

# Employee Clearance Request Workflow

## Supervisor and Approver Job Aid

### 1 Approver Notification Email

When an employee completes the clearance request, the supervisor named in the request will receive an email notifying the approver that an employee has completed an exit clearance request.

This is to notify your office that *Employee\_First\_Name Employee\_Last\_Name Employee\_Id\_Number* has recently completed a University HR Exit Clearance Form with an exit date of *Effective\_Date*.

To CLEAR this employee for exit from the University, per your department's existing policies, please access the link below to review and either return or approve the employee's clearance.

<http://moawkflw.morgan.edu:8003/wftest/>

Click on this link to access Workflow.

### 2 Log on to Banner Workflow

When you click the link in the email, if you are not already signed into SSO, you will be directed to the Banner Single Sign-On (SSO) page.



Enter your MSU eID  
(Username/Password)

Username:  
@morgan.edu

Password:

| clear

By logging into this system, I agree to the [MSU Technology Policies, Standards and Guidelines](#) as well this [notice](#).

Enter your Username and Password.

While logged into Workflow, if you have not accessed Workflow for 20 minutes or more, your session may time out and you will be asked to log in to Workflow again.

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## 3 Review and Approve Employee Clearance Request

If you have signed in successfully, the Employee Clearance Form will be displayed. Review the form and take action to **Approve** or **Return** the request.

The screenshot shows the 'Employee Clearance Form' interface. On the left, there are navigation menus for 'Home' (Worklist, Workflow Status Search, Workflow Alerts) and 'User Profile' (My Processes, User Information, Change Password). The main form area contains the following fields:

- First Name: Elsa
- Last Name: Everling
- Department: UIT
- Employee Id #: 00195708
- Phone Number: 703-307-6683
- Classification: Contractual
- Effective Date: 01-Apr-2015 12:00:00 AM
- Reason: Other
- If Other, Specify Reasons (Optional): Contract ended

**SUPERVISOR'S INFORMATION**

- \* Supervisor's Name: Gilbert Morgan
- \* Supervisor's Email: elsa.everling@morgan.edu
- Supervisor's Phone: 703-555-1212
- Supervisor Comments: (empty text area)

\* Supervisor Actions

- Approve
- Return

\* Please enter the reason why this is being returned: None

Buttons: Complete, Save & Close, Cancel

**Attachments**

- ✓ Letter of Resignation  
Letter of Resignation.docx (12 KB)  
07-Apr-2015 05:24:00 PM  
[Update] [Remove]

Attach File

**Callouts:**

- Box 1: Select either **Approve** or **Return**
- Box 2: Enter an explanation reason as to why is is being Returned
- Box 3: Select **Complete** when you have finished.
- Box 4: Optionally **Attach Files** if necessary.

If you selected **Approve**, Workflow will send the request to the next group of approvers.

If you selected **Return**, Workflow will send an email to the employee that includes the reason why it is being returned. The Workitem will remain on your Worklist until you resolve the issue with the employee.

**NOTE: YOU WILL NEED TO REACCESS THIS ITEM ON YOUR WORKLIST AND APPROVE IT IN ORDER TO MOVE IT THE THE NEXT GROUP OF APPROVERS.**