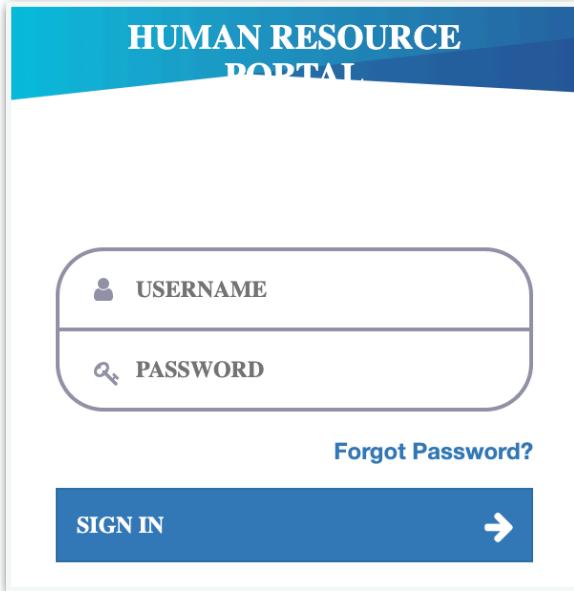


System:	Human Resource Information System	Date:	May 2, 2025
Portal URL	<a href="https://hr.hris-in-powermaccenter.com/">https://hr.hris-in-powermaccenter.com/</a>	Name:	Offboarding Module

## HR - HRIS > OFFBOARDING

Setup employee's off boarding requirements as well as the checklist of things the company needs to prepare when the employee resigns.

# Where can I find this module?



- **SIGN IN**

1. Go to <https://hr.hris-in-powermaccenter.com>
2. Enter your USERNAME and PASSWORD.
3. Click SIGN IN

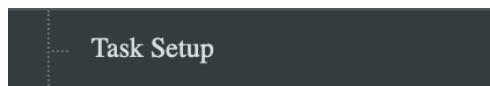
#### 4. On the left side of the HRIS Dashboard, click the Offboarding module.

The screenshot shows the HRIS Dashboard with the Offboarding module selected. The Offboarding module is highlighted with a red box in the navigation menu. The dashboard includes various charts and graphs such as 'Manpower Complement', 'Headcount by Employee Type', and 'Headcount by Length of Service'. The sidebar on the right shows 'Memorandum and Announcement' with three items, and a 'Task List' with several pending tasks.

## There are 3 main sub modules under Offboarding:



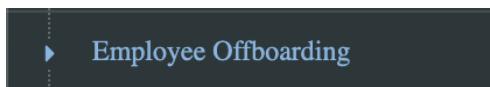
Setup employee's off boarding requirements as well as the checklist of things the company needs to prepare when the employee resigns.



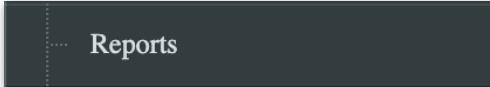
Define the tasks that can be part of the offboarding checklist



This is where you can classify the tasks into group to be the offboarding checklist.



This is where you initiate a new offboarding checklist for a resigned employee, you can also check the progress of other off boarding employees.



Can be used to extract the progress or status of the offboarding employees as a report.

# Define the tasks that can be part of the Offboarding Checklist

## 1. On the left part, click Offboarding > Task Setup

The screenshot shows the HRIS dashboard with the following sections:

- Left Sidebar:** Includes links for Talent Acquisition, Onboarding, Employee 201, HR Services, Personnel Development, Performance Management, Employee Relations, Safety & Health, and Offboarding. The "Task Setup" link is highlighted with a red box.
- Top Header:** Shows "everything at work", user profile "MELVIN D. PAG...", and navigation icons.
- Dashboard Metrics:**
  - 53 Open Requests
  - 2 Documents Processed (YTD) Jan 1 - Apr 29
  - 4 Document for Claiming
- Charts:**
  - Manpower Complement: A bar chart showing employee counts across different categories.
  - Headcount by Employee Type: A horizontal bar chart showing headcount by employee type.
  - Headcount by Length of Service: A pie chart showing the distribution of employees by length of service.
- Right Panel:** A "Task List" section showing a list of tasks with columns for Task Name, Assign to Employee, Task is mandatory, and Require employee acknowledgement. Tasks include "sample", "Return ID", "Surrender HMO (Physical Card)", "BIT TASK", "HR TASK", "OFFBOARDING EMPLOYEE TASK", "EMPLOYEE OFFBOARDING TASK", "DEPARTMENT HEAD TASK", and "SAMPLE111".
- Announcements:** A section titled "Memorandum and Announcement" with three items: "1 INFINITE MOBILE APP FAQ", "Employee HRIS User Guide Now Available!", and "WE WANT YOUR FEEDBACK!".

The screenshot shows the "Task List" page with the following interface elements:

- Left Sidebar:** Includes links for Offboarding, Task Setup, Onboarding Task Set Up, Employees Offboarding, and Reports. The "Task Setup" link is highlighted with a red box.
- Header:** Shows "Offboarding > Task List" and a "Edit" button.
- Search:** A search bar with a magnifying glass icon.
- Add:** Buttons for "Add" and "Add by batch".
- Table:** A grid of task details with columns: Task Code, Task Name, Assign to Employee, Task is mandatory, and Require employee acknowledgement.
- Bottom:** Page navigation buttons and a status message "View 1 - 11 of 11".

## 2. Add a Task, below are 2 ways on how to add a task.



Add single record

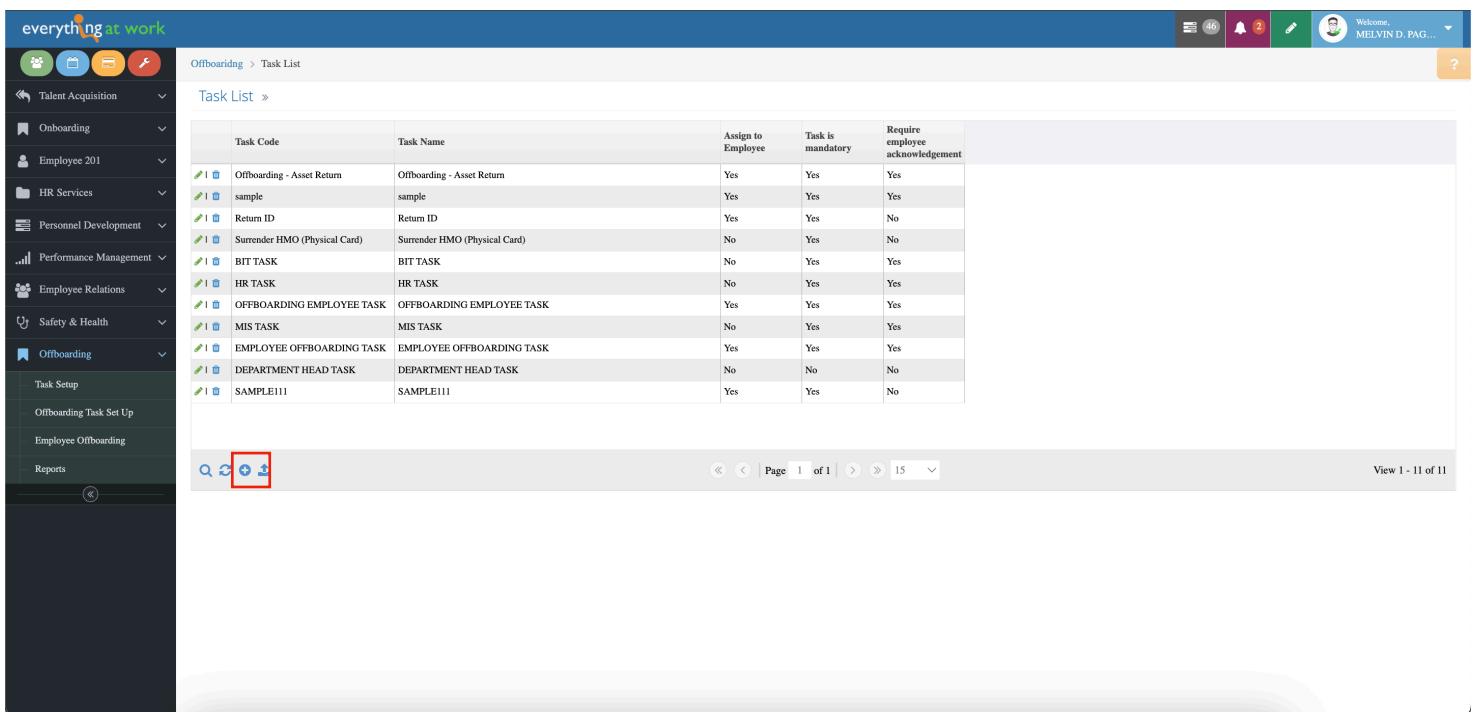


Add by batch



### Add single record

#### A. Click “Add” button



The screenshot shows the 'Task List' page under the 'Offboarding' section. The toolbar includes icons for search, refresh, and add, with the 'Add' icon highlighted by a red box. The main area displays a table of tasks with columns: Task Code, Task Name, Assign to Employee, Task is mandatory, and Require employee acknowledgement. The table lists various tasks such as Offboarding - Asset Return, sample, Return ID, Surrender HMO (Physical Card), BIT TASK, HR TASK, OFFBOARDING EMPLOYEE TASK, MIS TASK, EMPLOYEE OFFBOARDING TASK, DEPARTMENT HEAD TASK, and SAMPLE111. The last row, SAMPLE111, has 'Yes' in all four columns. At the bottom, there are navigation links for search, refresh, and add, along with a page number indicator (Page 1 of 15) and a view count (View 1 - 11 of 11).

Task Code	Task Name	Assign to Employee	Task is mandatory	Require employee acknowledgement
Offboarding - Asset Return	Offboarding - Asset Return	Yes	Yes	Yes
sample	sample	Yes	Yes	Yes
Return ID	Return ID	Yes	Yes	No
Surrender HMO (Physical Card)	Surrender HMO (Physical Card)	No	Yes	No
BIT TASK	BIT TASK	No	Yes	Yes
HR TASK	HR TASK	No	Yes	Yes
OFFBOARDING EMPLOYEE TASK	OFFBOARDING EMPLOYEE TASK	Yes	Yes	Yes
MIS TASK	MIS TASK	No	Yes	Yes
EMPLOYEE OFFBOARDING TASK	EMPLOYEE OFFBOARDING TASK	Yes	Yes	Yes
DEPARTMENT HEAD TASK	DEPARTMENT HEAD TASK	No	No	No
SAMPLE111	SAMPLE111	Yes	Yes	No

## B. Fill up the fields.

You may add other categories here.

The screenshot shows the 'Task List' section of the Offboarding module. A red box highlights the top-left area where task details are entered. An arrow points from the text 'You may add other categories here.' to the 'Task Category' dropdown menu, which is set to 'Offboarding'. Other visible fields include 'Task Code' (MIS TASK), 'Task Name' (MIS TASK), 'Task Description' (with a rich text editor toolbar), 'Timing' (1 day before Separation), and several checkboxes for task requirements like 'Required Document Upload' (checked) and 'Task is mandatory' (checked). At the bottom, there's a note: 'I HEREBY ACKNOWLEDGE THE TASK.' Below this is a table for document uploads:

Document Name	Review Criteria	Link To Upload File	File Name
ACCOUNT DEACTIVATION FORM	COMPLETE DETAILS		SAMPLE.pdf

At the bottom of the page, there are search, refresh, and add buttons, along with a page navigation bar showing 'Page 1 of 1' and a total of 15 records. The 'Input' tab is selected.

C. On the bottom part, upload an input if there's any. (Documents that need to be signed by employee), click “Add” under Input tab.

This screenshot shows the 'Input' tab of the document management interface. It displays a table with one record:

Document Name	Review Criteria	Link To Upload File	File Name
ACCOUNT DEACTIVATION FORM	COMPLETE DETAILS		SAMPLE.pdf

Below the table is a search bar and a message: 'No records to view'. At the bottom right are 'Save' and 'Close' buttons.

D. Fill up fields and choose file to be attached.

E. Click “Add” button.

Input

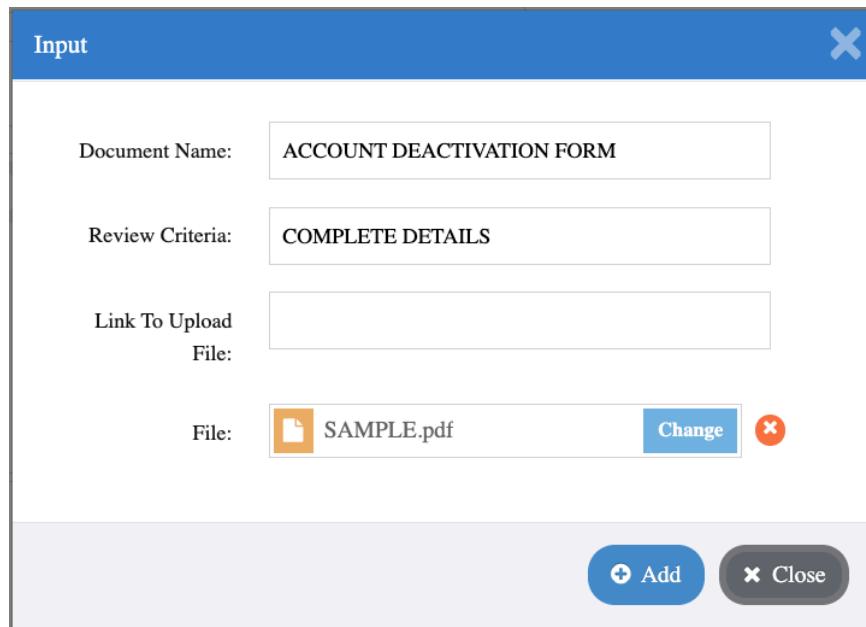
Document Name: ACCOUNT DEACTIVATION FORM

Review Criteria: COMPLETE DETAILS

Link To Upload File:

File: SAMPLE.pdf Change ×

+ Add × Close

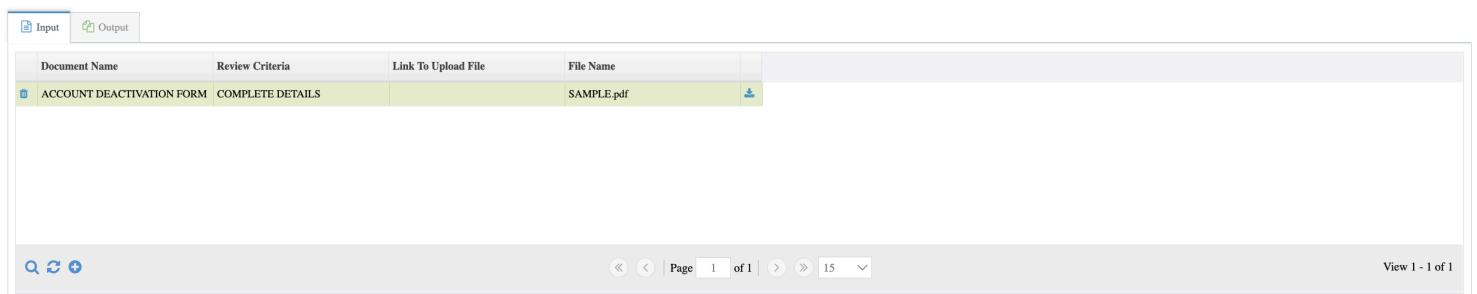


F. Go to “Output” tab.

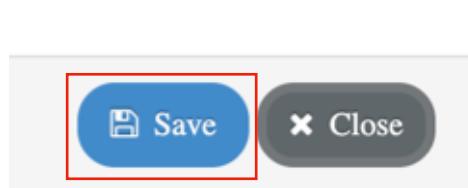
G. Enter the Document Name and its Description (this is the file name expected to be uploaded by the employee)

Document Name	Review Criteria	Link To Upload File	File Name
ACCOUNT DEACTIVATION FORM	COMPLETE DETAILS		SAMPLE.pdf

View 1 - 1 of 1



H. Click “Save” when done.



## This will now appear on the Task List.

	Task Code	Task Name	Assign to Employee	Task is mandatory	Require employee acknowledgement
	Offboarding - Asset Return	Offboarding - Asset Return	Yes	Yes	Yes
	sample	sample	Yes	Yes	Yes
	Return ID	Return ID	Yes	Yes	No
	Surrender HMO (Physical Card)	Surrender HMO (Physical Card)	No	Yes	No
	BIT TASK	BIT TASK	No	Yes	Yes
	HR TASK	HR TASK	No	Yes	Yes
	OFFBOARDING EMPLOYEE TASK	OFFBOARDING EMPLOYEE TASK	Yes	Yes	Yes
	MIS TASK	MIS TASK	No	Yes	Yes
	EMPLOYEE OFFBOARDING TASK	EMPLOYEE OFFBOARDING TASK	Yes	Yes	Yes
	DEPARTMENT HEAD TASK	DEPARTMENT HEAD TASK	No	No	No
	SAMPLE111	SAMPLE111	Yes	Yes	No



### Add by batch

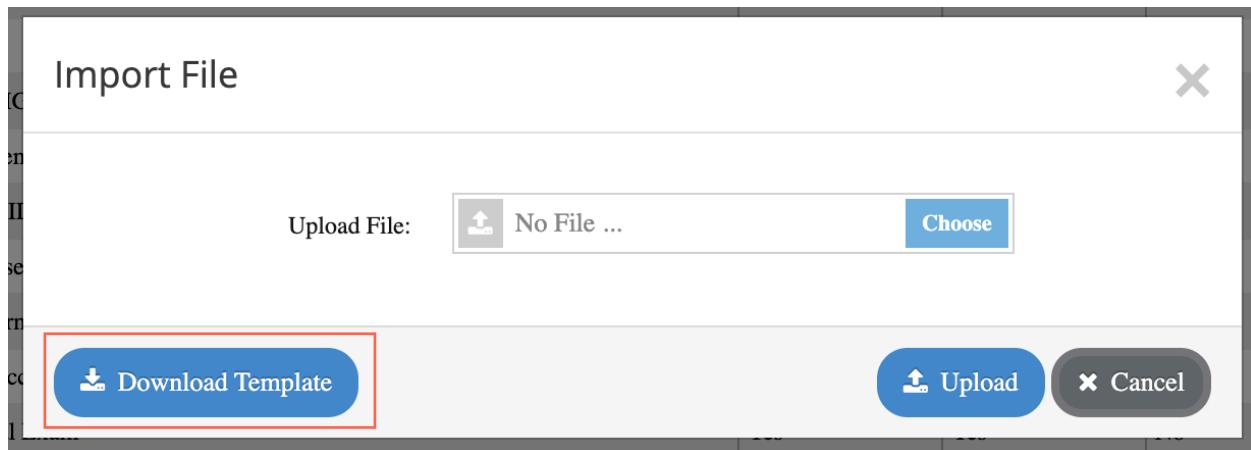
A. Click the “Add by Batch” button, this will allow you to upload multiple tasks at a time.

	Task Code	Task Name	Assign to Employee	Task is mandatory	Require employee acknowledgement
	Offboarding - Asset Return	Offboarding - Asset Return	Yes	Yes	Yes
	sample	sample	Yes	Yes	Yes
	Return ID	Return ID	Yes	Yes	No
	Surrender HMO (Physical Card)	Surrender HMO (Physical Card)	No	Yes	No
	BIT TASK	BIT TASK	No	Yes	Yes
	HR TASK	HR TASK	No	Yes	Yes
	OFFBOARDING EMPLOYEE TASK	OFFBOARDING EMPLOYEE TASK	Yes	Yes	Yes
	MIS TASK	MIS TASK	No	Yes	Yes
	EMPLOYEE OFFBOARDING TASK	EMPLOYEE OFFBOARDING TASK	Yes	Yes	Yes
	DEPARTMENT HEAD TASK	DEPARTMENT HEAD TASK	No	No	No
	SAMPLE111	SAMPLE111	Yes	Yes	No

Page 1 of 1 | 15

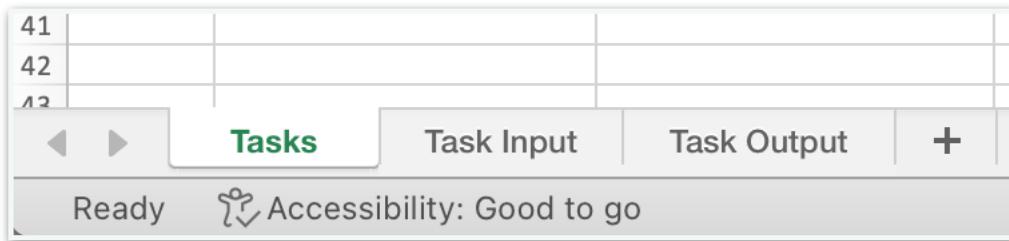
B. Click “Download Template” button to get the template file.



C. Open the template file on Excel and fill up columns. (Some columns has options, you may click the dropdown button on the side to choose.)

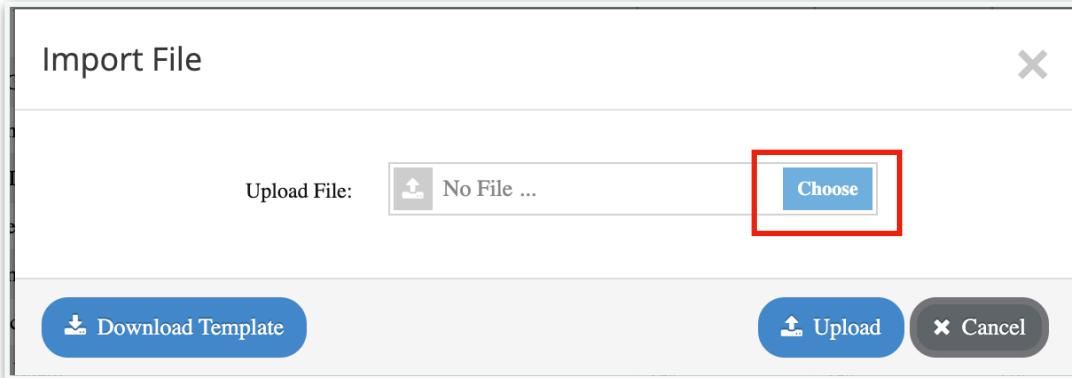
Code	Name	Description	Task Category	Timing	Standard	Task is Mandatory	Assign To Employee	Required Acknowledgement	Acknowledgement Remarks
REQ3	Government ID	PhilSys ID, SSS ID, Umid ID	INITIAL REQUIREMENTS	Before First Day	Yes	Yes	Yes	No	
REQ4	New Employee Form	Accomplished Employee Form	HR TASK						

Please take note that there are 3 sheets within this spreadsheet. Fill out the task Input and Output if there is any.

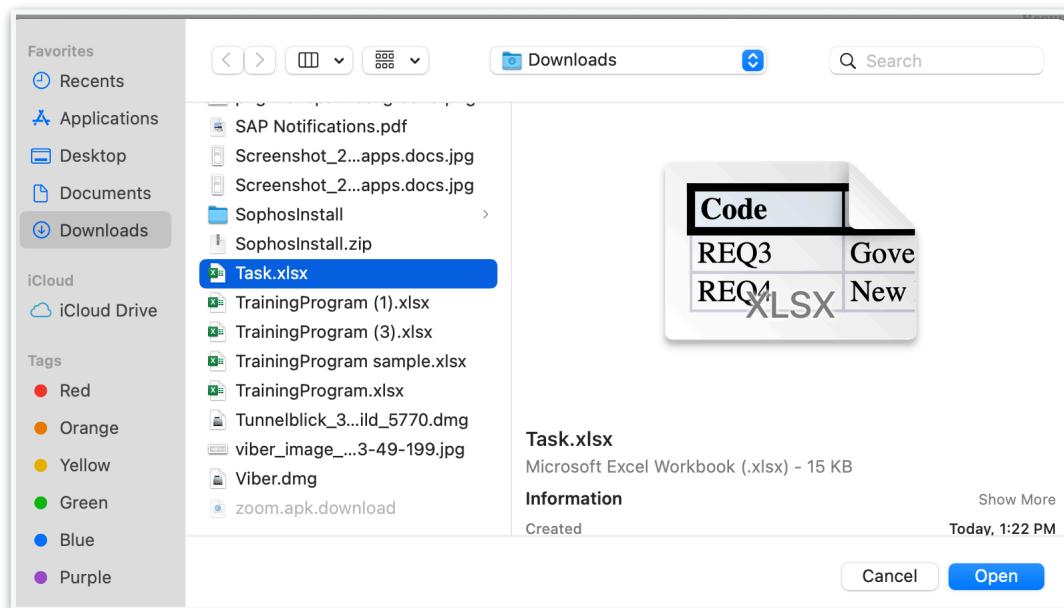


D. Save the file.

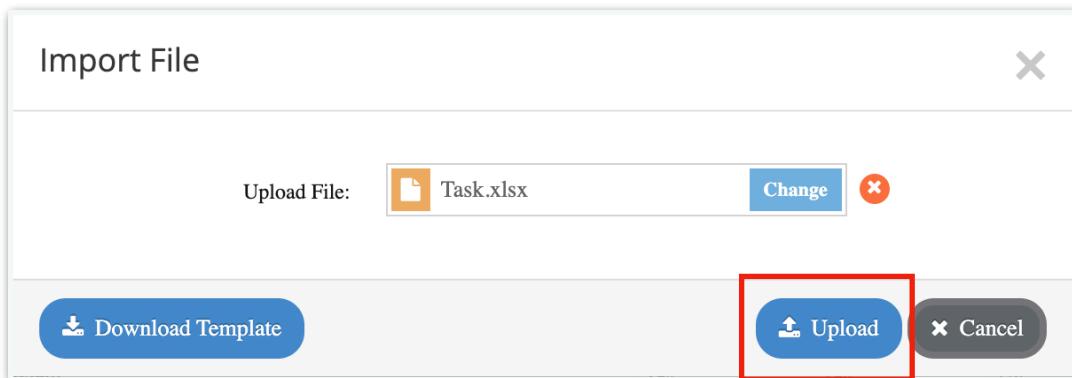
E. Back to the HRIS System, click the “Choose” icon to upload the file.



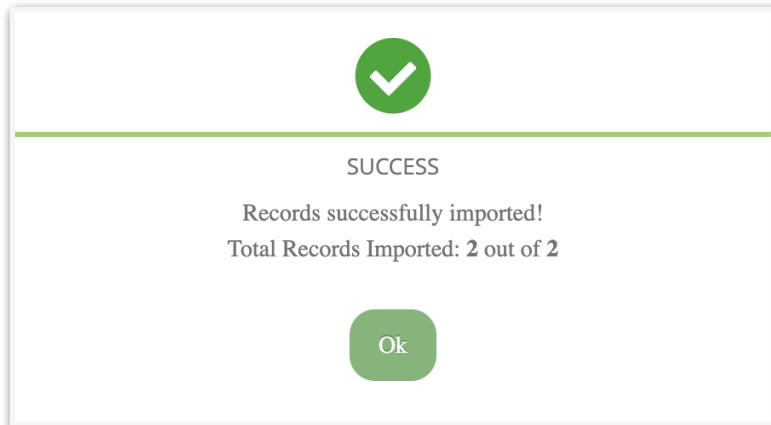
F. Choose the file and click “Open”



G. Click the “Upload” button.



This message will appear once upload is successful.



Newly added task will now appear here.

Offboarding > Task List

Task List »

	Task Code	Task Name	Assign to Employee	Task is mandatory	Require employee acknowledgement
	HRD11	Recruitment	No	No	No
	REQ1	2x2 Picture	No	Yes	No
	REQ2	2x2 picture	No	No	No
	REQ3	Government ID	Yes	Yes	No
	REQ4	New Employee Form	No	No	No

Page 2 of 2 | 15

## Offboarding Task Set Up

This is where you can classify the tasks into group to be the offboarding checklist.

### 1. On the left part, click Offboarding > Offboarding Task Setup

The screenshot shows the Offboarding Task Set Up page. On the left sidebar, under the Offboarding section, the 'Task Setup' option is selected and highlighted with a red box. The main area displays several charts: 'Manpower Complement' (a bar chart), 'Headcount by Employee Type' (a horizontal bar chart), and 'Headcount by Length of Service' (a pie chart). To the right, there is a 'Task List' section with a header 'View Unrouted Transactions'. It lists several tasks with their details and creation dates:

Task Description	Requested By	Date Requested
Onboarding (Final Approval)	BASCO, ANGELA Q.	about 5 hours ago
Onboarding (Final Approval)	JAN10, JUAN T.	a day ago
Offboarding (Final Approval)	DALAGAN, ARNOLD V.	13 days ago
Document Request (Final Approval)	PAGURAYAN, MELVIN D.	22 days ago
Official Business Request (Final Approval)	PAGURAYAN, MELVIN D.	about a month ago
Official Business Request (Final Approval)	PAGURAYAN, MELVIN D.	about a month ago

### 2. Click the “Add” button to create group of tasks / Checklist.

The screenshot shows the Offboarding Task Set Up List page. The left sidebar has the 'Task Setup' option selected. The main area displays a table titled 'Checklist Name' and 'Purpose' with the following data:

Checklist Name	Purpose
Surrender Item List	Surrender Item List
HMO	Surrender HMO
Return Asset	Return Asset
Offboarding Monitoring - Checklist	surrender the given asset to employee before 1 day of separation.
OFFBOARDING FOR MIS	SAMPLE PURPOSE
SAMPLE OFFBOARDING	SSSS
SAMPLE111	SAMPLE111
AAA	AAA
OFFBORADING FOR BIT	SAMPLE

At the bottom left of the table, there is a red box around the 'Add' button icon.

3. Fill out the left side and choose the scope for this checklist (you may choose it per Department / per Position / PER Job Level).

4. Add tasks to the checklist, click (+) to add new task. Or you may copy tasks from other existing checklist by clicking the List icon.

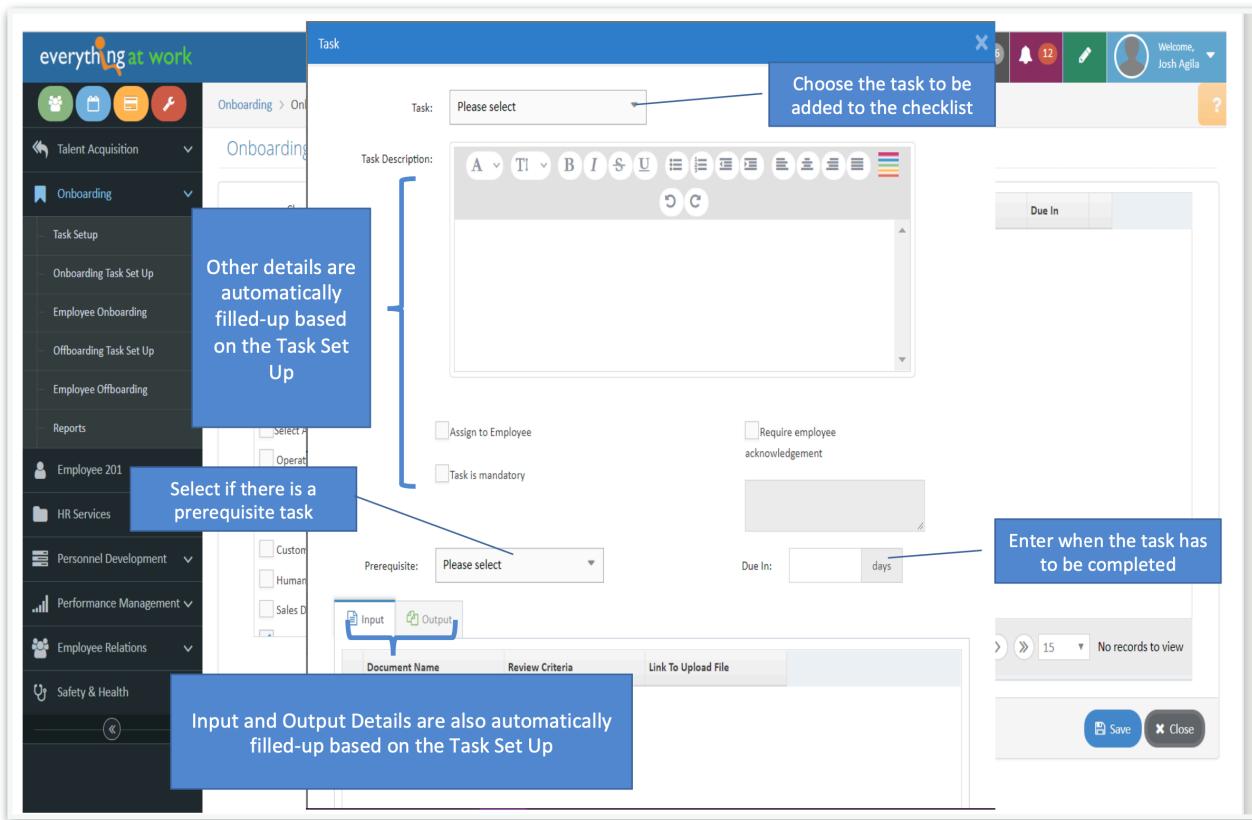
The screenshot shows the 'Offboarding Task Set Up' page. On the left, there's a form with fields for 'Checklist Name' (SAMPLE OFFBOARDING) and 'Purpose' (SAMPLE ONLY). Below these is a 'Scope' section with a checkbox for 'Select All' and a list of departments: EXECUTIVE OFFICE, RETAIL BUSINESS TEAM, ENTERPRISE TEAM, EDUCATION TEAM, Education and Enterprise Technical Support, and APPLE AUTHORIZED SERVICE PROVIDER. To the right is a table header row with columns for 'Code', 'Prerequisite', and 'Due In'. At the bottom of the page, there are two buttons: 'Add task' (with a downward arrow) and 'Copy from existing checklist' (with a diagonal arrow pointing towards it). There are also search and filter icons. The bottom right corner shows pagination (Page 1 of 1), a save button, and a close button.



## ADD BUTTON

A. After clicking the add button, a new window will appear. Select the task code that you want to include in the checklist.

The screenshot shows a 'Task' dialog box. On the left, there's a 'Task' dropdown menu showing 'BIT TASK' selected. Below it is a 'Task Description' dropdown menu showing 'DEPARTMENT HEAD TASK' selected. To the right of these dropdowns are several icons for filtering and sorting. At the bottom of the dialog, there are checkboxes for 'Require employee acknowledgement' and 'Task is mandatory', and input fields for 'Prerequisite' and 'Due In' (with a days dropdown). At the very bottom are 'Save' and 'Close' buttons.



Sample:

**Task**

Task: MIS TASK

Task Description:

Assign to Employee

Task is mandatory

Require employee acknowledgement

I HEREBY ACKNOWLEDGE THE TASK.

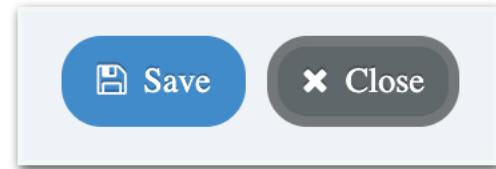
Prerequisite: Please select

Due In: days

Input Output

Document Name	Review Criteria	Link To Upload File
ACCOUNT DEACTIVATION FORM	COMPLETE DETAILS	

B. Once done, click “Save” on the right bottom part.



C. Add until you complete the tasks needed.

Offboarding Task Set Up »

Checklist Name:	SAMPLE OFFBOARDING	Code	Prerequisite	Due In
Purpose:	SAMPLE ONLY	EMPLOYEE OFFBOARDING TASK		3 day(s)
Scope	Department Position Job Level	MIS TASK		6 day(s)
		HR TASK		7 day(s)

**RED ICON** - no need to set, the offboarding employee itself will do the task (ex.NBI, Government IDs. Etc.)

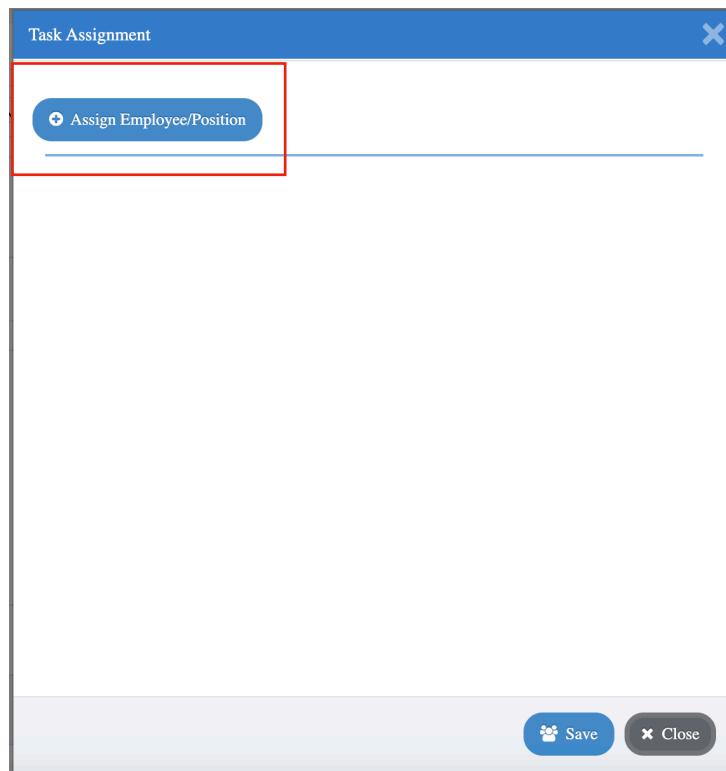
**GREEN ICON** - you need to assign an employee to do the task (ex. For preparing the workstation of the employee (admin employee), install needed softwares, IP and etc. (IT employee))

Save Close

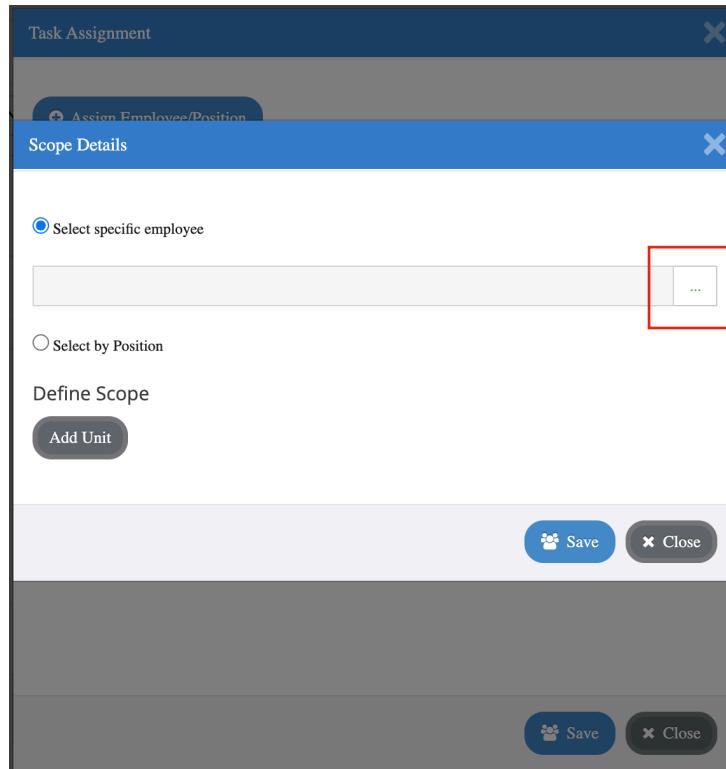
D. Click the color green icon to assign an employee for this task.

Code	Prerequisite	Due In	
EMPLOYEE OFFBOARDING TASK		3 day(s)	
MIS TASK		6 day(s)	
HR TASK		5 day(s)	

E. Click (+) button to add an employee assigned to check this task.



F. Click (...) button to select an employee who will be assigned to this task.



G. Click the (+) button to assign the employee

	Employee No	Employee Name	Department	Branch
<a href="#">+</a>	2281	ABALO, APRIL	APPLE AUTHORIZED SERVICE PROVIDER	APPLE AUTHORIZED SERVICE PROVIDER
<a href="#">+</a>	275	ABANILLA, DRANREB PESIGAN	RBT OPERATIONS	RETAIL BUSINESS TEAM
<a href="#">+</a>	224	LEONORAS, CRONICA CERYL ABANTO	Finance	Pasig Head Office
<a href="#">+</a>	180	ABENOJA, TESSIE ASIÑERO	RBT OPERATIONS	RETAIL BUSINESS TEAM
<a href="#">+</a>	666	ABLE, JOHN MARK TORRES	RBT OPERATIONS	RETAIL BUSINESS TEAM
<a href="#">+</a>	169	AGARIN, MARY GRACE RAMOS	BASECAMP	PMC BUSINESS SYSTEMS. INC.
<a href="#">+</a>	44	AGREDA, LERNA AZARCON	ADMINISTRATION AND CORPORATE SERVICES	Pasig Head Office
<a href="#">+</a>	775	AGUSTIN, RAY ROBIN ZABLAM	RBT OPERATIONS	RETAIL BUSINESS TEAM
<a href="#">+</a>	2280	ALCARAZ, MARCELINO TARUNAS	RBT OPERATIONS	RETAIL BUSINESS TEAM
<a href="#">+</a>	704	ALCAZAR, ANJO ONIFA	APPLE AUTHORIZED SERVICE PROVIDER	Service Center

Page 1 of 110 | 15 View 1 - 15 of 1,645

[Close](#)

H. Click “Save” Button.

Scope Details

Select specific employee  
ABENOJA, TESSIE ASIÑERO

Select by Position

Define Scope

Add Unit

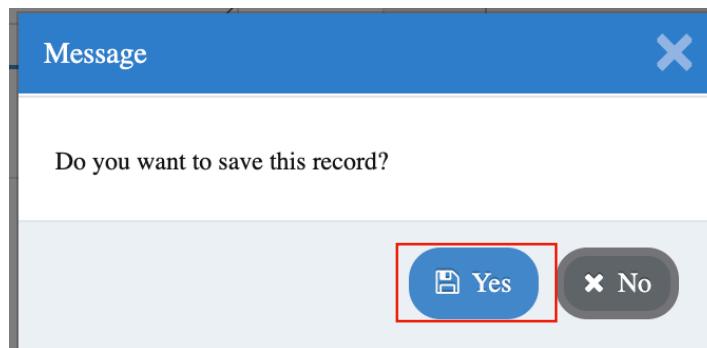
[Save](#) [Close](#)

**J. Once you're done adding tasks and assigning employees, you may now save the record and click "Yes" to proceed.**

Onboarding > Offboarding Task Set Up

Offboarding Task Set Up »

Checklist Name:	SAMPLE OFFBOARDING												
Purpose:	SAMPLE ONLY												
Scope	Department Position Job Level												
<input checked="" type="checkbox"/> Select All <input checked="" type="checkbox"/> EXECUTIVE OFFICE <input checked="" type="checkbox"/> RETAIL BUSINESS TEAM <input checked="" type="checkbox"/> ENTERPRISE TEAM <input checked="" type="checkbox"/> EDUCATION TEAM <input checked="" type="checkbox"/> Education and Enterprise Technical Support <input checked="" type="checkbox"/> APPLE AUTHORIZED SERVICE PROVIDER													
<table border="1"> <thead> <tr> <th>Code</th> <th>Prerequisite</th> <th>Due In</th> </tr> </thead> <tbody> <tr> <td>EMPLOYEE OFFBOARDING TASK</td> <td></td> <td>3 day(s) <span style="color:red">!</span></td> </tr> <tr> <td>MIS TASK</td> <td></td> <td>6 day(s) <span style="color:green">!</span></td> </tr> <tr> <td>HR TASK</td> <td></td> <td>5 day(s) <span style="color:green">!</span></td> </tr> </tbody> </table>		Code	Prerequisite	Due In	EMPLOYEE OFFBOARDING TASK		3 day(s) <span style="color:red">!</span>	MIS TASK		6 day(s) <span style="color:green">!</span>	HR TASK		5 day(s) <span style="color:green">!</span>
Code	Prerequisite	Due In											
EMPLOYEE OFFBOARDING TASK		3 day(s) <span style="color:red">!</span>											
MIS TASK		6 day(s) <span style="color:green">!</span>											
HR TASK		5 day(s) <span style="color:green">!</span>											
<span style="float:left;"> <input type="button" value="Search"/> <input type="button" value="Reset"/> <input type="button" value="Print"/> <input type="button" value="Export"/> </span> <span style="float:right;">View 1 - 3 of 3</span>													
<input style="border: 2px solid red; border-radius: 10px; padding: 5px 20px; margin-right: 10px;" type="button" value="Save"/> <input type="button" value="Close"/>													



This should now appear on the list.

Offboarding Task Set Up List »

	Checklist Name	Purpose
	Surrender Item List	Surrender Item List
	HMO	Surrender HMO
	Return Asset	Return Asset
	Offboarding Monitoring - Checklist	surrender the given asset to employee before 1 day of separation.
	OFFBOARDING FOR MIS	SAMPLE PURPOSE
	<b>SAMPLE OFFBOARDING</b>	<b>SAMPLE ONLY</b>
	SAMPLE111	SAMPLE111
	AAA	AAA
	OFFBORADING FOR BIT	SAMPLE



## COPY FROM EXISTING CHECKLIST

A. After clicking the “Copy From Existing Checklist” button, this window will appear. Click on checklist that you want to copy tasks inside.

Select From Check List Below X

**Surrender Item List**  
Surrender Item List

**HMO**  
Surrender HMO

**Return Asset**  
Return Asset

**Offboarding Monitoring - Checklist**  
surrender the given asset to employee before 1 day of separation.

**OFFBOARDING FOR MIS**  
SAMPLE PURPOSE  

**SAMPLE OFFBOARDING**  
SAMPLE ONLY

B. The tasks inside the chosen checklist will now be added here. You can add more task by clicking (+) button.  
C. Assign employees and click the “Save” button once done.

Onboarding > Offboarding Task Set Up ?

Offboarding Task Set Up »

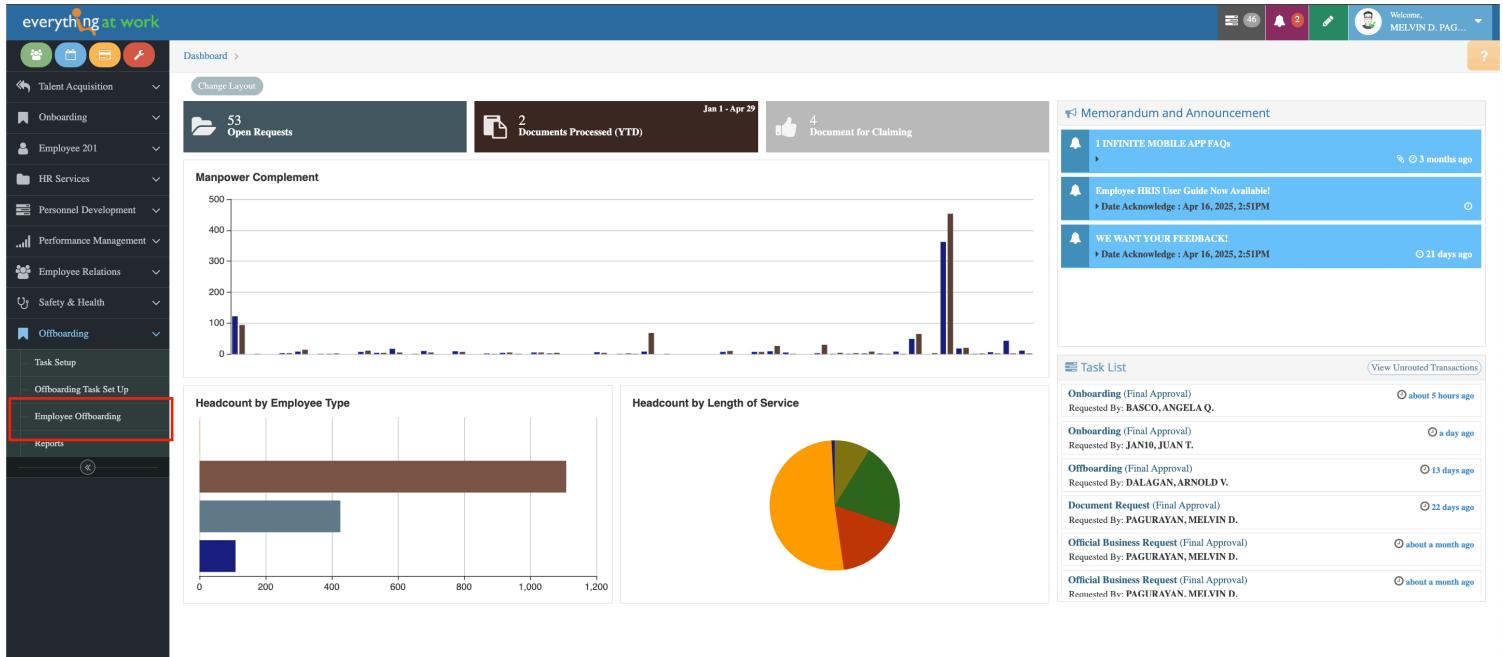
Checklist Name:	SAMPLE OFFBOARDING																		
Purpose:	SAMPLE ONLY																		
Scope	<input type="checkbox"/> Select All <input checked="" type="checkbox"/> EXECUTIVE OFFICE <input checked="" type="checkbox"/> RETAIL BUSINESS TEAM <input checked="" type="checkbox"/> ENTERPRISE TEAM <input checked="" type="checkbox"/> EDUCATION TEAM <input checked="" type="checkbox"/> Education and Enterprise Technical Support <input checked="" type="checkbox"/> APPLE AUTHORIZED SERVICE PROVIDER																		
Department	<input type="checkbox"/> Position <input type="checkbox"/> Job Level																		
<table border="1"><thead><tr><th>Code</th><th>Prerequisite</th><th>Due In</th></tr></thead><tbody><tr><td>BIT TASK</td><td></td><td>7 day(s) <span style="color: green;">✓</span></td></tr><tr><td>HR TASK</td><td></td><td>7 day(s) <span style="color: green;">✓</span></td></tr><tr><td>MIS TASK</td><td></td><td>7 day(s) <span style="color: green;">✓</span></td></tr><tr><td>EMPLOYEE OFFBOARDING TASK</td><td></td><td>4 day(s) <span style="color: red;">✗</span></td></tr><tr><td>DEPARTMENT HEAD TASK</td><td></td><td>3 day(s) <span style="color: green;">✓</span></td></tr></tbody></table>		Code	Prerequisite	Due In	BIT TASK		7 day(s) <span style="color: green;">✓</span>	HR TASK		7 day(s) <span style="color: green;">✓</span>	MIS TASK		7 day(s) <span style="color: green;">✓</span>	EMPLOYEE OFFBOARDING TASK		4 day(s) <span style="color: red;">✗</span>	DEPARTMENT HEAD TASK		3 day(s) <span style="color: green;">✓</span>
Code	Prerequisite	Due In																	
BIT TASK		7 day(s) <span style="color: green;">✓</span>																	
HR TASK		7 day(s) <span style="color: green;">✓</span>																	
MIS TASK		7 day(s) <span style="color: green;">✓</span>																	
EMPLOYEE OFFBOARDING TASK		4 day(s) <span style="color: red;">✗</span>																	
DEPARTMENT HEAD TASK		3 day(s) <span style="color: green;">✓</span>																	
<p style="text-align: center;"><span style="border: 1px solid #ccc; padding: 2px;"> </span> <span style="border: 1px solid #ccc; padding: 2px;"> </span> <span style="border: 1px solid #ccc; padding: 2px;"> </span> <span style="border: 1px solid #ccc; padding: 2px;"> </span></p> <p style="text-align: center;">View 1 - 5 of 5</p> <p style="text-align: right;"><span style="border: 2px solid red; padding: 2px;">Save</span> <span style="border: 1px solid #ccc; padding: 2px;">Close</span></p>																			

# How to assign a Checklist to an offboarding employee?

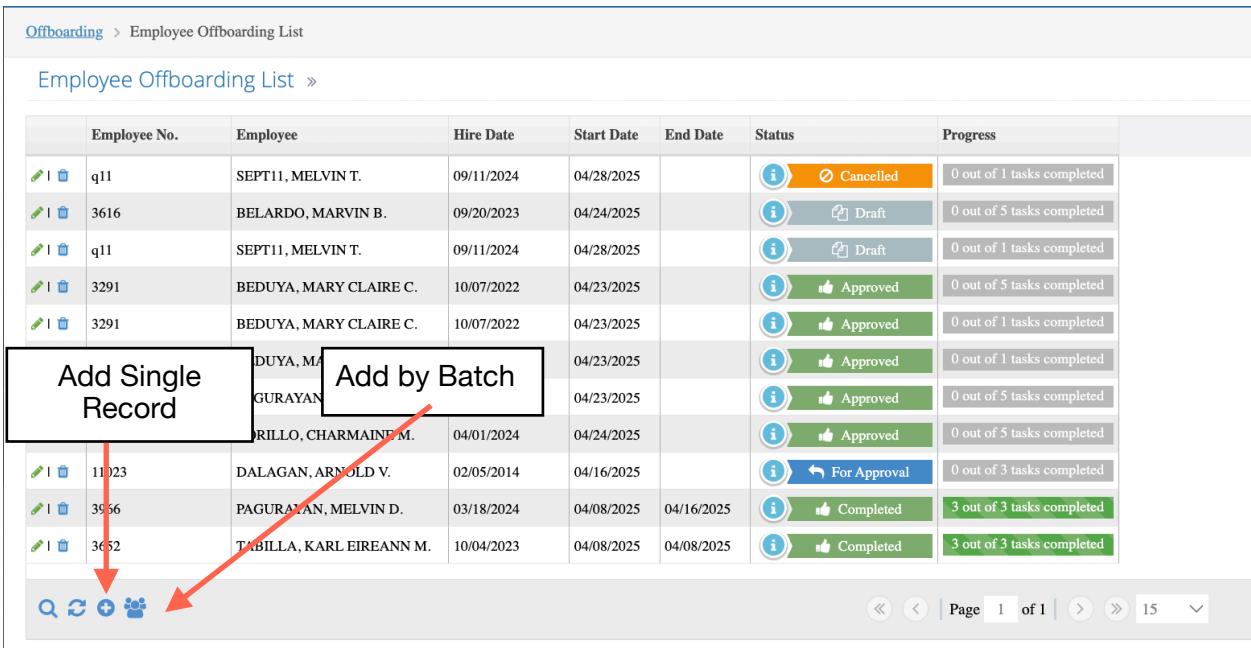


This is where you initiate a new off boarding checklist for a resigned employee, you can also check the progress of other off boarding employees.

## 1. On the left part, click Offboarding > Employee Offboarding



The screenshot shows the "Employee Offboarding" dashboard. On the left, there is a vertical sidebar with a navigation menu. The "Employee Offboarding" option is highlighted with a red box. The main area contains several data visualizations: a bar chart for "Manpower Complement", a horizontal bar chart for "Headcount by Employee Type", and a pie chart for "Headcount by Length of Service". To the right, there are sections for "Memorandum and Announcement" and "Task List", both showing a list of recent activities with small icons and timestamps.



The screenshot shows the "Employee Offboarding List" page. It features a table with columns for Employee No., Employee, Hire Date, Start Date, End Date, Status, and Progress. Several rows of data are listed. At the bottom of the table, there are two buttons: "Add Single Record" and "Add by Batch". A red arrow points from the bottom of the "Add Single Record" button down to a set of small navigation icons at the very bottom of the page. The page also includes a search bar and a footer with page navigation and a page number.

## There are 2 ways to add an Employee Offboarding



Add single record



Add by batch record



Add single record

A. Click the “...” button to select an employee.

B. Select an employee by clicking the (+) button on the left side of their name.

Select Employee				
	Employee No	Employee Name	Department	Branch
<input checked="" type="checkbox"/>	224	LEONORAS, CRONICA CERYL ABANTO	Finance	Pasig Head Office
<input checked="" type="checkbox"/>	416	BAÑADA, ALTA ALEGRE	Finance	Pasig Head Office
<input checked="" type="checkbox"/>	727	BAUTISTA, TONIPER POCHOLO PASION	Information Technology	Pasig Head Office
<input checked="" type="checkbox"/>	284	BAZAR, SHARA MAE CERDA	Finance	Pasig Head Office
<input checked="" type="checkbox"/>	424	BOO, RICARDO BENIGNOS	Finance	Pasig Head Office
<input checked="" type="checkbox"/>	108	CALIGUIRAN, MARIFE BARRIENTOS	Finance	Pasig Head Office
<input checked="" type="checkbox"/>	2284	CASARINO, JEMILLE ROSE JIMENEZ	Finance	Pasig Head Office
<input checked="" type="checkbox"/>	864	CASTILLO, JONATHAN QUIAMBAO	Information Technology	Pasig Head Office
<input checked="" type="checkbox"/>	261	Chua, Aileen Lee	Finance	Pasig Head Office
<input checked="" type="checkbox"/>	2140	CRUZ, MARIANE ALLOCOD	Finance	Pasig Head Office

Page  of 5 15 
View 1 - 15 of 63

Note: you can assign offboarding tasks only once in each employee, succeeding requests that is under offboarding category will be disregarded by the system.

C. Select a task checklist for this employee.

The screenshot shows the 'Employee Offboarding' page. At the top, there are buttons for Save, Submit, Print, and Close. Below that is a section titled 'Employee Offboarding Information' with fields for Employee (set to TORDECILLA, ARNOLD NAVARRO) and Task Checklist (set to 'Please select'). A dropdown menu is open, showing two options: 'Return Asset' and 'OFFBOARDING FOR MIS'. The 'OFFBOARDING FOR MIS' option is highlighted with a red box. To the right, there are fields for Hire Date (11/03/2023) and Status (Draft). Below the dropdown is a table with columns for Task, Name, Due Date, Status, Start Date, Date Accomplished, and Duration. The table contains five rows of tasks. At the bottom, there are search and page navigation buttons.

D. The list of tasks inside the chosen checklist will appear here. Click “Save” then “Submit”.

The screenshot shows the 'Employee Offboarding' page after selecting 'OFFBOARDING FOR MIS' from the checklist. The Task Checklist field now displays 'OFFBOARDING FOR MIS'. The table below lists five tasks under this checklist. The first task, 'DEPARTMENT HEAD TASK', is shown with a status of 'Not Started'. The other four tasks ('EMPLOYEE OFFBOARDING TASK', 'BIT TASK', 'HR TASK', and 'MIS TASK') also have 'Not Started' status. The table has columns for Task, Name, Due Date, Status, Start Date, Date Accomplished, Duration, and a small icon column.

	Task	Name	Due Date	Status	Start Date	Date Accomplished	Duration	
▶	i l b DEPARTMENT HEAD TASK	DEPARTMENT HEAD TASK	05/03/2025	Not Started				green checkmark
▶	i l b EMPLOYEE OFFBOARDING TASK	EMPLOYEE OFFBOARDING TASK	05/04/2025	Not Started				red X
▶	i l b BIT TASK	BIT TASK	05/07/2025	Not Started				green checkmark
▶	i l b HR TASK	HR TASK	05/07/2025	Not Started				green checkmark
▶	i l b MIS TASK	MIS TASK	05/07/2025	Not Started				green checkmark

E. Click “Close” to go back to the Employee Offboarding List. You will see that the status is for approval. The e@work will notify the assigned approver through their HR portal account.

	Employee No.	Employee	Hire Date	Start Date	End Date	Status	Progress	
	q11	SEPT11, MELVIN T.	09/11/2024	04/28/2025		Cancelled	0 out of 1 tasks completed	
	3616	BELARDO, MARVIN B.	09/20/2023	04/24/2025		Draft	0 out of 5 tasks completed	
	q11	SEPT11, MELVIN T.	09/11/2024	04/28/2025		Draft	0 out of 1 tasks completed	
	3291	BEDUYA, MARY CLAIRE C.	10/07/2022	04/23/2025		Approved	0 out of 5 tasks completed	
	3291	BEDUYA, MARY CLAIRE C.	10/07/2022	04/23/2025		Approved	0 out of 1 tasks completed	
	3291	BEDUYA, MARY CLAIRE C.	10/07/2022	04/23/2025		Approved	0 out of 1 tasks completed	
	3966	PAGURAYAN, MELVIN D.	03/18/2024	04/23/2025		Approved	0 out of 5 tasks completed	
	4017	BORILLO, CHARMAINE M.	04/01/2024	04/24/2025		Approved	0 out of 5 tasks completed	
	11023	DALAGAN, ARNOLD V.	02/05/2014	04/16/2025		For Approval	0 out of 3 tasks completed	
	3714	TORDECILLA, ARNOLD N.	11/03/2023	04/30/2025		For Approval	0 out of 5 tasks completed	
	3966	PAGURAYAN, MELVIN D.	03/18/2024	04/08/2025	04/16/2025	Completed	3 out of 3 tasks completed	

**Status:**

Submitted - click the submit button on the inside of the checklist.

**For Approval** - the approver should now approve the request, the system will notify them.

**Approved** - the employee in charge can now start to do the tasks

**Draft** - save only



## Add by batch record

### A. Select the Task Checklist then go to Select Employee.

Employee Offboarding >

Save Submit Close

Information

Task Checklist: OFFBOARDING FOR MIS

Detail Select Employees

> Company

Search Company

Select All

ACEGUARD SECURITY SERVICES, INC.

AGENCY

APPLE CENTER PHILIPPINES, INC.

BEFORE ANYTHING ELSE. CORP.

> Branch

> Department

> Office

> Team

> Job Rank

> Job Level

> Job Position

> Others

Heads up! Select Employees to be included.

Search Employee

Select All

30Test, Jan30 J.

Abalo, April

Abalos, Charlyn R.

Abanilla, Dramreb P.

Abante, Roma Amor F.

Abarle, Ma. Theresa O.

Abarquez, Sharmaine B.

Abarraigue, Irish C.

Absolo, Jenny Ann C.

Abd, 123Test

Abdul Rahman, Junaid B.

Abenoja, Tessie A.

Abierta, Alyssa L.

Abioig, Rafael V.

Abis, Shaira

### B. You may select or search directly the employee at the right side or you may filter per company, branch, department etc.

Offboarding > Employee Offboarding

Employee Offboarding >

Save Submit Close

Information

Task Checklist: OFFBOARDING FOR MIS

Detail Select Employees

> Company

Search Company

Select All

ACEGUARD SECURITY SERVICES, INC.

AGENCY

APPLE CENTER PHILIPPINES, INC.

BEFORE ANYTHING ELSE. CORP.

> Branch

> Department

> Office

> Team

> Job Rank

> Job Level

> Job Position

Heads up! Select Employees to be included.

Search Employee

Select All

Guanalao, Melvin P.

Miciano, Melvin V.

Pagurayan, Melvin D.

Sept11 , Melvin T.

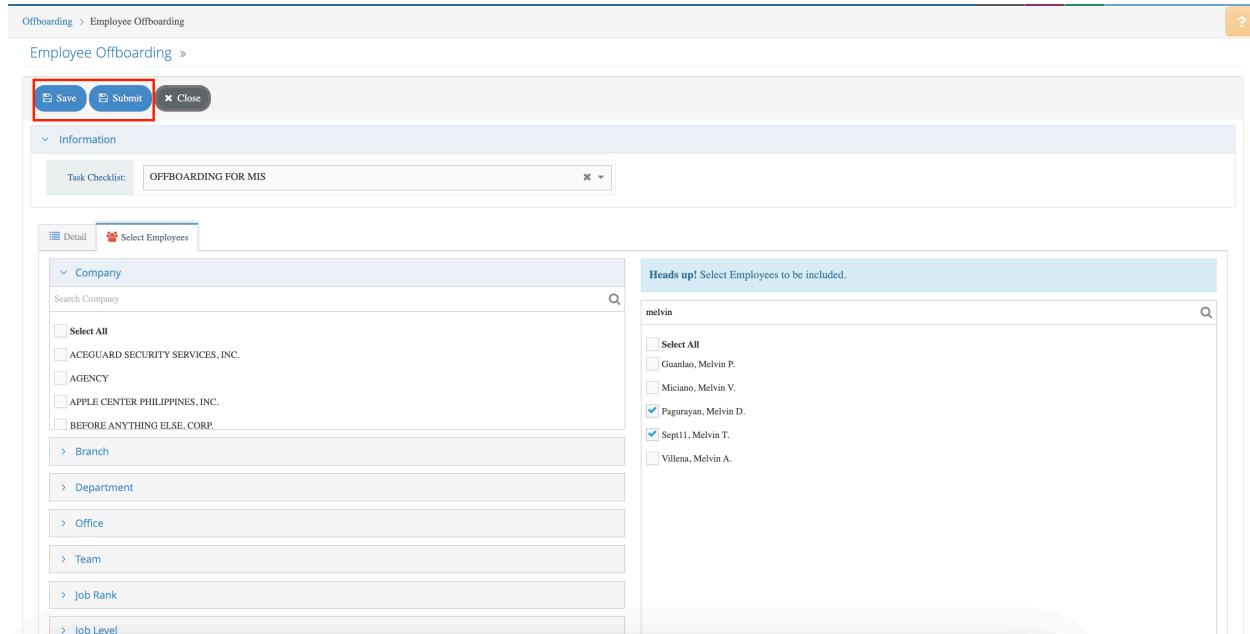
Villena, Melvin A.

C. Once the employee(s) are selected, you may now click “save” then “submit” to proceed.

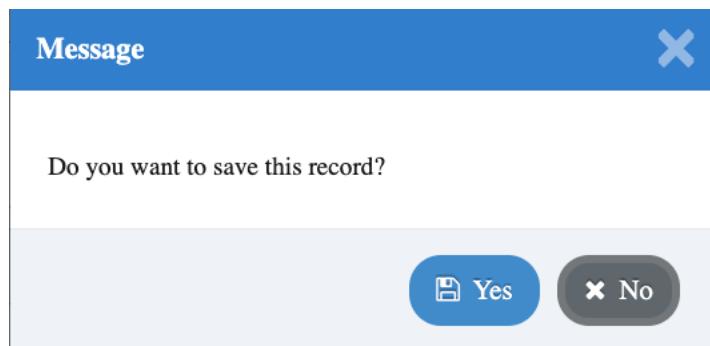
Note:

**Save button** - the status will be draft.

**Submit button** - the status will directly go to approver.



D. Click Yes to save or submit the request.



E. Once submitted, the request will save here and the status will be "For Approval".

	Employee No.	Employee	Hire Date	Start Date	End Date	Status	Progress
	q11	SEPT11, MELVIN T.	09/11/2024	05/06/2025		For Approval	0 out of 5 tasks completed
	3714	TORDECILLA, ARNOLD N.	11/03/2023	04/30/2025		Approved	1 out of 5 tasks completed
	q11	SEPT11, MELVIN T.	09/11/2024	04/28/2025		Draft	0 out of 1 tasks completed
	q11	SEPT11, MELVIN T.	09/11/2024	04/28/2025		Cancelled	0 out of 1 tasks completed
	4017	BORILLO, CHARMAINE M.	04/01/2024	04/24/2025		Approved	0 out of 5 tasks completed
	3616	BELARDO, MARVIN B.	09/20/2023	04/24/2025		Draft	0 out of 5 tasks completed
	3966	PAGURAYAN, MELVIN D.	03/18/2024	04/23/2025		Approved	0 out of 5 tasks completed
	3291	BEDUYA, MARY CLAIRE C.	10/07/2022	04/23/2025		Approved	0 out of 1 tasks completed
	3291	BEDUYA, MARY CLAIRE C.	10/07/2022	04/23/2025		Approved	0 out of 1 tasks completed
	3291	BEDUYA, MARY CLAIRE C.	10/07/2022	04/23/2025		Approved	0 out of 5 tasks completed
	11023	DALAGAN, ARNOLD V.	02/05/2014	04/16/2025		For Approval	0 out of 3 tasks completed
	3652	TABILLA, KARL EIREANN M.	10/04/2023	04/08/2025	04/08/2025	Completed	3 out of 3 tasks completed
	3966	PAGURAYAN, MELVIN D.	03/18/2024	04/08/2025	04/16/2025	Completed	3 out of 3 tasks completed

You may recall that we also selected the name Pagurayan, Melvin D., but the system did not create a new record for this name, that is because an employee can be assigned to a checklist only once.

	Employee No.	Employee	Hire Date	Start Date	End Date	Status	Progress
	3714	TORDECILLA, ARNOLD N.	11/03/2023	04/30/2025		Approved	1 out of 5 tasks completed
	q11	SEPT11, MELVIN T.	09/11/2024	04/28/2025		Draft	0 out of 1 tasks completed
	q11	SEPT11, MELVIN T.	09/11/2024	04/28/2025		Cancelled	0 out of 1 tasks completed
	4017	BORILLO, CHARMAINE M.	04/01/2024	04/24/2025		Approved	0 out of 5 tasks completed
	3616	BELARDO, MARVIN B.	09/20/2023	04/24/2025		Draft	0 out of 5 tasks completed
	3966	PAGURAYAN, MELVIN D.	03/18/2024	04/23/2025		Approved	0 out of 5 tasks completed
	3291	BEDUYA, MARY CLAIRE C.	10/07/2022	04/23/2025		Approved	0 out of 1 tasks completed
	3291	BEDUYA, MARY CLAIRE C.	10/07/2022	04/23/2025		Approved	0 out of 1 tasks completed
	3291	BEDUYA, MARY CLAIRE C.	10/07/2022	04/23/2025		Approved	0 out of 5 tasks completed
	11023	DALAGAN, ARNOLD V.	02/05/2014	04/16/2025		For Approval	0 out of 3 tasks completed
	3652	TABILLA, KARL EIREANN M.	10/04/2023	04/08/2025	04/08/2025	Completed	3 out of 3 tasks completed
	3966	PAGURAYAN, MELVIN D.	03/18/2024	04/08/2025	04/16/2025	Completed	3 out of 3 tasks completed

## Approval of Offboarding

You have to approve the Offboarding assigned to an employee before it can be started.

- If you are an approver, go to Offboarding > Employee Offboarding
- Click edit button on employee
- On the right side, you can click whether you Approve / Cancel / Disapprove

	Task	Name	Due Date	Status	Start Date	Date Accomplished
▶	DEPARTMENT HEAD TASK	DEPARTMENT HEAD TASK	05/03/2025	Not Started		
▶	EMPLOYEE OFFBOARDING TASK	EMPLOYEE OFFBOARDING TASK	05/04/2025	Not Started		
▶	BITT TASK	BITT TASK	05/07/2025	Not Started		
▶	HR TASK	HR TASK	05/07/2025	Not Started		
▶	MIS TASK	MIS TASK	05/07/2025	Not Started		

## Start the task of the employee using account as an HR:

- Click the “Edit” button to go to the tasks that is to be started.

	Employee No.	Employee	Hire Date	Start Date	End Date	Status	Progress
	q11	SEPT11, MELVIN T.	09/11/2024	04/28/2025		Cancelled	0 out of 1 tasks completed
	3616	BELARDO, MARVIN B.	09/20/2023	04/24/2025		Draft	0 out of 5 tasks completed
	q11	SEPT11, MELVIN T.	09/11/2024	04/28/2025		Draft	0 out of 1 tasks completed
	3291	BEDUYA, MARY CLAIRE C.	10/07/2022	04/23/2025		Approved	0 out of 5 tasks completed
	3291	BEDUYA, MARY CLAIRE C.	10/07/2022	04/23/2025		Approved	0 out of 1 tasks completed
	3291	BEDUYA, MARY CLAIRE C.	10/07/2022	04/23/2025		Approved	0 out of 1 tasks completed
	3966	PAGURAYAN, MELVIN D.	03/18/2024	04/23/2025		Approved	0 out of 5 tasks completed
	4017	BORILLO, CHARMAINE M.	04/01/2024	04/24/2025		Approved	0 out of 5 tasks completed
	3714	TORDECILLA, ARNOLD N.	11/03/2023	04/30/2025		Approved	0 out of 5 tasks completed
	11023	DALAGAN, ARNOLD V.	02/05/2014	04/16/2025		For Approval	0 out of 3 tasks completed
	3966	PAGURAYAN, MELVIN D.	03/18/2024	04/08/2025	04/16/2025	Completed	3 out of 3 tasks completed

B. Start the task by clicking the “Play” button.

The screenshot shows the 'Employee Offboarding' form. At the top, there are buttons for Save, Submit, Print, and Close. Below this is a section titled 'Employee Offboarding Information' with fields for Employee (TORDECILLA, ARNOLD NAVARRO), Task Checklist (OFFBOARDING FOR MIS), Hire Date (11/03/2023), and Status (Approved). A large table below lists tasks: DEPARTMENT HEAD TASK, EMPLOYEE OFFBOARDING TASK, BIT TASK, HR TASK, and MIS TASK, all marked as 'Not Started'. The first task has a red box around its play button icon. At the bottom, there is a navigation bar with links to center.com/EmployeeOffboarding/Form?EmployeeOnboardingId=30042#panel\_1 and View 1 - 5 of 5.

C. Click the “Yes” button to proceed.

The screenshot shows the same 'Employee Offboarding' form. A modal dialog box appears in the center, asking 'Do you want to start this task?' with 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a red box. The background table and other elements remain the same as in the previous screenshot.

## D. The task is now started.

The screenshot shows the 'Employee Offboarding' page with the following details:

- Employee:** TORDECILLA, ARNOLD NAVARRO
- Hire Date:** 11/03/2023
- Status:** Approved
- Task Checklist:** OFFBOARDING FOR MIS

Task	Name	Due Date	Status	Start Date	Date Accomplished	Duration
DEPARTMENT HEAD TASK	DEPARTMENT HEAD TASK	05/03/2025	Not Started			
EMPLOYEE OFFBOARDING TASK	EMPLOYEE OFFBOARDING TASK	05/04/2025	Not Started			
BIT TASK	BIT TASK	05/07/2025	Not Started			
HR TASK	HR TASK	05/07/2025	Not Started			
MIS TASK	MIS TASK	05/07/2025	Started	05/02/2025 11:15 AM		

A green banner at the top right says: "Selected task has been started." A question mark icon is also present.

## Mark Task as Completed as an HR

If the employee has completed the task and status is not yet updated, you have a choice to update it on your end as an HR.

### A. Click the “Forward” button to mark the task as Completed.

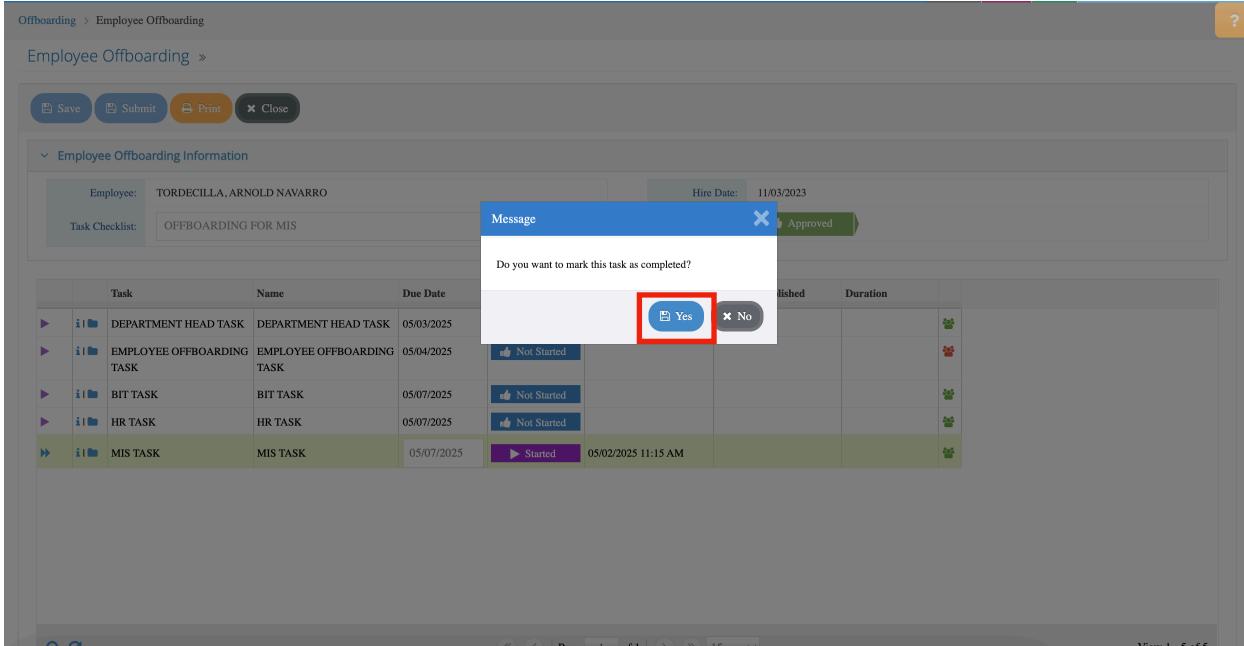
The screenshot shows the 'Employee Offboarding' page with the following details:

- Employee:** TORDECILLA, ARNOLD NAVARRO
- Hire Date:** 11/03/2023
- Status:** Approved
- Task Checklist:** OFFBOARDING FOR MIS

Task	Name	Due Date	Status	Start Date	Date Accomplished	Duration
DEPARTMENT HEAD TASK	DEPARTMENT HEAD TASK	05/03/2025	Not Started			
EMPLOYEE OFFBOARDING TASK	EMPLOYEE OFFBOARDING TASK	05/04/2025	Not Started			
BIT TASK	BIT TASK	05/07/2025	Not Started			
HR TASK	HR TASK	05/07/2025	Not Started			
MIS TASK	MIS TASK	05/07/2025	Started	05/02/2025 11:15 AM		

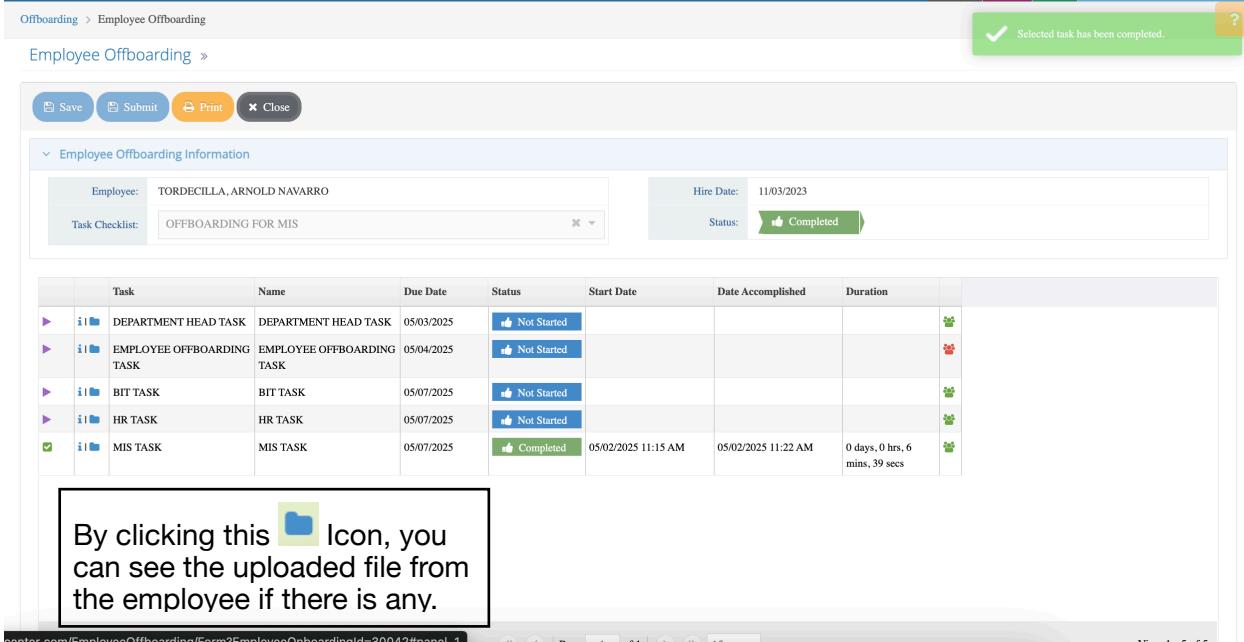
A red box highlights the 'MIS TASK' row in the table. A green banner at the top right says: "Selected task has been started." A question mark icon is also present.

**B. Click “Yes” button to finish the task.**



The screenshot shows the 'Employee Offboarding Information' page. At the top right, there is a message box with the title 'Message' and a status 'Approved'. Below it, a modal dialog box asks 'Do you want to mark this task as completed?' with two buttons: 'Yes' (highlighted with a red box) and 'No'. In the background, there is a table of tasks with columns: Task, Name, Due Date, Status, Start Date, Date Accomplished, and Duration. One task, 'MIS TASK', has a status of 'Started' and a start date of '05/02/2025 11:15 AM'. The bottom right corner of the screen shows 'View 1 - 5 of 5'.

**C. The status will now be updated as 'Completed,' along with the date of accomplishment and the duration it took to complete the task.**



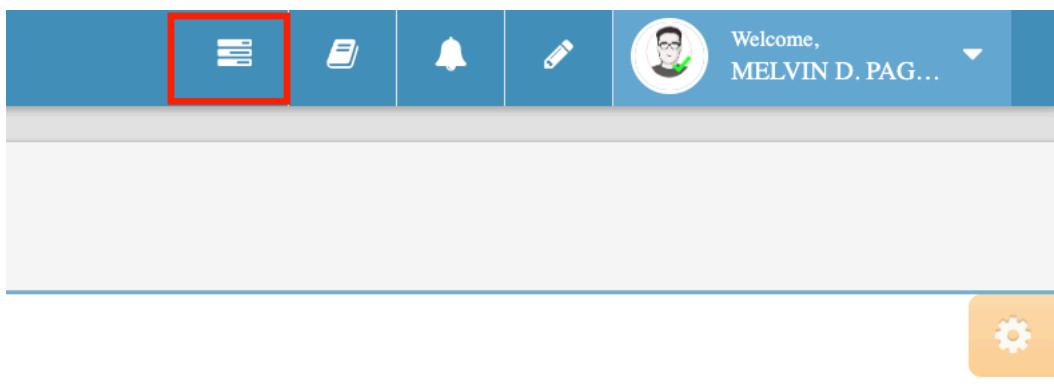
The screenshot shows the same 'Employee Offboarding Information' page after the task has been completed. The task table now shows the 'MIS TASK' with a status of 'Completed' and a start date of '05/02/2025 11:15 AM', and a completion date of '05/02/2025 11:22 AM'. A green success message at the top right says 'Selected task has been completed.' A callout box in the bottom left corner contains the text: 'By clicking this icon, you can see the uploaded file from the employee if there is any.' The bottom left of the screen shows the URL 'center.com/EmployeeOffboarding/Form?EmployeeOnboardingId=30042#panel\_1'.

## Start the task of the employee on Employee Portal:

The employee can also start his/her own task once approved, they can also see a notification that there is a task assigned to them.

The screenshot shows the 'everything at work' Employee Portal dashboard. At the top, there's a navigation bar with links like Schedule, Leaves, Attendance, Compensation & Benefits, Accountability, Personnel Development, Performance Management, Other Requests, and Safety and Health. On the right side, there's a user profile for 'MELVIN D. PAG...' and a 'Welcome' message. A red box highlights a notification bubble in the top right corner. The notification says: 'You have an offboarding task for TORDECILLA, ARNOLD NAVARRO' with a timestamp of '2 days ago'. Below the notification, there's a 'See All' link and a 'No survey available' message with a crossed-out document icon. The main content area includes a 'Schedule for (05/02/2025)' section with a clock icon and a 'Regular' shift from 8:00AM - 5:00PM. There are several cards for tracking attendance, tardiness, absences, overtime, vacation leave balance, and sick leave balance. The URL at the bottom is <https://employee-test.hris-in-powermaccenter.com/Default/Dashboard##/>.

A. Go to the tasks, click the task button.



B. Tasks assigned to you will be listed like this.

The screenshot shows a software interface with a blue header bar. In the top right corner, there is a welcome message for 'MELVIN D. PAG...' and several small icons. Below the header is a navigation bar with various tabs: Schedule, Leaves, Attendance, Compensation & Benefits, Accountability, Personnel Development, Performance Management, Other Requests, and Safety and Health. The 'Tasks' tab is currently selected. Under the 'Tasks' heading, there is a list of tasks. The first task, 'FA-NH - Fixed Asset Requests for New Hires Onboarding', is highlighted with a red rectangle. This task has a due date of 03/05/2025, a date started of 04/16/2025 (Completed), and a status of 'Not yet started'. Below it is another task: 'HRD5 - Office Tour (SEPT11, MELVIN ) Onboarding' with a due date of 04/15/2025 and a status of 'Not yet started'. The other tasks listed are: 'TECH2 - Access IDs (SEPT11, MELVIN ) Onboarding' (due 04/15/2025, status Not yet started), 'Desk Setup (APRIL14TEST, APRIL14) Onboarding' (due 04/21/2025, status Not yet started), 'Desk Setup (30TEST, JAN30) Onboarding' (due 04/21/2025, status Not yet started), and 'Desk Setup (TEST, SEPT 25) Onboarding' (due 04/21/2025, status Not yet started). A blue circular icon with three horizontal lines is located in the bottom right corner of the task list area.

C. You will see a paper clip icon on the right side of each task for attaching a file, and a play button to start the task.

This screenshot shows the same software interface as the previous one, but with some additional annotations. A blue box on the right side contains the text: 'Here are all the task from the previous sample offboarding.' A red box highlights the first task in the list: 'DEPARTMENT HEAD TASK (TORDECILLA, ARNOLD) Offboarding' (due 05/03/2025, status Not yet started). Another red box highlights the second task: 'BIT TASK (TORDECILLA, ARNOLD) Offboarding' (due 05/07/2025, status Not yet started). A third red box highlights the last task: 'ADMIN TASK (30TEST, JAN30) Onboarding' (due 05/07/2025, status 05/02/2025). To the right of these highlighted tasks is a red-bordered box containing a paperclip icon and a play button. A red arrow points from the text box to this icon. At the bottom of the screen, there is a footer with the text 'ALGAR Information Systems Inc. © 2000-2025'.

Note: All new task list will be at the bottom. You will see a paper clip icon beside the task if an attachment is required.

D. To start the task, click the start button.

The screenshot shows a list of tasks. One task, 'DEPARTMENT HEAD TASK (TORDECILLA, ARNOLD) Offboarding', has a play button icon with a red border around it. The play button is located in the 'Actions' column next to the task details. The task details include a due date of 05/03/2025, a date started field, and a status of 'Not yet started'.

Task Description	Due Date	Date Started	Status
+ HR TASK (ECLE, RAFAEL RAYMOND) Onboarding	05/01/2025		Not yet started
+ HR TASK (30TEST, JAN30) Onboarding	05/02/2025		Not yet started
+ DEPARTMENT HEAD TASK (TORDECILLA, ARNOLD) Offboarding	05/03/2025		Not yet started
+ ADMIN TASK (ECLE, RAFAEL RAYMOND) Onboarding	05/06/2025		Not yet started
+ HR TASK (TORDECILLA, ARNOLD) Offboarding	05/07/2025		Not yet started
+ BIT TASK (TORDECILLA, ARNOLD) Offboarding	05/07/2025		Not yet started
+ ADMIN TASK (30TEST, JAN30) Onboarding	05/07/2025		Not yet started
+ ADMIN TASK (30TEST, JAN30) Onboarding	05/07/2025		05/02/2025

ALGAR Information Systems Inc. © 2000-2025

E. Once the task is started, the play button will change to check icon and a notification will appear, indicating that the Task has been started.

The screenshot shows the same task list. The task 'DEPARTMENT HEAD TASK (TORDECILLA, ARNOLD) Offboarding' now has a checkmark icon in its play button area, indicating it has been started. A green notification bar at the top right of the screen displays the message 'Task has been started.' with a checkmark icon. The task details remain the same as in the previous screenshot.

Task Description	Due Date	Date Started	Status
+ HR TASK (ECLE, RAFAEL RAYMOND) Onboarding	05/01/2025		Not yet started
+ HR TASK (30TEST, JAN30) Onboarding	05/02/2025		Not yet started
+ DEPARTMENT HEAD TASK (TORDECILLA, ARNOLD) Offboarding	05/03/2025	05/02/2025	✓
+ ADMIN TASK (ECLE, RAFAEL RAYMOND) Onboarding	05/06/2025		Not yet started
+ HR TASK (TORDECILLA, ARNOLD) Offboarding	05/07/2025		Not yet started
+ BIT TASK (TORDECILLA, ARNOLD) Offboarding	05/07/2025		Not yet started
+ ADMIN TASK (30TEST, JAN30) Onboarding	05/07/2025		Not yet started
+ ADMIN TASK (30TEST, JAN30) Onboarding	05/07/2025		05/02/2025

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F. Once you finish your task, click the “Check” icon to mark it as completed. The system will remove it from your active tasks while maintaining a record that HR can access through their portal view.

The screenshot shows a list of tasks in the HR portal. The tasks are listed vertically with their due dates, start dates, and current status. One task, 'HR TASK (ECLE, RAFAEL RAYMOND) Onboarding' due on 05/01/2025, has its status changed to 'Not yet started' and is highlighted with a red box. To the right of this task, a green box contains a checkmark and the text 'Task has been started.' Another task, 'DEPARTMENT HEAD TASK (TORDECILLA, ARNOLD) Offboarding' due on 05/03/2025, has its status changed to '05/02/2025' and is also highlighted with a red box. The bottom right corner of the screenshot shows a blue circular icon with three horizontal lines.

Due Date	Date Started	Status
04/30/2025		Not yet started
05/01/2025		Not yet started
05/02/2025		Not yet started
05/03/2025	05/02/2025	05/02/2025
05/06/2025		Not yet started
05/07/2025		Not yet started
05/07/2025		Not yet started
05/07/2025		05/02/2025

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### Employee Offboarding Summary:

1. Set a checklist for employee
2. Submit a request
3. The assigned approver should approve the offboarding
4. Once approved, the system will notify the employee that the offboarding request is approved and the tasks will appear on the task list.
5. The employee /hr can now click the start button.
6. Attach file (if applicable, usually for the offboarding employee itself ex. Surrender ID, Clearance Form, Etc.)
7. Once done, click the check icon on the right side of the task. (Or you may edit task setup where the HR should check the uploaded documents first before the employee can update it as completed.)
8. The status completed will then appear on HR portal, you can view the employee's



