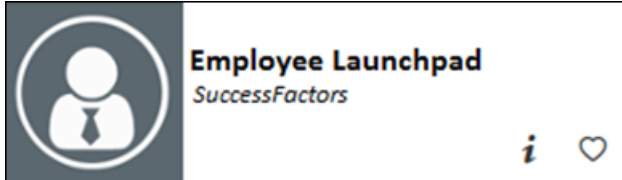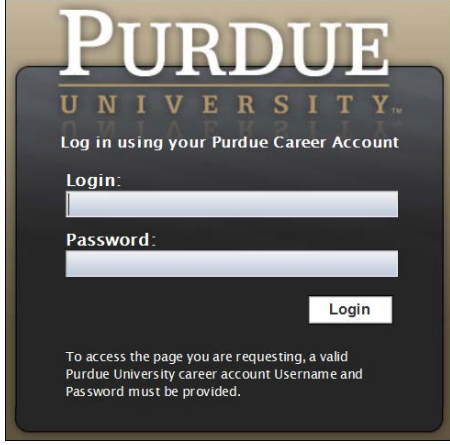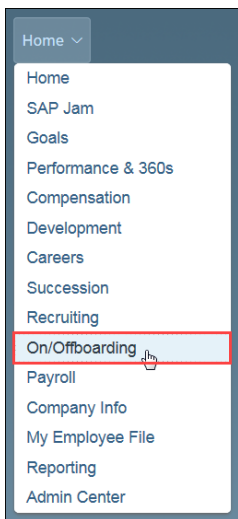**Quick Reference Guide: Offboarding – Initiate**

Last updated: 2/19/19

This QRG outlines the steps to initiate offboarding an employee. Only those employees with certain termination codes are subject to the offboarding process. Those codes are: Reduction in Force, Career Opportunity, Contract not renewed, Leave Exhausted, Personal Reasons, Retirement.

Access SuccessFactors	
Visit **OneCampus** and select **Employee Launchpad Success Factors**.	https://one.purdue.edu/ Employee Launchpad *SuccessFactors*
Log in using **Purdue Career Account ID** and **BoilerKey passphrase**.	PURDUE UNIVERSITY™ Log in using your Purdue Career Account **Login:** **Password:** Login To access the page you are requesting, a valid Purdue University career account Username and Password must be provided.

Offboarding Dashboard	
From the drop-down navigation menu, click **Offboarding**.	Home ⌄ Home SAP Jam Goals Performance & 360s Compensation Development Careers Succession Recruiting On/Offboarding Payroll Company Info My Employee File Reporting Admin Center

Click **Offboarding**.	> Onboarding 60 > I-9 3 Business-Days 0 > E-Verify 17 > I-9 Reverification 3 > **Offboarding** **84** > E-Verify Correct Data 0 > Internal Hire 2
Filter view to include only **Initiation** results.	∨ **Offboarding** **84** ☑ Initiation 60 ☐ Employee Step 5 ☐ Offboarding Coordinator… 19 ☐ Signature Step 0 ☐ Notifications 0
Only the first four (4) results are displayed. Click **More** to view all results.	**My Tasks For New Hire (60)** — Assigned To — Termination Date — Dept Name Cynthia Wilson, Initiation > Diane Brown — Oct 8, 2018 — Management & Mar… View ∨ | Reassign | ⊘ Bryan Scott, Initiation > Diane Brown — Sep 28, 2018 — Sponsored Program… ⊘ Test email, Initiation > Diane Brown — Sep 28, 2018 — Procurement Services ⊘ Brian Ingle, Initiation > Diane Brown — Aug 31, 2018 — Operations & Maint… **More** [4 / 60]
Locate the assigned employee and click to the right of their name to open. When the record has been selected the row turns gray.	**Cynthia Sanders** Initiation ⋮ Diane Brown **Nov 5, 2018** Discovery Park Admi… **Nancy Stevens** Initiation ⋮ Diane Brown **Nov 5, 2018** Building Services

Initiate Offboarding

Employee Data information is listed.	Verify Employee Data (Daniel Pierce) Initiation **Employee** First Name — Daniel Last Name — Pierce Employee ID — 90015982 Email Employee — amymd@purdue.edu **Position Information** Position Title — Telecommunications De Job Code — 20003458 Business Unit — WL Employee Class — Professional Employment Type — 12 Month Salaried
Click **Next**.	Cancel Next
Termination Data is displayed.	Termination Data (Daniel Pierce) Initiation Last Day Worked — 09/14/2018 Termination Date — 09/14/2018 Termination Reason — Reduction in Force
Click **Finish**.	Cancel Back Finish
A summary of the **Employee**, **Position Information**, and **Termination Data** is displayed. Click **Finish**.	Review and Approve - Initiation Finish Please review the data you have entered. If any information is incorrect simply click on the incorrect data. A wizard screen will pop-up where you can correct the data. Once corrected, click 'Finish' on the pop-up to return to the Review and Approval page. Verify Employee Data **Employee** First Name Daniel Last Name Pierce Employee ID 90015982 Email Employee amymd@purdue.edu **Position Information** Position Title Telecommunications Design Engineer Job Code 20003458 Business Unit WL Employee Class Professional Employment Type 12 Month Salaried **Termination Data** Last Day Worked 09/14/2018 Termination Date 09/14/2018 Termination Reason Reduction in Force Close Finish

Exit Survey
An exit survey is then sent via email to the employee.
There are two (2) exit surveys, one for Faculty and one for Staff.
The completed survey is then available to Employee Relations via SuccessFactors.