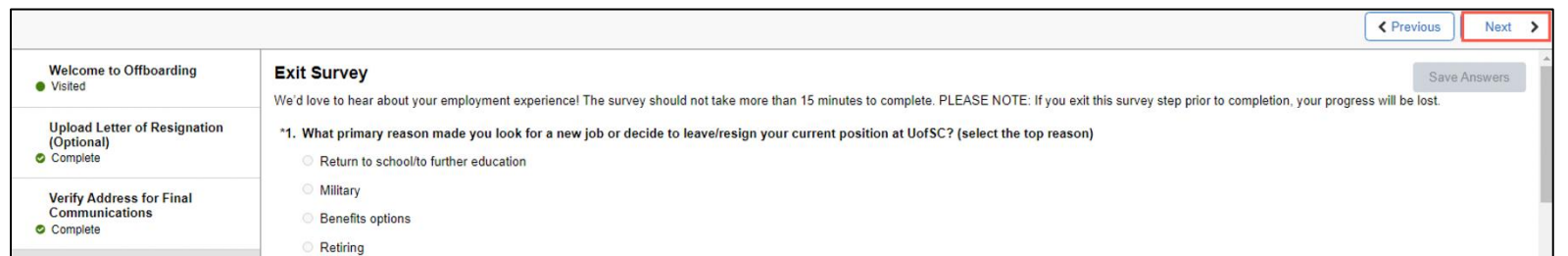
Once you've answered all questions, scroll back to the top of this page, and click the **Save Answers** button. Clicking the save answers button also marks this task as complete. Click the **Next** button in the top right corner to complete the final task.

**Step 11:** Upon clicking the next button in the previous step you are brought to the Summary page where you click the **Mark Complete** button to finish the offboarding process. You can click the Mark Complete button for any task that is not showing complete but has been completed.

**Congratulations, you have completed the offboarding tasks!** All the tasks on the lefthand menu show a status of complete.

It has been a great pleasure to have you work at UofSC. We appreciate the time you've spent with us and are grateful for your many contributions.

We wish you all the best in your future endeavors!