Managing an Employee Termination/Resignation

Step One - Managing an Employee Termination/Resignation

The offboarding procedure is mandatory and applies to the whole group without any exception.

Why this Moment Matters?

Exit Management is a key part of the leader's role as you will lead the **relationship** with the employee to ensure that this Moment that Matters is experienced as positively as possible with a focus on **business continuity**, while the role of the Site HR Partner is to ensure compliance by giving guidance and support on the technicalities.

Please look at the exit management process visual for managers.

The following scenarios **are in scope:**

- INVOLUNTARY SEPARATION (restructuring, poor performance, misconduct);
- VOLUNTARY SEPARATION (resignation);
- MEDICAL INCAPACITY (long term);
- RETIREMENT (legal retirement where it applies).

What to do as a Leader?

Partner with the employee's Site HR all along the process: from the moment an initial separation intent or request is communicated until when all practicalities regarding the separation have been completed.

As a Leader, these guidelines will help you organize the departure of your new team member. You will have to start **termination action in My HR Services** as well as submit **Offboarding request** to remove all to deactivate IT access and remove assets. The offboarding procedure is mandatory and applies to the whole group without any exception.

MANAGE SEPARATIONS AND EXITS

Exit Management is a key part of the leader's role. **You make the final decision**. Dedicated Site HR Partner are there to support you for all employment types (cadre and non-cadre). Below is a step-by-step guide for you to follow:

Step one: Discuss

- This mandatory step requires you to discuss the separation **intent or request** with relevant parties (N+1) and inform the **employee's Site HR Partner.**
- IMPORTANT: You should also check in My HR Services (employee Profile) whether the employee holds a **Sensitive Role** and consult the process for additional steps & decisions related to **Sensitive Roles**. If you have questions, the Site HR Partner is able to advise you.

Step two: Evaluate/ Decide

- Evaluate, with the Site HR, the right type of solution to take your decision.
- Think about the decision making criteria, who else to involve in the process and how you can avoid making biased decisions.

Step three: Create an action plan

- If a decision is taken to proceed with the separation, start by creating an action plan. Click **here** to download the template.

Step four: Communicate

- Notify employee of the separation decision and rationale.
- Discuss and confirm to the employee the separation date, package (if any) and other necessary terms based on action plan, **supported by the employee's Site HR Partner.**
- As a Leader you need to plan and prepare for difficult conversations and lead the discussion with courage and empathy. Here you can find a **communication toolkit** to prepare yourself.

Step five: Finalize the action plan and record separation in My HR Services

- **As soon as possible**, enter separation details (date, reason etc) in My HR Services to process the request. You will receive an automated confirmation when this is completed.
- This action will be reviewed and approved by the Site HR.

Next Steps

- Start the **Offboarding process** **as soon as possible.**

The offboarding procedure is mandatory and applies to the whole group without any exception.

HOW TO INITIATE A TERMINATION IN MY HR SERVICES

To launch the separation of your team member, the **first action** you need to do is record termination in My HR Services.

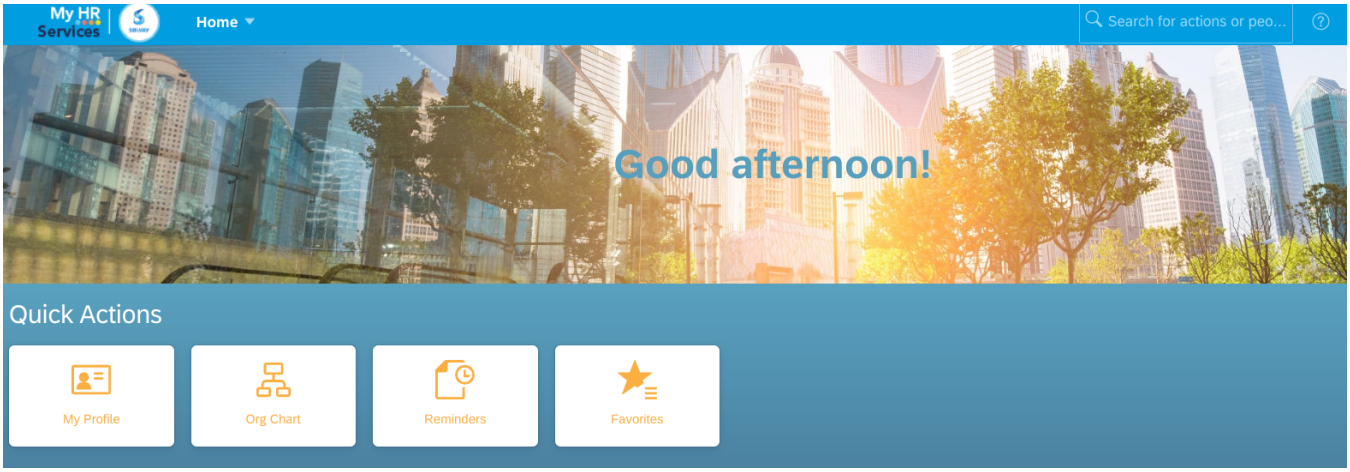
The termination action is owned and initiated by the Manager.

Below are the step-by-step instructions on how to enter the separation details in My HR Services.

FINDING EMPLOYEES

You have two ways to find employees in My HR Services:

- Option 1: by using the "**Org Charts**" **tile** you can see below and selecting the employee from the list;
- Option 2: by typing employee name in the "**Search for actions**" box on the top right hand corner of the image below.



RECORDING A TERMINATION

There are four steps to follow:

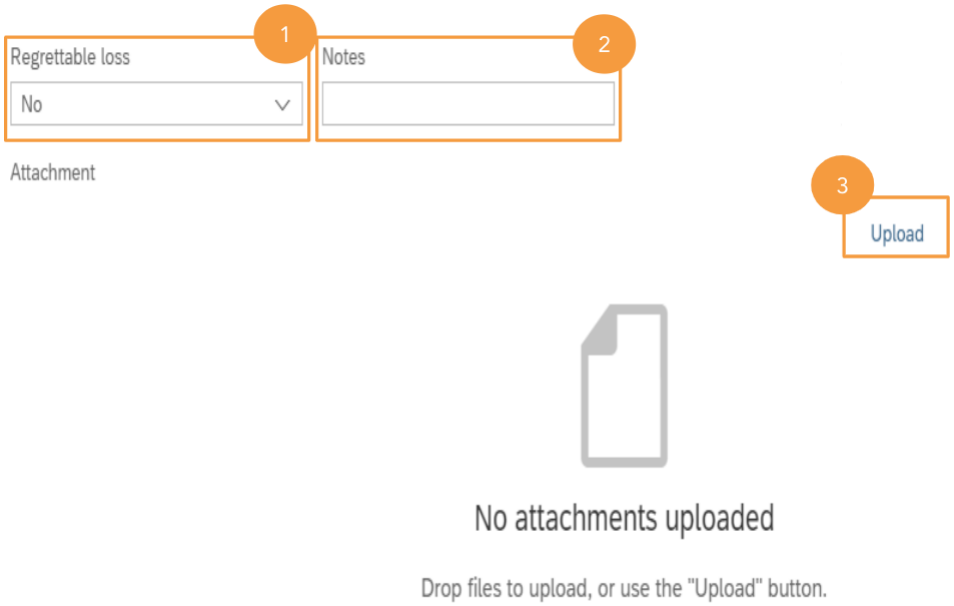
1. **Recording the termination.**
2. **Deactivating a position - if applicable.**
3. **Transferring Job Relationships - if applicable.**

- **Recording the termination.**
  - To record a termination, click on "**Actions**"
  - Select option "**Terminate**"

- The following information will need to be filled out next:
  a. The termination date is the date when the relationship between the employee and the company **ends**.
  b. The Last Date Worked is the effective last working day of the employee, which can be prior to the Termination date and followed by paid or unpaid leave.
  c. Choose between the termination reason options : **Resignation, Retirement or Other Termination Reason.**

d. **Set OK to Rehire to 'YES'** if you would agree the company to rehire the employee in the future. In case the employee had any action that doesn't fit the company and it is needed to prevent more actions like that in the future, **select 'NO'.**

- The following information will need to be filled out next:
  a. **Regrettable loss** concerns the voluntary resignation of an employee belonging to one or more of the following populations: S23+, EKAM, or part of a Talent Pool (Emerging Leader, Future Top Leader, or Top Leader).
  b. Insert Notes to provide any details regarding the termination situation. **The field is mandatory in case "Other termination reason" was selected.**
  c. You may choose to upload any relevant document if needed and provided, like resignation letter etc.



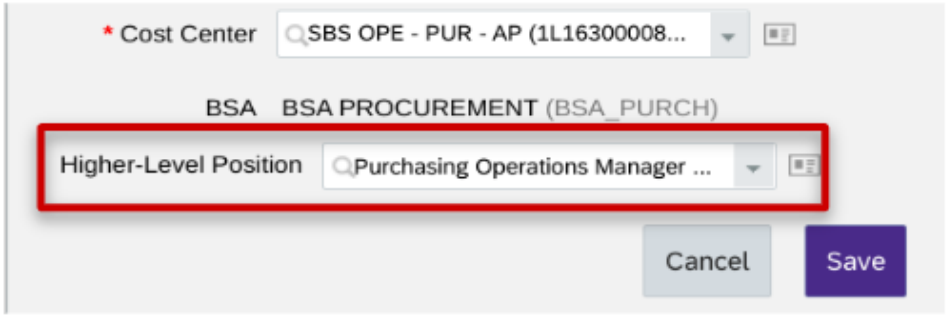
- **Deactivating a position - if applicable.**

If the position is to be deactivated in case you will not rehire on the position when it becomes vacant, follow these steps:

a. Choose Deactivate Position.
b. Click on Save to submit the termination request for approval.

*Note: "Deactivate Position" is **not always editable**, mainly when direct reports or vacant positions are still assigned to a manager's position. The **best practice** is to first maintain the lower-level positions before recording the termination. See more about this below:*

- ***Correct the higher-level position (hierarchy) of the position***



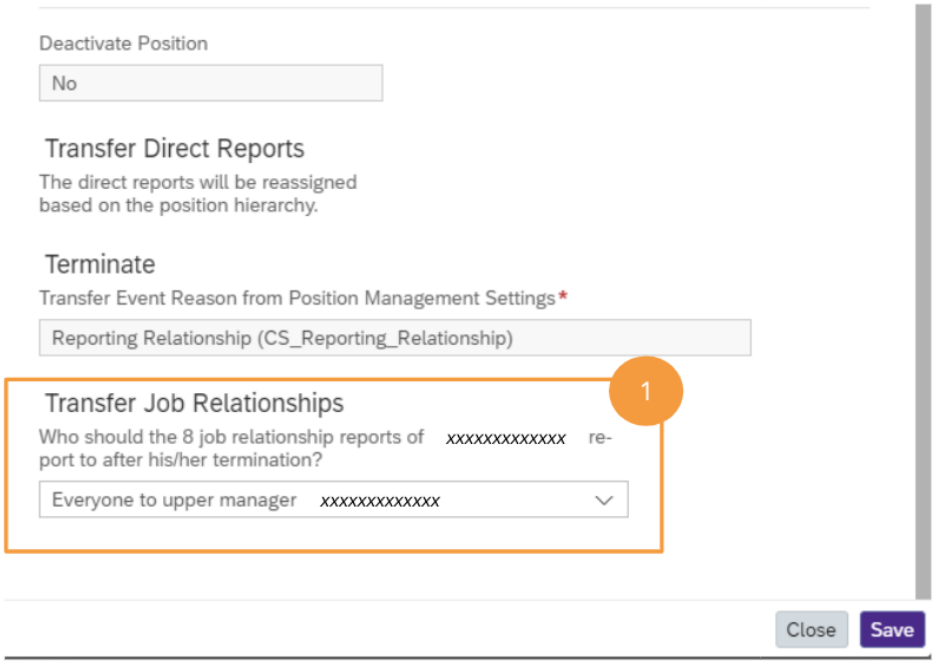
- **Transferring Job Relationships - if applicable.**

Transfer Job Relationships will appear for some employees like:

- Manager with a Compensation planner role used during the Compensation campaign.
- Strategic Business Partner.
- Site HR Partner.

Job relationships grant some authority to review and approve changes for a determined scope.

Select to whom you'd like to transfer this authority after the termination: upper manager, to another person, individually to other persons or terminate (no transfer of the authority).



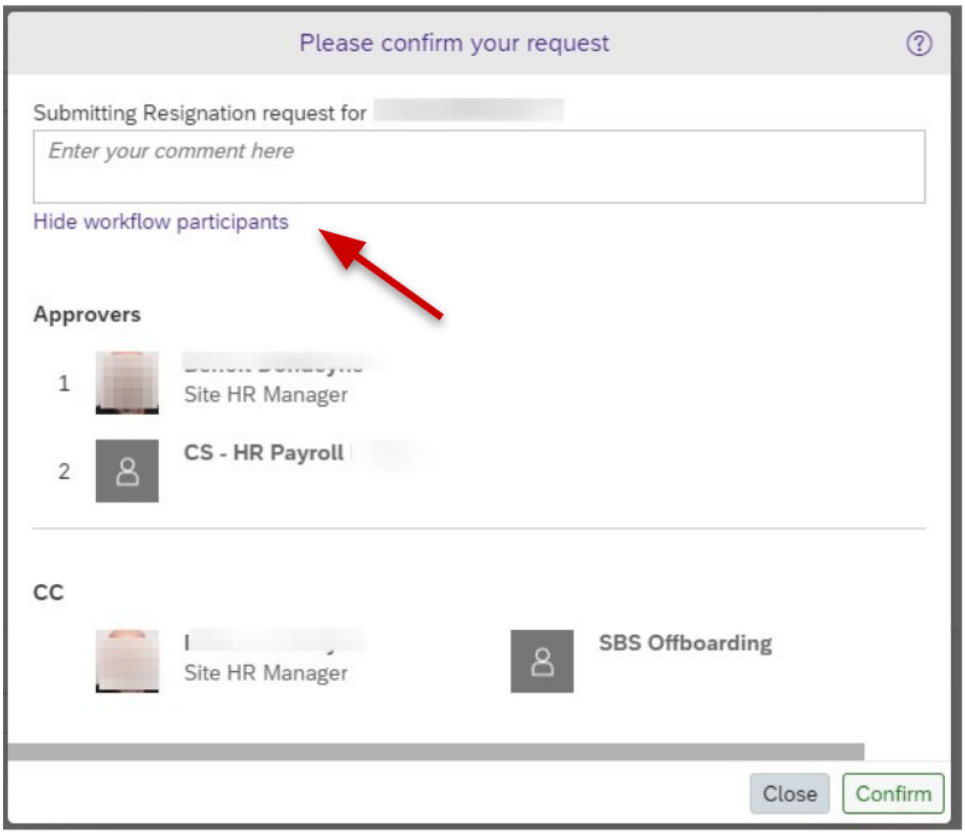
The last step of the Termination request is to confirm the request.

On this screen you can **Enter a comment** if needed, as well as review the **Workflow Participants** :

- Site HR Partner is the 1st step approver
- Payroll is the final approver

You will be notified by email once each step is processed by the different actors.

Remember that you can always go back to your pending request to check its status, add comments, withdraw etc … via the "Pending Requests" tile on the Home Page.



4. **Wait for HR confirmation to start the Offboarding procedure**

STEP TWO: Preparing an Employee & External Worker Offboarding

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Supporting Material

- Offboarding of Sensitive Roles
- Courageous Conversations

Supporting Documentation

- IT Offboarding: Service One User Guide
- Exit Management Action Plan Template