EMPLOYEE EXIT PROCESS

Information for Managers/Supervisors and Administrative Coordinators

LEHMAN COLLEGE
OFFICE OF HUMAN RESOURCES
OFFICE OF COMPLIANCE AND DIVERSITY
THE IMPORTANCE OF A COORDINATED EXIT PROCESS

CRITICAL OPERATIONAL NEEDS:

✓ Facilitate and streamline budget and position management
✓ Facilitate the transition and transfer of knowledge on on-going projects, daily tasks, and open items within the department
✓ Regain possession of college property, equipment and supplies
✓ Manage separation data (accurate pay, leave balances, payouts, etc.)
✓ Provide critical payroll and benefits information to separating employees

ORGANIZATIONAL ADVANTAGES:

✓ Collect actionable data on factors/reasons for separation to support retention and organizational effectiveness
✓ Improve quality of work life at the college
✓ Establish effective and efficient employee relations practices by identifying areas of strengths and weaknesses in job classification, workload, management style, and communication
✓ Increase managers’ accountability for employee retention
✓ Identify and monitor any illegal or unethical practices
RESPONSIBILITY

- **Manager / Supervisor, with the help of department staff** is responsible for immediate notification of separation to Human Resources; follow through with coordinating information between the employee and HR, *for e.g.*, correct date of separation, payroll (PAF), final timesheet, exit checklist form, confirmation of return of college property, equipment and supplies, and transition and transfer of information.

- **Employee** is responsible for completing the Exit Checklist Form, returning all college property, equipment and supplies, providing information to the supervisor and department staff for a smooth transition, and completing the exit interview with HR.
Employee notifies supervisor of separation.

Employee must give notice of separation to Manager/Supervisor.

Notice must include anticipated last work date.

Manager/Supervisor forwards employee’s notice of resignation /retirement to HR.

Depending on title, Manager/Supervisor submits to HR:
- Electronic Personnel Action Form (E-PAF)
- Personnel Action Form (PAF-hard copy)

HR sends employee:
- Exit Acknowledgment Memo, with a copy to Manager/Supervisor
- Exit Interview will be scheduled at least one week before the last date worked.

HR* holds Exit Interview and discusses Benefits and Payroll with employee.

HR provides Exit Checklist Form to employee:
- For ECP and HEO Series: Zoraida Rosa, Deputy Director
- For Classified Staff: Natalie Zambrana, HR Manager
- For Benefits: Georgette Roper-Walker; Kamesha Johnson

Employee completes Exit Checklist Form and submits to HR prior to last date worked.

HR reviews the completed Exit Checklist Form, signs off on the Form, provides employee with copy and sends copy to appropriate individuals in Budget and Payroll.
ISSUES WHEN EXIT PROCESS IS NOT COMPLETED

College Operations:
- The department cannot replace the departing employee until s/he is off payroll
- Loss of college property, equipment and supplies
- Lack of efficient transition for on-going projects and tasks

Payroll and Benefits:
Coordinating Separation Dates with Payroll dates is critical to managing accurate and timely Payroll payments CUNY pays approximately 27% of employer-sponsored health coverage

- Failure to notify HR of the exact date of separation may lead to overpayment and result in 6-8 week delays in pay adjustment
- An unexpected separation may also lead to overpayment and result in 6-8 week delays in pay adjustment
- Failure to notify HR of the exact date of separation may lead to continued payment of health coverage for a separated employee
- Failure to submit the final timesheet can cause overpayment. The college has to attempt to recoup monies from a separated employee
- Failure to submit the final timesheet can delay annual leave accrual payout
- Separated employee is not informed of his/her last day of health insurance coverage
- Separated employee is not informed of his/her pension rights