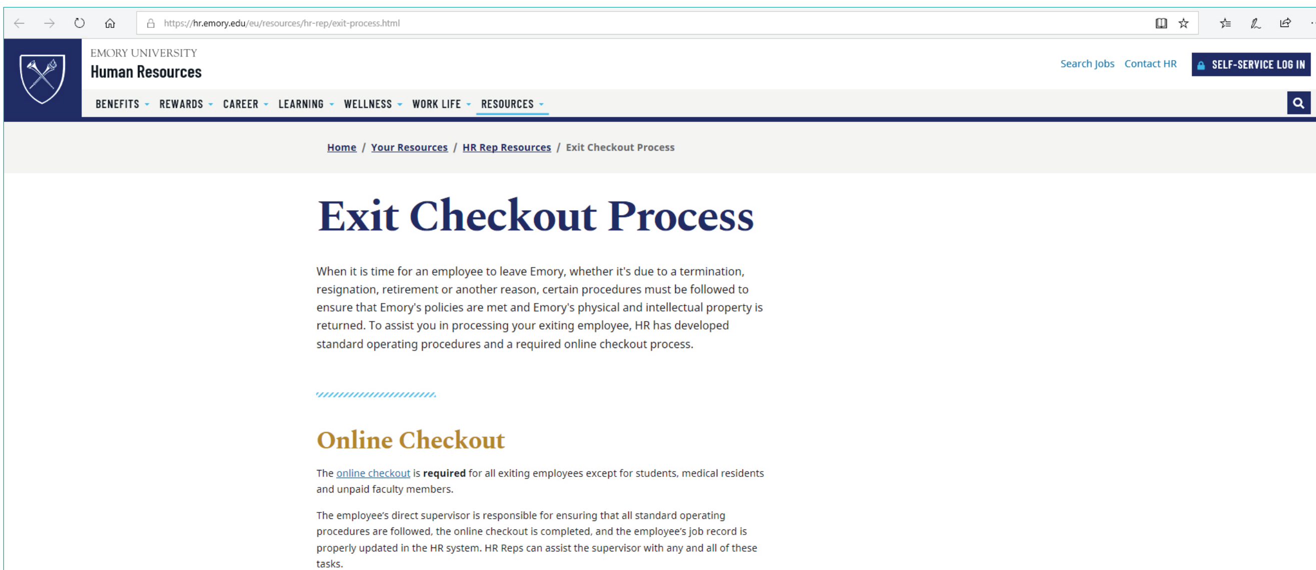
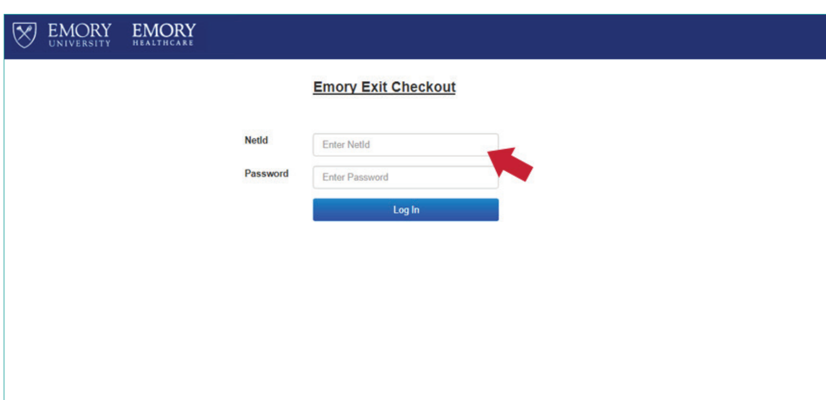
Online Exit Checkout Process

Overview: This job aid guides managers and HR Reps through the step-by-step instructions for using the online checkout tool to offboard an employee at Emory University. The tool is designed to record the completion of a standard set of exit tasks for terminations, retirements and other separations. A completed checkout is required for all separating paid faculty, staff, post-docs and librarians. ETS Temp checkouts are optional.

1. Before beginning, first review Emory University's Exit Checkout Process listed on the HR website at: **https://hr.emory.edu/eu/resources/hr-rep/exit-process.html**. This page has instructions and information about the process as well as training guides, FAQs and more.



2. Log in to the mobile-friendly checkout tool at: **https://apps.hr.emory.edu/checkout** using your Emory NetID and password.



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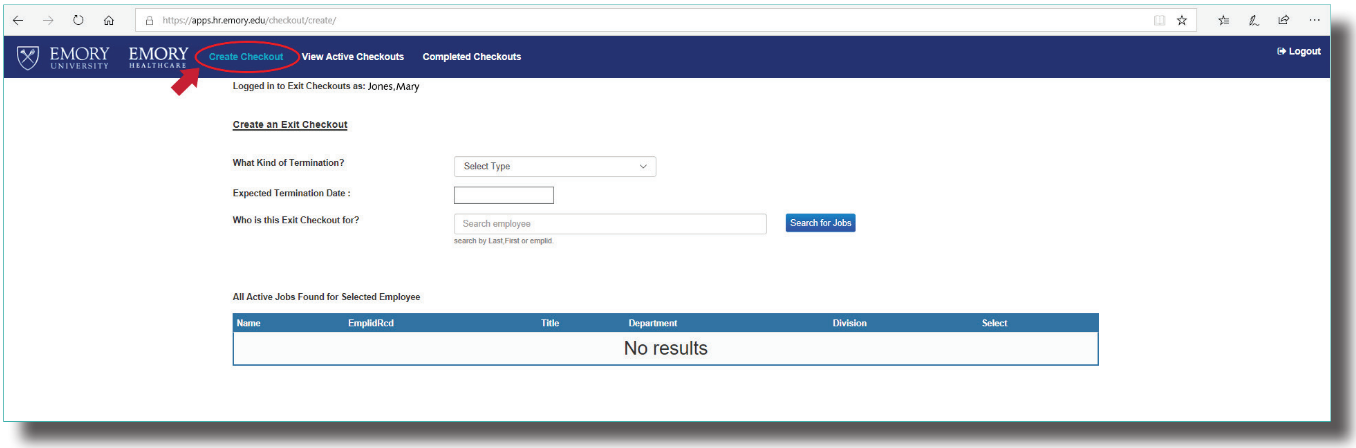
Click on **Create Checkout** from the top menu.



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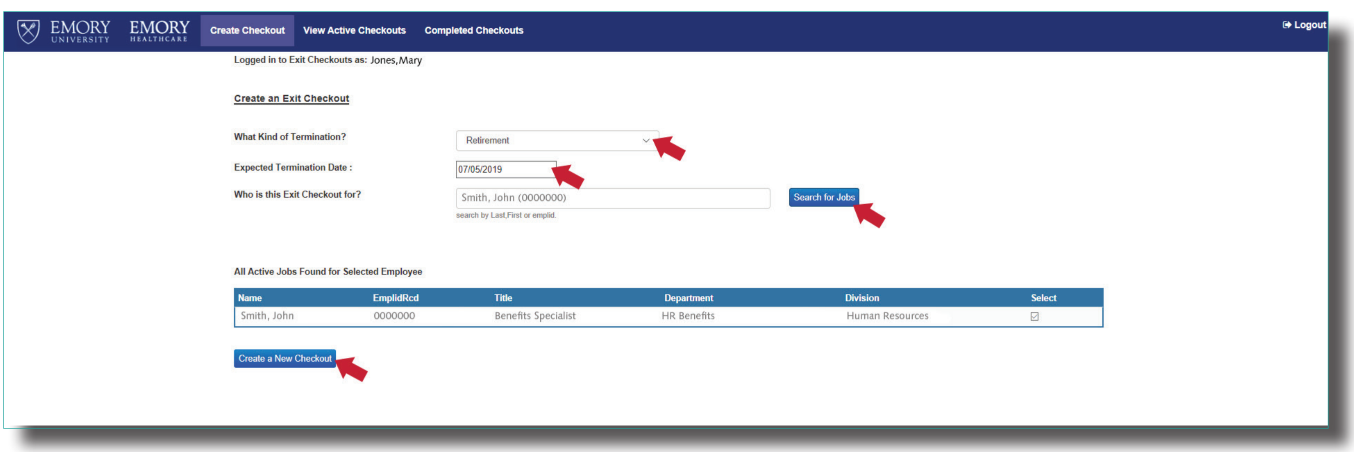
Fill in the **termination type** and the **termination date** and search for the **employee** who is being checked out. You must search by name: last, first or employee ID #. When finished, click the **Search for Jobs** button. The employee's information will then populate in the box below. If the employee has more than one job, select the correct position. Next, click on **Create a New Checkout**.



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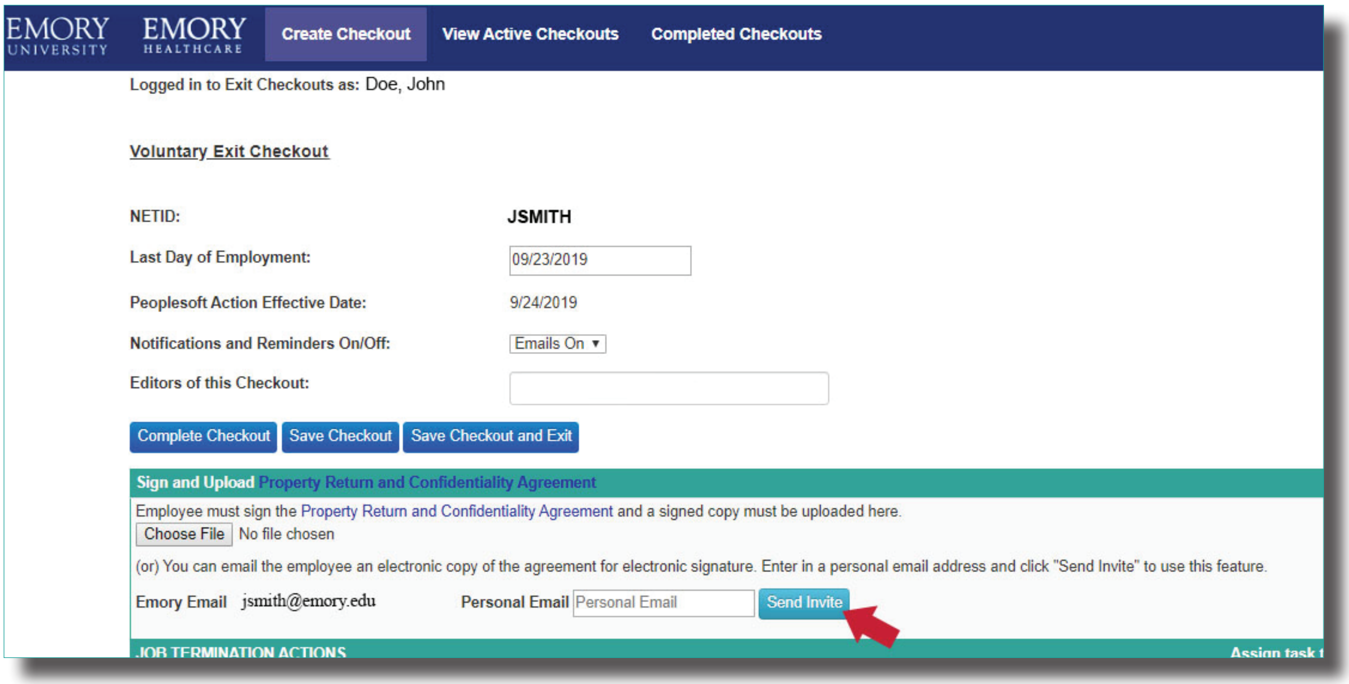
The checklist will then appear. Check all tasks as they are **Completed** or check them as **Not Applicable (N/A)**. You can also assign tasks to others (these individuals will only be able to update the status of the task(s) assigned to them).

IMPORTANT: Make sure you get the **Property Return and Confidentiality Agreement** signed by the employee who is leaving Emory. The employee will be marked ineligible for rehire in the HR System until the signed form is received. There are two ways to do this. (1) You can print a hard copy of the form, get it signed by the employee and upload it to the system OR (2) You can email the employee an electronic copy of the form for their electronic signature.



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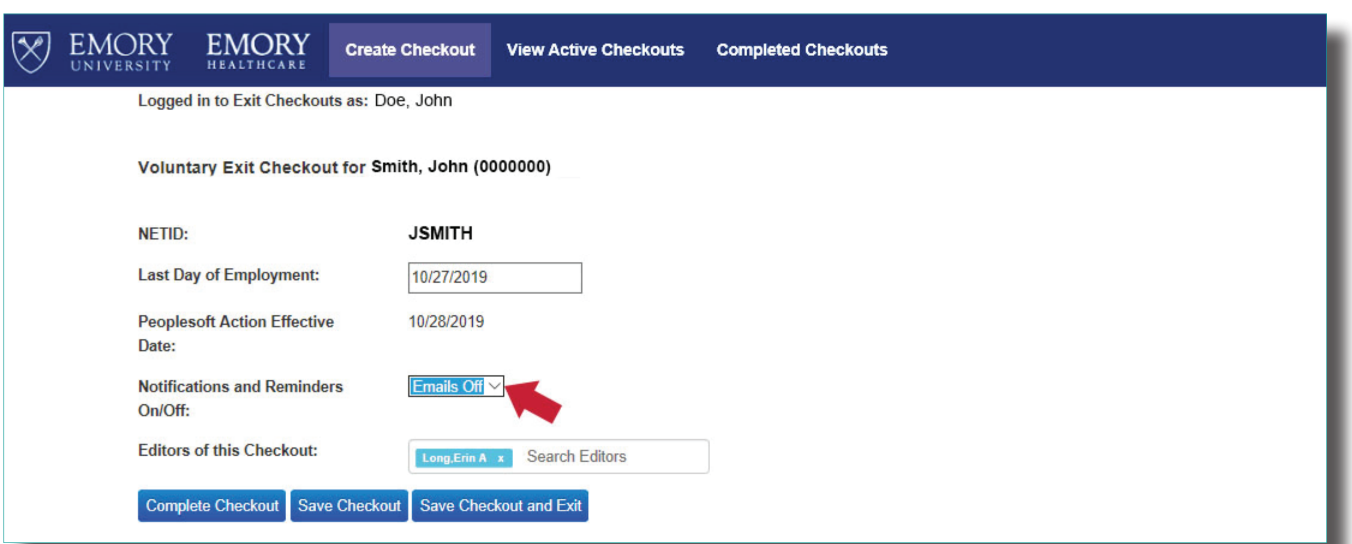
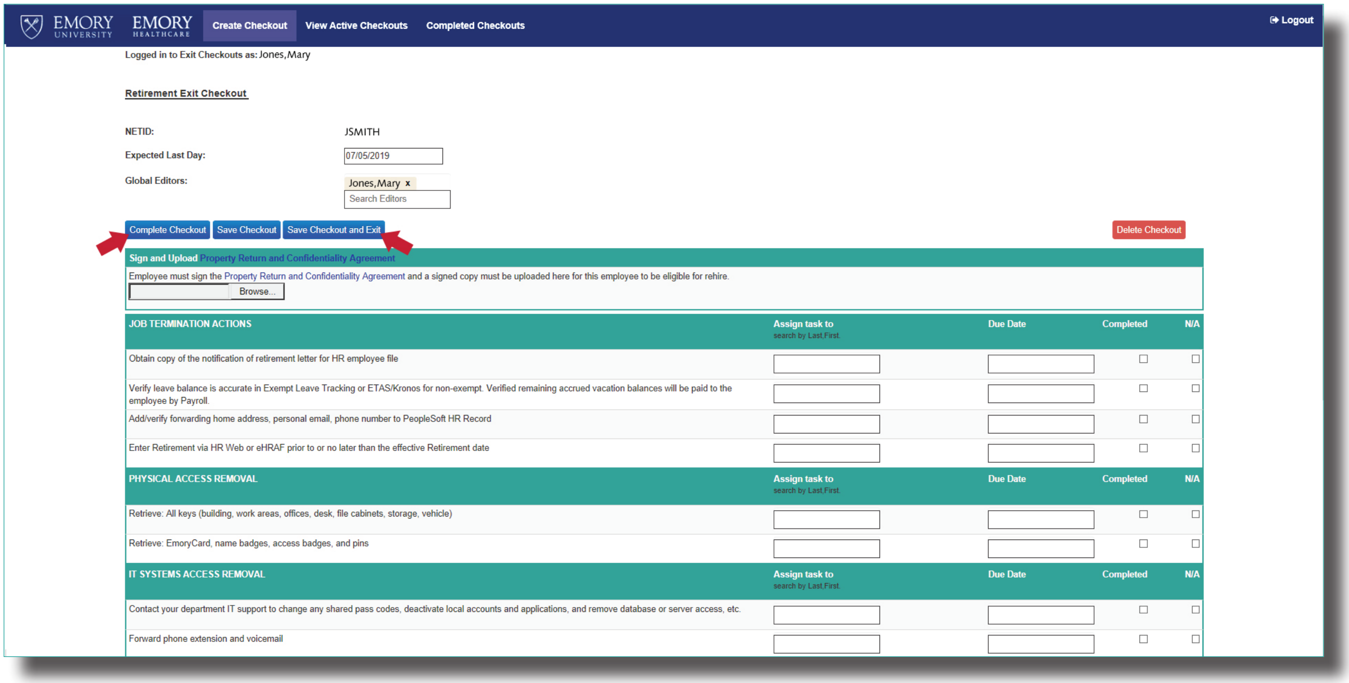
As a default, automatic email reminders are built into the system to alert you and others to the stages of the exit process. If you wish to turn these off, go to **Notifications and Reminders** and use the drop down menu to select **Emails Off**.



7 When you are finished with all items, click the **Complete Checkout** button. You can also use the **Save Checkout and Exit** button to return and finish it later.



You're all done! Congratulations!

TIPS

Make sure you:

1. Mark each task **Complete** or **N/A**.
2. Get the **Property Return and Confidentiality Agreement** signed by the separating employee (either by uploading a signed copy or sending a digital copy to the employee).
3. Mark the checkout **Complete**.

REMINDER EMAILS

Reminder emails will only be sent to the checkout creator, the supervisor of record and the global editors. Due to the varied and sensitive nature of some terminations, this tool does not generate automatic email notifications to individual task assignees. Remember, you can turn off email notifications as well.