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Introduction

The purpose of this guide is to assist you with the employee departure process at the Harvard T.H. Chan School of Public Health and to provide you with the resources you need when an employee transfers or leaves.

The Human Resources and/or Faculty Affairs Office’s can provide you with additional assistance if necessary.

**Human Resources**
617.432.0979

**Faculty Affairs**
617.432.1047
Departure
FAQs and Instructions for Managers

All managers must facilitate the departure of their employee(s) who leave or transfer to another department either within or out of the Harvard Chan School so that they can be properly de-activated from all necessary systems and so all assets can be appropriately protected.

Use these FAQs to help you with the process:

1. As a manager, if I become aware that someone is leaving, what should I do first?
   Locate the Manager Checklist – Departure on the HR website at www.hsph.harvard.edu/hr>HR Forms, Process, and Tools>Employee Departures to assist you with the process. Inform your Department Administrator about the employee leaving so that he/she can help you facilitate the process.

2. What is the Employee Departure Form?
   The on-line form is used to help managers and Department Administrators facilitate an employee’s departure. Completion of the on-line form will notify key administrative offices that an employee is departing from the School. This will ensure system access has been deactivated appropriately, that Harvard property has been returned, and other necessary steps are taken when an employee leaves or transfers.

The following offices will be notified when you submit a completed form on-line:

*Human Resources - Trina Weekes, Joanna Duque, Elissa Brennan, Linda Picard, Lisa Hoppie, Maressa Patts
*Office for Faculty Affairs - Isin Ugur-Bastepe, Philip Kret
*Office of Financial Services - Sherina Epps-Grant, Stacey Haymon, Ann Howe, Sharon Reine, Eugenia Sanchez, Lisa Parisi
*Center for History of Medicine (Records Management) – Meghan Kerr, Heather Mumford (Archives)
*Security/Operations - Alex Machaiek
*HR and Financial Systems – Joanna Duque, Trina Weekes, Diane Standring, Rachel Dalby, Steve Ferrandino (wasabi@sphofs.harvard.edu), Lisa Parisi
*Information Technology – Departure Server Team

*See telephone numbers under Who to Call for Help on page 13*
3. Who is authorized to complete the form?
Primarily Department Administrators have access to the form on-line, however there may be individuals who have been authorized by Department Administrators. If you need access to the form, please have your Department Administrator contact Joanna Duque at 2-7241 or Trina Weekes at 2-4368.

4. How do I access the form?
The form can be accessed through HR’s website at www.hsph.harvard.edu/hr by clicking on “HR iSite.” From there, choose “HR Forms, Resources and Tools”, then Employee Departures. The “Employee Departure Form” link will take you to the form: https://hsph.me/hr-forms-employee-departure.

5. Does the on-line form remove the employee from the payroll?
No. The Department Administrator must also complete the Wasabi/PeopleSoft Termination Form, which will remove the employee from the payroll. The Employee Departure Form must be completed before doing the Wasabi/PS Termination Form. Wasabi will prompt you to put the date the form was completed before you are allowed to submit.

6. Do I have to complete the entire form?
Only complete the areas of the form that are applicable. There are some critical pieces of data that are required, indicated by an asterisk on the form. The form will alert you if required information is missing.

7. When should the form be completed?
The form should be completed and submitted at least **two weeks prior** to the last day worked. The earlier the form is submitted, the better.

8. Whom should I contact if I submit the form on-line and information changes afterwards?
Contact Joanna Duque at 2-7241 or Trina Weekes at 2-4368 and the IT Department at 2-4357 or helpdesk@hsph.harvard.edu to edit the information if you have already submitted the Employee Departure Form.

...continued
9. Will the employee be asked to participate in an exit interview by HR?
Yes. We strongly encourage employees to participate in the Exit Interview Process. A representative from HR will be in touch with the staff member to schedule a meeting with their HR Partner.

10. Who should I contact if I have questions about the employee departure process?
Contact your HR Partner or Office for Faculty Affairs if you have questions about the departure form or the exit process for employees:

<table>
<thead>
<tr>
<th>For Questions Regarding</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff, Temps &amp; LHTs/Weekly Employees</td>
<td>HR Partners</td>
</tr>
<tr>
<td></td>
<td>Elissa Brennan, 2-6443</td>
</tr>
<tr>
<td></td>
<td>Lisa Hoppie, 2-4579</td>
</tr>
<tr>
<td></td>
<td>Linda Picard, 2-2719</td>
</tr>
<tr>
<td></td>
<td>Maressa Patts, 2-6441</td>
</tr>
<tr>
<td>Faculty/Academic Appointees</td>
<td>Office for Faculty Affairs</td>
</tr>
<tr>
<td></td>
<td>Isin Ugur-Bastepe, 2-4533</td>
</tr>
</tbody>
</table>

11. The on-line form asks you to choose a “reason for leaving”. Which one should I select?
We encourage you to be very specific when choosing the reason for leaving since this information helps us better understand why employees are leaving. Typically, the reason you choose will be the same one indicated on the Wasabi/PS Termination Form used to take the employee off the payroll. For example: An employee who has resigned, you might choose a reason of “To relocate,” or “Manager dissatisfaction,” or “To take other employment”.

If you have further questions about which reason to choose, contact Trina Weekes in HR at 2-4368 or your HR Partner.
Notify Human Resources or Office for Faculty Affairs

Notify your HR Partner or Office for Faculty Affairs contact that you are planning to leave or transfer.

Provide Official Notice in Writing

Provide your manager with notice in writing that you are leaving. The letter should include your departure date (last day worked). It is customary to give your manager at least two weeks’ notice.

Develop a Transition Plan with Your Manager

Work with your manager to determine what work needs to be done before you go. Do you need to meet with the person who will be picking up your workload? Where do you keep files and other important information? Do you need to document procedures for your successor?

Your Department Administrator Completes the Employee Departure Form

Your Department Administrator will complete the Harvard Chan School Employee Departure On-Line Form, which must be completed for every departing employee. When the form is submitted, an e-mail is sent to specific offices to let them know you are leaving Harvard or transferring within the Harvard Chan School, or transferring to another School within Harvard.

Contact Harvard Benefits at 6-4001

Contact the Benefits Office for any questions related to your benefits and to obtain COBRA information. The office is located in Cambridge at 114 Mt. Auburn Street, 4th Floor. They can be contacted by phone (617) 496-4001 or in person. Call Center: M,T,TH,F 9am-5pm, W 10am-5pm. Walk-Ins: M-TH 11am-3pm. (Closed Fridays to walk-ins). For additional details click here.

Report any Absence in PeopleSoft Absence Management (for staff only)

Any remaining vacation or longer service vacation time will be paid out to you in your last paycheck. If you leave the University before the 16th of the month, you do not accrue vacation for that month. However, if you leave on or after the 16th of the month, your accrual is awarded. You can put all or some of your vacation payout dollars into your TDA account using the Salary Reduction Agreement Tax-Deferred Annuity Plan Form.
Employee Check List – Departure

- **Contact the Parking Office**

  If you park in an LMA and you are transferring outside of the Harvard Chan School or to another School within Harvard, you’ll need to contact the Parking Office at 2-1111. It’s important to check on this before you depart because you could continue to be charged.

- **Forwarding Address Upon Departure**

  Update your forwarding address in PeopleSoft through “Employee Self Service” to ensure W2 is mailed to correct the address. SPH Payroll **does not** handle this step. However, you may contact Central Payroll at 617-495-8500 with additional questions concerning your change in address information in PS. Also note, the non-SPH email address is required by Faculty Affairs. Please contact them if you have any questions.

- **Return all Harvard University Property**

  You must turn in all Harvard property including your Harvard ID card (unless staying at the University), keys, business cell phone, laptop computer, PCard, Corporate Card, **university records and research data** (paper or electronic), and any other Harvard property prior to leaving, to your manager or Department Administrator.

- **Harvard’s General Records Schedule (GRS) Applied to University Records**

  Harvard’s General Records Schedule provides guidance on university policy for all records generated by employees, including email, electronic records, and research data. Assistance with this process is available through the Archives and Records Management program. University records eligible for destruction need to be documented using an in-office destruction form. Harvard also recognizes the historic value of certain types of records, particularly from faculty. Contact Heather Mumford, Archivist, ext. 2-6206, heather_mumford@hms.harvard.edu, with questions related to faculty and historic records.
Employee Check List – Departure

- **Participate in the Exit Interview (for staff only)**

As part of our process for departing staff employees, we ask that you give us your valuable feedback.

A representative from HR will be in touch with the staff member to schedule a meeting with their HR Partner. [Click here to learn who your HR Partner is and how to contact them.](http://messageme.harvard.edu)

- **Unsubscribe from MessageMe Emergency Notification System**

To stop receiving alerts through MessageMe, go to [http://messageme.harvard.edu](http://messageme.harvard.edu), select Register/Update, and choose Opt-Out. This will deactivate your account.
Manager Check List – Departure

- **Notify Human Resources/Office for Faculty Affairs**

As soon as you are aware of and/or receive a letter from an employee that notifies you of the employee's intention to depart or transfer, please notify your Department Administrator and [HR Partner](#).

- **Obtain Official Notice in Writing**

If an employee tells you of their intent to leave, ask them to provide you with written notice of their resignation as well as their departure date. A minimum of two weeks’ notice is customary. Send the letter to your Department Administrator and HR Partner.

- **Department Administrator Completes the “On-line Employee Departure Form” located on the HR website at [https://hsph.me/hr-forms-employee-departure](https://hsph.me/hr-forms-employee-departure).**

The form identifies specific tasks that need to be completed when an employee departs or transfers. When the completed form is submitted, an e-mail is sent to specific offices, informing them that the employee is leaving.

- **Employee Contacts Harvard Benefits**

Advise the departing employee to contact Harvard Benefits at (617) 496-4001 located in Cambridge at 114 Mt. Auburn Street, 4th Floor for benefits questions or to obtain COBRA information.

- **Contact HUIT for Harvard Phone Changes/Telecommunications**

Work with [Harvard Phone (HUIT)](#) to address any telephone changes (voice mail, forwarding, etc.) for the departing employee if needed.

- **Update Harvard Depository Authorized Users**

Check if employee is an authorized user of a Harvard Depository. If they are, contact the Archives and Records Management Program to revoke privileges and update the account.
Manager Check List – Departure

- Develop a Transition Plan with Your Direct Report

Work with your staff member to determine what work needs to be done before they depart. Do you need to hire a temp to pick up their workload during the transition*? Ensure files and other important information is saved in a shared location and document procedures for their successor using job aids. In some instances, permission to access files or documents may be needed, but must be done in advance of the employee leaving.

*To request a temp using the FieldGlass (YOH) system, contact your Department Administrator or HR Partner for more information.

- Collect Harvard University Property

Obtain from employee his/her Harvard University property prior to their departure:

- Review all records, regardless of format, including electronic files, email, and research data
- Return Harvard ID cards to the ID office at Kresge, 1st floor
- Return Landmark Elevator Swipe Card to Giancarlos Troncoso
- Return keys to Operations in Kresge LL
- Return Corporate Card, PCard, and Petty Cash Receipts at least two weeks before departure to Sharon Reine, Gina Sanchez, or Lisa Parisi in the Office of Financial Services
- Return business cell phone
- Return electronic devices (computer/laptop, iPad, etc.)

*See telephone numbers under Who to Call for Help on page 13

- Reconcile Vacation Time and other Absences in PeopleSoft Absence Management (for staff only)

If an employee is leaving before the 16th of the month, they do not accrue vacation time for that month. However, if any employee leaves on or after the 16th of the month, their accrual is awarded.

...continued
Process an Additional Pay Form in Wasabi to Payout Remaining Vacation Time

If an employee is being paid out for regular vacation and longer service vacation, the Department Administrator must complete two separate Additional Pay Forms in Wasabi:

- For Regular Vacation: Additional Pay Form with a VAO earnings code reason
- For Longer Service Vacation: Additional Pay Form with a LSO earnings code reason

All benefits-eligible employees are entitled to have their remaining vacation and longer service vacation time paid out when leaving Harvard. Remember the last months accrual for the employee based on their end date.

Since the employee can also put their vacation payout into their TDA using the Salary Reduction Agreement Tax-Deferred Annuity Plan, please be sure to place this note in the comments section of the Additional Pay Form:

“When processing the Additional Pay Form in Wasabi, attach the completed form to the action with a note in the comments section that some or all vacation payout dollars will be placed into their TDA.”

Payout Remaining Compensatory Time for Overtime Eligible Staff through PeopleSoft Time and Labor (not through Additional Pay)

Process a Termination Form in Wasabi

Process a termination form prior to the employee’s termination date. A delay in termination may end up in over-payment. The Effective Date field is the day after the last day worked even if it is a holiday or weekend.
OFS Payroll Termination/Vacation Payouts Process

Regular Termination/Retirement (Non-Exempt and Exempt)

1. Process Termination/Retirement in Wasabi
2. Process Vacation payment due to the employee at the time of termination*
3. Process Longer Service Vacation and any other Special Agreement payments due to the employee at the time of termination*
4. If the termination, vacation payout, longer service payout and special agreement is submitted prior to the effective date of the termination, payroll will process vacation payout and any other special agreement payments in the employees on cycle final paycheck
5. If the department is delayed in processing the termination, payroll will process a paper off cycle check mailed to the employee’s home address in PeopleSoft unless special instruction is received by the employee, the department or HR
6. When processing the Additional Pay Form in Wasabi, attach the completed Salary Reduction Agreement Tax-Deferred Annuity Plan form to the action with a note in the comments section that some or all vacation payout dollars will be placed into their TDA.

Involuntary Terminations (Non-Exempt)

1. Notify Payroll Office to make aware of the upcoming request
2. The department must enter and approve the hours to be paid into PeopleSoft
3. Process Termination in Wasabi
4. Process Vacation payment due to the employee at the time of termination*
5. Process Longer Service Vacation and any other Special Agreement payments due to the employee at the time of termination*
6. Payroll Specialist will process a request for the final off cycle paycheck. The check will include the final hours, vacation payout and any other payments due to the employee. **Note:** The hours must be entered and approved in PeopleSoft prior to Payroll requesting the off cycle check.
7. Checks are processed in Central on Wednesdays and Fridays, available for pick-up on Thursdays and Mondays, which is the next business. **These days are subject to change during holidays.** Payroll request to have all documents and actions submitted into Wasabi the **day before** in order to make the Central deadline 10:00AM.
8. Once check is processed in Central, Payroll Specialist will contact the courier service to pick up the check.
9. Payroll Specialist will contact the HR Partner when check arrives

*You’ll be required to use the vacation wizard tool that will include the detailed hours and hourly rate at the time of termination in the comments section.*
Involuntary Terminations (Exempt)

1. Notify Payroll Office to make aware of the upcoming request
2. Process Termination in Wasabi
3. Process Vacation payment due to the employee at the time of termination*
4. Process Longer Service Vacation and any other Special Agreement payments due to the employee at the time of termination*
5. Payroll Specialist will process a request for the final off cycle paycheck. The check will include the final hours, vacation payout and any other payments due to the employee.
6. Checks are processed in Central on Wednesdays and Fridays, available for pick-up on Thursdays and Mondays, which is the next business. These days are subject to change during holidays. Payroll must have all documents and actions submitted into Wasabi the day before in order to make the Central deadline 10:00AM.
7. Once check is processed in Central, Payroll will contact the courier service to pick up the check.
8. Payroll Specialist will contact the HR Partner when check arrives

Please be sure to complete the Employee Departure Form on-line.

*You’ll be required to use the vacation wizard tool that will include the detailed hours and hourly rate at the time of termination in the comments section.
Procedure to Access Email, OneDrive, or P: Drive

At a minimum of two weeks prior, the departing employee or student should always work with their manager to transfer all work related data/files to the shared drive for the department to access upon their departure.

Important! A departed employees’ OneDrive data and Outlook email data is automatically deleted 30 days after the last day worked. Access requests for this data must be included on the Employee Departure Form.

Be mindful that the employee or student may have had access to systems and other tools to complete the work. However, when this is not possible and the employee or student has departed unexpectedly, the department can request access to their email or files on the p: drive through IT. Should this occur, the Department Administrator will follow this process:

<table>
<thead>
<tr>
<th>What to do if there is consent from the employee or student:</th>
<th>What to do if there is NOT consent from the employee or student:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Contact the IT helpdesk by email to request the need. The email should contain their name, department, and username AND consent from the employee. The consent must be in writing when sent to IT.</td>
<td>1. Contact the IT helpdesk by email to request the need. The email should contain their name, department, and username.</td>
</tr>
<tr>
<td>2. IT reviews the request according to University policy and procedures: <a href="http://provost.harvard.edu/files/provost/files/policy_on_access_to_electronic_information.pdf">policy</a></td>
<td>2. IT reviews the request according to University policy and procedures: <a href="http://provost.harvard.edu/files/provost/files/policy_on_access_to_electronic_information.pdf">policy</a></td>
</tr>
<tr>
<td>3. Once approved, IT will communicate approval back to the department and grant access to the information.</td>
<td>3. IT notifies the appropriate offices/contacts (see below) to communicate the request and seek approval based on the type of user.</td>
</tr>
<tr>
<td></td>
<td>4. Once approved, IT will communicate approval back to the department and grant access to the information.*</td>
</tr>
</tbody>
</table>

*Access is only granted in rare instances when there is an urgent business need. Every effort should be made to request employee permission to files in advance of departure.*

<table>
<thead>
<tr>
<th>Staff</th>
<th>Faculty &amp; Academic</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Linda Picard 2-2719 <a href="mailto:lpicard@hsph.harvard.edu">lpicard@hsph.harvard.edu</a></td>
<td>Jennifer Ivers 2-1047 <a href="mailto:ivers@hsph.harvard.edu">ivers@hsph.harvard.edu</a></td>
<td>Erin Driver-Linn 2-3703 <a href="mailto:edriver-linn@hsph.harvard.edu">edriver-linn@hsph.harvard.edu</a></td>
</tr>
<tr>
<td>Michael Grusby</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Who to Call for Help

**Human Resources (For Staff/Weekly Employees)**
Linda Picard, 2-2719
Elissa Brennan, 2-6443
Lisa Hoppie, 2-4579
Maressa Pattis, 2-6441

**Faculty Affairs (Faculty/Academic)**
Isin Ugur-Bastepe, 2-4533

**Financial Services (Payroll)**
Sherina Epps-Grant, 2-3529
Stacey Haymon, 2-7695
**Staff/Weekly Employees**
TBH
**Faculty & Teaching Fellows**
Ann Howe, 2-7694

**Financial Services (Accounts Payable)**
**PCard/Corporate Card/Petty Cash**
Sharon Reine, 2-7693
Gina Sanchez, 2-0564
Lisa Parisi, 2-2488

**Operations Office**
Alex Machaieek, 2-6053
Alyce McEachen, 2-3682

**Center for the History of Medicine**
**Archives and Records Management Program**
Meghan Kerr, 2-6194
**Archivist, Harvard Chan School**
Heather Mumford, 2-6206

**Terminate Systems Access**
Wasabi,
wasabi@sphofs.harvard.edu

**Oracle and OBI Financial Systems**
Amy Kelly,
akelly@hsph.harvard.edu

**GMAS**
Kathleen Sullivan, 2-8187

**PeopleSoft, QlikView, YOH**
Trina Weekes, 2-4368
Joanna Duque, 2-7241

**IT Helpdesk, 2-4357**
helpdesk@hsph.harvard.edu
**HUIT-Harvard Phone/Telecommunications**
harvardphone@harvard.edu

**Harvard Benefits**
6-4001

**Security Office**
TJ Moon and Ryan Pitt
2-1040 FXB Building

**Harvard ID Office**
2-0389 Kresge Building
5-3322 Cambridge

**LMA Parking Office**
2-1111