

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

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



| mployee Self Service omepage click the offboarding tile. tep 2: Click the > button o continue to the ffboarding task list. In Progress Empl ID S76763305 | OffBoarding | Employee Self Ser Time and Absence | Payroll | Personal Details | < 2 of 2 |
|--|-------------|---------------------------------------|---------------------------------|------------------|--------------|
| boarding tile. p 2: Click the > button continue to the boarding task list. In Progress Empl ID | ŮÎÎ ▲ | OffBoard | 05/13/2022 | | |
| p 2: Click the > button continue to the poarding task list. | ŮÎÎ ▲ | OffBoard | 05/13/2022 | | Δ : |
| continue to the coarding task list. | | | Last Pay Date 05/13/2022 | ■ | Δ : |
| ontinue to the poarding task list. Empl ID | | | | <u>۵</u> ۹ | Δ: |
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| Darding task list. | Empl Record | Status | | | |
| Empl ID | Empl Record | Status | | | |
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| | 0 | Completed 0 of 9 | Steps | | |
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| Step 3: Upon clicking the > | | |
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| button in the previous | × Exit | UofSC Offboarding |
| step, you are brought into | Offboarding Employee 3 Academic Program Director | |
| the Offboarding | | |
| assignment. | | Mark Complete Next > |
| | Welcome to Offboarding Visited | Welcome to Offboarding |
| Read all information on the | Upload Letter of Resignation | |
| Welcome to Offboarding | (Optional) Visited | South Carolina |
| page. If you wish to request | Verify Address for Final Communications | Offboarding Employee 3, |
| a one-on-one exit | Visited | 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: |
| interview, simply click the | Manager Checklist Visited | • 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. |
| link to reach out to your | Submit Final Working Time & | 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 |
| area's assigned HR Service | Visited | Call interviews, in addition to the exit survey included in this biobarating checking, one-exit interview conversation, contact your <u>HR Service Team representative</u> 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 <u>civilrights@mailbox.sc.edu</u>. |
| Team. | Submit Final Expenses Visited | 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 data. |
| You will retain access to | Understand Benefits and Final Check Visited | |
| employee self-service for 45 days from your date of | Stay informed with job alerts Visited | |
| separation, so be sure to | Exit Survey Visited | |
| save any paystubs or tax documentation within this | * Summary O Not Started | |
| timeframe. | | |
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| Click the Next button in the | | |
| top right corner. | | |
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| Step 4: Upon clicking the | | | | | |
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| next button in the previous | | | Mark Complete | < Previous | Next > |
| step you are brought to the | Welcome to Offboarding Visited | Upload Letter of Resignation (Optional) | | | |
| optional step to provide | Upload Letter of Resignation | You have not added any attachment. | | | |
| your letter of resignation. | (Optional) • Visited | Add Attachment | | | |
| If you wish to provide this | | | | | J |
| 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. | | | | | |
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| Step 5: Upon clicking the | | Mark Complete |
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| next button in the previous | | |
| step you are prompted to | Welcome to Offboarding Visited | Verify Address for Final Communications |
| review your home and | Upload Letter of Resignation | Home Address 212 Winding Oak Way |
| mailing address. It is | (Optional) Complete | Blythewood, SC 29016-8029 Current > Richland |
| imperative to update this | Verify Address for Final | |
| information if you are | Communications Visited | Mailing Address |
| moving from your current | Manager Checklist | Sc Sbdc 1014 Sbdc Greene St Columbia, SC 29208-0001 Current > |
| residence so that UofSC | Visited | Richland |
| can send final | | Cancel Address Save |
| communications (including | | |
| the current year W2) to the | | Employee Instruction To save United States addresses at least one of the following fields must get populated. Address 1, Address 2, Address 3 |
| correct address. | | Change As Of 07/15/2022 |
| | | Address Type Home |
| To edit the home address | | Country United States Q Address 1 212 Winding Oak Way |
| currently on file, click the | | Address 2 |
| row and enter your new | | Address 3 |
| address information. Click | | City Blythewood |
| the Save button. | | State South Carolina Q |
| | | Postal 29016-8029 |
| If you need to add a | | County Richland |
| separate mailing address, | | Override Address Verification |
| click the Add Mailing | | |
| Address button, and follow | | Mark Complete Vervious Next > |
| the steps to enter the | Welcome to Offboarding Visited | Verify Address for Final Communications |
| address. | Upload Letter of Resignation | Home Address 212 Winding Oak Way |
| address. | (Optional) © Complete | Blythewood, SC 29016-8029 Current > |
| Click the Mark Complete | Verify Address for Final | Richland |
| button. Click the Next | Communications • Visited | Mailing Address |
| button in the top right | Manager Checklist | Sc Sbdc 1014 Sbdc Greene St Columbia, SC 29208-0001 Current |
| | Visited | Richland |
| corner. | | |



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| Step 6: Upon clicking the | | | < Previous | Next | > |
| next button in the previous | | | ••••••••••••••••••••••••••••••••••••••• | | |
| step, you are reminded to | Welcome to Offboarding Visited | Submit Final Working Time & Leave Requests | | | |
| submit final work time | Upload Letter of Resignation | 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 y | our final check. | | |
| and/or leave requests as | (Optional) Complete | For your convenience, Enter Working Time & Leave Request | | | |
| applicable. | | I acknowledge that all working time and leave requests have been submitted. | | | |
| | Verify Address for Final Communications Complete | Save | | | |
| Once you have submitted | | | | | |
| all outstanding timesheets | Manager Checklist Visited | | | | |
| and/or leave requests, click | Submit Final Working Time & | | | | |
| the acknowledgement | Leave Requests Visited | | | | |
| button. Click the Save | | | | | |
| button. | | | | | |
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| Clicking the Save button in | | | < Previous | Next | > |
| this step also marks the | Welcome to Offboarding Visited | Submit Final Working Time & Leave Requests | | | |
| task as complete. | Helevel and Declaration | 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 | our final check | e . | |
| - | Upload Letter of Resignation (Optional) Complete | For your convenience, Enter Working Time & Leave Request | | | |
| Click the Next button in the | | I acknowledge that all working time and leave requests have been submitted. | | | |
| top right corner. | Verify Address for Final Communications © Complete | Save | | | |
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| | Manager Checklist Visited | | | | |
| | Submit Final Working Time & | | | | |
| | Leave Requests | | | | |
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| | Submit Final Working Time & Leave Requests | | | | |



| Step 7: Upon clicking the | | Previous |
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| next button in the previous | | |
| step, you are reminded to | Welcome to Offboarding Visited | Submit Final Expenses |
| submit final expenses for | Upload Letter of Resignation | Prior to your last day: |
| travel or other | (Optional) Complete | 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 |
| reimbursable expenses. | Verify Address for Final | 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. |
| This task also outlines | Communications | Failure to submit or approve travel or other reimbursable expenses could delay payment. |
| required processes for | | Travel - Office of the Controller University of South Carolina (sc.edu) |
| those who are PCard, Team | Manager Checklist Visited | I acknowledge that all reimbursable expenses have been submitted. |
| Card, Travel Card, or | Submit Final Working Time & | Save |
| Business Expense prepaid | Complete | |
| card holders. | Submit Final Expenses | |
| | Visited | |
| Once you have submitted | | |
| all outstanding | | <pre></pre> |
| reimbursable expenses | Welcome to Offboarding Visited | Submit Final Expenses |
| and/or taken appropriate | | Prior to your last day: |
| action for card holder | Upload Letter of Resignation (Optional) | Submit any outstanding travel or other reimbursable expenses. Failure to submit or approve travel or other reimbursable expenses could delay payment. |
| status, click the | Complete | 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. |
| acknowledgement button. | Verify Address for Final Communications | 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. |
| Click the Save button. | Complete | Travel - Office of the Controller University of South Carolina (sc.edu) |
| | Manager Checklist Visited | I acknowledge that all reimbursable expenses have been submitted. |
| Clicking the Save button in | | |
| this step also marks the | Submit Final Working Time & Leave Requests | Save |
| task as complete. | Complete | |
| | Submit Final Expenses Complete | |
| Click the Next button in the | | |
| top right corner. | | |
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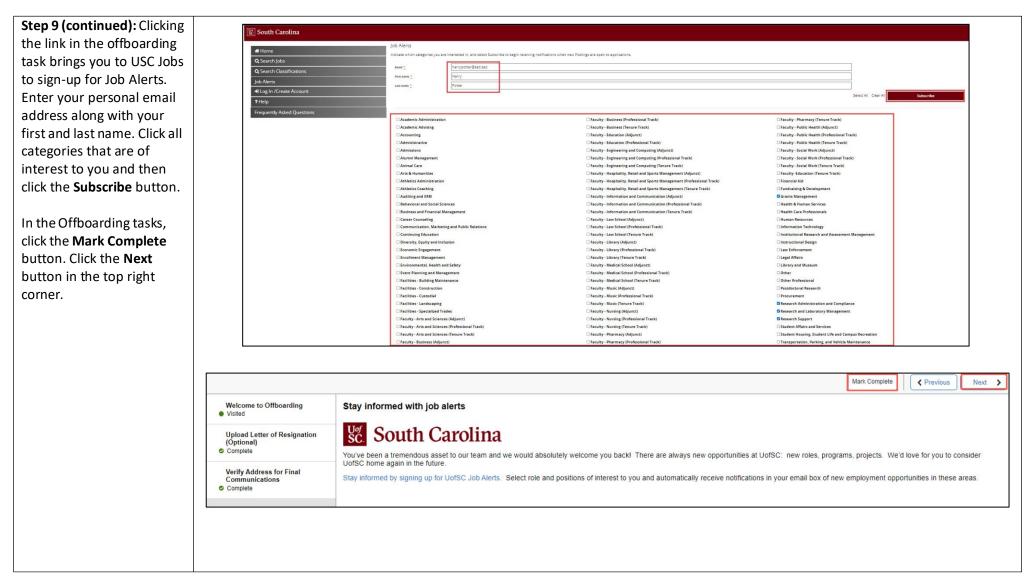


| Step 8: Upon clicking the | | |
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| next button in the previous | | Mark Complete Vervious Next > |
| step you are provided detailed information to | Welcome to Offboarding Visited | Understand Benefits and Final Check |
| assist in understanding your benefits and final | Upload Letter of Resignation (Optional) © Complete | 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. |
| paycheck. Be sure to read all information provided. | Verify Address for Final Communications Complete | 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. lag. |
| | Manager Checklist Visited | 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. |
| Click the Mark Complete button. Click the Next button in the top right | Submit Final Working Time & Leave Requests Complete | 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. |
| corner. | Submit Final Expenses | 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. |
| | Understand Benefits and Final Check Visited | 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. |
| | Stay informed with job alerts Visited | Please note: You are ineligible to transfer your unused leave from and to a Research Grant or Time Limited Position. |
| | Exit Survey Visited | |
| | Summary Not Started | |
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| Stop 9: Upon dicking the | | |
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| Step 9: Upon clicking the | | Mark Complete Vervious Next > |
| next button in the previous | Welcome to Offboarding | |
| step you are provided the | Visited | Stay informed with job alerts |
| option to stay informed | Upload Letter of Resignation | 🐰 South Carolina |
| about future opportunities | (Optional) Complete | |
| at UofSC by signing up for | Verify Address for Final | 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. |
| UofSC Job Alerts. If you're | Communications © Complete | 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. |
| interested in learning of | and the definition of the second seco | |
| future openings, click the | Manager Checklist Visited | |
| link on this page. | Submit Final Working Time & Leave Requests Complete | |
| | Submit Final Expenses Complete | |
| | Understand Benefits and Final Check © Complete | |
| | Stay informed with job alerts Visited | |
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| Step 10: Upon clicking the next button in the previous | | <pre></pre> |
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| step you are brought into | Welcome to Offboarding Visited | Exit Survey We'd love to hear about your employment experience! The survey should not take more than 15 minutes to complete. PLEASE NOTE: If you exit this survey step prior to completion, your progress will be lost. |
| the exit survey which is the last offboarding task. | Upload Letter of Resignation (Optional) © Complete | *1. What primary reason made you look for a new job or decide to leave/resign your current position at UofSC? (select the top reason) Return to school/to further education |
| The exit survey is comprised of 14 required questions. | Verify Address for Final Communications © Complete | Military Benefits options Retiring |
| This invaluable data is | Manager Checklist Visited | Personal Relocation |
| reviewed by central HR and used to inform decisions for future improvement to the | Submit Final Working Time & Leave Requests © Complete | Salary/compensation Workload |
| employee experience. | Submit Final Expenses Complete | O Work Hours O Work location |
| Note : You cannot start and come back to this step. Prior | Understand Benefits and Final Check Complete | Telecommuting options Job Advancement or Anticipated/denial of tenure Job Eliminated/Discontinuation of Funding |
| to initiating this task, ensure | Stay informed with job alerts Complete | O Work Climate/Environment |
| you have 15 minutes you can dedicate to completion | Exit Survey Visited | Quality of supervision Other (please specify) |
| of this survey. Answers cannot be changed once the | * Summary O Not Started | |
| 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.

| Welcome to Offboarding Visited | Exit Survey We'd love to hear about your employment experience! The survey should not take more than 15 minutes to complete. PLEASE NOTE: If you exit this survey step prior to completion, your progress will be lost. |
|--|---|
| Upload Letter of Resignation (Optional) Complete | *1. What primary reason made you look for a new job or decide to leave/resign your current position at UofSC? (select the top reason) Return to school/to further education |
| Verify Address for Final Communications © Complete | Military Benefits options Retiring |

Previous
 Next



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.

| Welcome to Offboarding Visited | Summary | | | | |
|---|--|----------|----------------|----------------|------------|
| Upload Letter of Resignation (Optional) © Complete | Steps | | | | |
| Verify Address for Final Communications | Step | Status | Date Completed | Mark Complete | Go to Step |
| Complete | Welcome to Offboarding | Visited | | Mark Complete | Go to Step |
| Manager Checklist Visited | Upload Letter of Resignation (Optional) | Complete | 07/15/2022 | Completed | Go to Step |
| Submit Final Working Time & Leave Requests © Complete | Verify Address for Final Communications | Complete | 07/15/2022 | Completed | Go to Step |
| | Manager Checklist | Visited | | Mark Complete | Go to Step |
| Submit Final Expenses Complete | Submit Final Working Time & Leave Requests | Complete | 07/15/2022 | Not Applicable | Go to Step |
| Understand Benefits and Final | Submit Final Expenses | Complete | 07/15/2022 | Not Applicable | Go to Step |
| Check Complete | Understand Benefits and Final Check | Complete | 07/15/2022 | Completed | Go to Step |
| Stay informed with job alerts Complete | Stay informed with job alerts | Complete | 07/15/2022 | Completed | Go to Step |
| Exit Survey Complete | Exit Survey | Complete | 07/15/2022 | Not Applicable | Go to Step |
| k Summary | | | | | |
| In Progress | | | | | |



| | Velcome to Offboarding Complete | Summary | | | | |
|---------------------|---|--|----------|----------------|----------------|------------|
| (0 | Upload Letter of Resignation (Optional) Complete | Steps | | | | |
| complete | 1 March 1990 - Hill | | | | | |
| C | Verify Address for Final Communications Complete | Step | Status | Date Completed | Mark Complete | Go to Step |
| en a great pleasure | | Welcome to Offboarding | Complete | 07/15/2022 | Completed | Go to Step |
| N | Aanager Checklist Complete | Upload Letter of Resignation (Optional) | Complete | 07/15/2022 | Completed | Go to Step |
| | Submit Final Working Time & Leave Requests © Complete | Verify Address for Final Communications | Complete | 07/15/2022 | Completed | Go to Step |
| ve spent with us | | Manager Checklist | Complete | 07/15/2022 | Completed | Go to Step |
| | Submit Final Expenses Complete | Submit Final Working Time & Leave Requests | Complete | 07/15/2022 | Not Applicable | Go to Step |
| U | Understand Benefits and Final Check © Complete | Submit Final Expenses | Complete | 07/15/2022 | Not Applicable | Go to Step |
| | | Understand Benefits and Final Check | Complete | 07/15/2022 | Completed | Go to Step |
| | Stay informed with job alerts Complete | Stay informed with job alerts | Complete | 07/15/2022 | Completed | Go to Step |
| | Exit Survey Complete | Exit Survey | Complete | 07/15/2022 | Not Applicable | Go to Step |
| | Summary Complete | | | | | |