Exit Checklist for Managers
Term Date Expiration

My employee’s term date is coming up – what do I do?

☐ Your HR team will reach out to remind you of this date. If you are not interested or unable to extend their employment, let them know as soon as possible.

☐ Fill out the Offboarding form in ServiceNow

☐ Make sure your employee has received and reviewed their own Exit Checklist

☐ Come up with a communication plan to alert your staff, finance and business partners to this change

Develop a transition plan for your team.

Questions to consider: What work needs to be done before your employee leaves? Who will be picking up their workload and how can you maximize the remainder of your employee’s time at Harvard to ensure that they are ready to do so? Where does the employee keep files and other important information? Who should gain access to those files and how?

Now that everyone has been looped in, what do I need to do before my employee’s last day?

☐ Work with your team on your transition plan

☐ Work with your employee on transferring over all work-related electronic information to you

☐ Make sure the departing employee no longer has access to shared departmental accounts, proxy access to others’ calendars, online applications or databases that are local to your department, special VPN access and/or administrator accounts or privileges on network drives, devices or servers

☐ Update any internal directories or forms to reflect your employee’s departure

☐ Confirm that all time and absences have been submitted and approved in PeopleSoft.

Please Note: Your employee’s last day cannot be paid time off

Make sure to collect from your employee:
- All Harvard-owned equipment; i.e. computer, software licenses and accessories
- Any Harvard-owned cell phones
- All keys to their desk, office, etc.
- Their HUID Card, and any P-Cards or Corporate Cards

After my employee has left Harvard, what am I responsible for doing?

☐ Work with the Admin Ops team to provide them with your employee’s technical equipment

☐ Shred your employee’s HUID Card, and any P-Cards or Corporate Cards

☐ Regularly check in with your team on your transition plan and continuously checking in on workload
Questions?

Health, Welfare and Voluntary Benefits
  Benefits Office – (617) 496-4001

Paid Time Off and Time Cards
  Traci McBurnie, Payroll Coordinator – (617) 495-9987

Service Now Requests, Space and Logistics
  May Woo-Mok, Department Administrator, Admin Ops – (617) 496-2610

IT Help
  HUIT Service Desk – (617) 495-7777

Parking
  Parking Services Office – (617) 496-7827

General HR Questions
  Jessica Whelan, Human Resources Coordinator – (617) 495-5314
  Karen Pemstein, Associate Director of Human Resources – (617) 495-0372
    Architecture & Engineering, Collaboration and Communication Services, Infrastructure, IT Security, and Library Technology Services
  Patty St. Amand, Associate Director of Human Resources – (617) 495-7995
    Academic Technology Services, Administration & Finance, Administrative Technology Services, and Strategy and Planning
  Dick McGinnis, Associate Director of Human Resources – (617) 496-2296
    Data Management Services
  Nicole Breen, Director of Human Resources – (617) 495-0826