Saying Farewell

- ☐ Help the employee to leave on a good note by making their final days as pleasant as possible. The employee will still have ideas and suggestions that may be useful so continue to include them in meetings and department events.
- ☐ Determine how and when to communicate the separation to colleagues and key stakeholders. The message will depend on the circumstances of the departure and should state who will handle the responsibilities.
- ☐ A farewell event is good for the morale of the employee leaving as well as their colleagues. It conveys that the environment is a positive one and the contributions of team members are valued. Keep in mind that tax levy and auxiliary funds cannot be used to purchase food, beverages, supplies, decorations, etc. for personal events such as farewell celebrations.

Contacts and Links

Accounts Payable/Purchasing	(P or T-card changes, ProfTech)	**https://www.lehman.edu/administration/business-office/accounts-payable.php**
Buildings and Grounds Online Work Order		https://www.lehman.edu/administration/facilities-management/buildings-and-grounds.php http://facility.lehman.edu/webwr/
Environmental Health and Safety	ILona Linins, Director, Environmental Health and Safety	llona.linins@lehman.cuny.edu
Human Resources Natalie Zambrana Zoraida Rosa	 HR Manager for Classified Staff Associate Director (HEO and Faculty positions)	 natalie.zambrana@lehman.cuny.edu zoraida.rosa@lehman.cuny.edu
Information Technology **Computer Support** Vincent Sandella **Lehman Connect/LOMRS** Elkin Urrea **CUNYfirst** Youssry Youssef **Telecommunications** Junior Abad	 Desktop Support Web Applications Analyst CUNYfirst Support Assistant Manager for Telecommunications	 Vincent.sandella@lehman.cuny.edu elkin.urrea@lehman.cuny.edu youssry.youssef@lehman.cuny.edu junior.abad@lehman.cuny.edu
Budget and LOMRS Bethania Ortega	 Budget Director	 bethania.ortega@lehman.cuny.edu
Records Retention and Disposition Schedule		https://www2.cuny.edu/wp-content/uploads/sites/4/page-assets/about/administration/offices/legal-affairs/Records_Retention_Schedule-May_2007.pdf

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LEHMAN COLLEGE | CUNY

Manager's Guide to Offboarding Employees

INTRODUCTION

The separation of an employee because of resignation, retirement, internal transfer, or other reason can leave a void in the department. However, there are things managers can do to lessen the impact of the separation and minimize disruption to the work of the office.

This off-boarding guide explains what to do--from off-boarding employees properly to updating systems information, from seamlessly transferring knowledge to bidding the employee farewell on a positive note, all things that will make the transition as smooth as possible for you, your team and the employee who is leaving. Proper planning for an employee's departure also ensures that Human Resources (HR), Information Technology Resources (ITR), Public Safety, Budget, Financial Operations and other business offices implement personnel changes and business processes in accordance with University and New York State policies and procedures. *A contacts and links page is available at the end of the document.*

STEP I • When An Employee is Leaving

A. Steps the Manager Should Take

- ☐ Notify Human Resources (HR) as soon as the employee announces their intention to resign or retire. If the employee submits a resignation letter, send a copy to HR. If not, ask the employee to write a resignation letter that includes their last day of work at Lehman. Depending on the needs of the department, and the employee's commitments, the supervisor may be able to negotiate the departure date.

- ☐ Prepare a *Personnel Action Form* and send to Human Resources within two (2) business days following notice of the separation. HR requires this form to calculate the employee's time and leave balances, to suspend health benefits, and to update payroll and other records in CUNYfirst.
  - Complete the paper version of the PAF for full-time Instructional staff and Executive Compensation Plan employees.
  - Complete the electronic PAF (e-PAF) for all other staff after consultation with HR

- ☐ If office or lab access or intrusion alarm codes have to be deactivated notify the Director or Associate Director of Public Safety (see Contacts and Links).

- ☐ Ensure the employee reconciles all credit card statements before leaving. This includes Purchasing, Travel and NET cards that have to be reconciled in the Financials Module of CUNYfirst and any cards issued by the Auxiliary Enterprises Office, Student Association or the Research Foundation.

B. Steps Human Resources Will Take

Human Resources will send the employee an email with instructions to complete the online exit survey and schedule the exit interview. The employee will also receive a consent form to provide access to email and other files for business continuity purposes. The supervisor will receive a copy of the memo.

During the exit interview, the Human Resources representative will review benefits, time and leave, the calculation of final pay and the retiree e-mail that is available to employees who retire from certain titles. The employee will also receive the Exit Checklist and instructions for completing it.

The exit interview is also an opportunity for Human Resources to learn about the employee's experience while at Lehman. The information they acquire will help to improve recruiting, retention initiatives and the work experience of current employees.

C. Transfers/Reassignments

If the employee is transferring to another department within Lehman the following actions will ensure the transfer is managed properly:

- ☐ The managers should agree on the best date for the transfer to occur, when roles and access to system workflows will change and agree on other issues related to the transfer.

- ☐ The home department and the new department must each prepare a *Personnel Action Form* (or ePAF depending on the employee's title). The home department prepares the form to transfer the employee to the new department. The new department prepares the PAF (or ePAF) to appoint the employee.
  - Deliver the *Personnel Action Form* to Human Resources within two (2) business days following agreement of the transfer date.
  - The PAF (or ePAF) will generate the changes to the Personnel Services (PS) budget, update payroll and other records in CUNYfirst and generates an alert to Public Safety, IT and the Property Manager's Office. If office/lab access or intrusion alarm codes have to be deactivated notify the Director or Associate Director of Public Safety (see Contacts and Links).

STEP II • Ensuring Business Continuity

The Transition Plan

If the office does not have an administrative manual that describes how assignments are carried out, the manager should work with the employee to create a transition plan. A transition plan ensures data and business records are properly transferred to the employee(s) who will assume the tasks. It is a good idea for the separating employee and the person(s) taking on the duties to meet to review the assignments and confirm what is done and how it is done. This is also a good time for the manager to discuss the return of college property and confirm passwords to social media and other shared college-related systems. Passwords should be changed as needed.

Some items to include in the transition plan are (but not limited to):

- Position description based on current duties;
- Outline of daily and routine tasks in easy to understand steps;
- Status of work in progress and files/information/contacts needed to continue the work on the projects;
- Location of hard copy and electronic files. This may be a good time to create a document sharing account. This will allow you to centralize files and give access to others. Contact IT for assistance with creating a shared drive;
- Key contacts and their role;
- Reports the employee is responsible for, the submission dates and the distribution of the reports;
- College, University and other committees the employee is a member of and details of the committee assignments;
- Details of all grants the employee is responsible for;
- Examples of the work product and templates.

Managing Workflows and Other Processes

More and more tasks are being done electronically which means, the employee may have a "role" such as initiator or reviewer/approver in CUNYfirst, LOMRS, and other system workflows. The workflows and other processes that may need to be updated when an employee leaves the college or department are described below.

- ☐ Audit the department's online directory and the home and landing web pages and all pages that link from these sites. The audit is to identify content to update, remove and archive. Changes should be made only after the employee leaves.

- ☐ Create an automatic outgoing email message. The message should say the employee is no longer with the department/college and direct the person to the specific point of contact. Activate the message the first day the employee is no longer in the office. If the separating employee is an adjunct faculty member their e-mail account will still be available to them and alternative options for handling this will have to be considered.

- ☐ Submit a work order to the IT division for the following processes:
  - To update roles in CUNYfirst, LOMRS and other system workflows. Updating roles to remove the departing employee's name and replace with the name of the new initiator or reviewer/approver ensures electronic forms are routed properly.
  - To notify IT that the computer and telephone extension are no longer associated with the employee. The computer may be assigned to the incoming employee or to another office employee. Telecommunications will update the system information.
  - To replace the employee's digital signature (if embedded in an online document), with the digital signature (PDF or image file) for the new approver. Contact the web applications analyst for assistance (see Contacts and Links).

STEP III • Vacating Office and/or Laboratory Space

The employee is responsible for cleaning out their desk, file drawers, bookshelves and personal items prior to departure and all documents, supplies and materials must be disposed of properly or transferred to another laboratory or to the department office before the employee leaves the campus. Refer to the *Records Retention and Disposition Schedule* to ensure College records are disposed of and archived properly (see Contacts and Links).

- ☐ Submit a B&G online work order to arrange for a waste disposal bin (hamper) to be delivered to the office/lab. The removal of office furniture, equipment and debris and the painting or the reorganization of the office workspace should also be scheduled.

- ☐ Researchers in wet labs must arrange for the proper disposal of chemicals by contacting the Environmental Health and Safety Office at extension 8978 or 8988.