

# Employee Offboarding Workflow

## Retirement

### Notification

- Employee (EE) notifies Hiring Manager (HM) regarding retirement
- Manager notifies HR Consultant and HR Coordinator
- If resignation letter not provided in retirement notification, HR Coordinator reaches out to EE for written letter or detailed email
- HR Coordinator sends Exit Checklist to Manager, 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 DA, EA and HR Consultant
- HR Coordinator sends Exit Checklist to EE, providing resources and information regarding Vacation Payout, Exit Interviews and final processes

### Pre-Departure

#### FAD Department

- HM works with EE on transition plan
- HM works with DA on removal of user accounts and phones, and equipment retrieval, leaving desk phone for future hires
- EE distributes other equipment, keys and cards to Manager

#### Payroll/Finance

- HR Coordinator sends CADM Payroll team information about EE departure, including resignation letter
- CADM Payroll sets employee to be terminated in PeopleSoft

#### 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

### Post-Departure

- HR Coordinator transfers EE's direct reports in Payroll, providing new managers with appropriate T&L and AM group access
- EE's ePerformance documents are automatically cancelled by the system
- HR Coordinator transfers the ePerformance documents of EE's direct reports, if any, to new Manager
- HR Coordinator removes EE from FAD All-Staff Mailing List
- DA/EA 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
- CADM Payroll processes EE's last paycheck including their Vacation Payout
- HR Team moves EE Personnel File into Archives