# University of South Australia

# End of Employment - Online Request
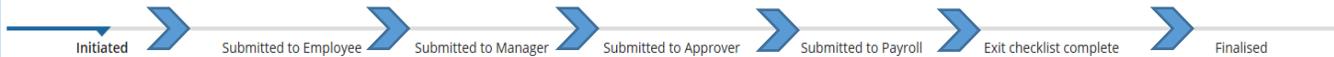# Quick Guide for Human Resources

**Purpose:** This guide applies to HR team members when submitting an End of Employment request on behalf of an employee. It also provides advice on conducting a HR Review when employees or managers submit an end of employment request and the approval processes associated with the request.

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

## Review and approval process

The below process will take place once Human Resources submit the request.

Initiated → Submitted to Employee → Submitted to Manager → Submitted to Approver → Submitted to Payroll → Exit checklist complete → Finalised

## Access the online End of Employment request

| | | |
|---|---|---|
| 1. | Log in to the staff portal by navigating to https://my.unisa.edu.au/public/staffweb/ <br><br> 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. <br> Type 'end of employee' in the form search, select **Search**. <br> Click on the hyperlink provided. <br> You may need to enter your network user ID and password. <br><br> The **Submit End of Employment Request** page is displayed. | |
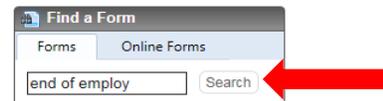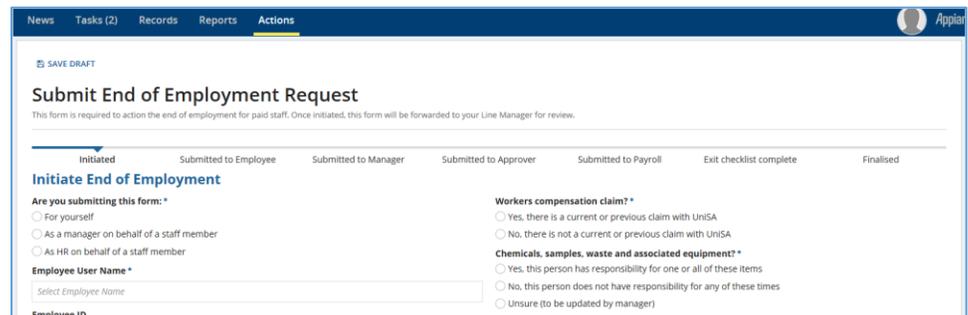
## Initiating the request

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

> ℹ️ *The submitted request will be forwarded to the employee. The employee will need to review and accept the EOE, however this step will not occur if the reasons Dismissed/Deceased are chosen.*

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

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

**Submit End of Employment Request**

This form is required to action the end of employment for paid staff. Once initiated, this form will be forwarded to the er

Initiated — Submitted to Employee — Submitted to Manager — Submitted

**Initiate End of Employment**

Are you submitting this form: *
- ◯ For yourself
- ◯ As a manager on behalf of a staff member
- **1** ◉ As HR on behalf of a staff member

Employee User Name *
- **2** | adam cald |
  - 👤 Adam Calderon
    caldera

Position Title

**3** Reason for end of employment *
- ---Select a Value--- ▾

Last day of employment ❓ *
- **4** dd/mm/yyyy

Last day at work ❓ *
- dd/mm/yyyy

Further information may be required if/when re-employment is to occur for this employee. Ensure **Yes** / **No** is selected accordingly. Provide a **Payroll Instruction** if required.

Past employee check required? *
- ◉ Yes
- ◯ No

Payroll Instructions
- [                    ]

2000/2000 character(s) remaining

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 the 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**.

**5** 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? ❓
- **6** ◯ Yes, at termination date
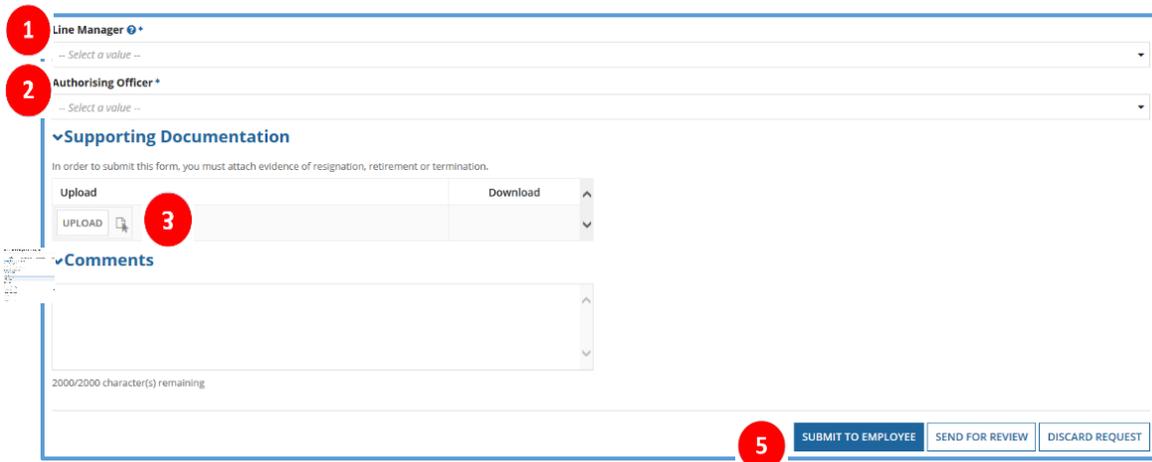- ◯ No, allow access for 30 days

Chemicals, samples, waste and associated equipment? *
- **7** ◯ Yes, this person has responsibility for one or all of these items
- ◯ No, this person does not have responsibility for any of these times
- ◯ Unsure (to be updated by manager)

## 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.
2. Select the appropriate **Authorising Officer** who will review and approve the request.
3. Provide written evidence of the end of employment.  **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.
4. 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.



5. Click the **Submit to Employee** button.  An email notification will be sent to the employee to provide an EOE declaration and to ensure forwarding contact details are correct.

> A **Submit to Line Manager** button will appear if the EOE reasons Dismissed or Deceased are chosen.

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

## HR Review – for requests submitted by employees or managers

Employees can submit their own end of employment requests, and Managers can also submit a request on behalf of an employee.  When this occurs, a HR Review will be undertaken.  This occurs after the Line Manager has acknowledged the employees notice to resign or retire.

**How to complete an EOE HR Review**

When the review is due, the HR team (HR team of the employee's Org2) will receive an email notification to complete the HR Review.  A hyperlink is provided in the email, which enables the recipient to click and access the record in Appian directly.

Other than checking the detail of the request, there are a few steps to complete prior to submitting to the Authorising Officer for further review.

## HR Review…..continued



1. Review the details of the last day of employment and last day at work.
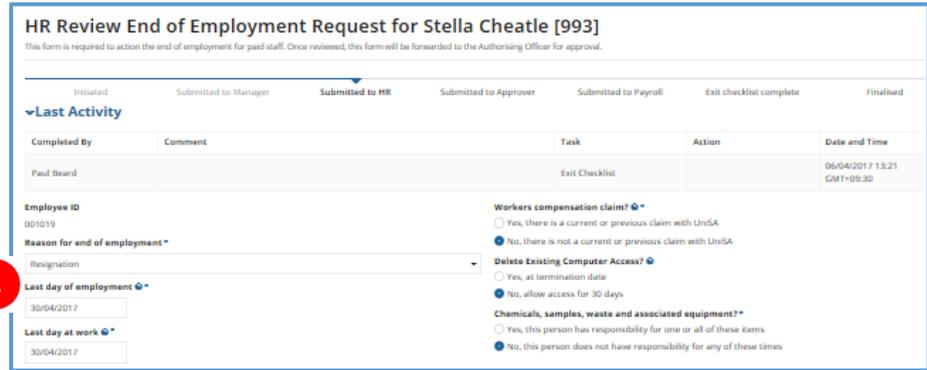
2. Further information may be required if/when re-employment is to occur for this employee. Ensure **Yes / No** is selected accordingly. Provide a **Payroll Instruction** if required.
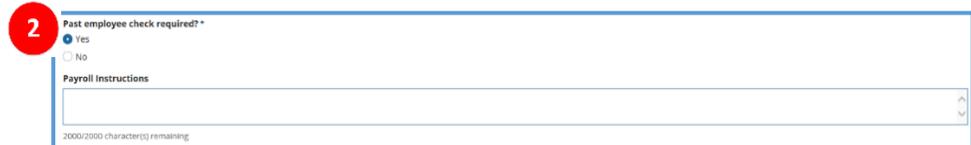
3. Select the appropriate **Authorising Officer** who will review and approve the request.

4. Click **Submit to Approver** when the review is complete.

## 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.

*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 recipent of the request. An email will also be forwarded to you when the reivew is completed. You can then proceed with the approval process.
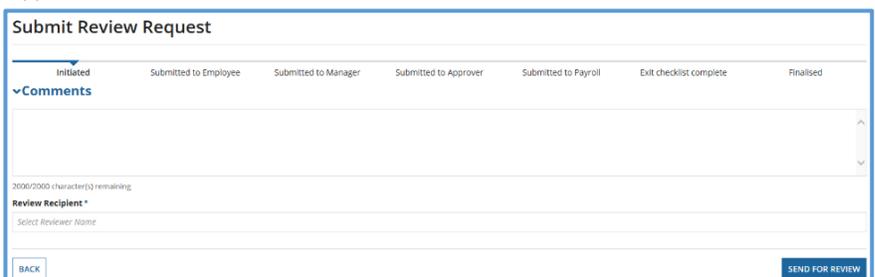
## Reassigning a task

HR teams have the ability to reassign an outstanding request for approval to another Line Manager or Authorising Officer. This should only be applied when the following occurs:

- The Line Manager is unavailable or the incorrect person has been selected
- The Authorising Officer is unavailable or the incorrect person has been selected

In both instances, the HR team will be notified by email after 72 hours of the task not being completed. A link is provided in the email. Clicking on the link will redirect the user to the task. The reassignment can then occur by following the below steps.

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



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



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.*



## Email notifications

A number of email notifications have been created to inform HR team members of an outstanding action or decision within the process. Appian generated emails will be sent from a **UniSA BPI** address. A description of each email is provided below.

- Information email only: when an employee has submitted a request.
- Action email for a HR Review: after the manager has accepted a request completed by the employee.
- Action email for a reassignment: when the Line Manager or Authorising Officer has not completed a task.
- Information email only: when an Authorising Officer has either approved or declined a request.
- Information email only: when the Exit Checklist is completed and the employee is in possession of a university owned mobile phone or other mobile device.
- Information email only: when an employee wishes to have an Exit Interview scheduled.

## Tracking the progress of your request

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

Select **End of Employment Records** from the list displayed. A list of the records you have access to will appear in a table. Click on the hyperlink to open.