### Employee Offboarding Workflow

#### University Transfer

#### Notification
- Employee (EE) notifies Hiring Manager (HM) regarding resignation
- HM notifies HR Consultant and HR Coordinator
- If resignation letter not provided in resignation notification, HR Coordinator reaches out to EE for written letter or detailed email
- HR Coordinator sends Exit Checklist to Manager, including ServiceNow Offboarding Form, asking if EE has any direct reports that will need new Managers, and connecting them to their HR Consultant if they are looking to replace this role, cc’ing Admin Ops and HR Consultant
- HR Coordinator sends Exit Checklist to EE, providing resources and information about transferring
- HR Coordinator fills out Admin Ops and Finance spreadsheets
- HM submits SNOW Offboarding form, kicking off offboarding process

#### Pre-Departure
- HM works with EE on transition plan
  - SNOW triggers removal of HUIT-specific user accounts, phones, and equipment, leaving desk phone for future hires
  - EE distributes other equipment, HUIT-specific keys and cards to Manager
- EE’s new School/Department processes their new role in PeopleSoft
- HUIT Finance processes EE’s departure in ServiceNow

#### Human Resources
- HM lets HR Coordinator know if EE has any direct reports that need to be moved, and who they need to be transferred to
  - If position needs replacing, HM works with HR Consultant to kick off hiring process
  - EE chooses to do Exit Interview, schedules with HR Consultant before last day

#### Payroll/Finance
- HR Coordinator transfers EE’s direct reports in Payroll, providing new managers with appropriate T&L and AM group access
- EE’s active ePerformance documents are automatically canceled by the system, new ones are created by new team/school
- HR Coordinator transfers the ePerformance documents of EE’s direct reports, if any, to new Manager
- HR Coordinator removes EE from HUIT All-Staff Mailing List
- HM/Team Administrator removes EE from internal directories and lists
- HR Coordinator removes EE from Org Chart on the Friday after their departure
- HR Coordinator moves EE’s direct reports to their new Manager in the Org Chart on the Friday after their departures
- ITSM removes EE’s SNOW account
- HR Team transfers EE Personnel File to new Harvard School/Department