

Purpose: This guide applies to managers and approvers for the ending of employment of a staff member. This guide will also provide further information on mandatory approvals and the requirement for managers to conduct an Exit Checklist with the employee prior to their last working day.

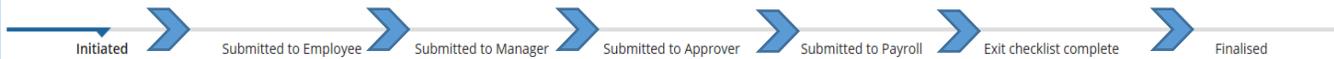


Employees and Line Manager should only complete this request if the reason for end of employment is resignation or retirement. When the reason is anything other than this, the end of employment request must be submitted by a HR Manager.

The End of Employment request is not applicable for non-paid staff members (contactors, volunteers, work experience etc.).

Review and approval process

The below process will take place once a request is submitted. There are some exceptions to this process, mainly based on who is entering the request or what the reason for end of employment is. These exceptions will be provided further in this guide.



Access the online End of Employment request

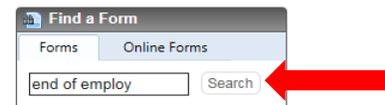
1. Log in to the staff portal by navigating to <https://my.unisa.edu.au/public/staffweb/>

The Staff Portal is displayed

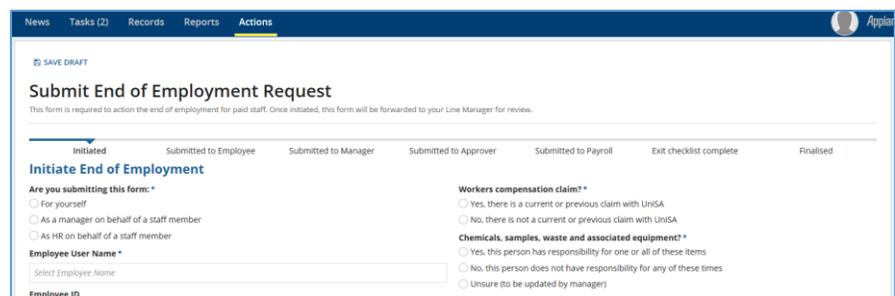


2. To access the online End of Employment request, either search in **Search UniSA**, or go to **Find a Form** and select the **Forms** tab. Type 'end of employee' in the form search, select **Search**. Click on the hyperlink provided. You may need to enter your network user ID and password.

end of employment



The **Submit End of Employment Request** page is displayed.



The screenshot shows the 'Submit End of Employment Request' form. At the top, there is a navigation bar with 'News', 'Tasks (2)', 'Records', 'Reports', and 'Actions'. Below the navigation, there is a progress bar showing the request status: Initiated, Submitted to Employee, Submitted to Manager, Submitted to Approver, Submitted to Payroll, Exit checklist complete, and Finalised. The form is titled 'Initiate End of Employment' and contains several sections with radio button options:

- Are you submitting this form? ***
 - For yourself
 - As a manager on behalf of a staff member
 - As HR on behalf of a staff member
- Employee User Name ***
 - Select Employee Name
- Employee ID**
- Workers compensation claim? ***
 - Yes, there is a current or previous claim with UniSA
 - No, there is not a current or previous claim with UniSA
- Chemicals, samples, waste and associated equipment? ***
 - Yes, this person has responsibility for one or all of these items
 - No, this person does not have responsibility for any of these items
 - Unsure (to be updated by manager)

Initiate the request on behalf of a staff member

1. Select the radio button **As a manager on behalf of a staff member**.
2. Enter the **Employee User Name** and select from the picker list. The **Employee ID** and **Position Title** will automatically appear.
3. Select the **Reason for end of employment** from the drop down and choose the relevant reason.



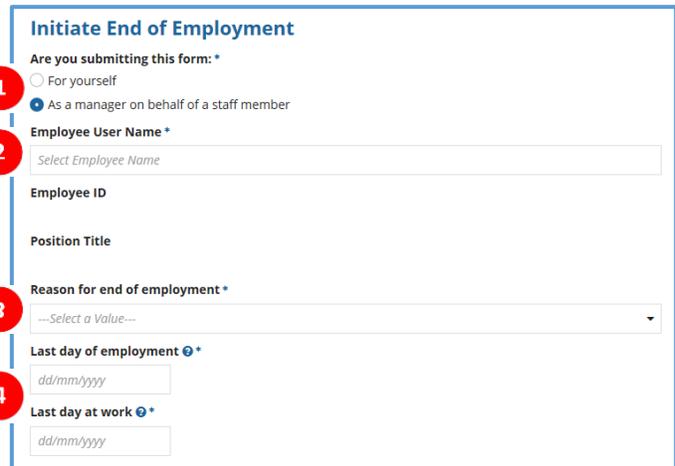
The submitted request will be forwarded to the employee for review and acceptance.

4. Choose a date for **Last day of employment**, along with the **Last day at work**.



For fixed term contracts, enter last day at the university (which may not be the same as contract end date)..

5. Indicate if there is a **Workers compensation claim** outstanding. If unsure, contact the HR Safety and Wellbeing Team (contact number provided from the help icon).
6. Access to email will be available for 30 days. An email will notify IT HelpDesk if **Yes, at termination date** is chosen.
7. Indicate if the employee has been responsible for any **Chemicals, samples, waste and associated equipment**.



Initiate End of Employment

Are you submitting this form: *

For yourself

As a manager on behalf of a staff member

Employee User Name *

Select Employee Name

Employee ID

Position Title

Reason for end of employment *

---Select a Value---

Last day of employment *

dd/mm/yyyy

Last day at work *

dd/mm/yyyy



Workers compensation claim? *

- Yes, there is a current or previous claim with UniSA
- No, there is not a current or previous claim with UniSA



Delete Existing Computer Access? *

- Yes, at termination date
- No, allow access for 30 days



Chemicals, samples, waste and associated equipment? *

- Yes, this person has responsibility for one or all of these items
- No, this person does not have responsibility for any of these times

Submitting the request for approval/processing

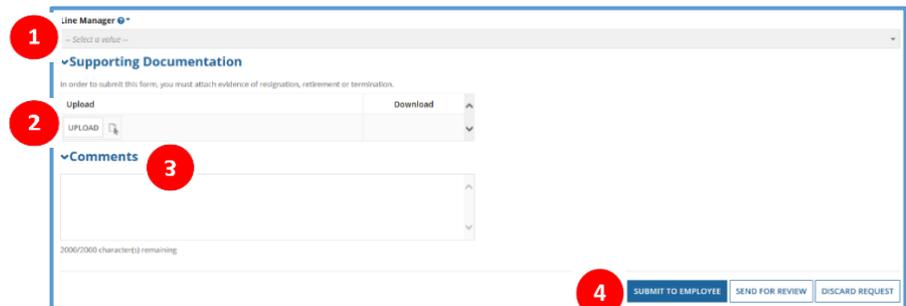
Finalise the request with the following steps:

1. From the drop down, select the appropriate **Line Manager** who will review the request.



If the initiator of the request and the Line Manager are the same person, the manager will not need to review the request again.

2. Uploading written evidence of the end of employment is mandatory. **It is important to note** that while the employee has network access at the university, they can view this record and the documents uploaded by others.
3. Add a **Comment** if necessary (not a mandatory requirement) but this can be useful to communicate a message to the next person in the process. **It is important to note** that while the employee has network access at the university, they can view this record and the comments added by others.
4. Click the **Submit to Employee** button. An email notification will be sent to the employee for acceptance of the request. They will be asked to make a declaration of their understanding of last pay and agree to return University assets.



Line Manager *

---Select a value---

Supporting Documentation

In order to submit this form, you must attach evidence of resignation, retirement or termination.

Upload

UPLOAD

Download

Comments

3000/2000 character(s) remaining

SUBMIT TO EMPLOYEE SEND FOR REVIEW DISCARD REQUEST

Refer to the section **Sending for Review** for further information on this function.

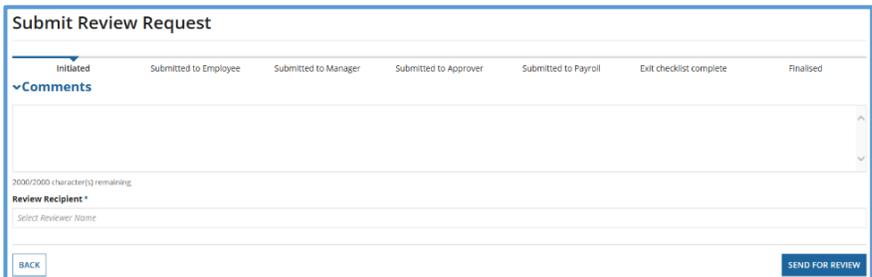
Sending for Review

In most stages in the process, users will notice a **Send for Review** button at the bottom right side of the screen. Send for Review is a helpful tool to be used to send the request to other people and request their input or feedback.

i The *Send for Review* function **IS NOT** a request for approval. It simply provides a mechanism to communicate to people who are not part of the approval process. Care should be given to keep employee confidentiality.

Sending the request for review will stop the process until the review is complete and sent back to the person who requested the review, at which point the request can be forwarded for approval.

When sending a review request, select a person and enter a comment/message. An email notification will be forwarded to the recipient of the request. An email will also be forwarded to you when the review is completed. You can then proceed with the approval process.



Approving the request

Once a request is submitted, the Line Manager and Authorising Officer must review and approve, prior to the finalised request being sent to Payroll Services (who will then process the request and prepare final payment). HR will assign the correct Authorising Officer to provide final approval.

Notifications and Approving the Request

Approvers will receive an email notification requesting their review and approval. A link to the task is provided in the email. It can also be obtained by clicking on the Task link within Appian, then selecting the specific task.

Tasks (39)

 + Me
Review and Approve End of Employment Request for Stella Cheatle
Yesterday 10:53 ☆

To approve, click the **Approve** button. Similar for **Decline**. Delining a request should only be used when the employee has withdrawn their resignation/retirement. This will ensure the request is not directed to Payroll Services).

APPROVE **SEND FOR REVIEW** **DECLINE**

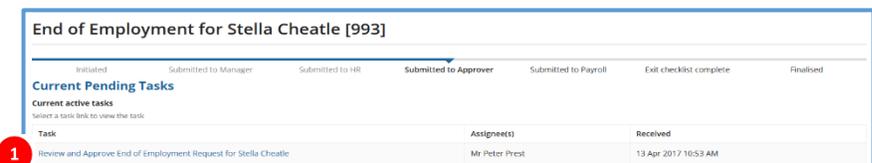
Reminders

If the task has not been actioned for 48 hours of receiving the initial notification, a reminder email will be sent to the approver.

Reassigning the Approver

Approvers (along with HR) have the ability to reassign an outstanding task to another person.

1. Click the specific task to reassign. The task will open.



Task	Assignee(s)	Received
Review and Approve End of Employment Request for Stella Cheatle	Mr Peter Prest	13 Apr 2017 10:53 AM

2. Click the **Reassign** button. A **Reassign Task** window will appear.

ACCEPT **GO BACK** **REASSIGN**

3. Type the name of the person who will receive the task (a search will begin and select the person from the pick list provided), then select the **Reassign** button.



An email notification of the reassigned task will be sent to the person chosen. That person is now responsible for completing the task.

Reassign Task

This task is assigned to: Peter Prest

Reassign To

 Vikki Hughes 3

REASSIGN
CANCEL

The Exit Checklist

Prior to, or on the last day at the University, the manager must walk through and record the Exit Checklist in Appian. The exit checklist is mandatory and is conducted to ensure the following has been completed:

- University assets have been returned
- Electronic access cards and room keys are returned
- Considerations are made for existing email accounts and redirection of future emails
- 'Out of office' messages are activated for email accounts
- Additional checklists for local procedures (if applicable) are undertaken.

The manager will receive an email notification requesting the Exit Checklist be completed. A link to the exit checklist is provided in the email. It can also be obtained by clicking on the Task link within Appian, then selecting the specific task.

Tasks (39)



All questions on the exit checklist are mandatory prior to submission. Depending on how some questions are answered, will depend on email notifications being directed to specific groups on a 'needs to know' basis.

Tracking the progress of your request

Track the progress of your request by clicking on the **Records** menu.

Records

Select **End of Employment Records** from the list displayed. The records you have access too will appear. Alternatively you can search on the process status or by employee.

Email notifications

A number of email notifications have been created to inform approvers of an outstanding action or decision within the end of employment process. Appian generated emails will be sent from a UniSA BPI address.

Dear Jason White

Malika Kumarasiri has submitted a End of Employment request.

Please review this request via the following link:
[Review End of Employment submission for Malika Kumarasiri](#)

Last day of employment:	20/07/2017
Last day at work:	13/07/2017

For further assistance with this request, please contact Human Resources.

Online Administration with Appian

Online Administration: Anywhere, Anytime, Any Device. Look for the UniSA Forms app in your mobile app store.