

# OFFBOARDING CHECKLIST FOR MANAGERS

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The purpose of this document is to guide department managers and supervisors with direct reports on the steps and processes necessary to properly terminate and offboard an employee from UAMS.

## **Voluntary Terminations:**

- If the notice was received electronically in Workday, follow the prompts in the business process. Complete the following “Terminate Employee” action in Workday. – **OR** – If the notice was provided verbally or written outside of Workday, complete the “Terminate Employee” action in Workday and attach the notice received, along with the manager’s acceptance, to the business process.
  
- Collect any UAMS property from the employee including, but not limited to, ID badges, keys, equipment, etc.
  
- Follow the procedures outlined for the Employee Separation System.
  - The employee clearance process must be completed in its entirety, prior to employee receiving terminal payout check. [Employee Separation Clearance Form](#)

## **Involuntary Terminations:**

- Complete the “Recommending Termination” disciplinary action in Workday and attach supporting documentation. See [Discipline – Required Supportive Documentation handout](#) for more details.
  
- Once the disciplinary action has been approved by Employee Relations, meet with the employee to inform them of the termination.
  
- Collect any UAMS property from the employee including, but not limited to, ID badges, keys, equipment, etc.
  - If badge not collected, you must complete the form to revoke access on [Institutional Support Services](#) site.
  
- Complete the “Terminate Employee” action in Workday and select the appropriate termination reason. See [Workday Tip Sheets](#) for more details.
  
- Follow the procedures outlined for the Employee Separation System.
  - The employee clearance process must be completed in its entirety, prior to employee receiving terminal payout check. [Employee Separation Clearance Form](#)

**\*NOTE:** “Terminate Employee” actions in Workday and employee Clearance Forms must be completed within 5 business days and 30 calendar days, respectively, following the employee’s termination date. In accordance with Administrative Guide 4.5.16, “Employee Separation Policy,” department managers, supervisors, or designees are responsible for the timely completion of these actions/forms. If the deadlines are not met, the **Separation Clearance Audit** form must be completed and returned to the sender within 5 days of receipt. Violation of the Employee Separation Policy will result in disciplinary action in accordance with Administrative Guide Policy 4.4.02 *Employee Discipline Policy*.

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For more information, not provided above, please review the following trainings/QRGs in [Workday Learning](#). Additional resources are available on the [Employee Relations](#) webpage.

- [Separations Training & QRG](#)
- [Disciplinary Actions Training & QRG](#)
- [Performance Improvement Plans \(PIPs\) Training & QRG](#)
- [Offboarding Expectations for Supervisors Training](#) and [Knowledge Article](#)

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## POLICIES:

- [Board Policy 405.6 -- Termination and Eligibility for Rehire](#)
- [Admin. Guide 4.5.16, “Employee Separation”](#)