

Electronic Clearance Process Guide

Role Based Training for:

- Supervisor
- Functional Unit Designee
- OHR Administration Staff



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Introduction



The Office of Human Resources (OHR) is implementing a new automated Clearance Form process to off-board employees separating from the University.

Why change?

Automating the Clearance Form process provides the following **benefits**:

1. **Eliminates** filling out a paper Clearance Form.
2. **Discontinues** employees **walking the campus** to obtain signatures from designated functional areas on a paper Clearance Form.
3. Provides the ability to **track** the location of the form throughout the process.
4. Creates a repository to **retain data** related to the Clearance Form process.

Supervisor

Objective: Supervisor Task



The supervisor starts the clearance process!

This guide will lead the supervisor through each task to be performed.

Objectives

The supervisor will:

1. Access the Clearance Form link from the University's website
2. Create a Clearance Request
3. Attach Documents (e.g., Letter of Resignation)
4. Receive and Respond to Email Notifications
5. Approve or Decline Request
6. Complete Supervisor Task List

Supervisor: Access Clearance Form



Situation

You supervise an **employee** who has:

1. verbally informed you that he/she will be **leaving** the University
2. given you a letter of **resignation**
3. been **terminated** from the University



Supervisor, It's time to initiate a Clearance Form!





Supervisor: Access Clearance Form (continued)



Note: (Some browsers are more compatible than others.)

- For best results use:

 Chrome	 Internet Explorer	 Microsoft Edge
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- Firefox  is not compatible.

Instructions:

1. Click **OR** copy and paste the link below into your browser to access the '**Clearance Request Form.**'

(<https://intranet.vsu.edu/webforms/Clearance>)

2. The 'intranet.vsu.edu' login box may/may not appear.

The screenshot shows a login form for intranet.vsu.edu. It includes a header with the site name and a message: "This site is asking you to sign in." Below this are two input fields: "Username" and "Password". A blue "Sign in" button and a grey "Cancel" button are at the bottom. Red arrows with numbers 3, 4, and 5 point to the Username field, Password field, and Sign in button respectively.

Note: If 'intranet.vsu.edu' login does appear, continue to step 3, 4 and 5 below.

3. Type username.
4. Type password.
5. Click 'Sign in' button.

Note: If 'intranet.vsu.edu' login does not appear, go to step 1 on slide 8.

Supervisor: Create a Clearance Request



“Supervisor, Your **first** step is to create a **Clearance Request**.”

Instructions

1. Select '*Create a Clearance Request*.'

A screenshot of a web application interface. At the top, it says "VSU Clearance Requests" with a blue double arrow icon. Below that is a grey box titled "I want to..." containing four menu items, each with a blue double arrow icon: "Create a Clearance Request", "View My Clearances", "Complete Clearance Tasks", and "View My Activity". A red arrow with the number "1." points to the first item. At the bottom of the screenshot, it says "Version: 1.1.0.0 04/05/2021 Role: None".

1.

VSU Clearance Requests

I want to...

- »» Create a Clearance Request
- »» View My Clearances
- »» Complete Clearance Tasks
- »» View My Activity

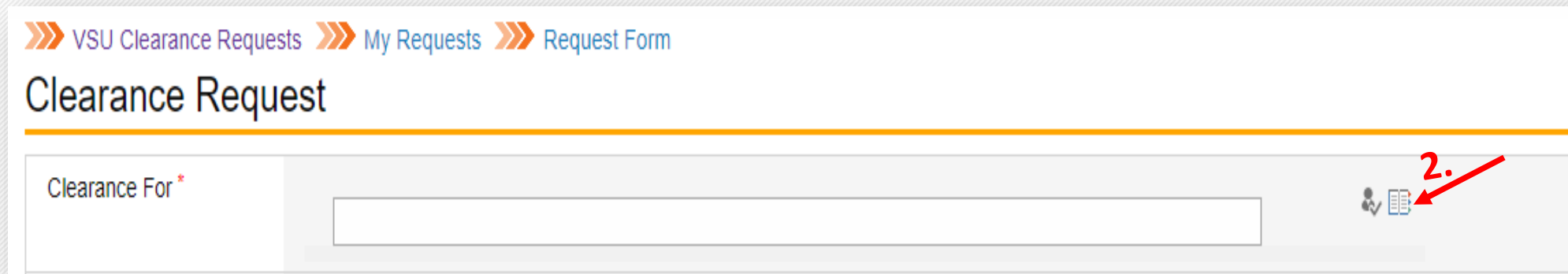
Version: 1.1.0.0 04/05/2021 Role: None

Supervisor: Create a Clearance Request (continued)

Instructions

Note: The 'Clearance Request' screen will pop-up.

2. Click '**Employee Directory**' icon to search for employee's name.



The screenshot shows a web interface for creating a clearance request. At the top, there are three breadcrumb links: 'VSU Clearance Requests', 'My Requests', and 'Request Form'. Below this is the title 'Clearance Request'. The main form area has a label 'Clearance For *' followed by an empty text input field. To the right of the input field is an icon representing an employee directory, which is highlighted with a red arrow and the number '2.'.

Note: Perform steps 3-6 on slide 10 any time you click the '**Employee Directory**' icon to find someone's name.

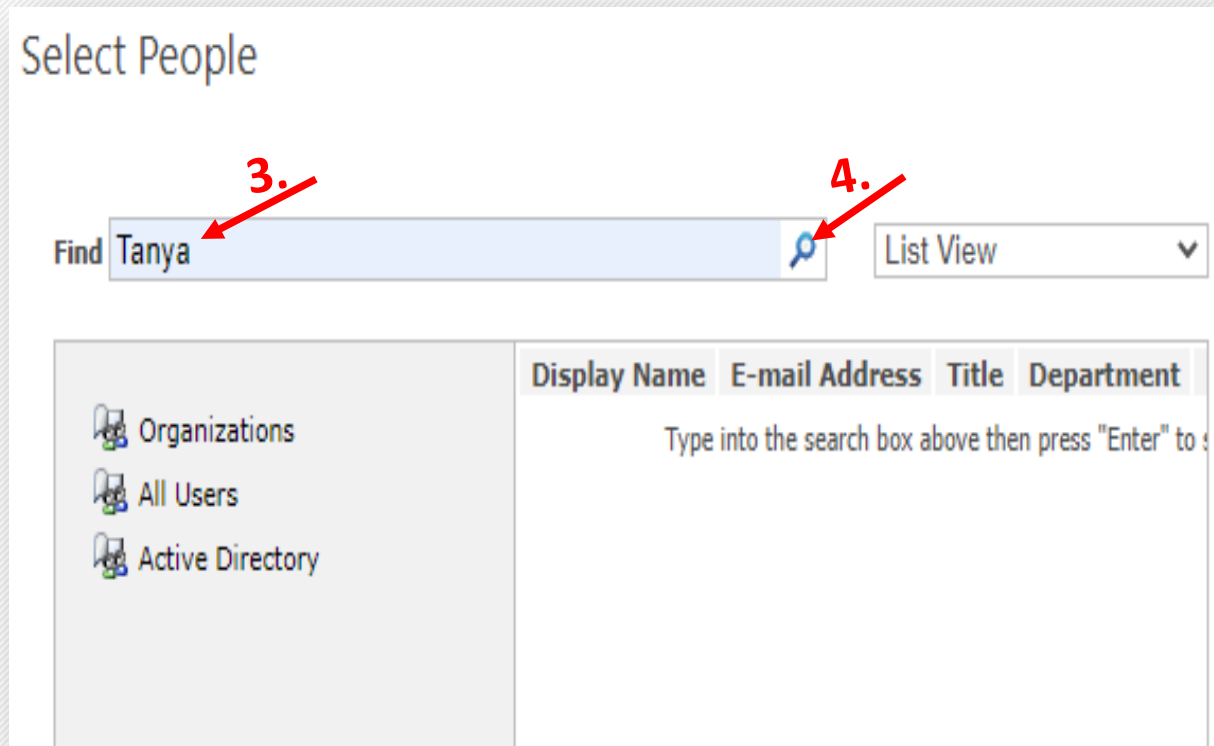
Supervisor: Create a Clearance Request (continued)

Instructions

Note: The ‘Select People’ pop-up screen will appear.

3. Type employee’s first name in ‘Find’ field.

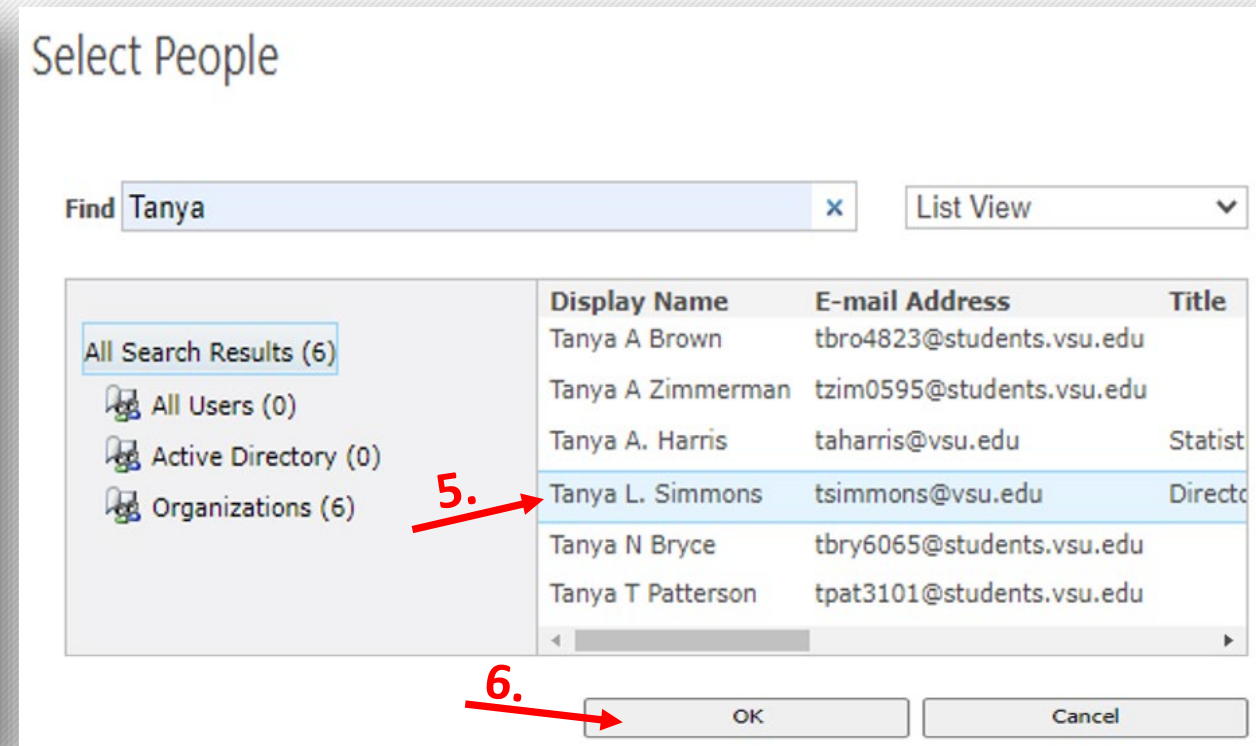
4. Click ‘Search’ icon. (A list of names will appear.)



Instructions

5. Select the employee’s name.

6. Click ‘OK’ button.



Supervisor: Create a Clearance Request (continued)

Instructions

Note: The 'Clearance Request' screen will pop-up.

7. Type in '*Employee's ID#.*'

8. '*Employee's V#*' will populate **automatically** with name.

9. Click '*calendar*' icon to enter employee's last work day.

10. Employee's '*address*' is optional.

11. Employee's 'telephone number' is optional

12. Click on '*Employee Directory.*'

Note: Follow steps 3-6 on slide 10 to select **supervisor's** name.

13. Click '*Submit*' button, if there is **no attachment**.

The screenshot shows the 'Clearance Request' form with the following fields and annotations:

- Clearance For ***: Tanya L. Simmons (arrow 7 points to the dropdown icon)
- Employee ID ***: 1234567 (arrow 7 points to the text)
- V Number ***: V00000001 (arrow 8 points to the text)
- Last Day of Employment**: 4/2/2021 (arrow 9 points to the calendar icon)
- Address**: Optional (arrow 10 points to the text)
- Telephone**: Optional (arrow 11 points to the text)
- Supervisor ***: Kevin W. Davenport (arrow 12 points to the dropdown icon)
- Attachments**: No attachments (arrow 13 points to the Upload button)

At the bottom of the form, there are two buttons: 'Close' (red) and 'Submit' (blue).

Supervisor: Attach Documents to Form (if needed)



“Supervisor, if an employee gives you a ‘**Letter of Resignation**’ or other important documents, **attach** the documents to the ‘**Clearance Request Form**.”

Instructions

1. Click ‘**Chose File**’ button.
(**Note:** A new window will open.)

Attachments

Choose File | No file chosen

Upload

No attachment

Name	Date modified	Type
Letter of Resignation	8/10/2021 1:29 AM	Microsoft Word

All Files

Open Cancel

2. Select document from computer.
3. Click ‘Open’ button.

Attachments

Choose File Letter of Resignation

Upload

No attachment

Close

Submit

(**Note:** The ‘Letter of Resignation’ will appear)

4. Click ‘**Submit**’ button.

(**Note:** To choose a different document repeat steps 1-4.)

Supervisor: Receive and Respond to 1st Email Notification



“Supervisor, After submitting the ‘*Clearance Request*’, the *first (1st)* ‘*email notification*’ will be sent to your Outlook mailbox.



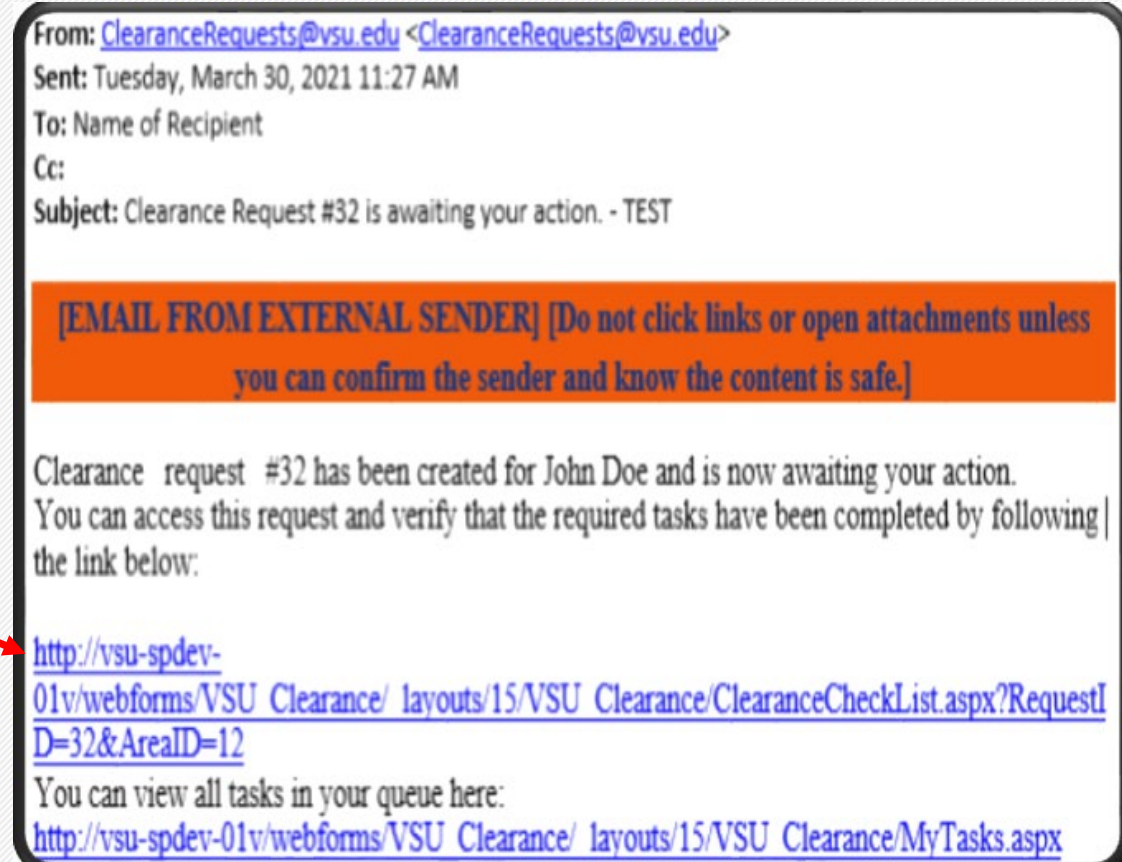
Instructions

Note: Open the **1st** email sent to you from **ClearanceRequests@vsu.edu**

1. Click on the *link* in the body of the email.

Important Message:

- You must be **logged** into **VSU network** in order to approve this request.
- If you *experience issues* approving this request, please *contact* the Technology Services Desk:
 - Phone: 804-524-5210
 - Email: VTS_servicedesk@vsu.edu



Supervisor: Receive and Respond to Email Notifications (Approve Request)



“Supervisor, Good job! You have opened the **email notification link**. You must now **Approve Request** for ‘**Clearance Checklist for John Doe**’.

Note: Review ‘**Clearance Checklist for John Doe**’ for accuracy.

➤ *The form fields populate automatically.*

Instructions

1. ‘Approve Clearance Notes’- This field is optional.
2. Click ‘Approve Request’ button to move the form to the next step in the process.
 - ‘Decline Request’ button - Decline the request if it is incorrect or has been created by mistake.
 - ‘Close Form’ button - Stop now and finish request later.


»» VSI Clearance Requests »» My Tasks »» Clearance Area Checklist


Clearance Checklist for John Doe

ID	39
Overall Clearance Status	Awaiting Supervisor Approval
Checklist Status	Awaiting Supervisor Approval
Clearance For	John Doe
Employee ID	1234567
V Number	V09000010
Supervisor	Gary Martin
Last Day of Employment	04/02/2021
Address	
Telephone	
Attachments	No attachments
Created	4/23/2021 12:32:48 AM Gary Martin

Note: *The top form fields populate automatically.*

Approve Clearance

Notes  1.

 2.

Decline Request Approve Request Close Form

Supervisor: Receive and Respond to 2nd Email Notification



“Supervisor, A **second (2nd)** email notification will arrive **after** clicking ‘**Approve Request**’ button.



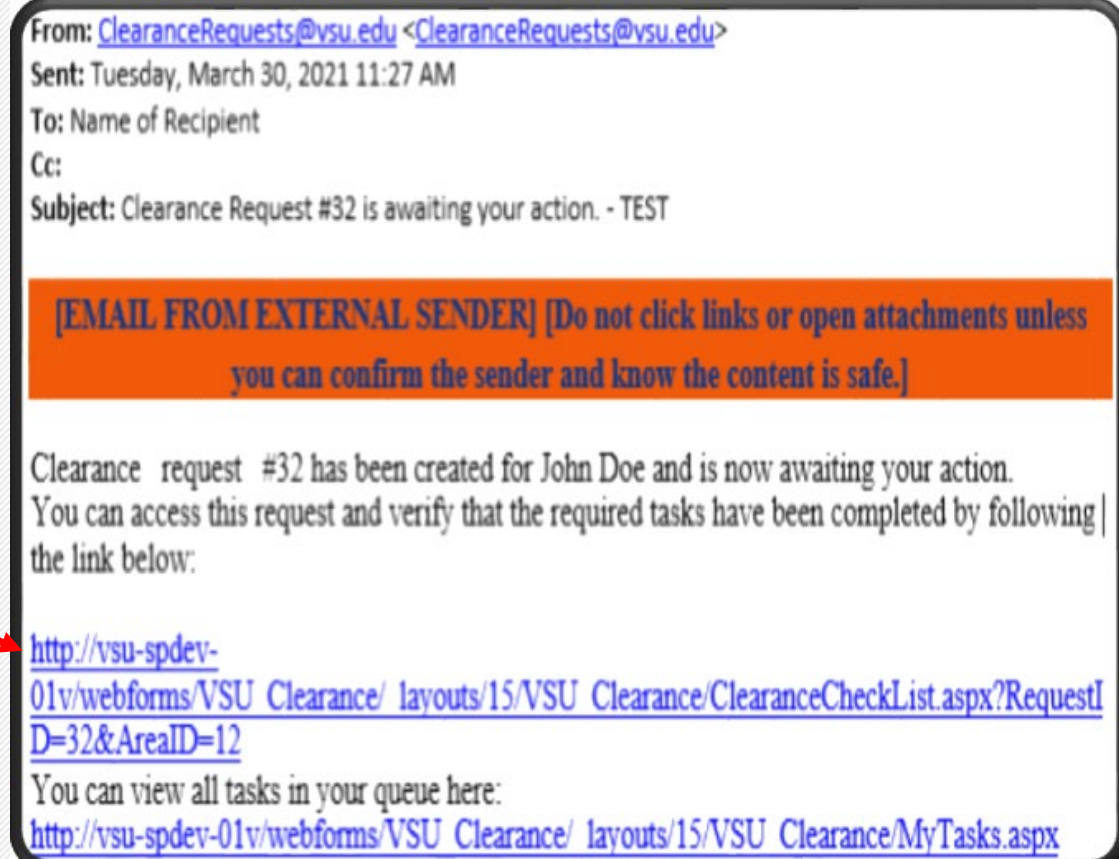
Instructions

Note: Open the **2nd** email sent to you from **ClearanceRequests@vsu.edu**

1. Click on the *link* in the body of the email.

Important Message:

- You must be **logged** into **VSU network** in order to approve this request.
- If you **experience issues** approving this request, please **contact** the Technology Services Desk:
 - Phone: 804-524-5210
 - Email: VTS_servicedesk@vsu.edu



Supervisor: Complete Checklist Tasks



“Supervisor, You must now complete **all** tasks **assigned** to you on the ‘**Supervisor Checklist**’.

Instructions

1. Review the task listed in the ‘Item’ column.
2. Select ‘Completed’ or N/A’ to describe the **action** you take.
3. Enter **task notes** in the ‘Comments’ text box, if needed.
4. Click ‘Complete’ button when action is taken on **all** items.

OR

- ‘Save Changes’ button - Keep **corrections** made to form.
- ‘Close Form’ button - **Stop** and **finish** checklist **later**.

Note: The **Checklist** consists of three (3) columns:

- A. **Item** - Identifies task.
- B. **Status** - Identifies current state of task.
 - Open - Task is **awaiting** action from you.
 - Completed - Task action **accomplished**.
 - N/A - Task action **is not** required.
- C. **Comments** - Enter relevant task notes if needed.

VSU Clearance Requests >>> My Tasks >>> Clearance Area Checklist

Supervisor checklist for Test Account

ID	39
Overall Clearance Status	In Progress
Checklist Status	In Progress
Clearance For	Test Account
Employee ID	1234567
V Number	V09000010
Supervisor	Gary Martin
Last Day of Employment	04/02/2021
Address	
Telephone	
Attachments	No attachments
Created	4/23/2021 12:32:48 AM Gary Martin

Note: The top form fields populate automatically.

Item	Status	Comments
<input type="checkbox"/> 2698: Departmental Request for Personnel Action (A21)	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	
<input type="checkbox"/> 2699: Resignation Letter submitted	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	
<input type="checkbox"/> 2700: VSU Policy and Procedure Manuals	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	
<input type="checkbox"/> 2701: All Equipment	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	
<input type="checkbox"/> 2702: Keys	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	

1. → 2. → 3. → 4. →

Save Changes Complete Close Form

Supervisor Congratulations You're Done!



“Supervisor, **CONGRATULATIONS!**

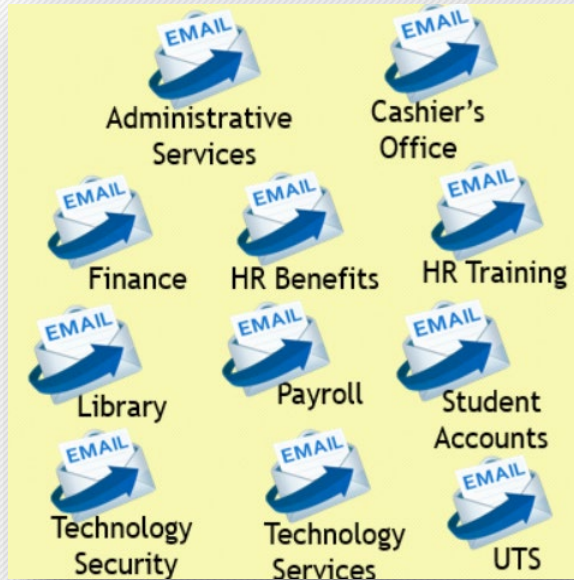


You have **completed** all **supervisor tasks** for the clearance process!

When you clicked the Supervisor Checklist **‘Complete’** button, email notifications were sent simultaneously to **various** departments to the **functional unit designee.**”

Functional Unit Designee

Objective: Functional Unit Designee Task



Functional unit designee **start** here!

Your **role** is to **ensure** that the departing employee:

- returned University **property** and
- has no outstanding **balances**.

This guide will lead the **functional unit designee** through each **Clearance Area Checklist task** to be performed.

Objectives

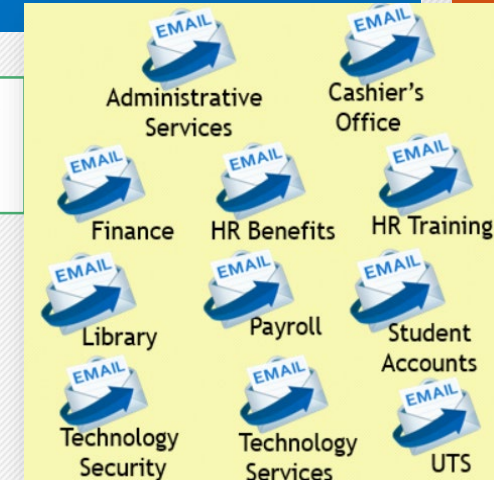
The functional unit designee will:

1. Open the Email Notification
2. Review Clearance Area Checklist Task Item
3. Determine Item Status
4. Complete Tasks Assigned to Functional Unit

Email Notification to Functional Unit Designees



“**Functional Unit Designees** in various departments are notified by **email** that a **Clearance Form activity** is awaiting their review.”



Instructions

Note: Open the email notification.

1. Click on the *link* in the body of the email.

Important Message:

- You must be **logged** into VSU network in order to approve this request.
- If you **experience issues** approving this request, please **contact** the Technology Services Desk:
 - Phone: 804-524-5210
 - Email: VTS_servicedesk@vsu.edu

From: ClearanceRequests@vsu.edu <ClearanceRequests@vsu.edu>
Sent: Tuesday, March 30, 2021 11:27 AM
To: Name of Recipient
Cc:
Subject: Clearance Request #32 is awaiting your action. - TEST

[EMAIL FROM EXTERNAL SENDER] [Do not click links or open attachments unless you can confirm the sender and know the content is safe.]

Clearance request #32 has been created for John Doe and is now awaiting your action. You can access this request and verify that the required tasks have been completed by following the link below:

1. http://vsu-spdev-01v/webforms/VSU_Clearance/layouts/15/VSU_Clearance/ClearanceCheckList.aspx?RequestID=32&AreaID=12

You can view all tasks in your queue here:

http://vsu-spdev-01v/webforms/VSU_Clearance/layouts/15/VSU_Clearance/MyTasks.aspx

Administrative Services: Complete Checklist Tasks

Instructions

1. Review the **task** listed in the 'Item' column.
2. Select 'Completed' or N/A' to describe the **action** you take.
3. Enter **task notes** in the 'Comments' text box, if needed.
4. Click 'Complete Checklist' button when action is taken on all items. **YOU'RE DONE!**

OR

- 'Save Changes' button - Keep **corrections** made to form.
- 'Close Form' button - **Stop** and **finish checklist later**.

Note: The **Checklist** consists of three (3) columns:

- A. **Item** - Identifies task.
- B. **Status** - Identifies **current state** of task.
 - **Open** - Task is **awaiting** action from you.
 - **Completed** - Task action **accomplished**.
 - **N/A** - Task action **is not** required.
- C. **Comments** - Enter relevant task notes if needed.

»» VSU Clearance Requests »» My Tasks »» Clearance Area Checklist

Administrative Services checklist for Test Account

ID	40	
Overall Clearance Status	In Progress	
Checklist Status	In Progress	Note: The top form fields populate automatically.
Clearance For	Test Account	
Employee ID	1234567	
V Number	V09000010	
Supervisor	Gary Martin	
Last Day of Employment	04/30/2021	
Address		
Telephone		
Attachments	Clearance Notes.txt	
Created	4/30/2021 10:45:36 / Gary Martin	

Item	Status	Comments
<input type="checkbox"/> 2734: Fixed Assets and Accounting Control System (FAACS)	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	

1. 2. 3. 4.

Save Changes Complete Checklist Close Form

Cashier's Office: Complete Checklist Tasks

Instructions

1. Review the task listed in the 'Item' column.
2. Select 'Completed' or N/A' to describe the **action** you take.
3. Enter **task notes** in the 'Comments' text box, if needed.
4. Click 'Complete Checklist' button when action is taken on **all** items. **YOU'RE DONE!**

OR


- 'Save Changes' button - Keep **corrections** made to form.
- 'Close Form' button - **Stop** and **finish** checklist **later**.

Note: The **Checklist** consists of three (3) columns:

- A. **Item** - Identifies task.
- B. **Status** - Identifies current state of task.
 - **Open** - Task is **awaiting** action from you.
 - **Completed** - Task action **accomplished**.
 - **N/A** - Task action **is not** required.
- C. **Comments** - Enter relevant task notes if needed.

»» VSU Clearance Requests »» My Tasks »» Clearance Area Checklist

Cashier's Office checklist for Test Account

ID	40
Overall Clearance Status	In Progress
Checklist Status	In Progress
Clearance For	Test Account
Employee ID	1234567
V Number	V09000010
Supervisor	Gary Martin
Last Day of Employment	04/30/2021
Address	
Telephone	
Attachments	 Clearance Notes.txt
Created	4/30/2021 10:45:36 AM Gary Martin

Note: The top form fields populate automatically.

Item	Status	Comments
<input type="checkbox"/> 2735: Traffic Regulatory Commission	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	
<input type="checkbox"/> 2736: Non-Sufficient Funds Checks	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	

1. (points to Item column)
2. (points to Status column)
3. (points to Comments column)
4. (points to Complete Checklist button)

Save Changes Complete Checklist Close Form

Finance: Complete Checklist Tasks

Instructions

1. Review the task listed in the 'Item' column.
2. Select 'Completed' or N/A' to describe the **action** you take.
3. Enter **task notes** in the 'Comments' text box, if needed.
4. Click 'Complete Checklist' button when action is taken on **all** items. **YOU'RE DONE!**

OR

- 'Save Changes' button - Keep **corrections** made to form.
- 'Close Form' button - **Stop** and **finish checklist later**.

Note: The **Checklist** consists of three (3) columns:

- A. Item** - Identifies task.
- B. Status** - Identifies current state of task.
 - **Open** - Task is **awaiting** action from you.
 - **Completed** - Task action **accomplished**.
 - **N/A** - Task action **is not** required.
- C. Comments** - Enter relevant task notes if needed.

»» VSU Clearance Requests »» My Tasks »» Clearance Area Checklist

Finance checklist for Test User

ID	40
Overall Clearance Status	In Progress
Checklist Status	In Progress
Clearance For	Test User
Employee ID	1234567
V Number	V09000001
Supervisor	Kerryn S. King
Last Day of Employment	
Address	
Telephone	Gary Martin
Attachments	No attachments
Created	6/22/2021 3:31:28 PM Gary Martin

Note: The top form fields populate automatically.

Item	Status	Comments
<input type="checkbox"/> 2709: Disable EVA Approver Account	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	
<input type="checkbox"/> 2710: Disable EVA User Account	<input type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	
<input type="checkbox"/> 2724: Disable Self Service Account	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	
<input type="checkbox"/> 2725: Disable Banner Finance(INB)	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	

1. (points to Item column)

2. (points to Status column)

3. (points to Comments column)

4. (points to Complete Checklist button)

Save Changes Complete Checklist Close Form

Human Resources Benefits: Complete Checklist Tasks

Instructions

1. Review the task listed in the 'Item' column.
2. Select 'Completed' or N/A' to describe the **action** you take.
3. Enter **task notes** in the 'Comments' text box, if needed.
4. Click 'Complete Checklist' button when action is taken on **all** items. **YOU'RE DONE!**

OR

- 'Save Changes' button - Keep **corrections** made to form.
- 'Close Form' button - **Stop** and **finish checklist later**.

Note: The **Checklist** consists of three (3) columns:

- A. **Item** - Identifies task.
- B. **Status** - Identifies current state of task.
 - **Open** - Task is **awaiting** action from you.
 - **Completed** - Task action **accomplished**.
 - **N/A** - Task action **is not** required.
- C. **Comments** - Enter relevant task notes if needed.

»»» VSU Clearance Requests »»» My Tasks »»» Clearance Area Checklist

Human Resources checklist for Test Account

ID	40	
Overall Clearance Status	In Progress	
Checklist Status	In Progress	Note: The top form fields populate automatically.
Clearance For	Test Account	
Employee ID	1234567	
V Number	V09000010	
Supervisor	Gary Martin	
Last Day of Employment	04/30/2021	
Address		
Telephone		
Attachments	Clearance Notes.txt	
Created	4/30/2021 10:45:36 AM	Gary Martin

Item A.	Status B.	Comments C.
<input type="checkbox"/> 2739: Benefits Closeout	<input type="radio"/> Open <input type="radio"/> Completed <input checked="" type="radio"/> N/A	<input type="text"/> <small>Please enter a comment.</small>
<input type="checkbox"/> 2740: Exit Interview	<input type="radio"/> Open <input checked="" type="radio"/> Completed <input type="radio"/> N/A	<input type="text"/>

1. 2. 3. 4.

Save Changes Complete Checklist Close Form

Human Resources Training: Complete Checklist Tasks

Instructions

1. Review the task listed in the 'Item' column.
2. Select 'Completed' or N/A' to describe the **action** you take.
3. Enter **task notes** in the 'Comments' text box, if needed.
4. Click 'Complete Checklist' button when action is taken on **all** items. **YOU'RE DONE!**

OR

- 'Save Changes' button - Keep **corrections** made to form.
- 'Close Form' button - **Stop** and **finish** checklist **later**.

Note: The **Checklist** consists of three (3) columns:

- A. Item** - Identifies task.
- B. Status** - Identifies current state of task.
 - **Open** - Task is **awaiting** action from you.
 - **Completed** - Task action **accomplished**.
 - **N/A** - Task action **is not** required.
- C. Comments** - Enter relevant task notes if needed.

»»» VSU Clearance Requests »»» My Tasks »»» Clearance Area Checklist

Human Resources - Training checklist for Test Account

ID	40	
Overall Clearance Status	In Progress	
Checklist Status	In Progress	Note: The top form fields populate automatically.
Clearance For	Test Account	
Employee ID	1234567	
V Number	V09000010	
Supervisor	...	
Last Day of Employment	Gary Martin	
Address		
Telephone		
Attachments	Clearance Notes.txt	
Created	4/30/2021 10:45:36 AM	Gary Martin

Item	Status	Comments
<input type="checkbox"/> 2741: Training Material	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	
<input type="checkbox"/> 2742: Tuition Waiver	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	

1. 2. 3. 4.

Save Changes Complete Checklist Close Form

Library: Complete Checklist Tasks

Instructions

1. Review the task listed in the 'Item' column.
2. Select 'Completed' or N/A' to describe the **action** you take.
3. Enter **task notes** in the 'Comments' text box, if needed.
4. Click 'Complete Checklist' button when action is taken on all items. **YOU'RE DONE!**

OR

- 'Save Changes' button - Keep **corrections** made to form.
- 'Close Form' button - **Stop** and **finish checklist later**.

Note: The **Checklist** consists of three (3) columns:

- A. Item** - Identifies task.
- B. Status** - Identifies current state of task.
 - **Open** - Task is **awaiting** action from you.
 - **Completed** - Task action **accomplished**.
 - **N/A** - Task action **is not** required.
- C. Comments** - Enter relevant task notes if needed.

»»» VSU Clearance Requests »»» My Tasks »»» Clearance Area Checklist

Library checklist for Test Account

ID	40	
Overall Clearance Status	In Progress	
Checklist Status	In Progress	Note: The top form fields populate automatically.
Clearance For	Test Account	
Employee ID	1234567	
V Number	V09000010	
Supervisor	Gary Martin	
Last Day of Employment	04/30/2021	
Address		
Telephone		
Attachments	Clearance Notes.txt	
Created	4/30/2021 10:45:36 AM Gary Martin	

Item A.	Status B.	Comments C.
<input type="checkbox"/> 2743: Overdue books/periodicals/film	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	

1. → 2. → 3. → 4. →

Save Changes Complete Checklist Close Form

Purchasing: Complete Checklist Tasks

Instructions

1. Review the task listed in the 'Item' column.
2. Select 'Completed' or N/A' to describe the **action** you take.
3. Enter **task notes** in the 'Comments' text box, if needed.
4. Click 'Complete Checklist' button when action is taken on **all** items. **YOU'RE DONE!**

OR

- 'Save Changes' button - Keep **corrections** made to form.
- 'Close Form' button - **Stop** and **finish checklist later**.

Note: The **Checklist** consists of three (3) columns:

- A. Item** - Identifies task.
- B. Status** - Identifies current state of task.
 - **Open** - Task is **awaiting** action from you.
 - **Completed** - Task action **accomplished**.
 - **N/A** - Task action **is not** required.
- C. Comments** - Enter relevant task notes if needed.

»» VSU Clearance Requests »» My Tasks »» Clearance Area Checklist

Purchasing checklist for Test Account

ID	40	
Overall Clearance Status	In Progress	
Checklist Status	In Progress	Note: The top form fields populate automatically.
Clearance For	Test Account	
Employee ID	1234567	
V Number	V0900010	
Supervisor	Gary Martin	
Last Day of Employment	04/30/2021	
Address		
Telephone		
Attachments	<input type="text" value="Clearance Notes.txt"/>	
Created	4/30/2021 10:45:36 AM : Gary Martin	

Item A.	Status B.	Comments C.
<input type="checkbox"/> 2744: Corporate Card	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	<input type="text"/>

1. (points to item) 2. (points to status options) 3. (points to comments) 4. (points to Complete Checklist button)

Save Changes Complete Checklist Close Form

Student Accounts: Complete Checklist Tasks

Instructions

1. Review the task listed in the 'Item' column.
2. Select 'Completed' or N/A' to describe the **action** you take.
3. Enter **task notes** in the 'Comments' text box, if needed.
4. Click 'Complete Checklist' button when action is taken on **all** items. **YOU'RE DONE!**

OR

- 'Save Changes' button - Keep **corrections** made to form.
- 'Close Form' button - **Stop** and **finish checklist later**.

Note: The **Checklist** consists of three (3) columns:

- A. Item** - Identifies task.
- B. Status** - Identifies current state of task.
 - **Open** - Task is **awaiting** action from you.
 - **Completed** - Task action **accomplished**.
 - **N/A** - Task action **is not** required.
- C. Comments** - Enter relevant task notes if needed.

»»» VSU Clearance Requests »»» My Tasks »»» Clearance Area Checklist

Student Accounts checklist for Test Account

ID	40	
Overall Clearance Status	In Progress	
Checklist Status	In Progress	Note: The top form fields populate automatically.
Clearance For	Test Account	
Employee ID	1234567	
V Number	V09000010	
Supervisor	Gary Martin	
Last Day of Employment	04/30/2021	
Address		
Telephone		
Attachments	<input type="text" value="Clearance Notes.txt"/>	
Created	4/30/2021 10:45:36 AM Gary Martin	

A. Item	B. Status	C. Comments
1. <input type="checkbox"/> 2745: Tuition Waiver	2. <input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	3. <input type="text"/>

4.

Technology Services: Complete Checklist Tasks

Instructions

1. Review the task listed in the 'Item' column.
2. Select 'Completed' or N/A' to describe the **action** you take.
3. Enter **task notes** in the 'Comments' text box, if needed.
4. Click 'Complete Checklist' button when action is taken on **all** items. **YOU'RE DONE!**

OR

- 'Save Changes' button - Keep **corrections** made to form.
- 'Close Form' button - **Stop** and **finish checklist later**.

Note: The **Checklist** consists of three (3) columns:

- A. Item** - Identifies task.
- B. Status** - Identifies current state of task.
 - **Open** - Task is **awaiting** action from you.
 - **Completed** - Task action **accomplished**.
 - **N/A** - Task action **is not** required.
- C. Comments** - Enter relevant task notes if needed.

VSU Clearance Requests >>> My Tasks >>> Clearance Area Checklist

Technology Services checklist for Test Account

ID	40	
Overall Clearance Status	In Progress	
Checklist Status	In Progress	Note: The top form fields populate automatically.
Clearance For	Test Account	
Employee ID	1234567	
V Number	V09000010	
Supervisor	Gary Martin	
Last Day of Employment	04/30/2021	
Address		
Telephone		
Attachments	Clearance Notes.txt	
Created	4/30/2021 10:45:36 AM Gary Martin	

A. Item	B. Status	C. Comments
1. <input type="checkbox"/> 2746: IT Equipment	2. <input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	3.

4.

Technology Services Security: Complete Checklist Tasks

Instructions

1. Review the task listed in the 'Item' column.
2. Select 'Completed' or N/A' to describe the **action** you take.
3. Enter **task notes** in the 'Comments' text box, if needed.
4. Click 'Complete Checklist' button when action is taken on **all** items. **YOU'RE DONE!**

OR

- 'Save Changes' button - Keep **corrections** made to form.
- 'Close Form' button - **Stop** and **finish checklist later**.

Note: The **Checklist** consists of three (3) columns:

- A. **Item** - Identifies task.
- B. **Status** - Identifies current state of task.
 - **Open** - Task is **awaiting** action from you.
 - **Completed** - Task action **accomplished**.
 - **N/A** - Task action **is not** required.
- C. **Comments** - Enter relevant task notes if needed.

»» VSU Clearance Requests »» My Tasks »» Clearance Area Checklist

Technology Services - Security checklist for Test Account

ID	40	
Overall Clearance Status	In Progress	
Checklist Status	In Progress	Note: The top form fields populate automatically.
Clearance For	Test Account	
Employee ID	1234567	
V Number	v099999910	
Supervisor	Gary Martin	
Last Day of Employment	04/30/2021	
Address		
Telephone		
Attachments	Clearance Notes.txt	
Created	4/30/2021 10:45:36 AM	Gary Martin

A. Item	B. Status	C. Comments
1. <input type="checkbox"/> 2747: Computer Passwords/Software	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	<input type="text"/>
<input type="checkbox"/> 2748: Banner Self Direct	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	<input type="text"/>
<input type="checkbox"/> 2749: RSA Hardware Token	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	<input type="text"/>

There are still open items on this checklist. Please complete all checklist items before submitting the checklist.

UTS: Complete Checklist Tasks

Instructions

1. Review the task listed in the 'Item' column.
2. Select 'Completed' or N/A' to describe the **action** you take.
3. Enter **task notes** in the 'Comments' text box, if needed.
4. Click 'Complete Checklist' button when action is taken on **all** items. **YOU'RE DONE!**

OR

- 'Save Changes' button - Keep **corrections** made to form.
- 'Close Form' button - **Stop** and **finish checklist later**.

Note: The **Checklist** consists of three (3) columns:

- A. **Item** - Identifies task.
- B. **Status** - Identifies current state of task.
 - **Open** - Task is **awaiting** action from you.
 - **Completed** - Task action **accomplished**.
 - **N/A** - Task action **is not** required.
- C. **Comments** - Enter relevant task notes if needed.

»»» VSU Clearance Requests »»» My Tasks »»» Clearance Area Checklist

UTS checklist for Test Account

ID	40	
Overall Clearance Status	In Progress	
Checklist Status	In Progress	
Clearance For	Test Account	Note: The top form fields populate automatically.
Employee ID	1234567	
V Number	V09000010	
Supervisor	Gary Martin	
Last Day of Employment	04/30/2021	
Address		
Telephone		
Attachments	Clearance Notes.txt	
Created	4/30/2021 10:45:36 AM : Gary Martin	

A. Item	B. Status	C. Comments
1. <input type="checkbox"/> 2750: Cisco IP Phone Pin	2. <input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	3. <input type="text"/>
<input type="checkbox"/> 2751: VSU TrojanCard	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	<input type="text"/>

4.

Payroll: Complete Checklist Tasks

Instructions

1. Review the task listed in the 'Item' column.
2. Select 'Completed' or N/A' to describe the **action** you take.
3. Enter **task notes** in the 'Comments' text box, if needed.
4. Click 'Complete Checklist' button when action is taken on **all** items. **YOU'RE DONE!**

OR

- 'Save Changes' button - Keep **corrections** made to form.
- 'Close Form' button - **Stop** and **finish** checklist **later**.

Note: The **Checklist** consists of three (3) columns:

- A. Item** - Identifies task.
- B. Status** - Identifies current state of task.
 - **Open** - Task is **awaiting** action from you.
 - **Completed** - Task action **accomplished**.
 - **N/A** - Task action **is not** required.
- C. Comments** - Enter relevant task notes if needed.

»» VSU Clearance Requests »» My Tasks »» Clearance Area Checklist

Payroll checklist for Test Account

ID	40	
Overall Clearance Status	In Progress	
Checklist Status	In Progress	Note: The top form fields populate automatically.
Clearance For	Test Account	
Employee ID	1234567	
V Number	V09000010	
Supervisor	Gary Martin	
Last Day of Employment	04/30/2021	
Address		
Telephone		
Attachments	Clearance Notes.txt	
Created	4/30/2021 10:45:36 AM : Gary Martin	

A. Item	B. Status	C. Comments
1. <input type="checkbox"/> 2752: Confirm Balance	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	3. <input type="text"/>
<input type="checkbox"/> 2753: Verify Signatures	<input checked="" type="radio"/> Open <input type="radio"/> Completed <input type="radio"/> N/A	<input type="text"/>

4.

Payroll & OHR Final Activity



“After all functional units have **completed** the **Clearance Area Checklist** tasks, an email notification will be sent ‘**automatically**’ to payroll@vsu.edu”



“OHR will continue to deliver all **separation** documents to Payroll Office (i.e. A-21 forms).”

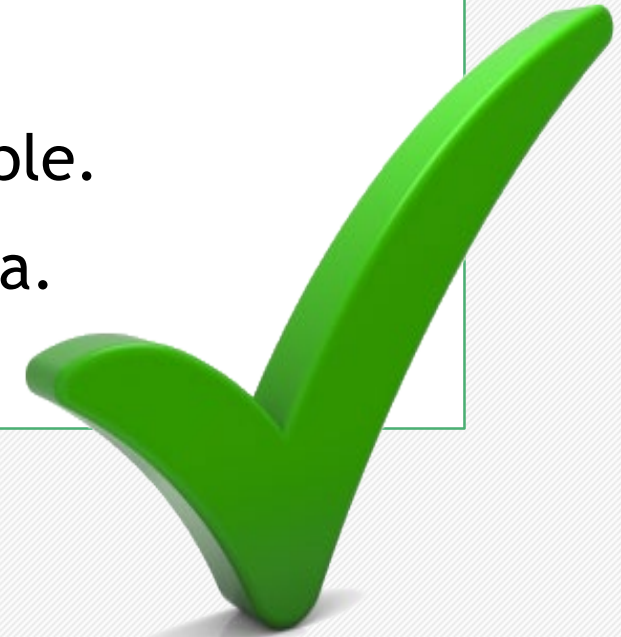
OHR Administration Staff

New Clearance Process Improves OHR Capability



The Automated Clearance Form Process provides OHR staff the following capabilities:

- Tracks Clearance Form **status**.
- Identifies and makes processing **delays** easily visible.
- Creates a **repository** to store Clearance Form data.
- Simplifies **audit** process.



More Robust Tracking & Viewing Capability



“OHR Administration staff have **multiple** ways to view:

- who **currently** has the Clearance Request Form
- who has **completed** the Clearance Request Form
- who is **delaying/holding up** the Clearance Request Form

See **3 views below** that provides **robust** tracking and viewing capability.

Clearance
Request
View

Search for
'All',
'In-Progress'
or
'Completed'
Request
View

Application
Workflow
Setting
View

OHR Administration Staff: Accessing Views



“OHR Administration Staff will have viewing **privileges** that others **will not** have!”

1. Everyone will have the same **‘Main Menu’**

I want to...

- » Create a Clearance Request
- » View My Clearances
- » Complete Clearance Tasks
- » View My Activity

2. OHR Administration staff only will have the **‘Administration Menu’**

Administration

- » View All Requests
- » Workflow

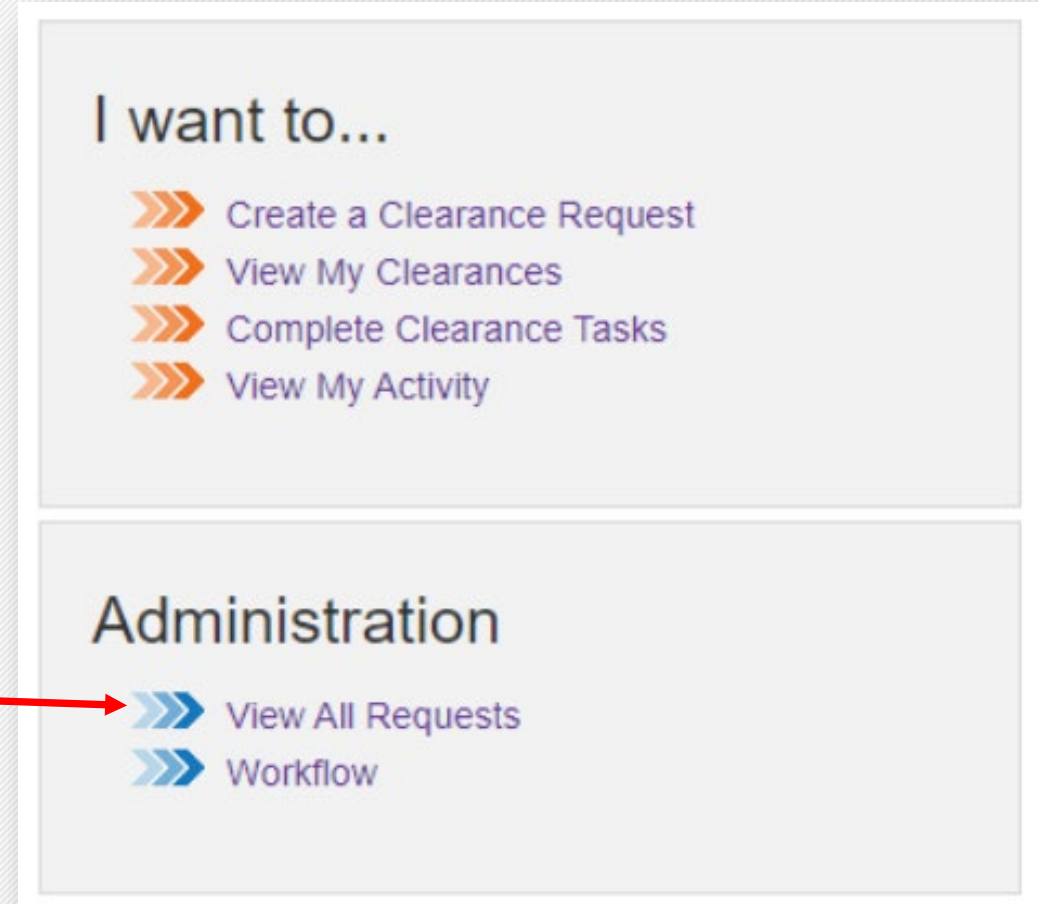
How to Access: 'Clearance Request View'

Instructions

To access the 'Clearance Request View':

1. Select '*View All Requests*'.

Note: The next slide will display what the actual 'Clearance Request View' looks like.



'Clearance Request' View - Consists of 3 Sections

Top Section

Clearance Request 39	
Clearance Status	Completed
Clearance For	Test Account
Employee ID	1234567
V Number	V09000010
Supervisor	Kerryn S. King
Last Day of Employment	04/02/2021
Address	
Telephone	
Attachments	No attachments
Created	4/23/2021 12:3

1. Displays:
- Clearance status
 - Employee data
 - Supervisor data

Middle Section

Clearance Areas	
Area	Status
■ Clearance	Completed
■ Supervisor	Completed
Departmental Request for Personnel Action (A21)	■ Completed
Resignation Letter submitted	■ Completed
VSU Policy and Procedure Manuals	■ Completed
All Equipment	■ Completed
Keys	■ Completed
Reports/Completion of all assigned tasks	■ Completed
Outstanding Leave Forms submitted to HR	■ Completed
PI due diligence validation (needs OSP signature)	■ Completed
■ Administrative Services	Completed
Fixed Assets and Accounting Control	■ Completed

2. Displays:
- Clearance Areas (Supervisor, Administrative Services, etc.)
 - Status of each task

Bottom Section

Role	Activity	Name	Date/Time	Notes
Initiator	Submit Clearance	Kerryn S. King	4/23/2021 12:32:48 AM	
Supervisor	Approve Request	Kerryn S. King	4/23/2021 12:37:20 AM	approved
Supervisor	Complete	Kerryn S. King	4/23/2021 12:43:56 AM	
Administrative Services	Complete	Kerryn S. King - DBA	4/30/2021 10:24:56 AM	
Cashier's Office	Complete	Kerryn S. King - DBA	4/30/2021 10:25:02 AM	
Finance	Complete	Kerryn S. King - DBA	4/30/2021 10:25:07 AM	
Human Resources	Complete	Kerryn S. King - DBA	4/30/2021 10:25:14 AM	
Human Resources - Training	Complete	Kerryn S. King - DBA	4/30/2021 10:26:47 AM	
Library	Complete	Kerryn S. King - DBA	4/30/2021 10:27:01 AM	
Purchasing	Complete	Kerryn S. King - DBA	4/30/2021 10:27:20 AM	
Student Accounts	Complete	Kerryn S. King - DBA	4/30/2021 10:27:41 AM	
Technology Services	Complete	Kerryn S. King - DBA	4/30/2021 10:28:13 AM	
Technology Services - Security	Complete	Kerryn S. King - DBA	4/30/2021 10:36:48 AM	
UTS	Complete	Kerryn S. King - DBA	4/30/2021 10:37:39 AM	
Payroll	Complete	Kerryn S. King - DBA	4/30/2021 10:42:39 AM	

3. Displays:
- Role - Functional Unit
 - Activity - Approve, Complete, etc.
 - Date of activity
 - Name - Designee who has completed activity.

Close Form

How to Access: 'Search for All', 'In Progress' or 'Completed Request' View

Instructions

To access 'Search for 'All', 'In-Progress' or 'Completed Request' View:

1. Select '*View All Requests*'.

Note: The next slide will display what the actual ' looks like.

Search for
'All',
'In-Progress'
or
'Completed'
Request
View

I want to...

- » Create a Clearance Request
- » View My Clearances
- » Complete Clearance Tasks
- » View My Activity

Administration

- » View All Requests
- » Workflow

Search for 'All', 'In Progress' or 'Completed Request' View Consists of 2 Sections

Note: This view displays 3 types of 'Clearance Status' of a Request: 'All', 'In Progress', or 'Completed'.

All Requests

Clearance Status	Request For	Supervisor	Created By	
<input checked="" type="radio"/> All <input type="radio"/> In Progress <input type="radio"/> Completed	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Search"/> <input type="button" value="Reset"/>

1. Select 'All', 'In Progress', or 'Completed'.

2. Enter employee's name.

3. Enter supervisor's name

4. Enter initiator's name. (Note: This may be someone other than the supervisor.)

5. Click 'Search' button OR Click 'Reset' to clear all data.

6. View 'Status' column for results.

ID	Clearance For	Status	Supervisor	Last Day Worked	Created By	Date Created
40	Test Account	Completed	Kerlyn S. King	04/30/2021	Kerlyn S. King	04/30/2021
39	Test Account	Completed	Kerlyn S. King	04/02/2021	Kerlyn S. King	04/23/2021
38	Jesse Vaughan	In Progress	Tonya S. Hall	04/09/2021	Tonya S. Hall	04/02/2021
37	Christy Johnson-Oliver	Completed	Danika Clemmons	03/25/2021	Danika Clemmons	03/23/2021
36	Katea A Jemott	Awaiting Supervisor Approval	Gary Martin	03/12/2021	Kerlyn S. King	03/08/2021

How to Access: 'Application Workflow Setting' View

Instructions

To access 'Application Workflow Setting' View:

1. Select '*Workflow*'.

Note: The next slide will display what the actual 'Application Workflow Setting View' looks like.

Application
Workflow
Setting
View

I want to...

- »»» Create a Clearance Request
- »»» View My Clearances
- »»» Complete Clearance Tasks
- »»» View My Activity

Administration

- »»» View All Requests
- »»» Workflow

1.

'Application Workflow Setting' View - Consists of 1 Section

Note: This view displays 'workflow'.

This is another way to track the Clearance Request. This view displays the **current state** of the Clearance Request, **who** needs to take action and **what** action is required.

Application Workflow Settings

Refresh

1. Click 'Refresh' button for the most recent update.

Process ID	State ID	State	State Type	Role	Action	Account ID	User Name
14	136	Awaiting Payroll Completion	In Progress	System	Complete Payroll Tasks		
14	136	Awaiting Payroll Completion	In Progress	HR Coordinator	Close Request	vsu\gmartin	Gary Martin
14	136	Awaiting Payroll Completion	In Progress	HR Coordinator	Close Request	vsu\kkingdba	Kerryn S. King - DBA
14	136	Awaiting Payroll Completion	In Progress	HR Coordinator	Close Request	vsu\mmorse	Misty Morse
14	136	Awaiting Payroll Completion	In Progress	HR Coordinator	Close Request	vsu\psimpson	Pansy L Simpson
14	136	Awaiting Payroll Completion	In Progress	HR Coordinator	Close Request	vsu\tsimmons	Tanya L. Simmons
14	129	Awaiting Supervisor Approval	Awaiting Approval	Supervisor	Approve		
14	129	Awaiting Supervisor Approval	Awaiting Approval	Supervisor	Decline		

1. State
The internal status of the request)

2. State Type
Identifier used in Email or Report as an alternative to describe state.

3. Role
Identifies unit designee

4. Action
Identifies what the unit designee must do.

5. Account ID
Provides user's system account information.

6. User Name
Identifies user by name.

Need assistance?



Please direct all **training** comments, questions or concerns to:
hr@vsu.edu

Please direct all **technology** comments, questions or concerns to:
IT Service Help Desk @ [\(804\) 524-5210](tel:8045245210)

Thank you!