

How to start an offboarding form as an initiator

Purpose

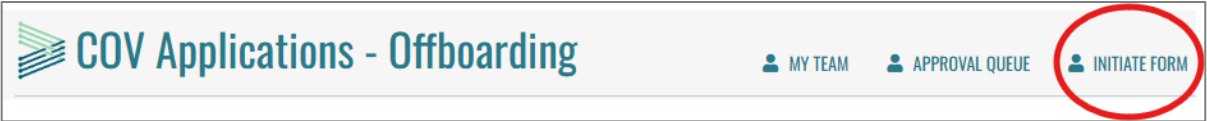
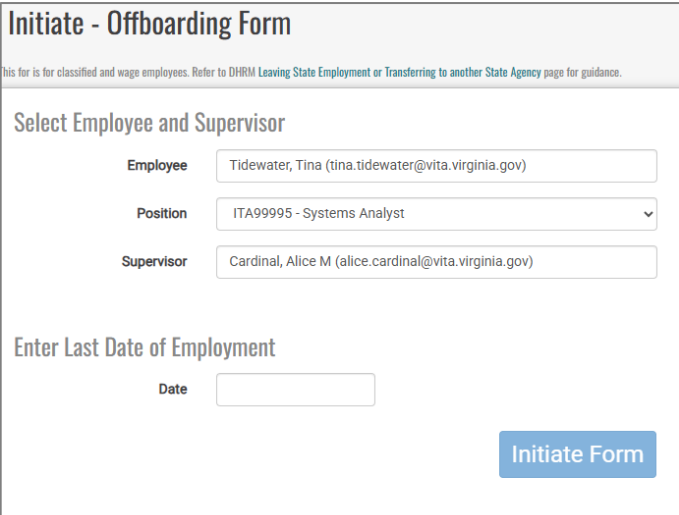
This job aid demonstrates how to start an offboarding form as an initiator.

Responsibility

All Commonwealth of Virginia (COV) employees who are assigned the initiator role.

Procedures

Note: Prior to being able to initiate a checklist for someone, the checklist for this agency must first be marked **Complete/Activate** via the **Checklist Editor** tab by someone at your agency in the **Checklist Editor** role.

1.	If you have been given the role of initiator for the offboarding application by your agency administrator, you will see the Initiate Form tab on the top right of the offboarding application. Select Initiate Form 
2.	In the Employee field, begin typing the employee's name that is being offboarded. Suggested names will appear; select their name. 

3.	If a person has more than one position, select the position that is being offboarded, otherwise their position in Cardinal will populate.
4.	The employee's assigned supervisor in Cardinal will appear. If needed, you may overwrite this name for the person who will be completing the offboarding checklist.
5.	Enter the last date of employment and select Initiate Form .
6.	A notification will be sent to the supervisor and the agency human resource (HR) approvers assigned this role in the offboarding application to complete the offboarding checklists for the employee.

If you have any questions about the offboarding process, please contact your HR representative.