Exit Checklist for Managers

University Transfer

My employee has just given notice to work at another Harvard school – what do I do?

☐ Let your HR Consultant know, passing along a resignation letter with a departure date and a reason for departure. If you do not have one, the HR Coordinator will reach out to request one.

☐ 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, making sure to discuss with the departing employee anyone that they would like to personally inform.

☐ If your employee has any direct reports, let the HR team know who they will be reporting to in the interim

   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.

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

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

☐ If this is a position that needs replacing, work with your HR Consultant to kick off the hiring process

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

☐ Shred any P-Cards or Corporate Cards from your employee

☐ Regularly check in with your team on your transition plan, updating them on a hiring timeline, if this position is being replaced, 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
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Patty St. Amand, Associate Director of Human Resources – (617) 495-7995
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