# **Employee Offboarding** Process Automation

# About this automation:

Use this process to create tasks and documents required for offboarding an employee.

Simply import the sample automation, customise to suit your practice, test and activate!

Employee Name: Position: Date of interview:	«EmployeeName «Custom_Employ «CreatedDate»				
What are the reasons for leav	ing?				
Select one or more:					
Higher pay Improved work life balan Conflict with other Company instability Comments			Clos	er career o er to home Øy and/or j	
Please rank the following:					
		Strongly Disagree	Disagree	Agree	Strongly Agree
ib itself			Disagree	Agree	
<b>b itself</b> Job was challenging There were sufficient opport	unities for		Disagree	Agree	
b itself Job was challenging There were sufficient opport advancement	unities for		Disagree	Agree	
<b>b itself</b> Job was challenging There were sufficient opport advancement Workload was manageable			Disagree	Agree	
b itself lob was challenging There were sufficient opport advancement Workload was manageable Sufficient resources and staff	were available		Disagree	Agree	
Please rank the following: whitself There were sufficient opport advancement Workload was mangeable Sufficient resources and staff Your colleagues listened and, suggestion Your skills were effectively up Your skills were effectively up	were available appreciated your		Disagree	Agree	

## What's included:

- Exit Interview Document &
  - **Email Templates**
- Automation Process Steps

-							Knov	vledge				
ŕvi	FYI: Offboarding an Employee	0				ά 📃	Templa	tes Directors Files & Pap	ers Knowledge Base Policies & P	rocedures Task Templat	es	
	Make sure no steps are missed w practice.	hen an en	nployee I	leaves y	your			Active •	Search templates	×		
							Туре	Template Name		Name	Modified by	Modifie
	Employee Name: «EmployeeNam Position: «Custom Employ							FYI: Offboarding Next	Steps	FYI: Offboarding	Cathy Woods	09 Feb 2
	Position: «Custom_Empli Date of interview: «CreatedDate»	Acc"woics					6 D	FYI: Exit Interview		FYI: Exit Interview	Cathy Woods	09 Feb 2
	What are the reasons for leaving? Select one or more: Higher pay Better be Improved work life balance Career ch Conflict with other Conflict with other		Clos	ter career o ser to home			<b>H</b> 1	FYI Actions	Create Task • A task will be created with the Received <sup>*</sup> Notes Consider updating the assignee to			C 995
	Company instability Other						₩2	FYI Actions	Create Word A Word document will be one The document will be filed as A task will be created with the Notes Consider updating the assignce to	"FYI: Bit Interview" in the Empli e subject "Complete Bit Intervie	oyees cabinet w Document"	3.983
n	Please rank the following: he lob itself	Strongly Disagree	Disagree	Agree	Strongly Agree		<b>H</b> 3	FYI Actions	Create Meeting A meeting will be created The document will be filed Employees calinet A task will be created with the Notes			₿₽₿
	Job was challenging There were sufficient opportunities for advancement								Consider updating the assignee to	the appropriate User or User Ro	le	
	Workload was manageable Sufficient resources and staff were available Your colleagues listened and appreciated your suggestions						₩4	FYI Actions	Create Email An Email will be created from Created email will be it Attachments will be Sh The document will be filed as	mmediately sent ared via Collaborate		C. <b>F B</b> B
	Your skills were effectively used You had access to adequate training and development programs								cabinet Notes Consider updating the sender of th or User Role			

# How to import:

Before you begin - ensure your **Employee View** has been saved.

• Employee Status = Active

Ste	р1-	Save	the	import	file	locally
000		JUIC		in porc		locally

The first step is to download the zip file provided in FYI's help centre.

Simply save the file locally, for example, in your Windows Explorer Downloads folder. You **do not** need to extract the files.

## Step 2 - Import the files into FYI

Navigate to the Automations screen and click the Import button on the right-hand side of the screen.

Locate and select your saved "Offboarding an Employee" file and click **Open** to import the automation.

You can also drag and drop the zip file to the Automation list view.

The Process and Templates will be imported into FYI.

#### Step 3 - Review the process

#### **Review the Templates**

Locate the templates in **Knowledge - Templates**. The templates will import with the prefix FYI making them easy to locate.

- Review and personalise the imported templates
- Update the template **Status** to Active.

#### Edit and Review Each Process Step

The Custom Process is imported with the **Status** set to Draft. You can locate the process by searching in the "Search processes" field.

- Review the schedule and owner
- Review and update each **process step.** Specific comments have been added to the steps where action is required. These will display in **blue**.

## Step 4 - Test and run the automation

Click the Test button to display a list of Employees.

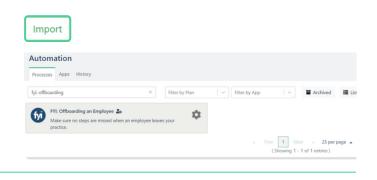
From Select Test Employee, search and select a specific employee to run the test for and select Run Test. A Test Employee is handy for testing scheduled automations.

Review the test by clicking the View History link, or from the Employee workspace.

When ready, set the **Status** to Active. The process will run automatically according to the schedule.

Practice				
Activity Reports Time Invoices Employe	6			
<ul> <li>Active Employees</li> </ul>	Search employees ×			59 ro
Name	Email	Partner	Manager	Active 👻
Carl Davies	carl.davies@thegrowth.partners	Olivia Williams		0
E Cathy Woods	cathy.woods@thegrowth.partners	Harry Spins	Liz Hurst	0
Crystal Rich	crystal.rich@thegrowth.partners	Crystal Rich		0

🦆   🛃 🖬 🛛 Downloads				-
Name	Date modified	Type		Size
~ Today				
5 FVI_ Offboarding an Employee_v0.02	9/02/2024 5:38 1	PM	Compressed (zipped) F	187 KE



	Active      Section	earch templates	× &		
Туре	Template Name		Name	Modified by	Modified or
	FYI: Offboarding Next Ste	95	FYI: Offboarding	Cathy Woods	09 Feb 2024
	FYI: Exit Interview		FYI: Exit Interview	Cathy Woods	09 Feb 2024
Step	Application	Action			
1	FYI Actions	Received" Notes	n the subject "Ensure Formal Res e to the appropriate User or Use	-	C. BBS
12	FYI Actions	The document will be file     A task will be created with Notes	created from the "FYI: Exit Inten d as "FYI: Exit Intenview" in the En the subject "Complete Exit Inte e to the appropriate User or Use	nployees cabinet n/lew Document*	8.989
₩3	FYI Actions	Create Meeting • A meeting will be created	d ac 'll TrinnerFmninuseName II		C ( P )

Select Test E	mployee
Employee Name	
Ignore Process Filter	NO
	Employee
0	Aaron Test
0	Amanda Bailey
0	Anna Jordan