OFF-BOARDING

POLICY

For all staff in Education and Training Boards Ireland
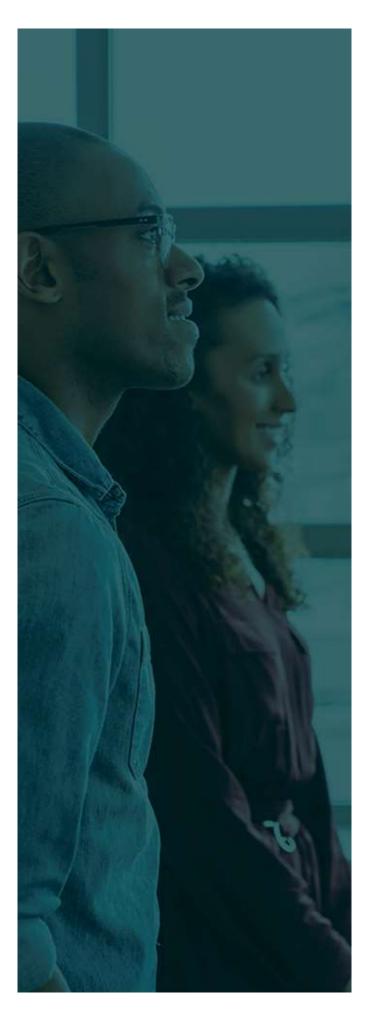
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1. INTRODUCTION

Our "Off-boarding" is just as important to Education and Training Boards Ireland (ETBI) as our "Onboarding" process. We want to ensure that the employee has a positive and respectful experience when they are leaving ETBI.

The purpose of this policy is to outline that when an employee leaves due to resignation, retirement or involuntary termination, a series of actions must be initiated to ensure that all aspects of employment - email and electronic access, use of ETBI property and materials, payroll and personnel records - are properly managed.

ETBI's Off-Boarding Policy provides an off-boarding flowchart and guidance document to help human resources (HR), managers and the information technology (IT) section understand the process.

2. SCOPE

This policy applies to all employees who are involved in the off-boarding process in ETBI.

3. EXITING PROCEDURES

Employees Responsibilities

1. Notifying their line manager directly through a conversation of their resignation.
2. If the departure by the staff member from ETBI is voluntary, they must inform HR in writing of the decision with sufficient notice that is stated on their employment contract.
3. Prepare the handover document for the section.
4. Organise with IT to return all ETBI's equipment on or before their last day to ETBI, Piper's Hill, Naas, Co Kildare.

5. Submit expenses on Zoho People before leaving.

Line Managers Responsibilities

1. Contact the HR department to discuss the next steps.
2. Inform their team that the employee is leaving.
3. Discuss the handover documentation with the employee.

Human Resources Responsibilities

1. If the departure by the staff member from ETBI is involuntary, HR will inform the staff member at least 3 months before their contract end date.
2. HR will create an internal communications plan to deliver news of the exit to relevant people in their department and the General Secretary.
3. HR will complete an exit interview with the staff member.
4. HR will send an email to payroll with a notification of the last payday and remaining annual leave.
5. Zoho People will trigger an email to IT informing them of the employee's departure date and providing a guidance document on the offboarding procedures.
6. HR will remove their access from Zoho People after expenses have been paid.

IT Responsibilities

The following steps are taken by the ICT Officer:

- Disable the email account.
- Remove employee's name from email-group distribution lists, MS Teams, internal/office phone lists and website.
- Disable computer access and access to systems, including any internal department systems, social media accounts, Sharepoint, Room booking app "Skedda", databases, etc.
- Disable phone extension/voicemail and mobile phones.

Payroll Responsibilities

It is the responsibility of the finance team to ensure:

- Employees receive their final salary including annual leave owing.
- Employees receive the payment of their final expenses within the nearest expense payment date.
- Revenue is notified of the exit date.

ETBI Property

Employees are required to return all ETBI property to the IT Department, including identification, keys, computers/laptops, mobile and other equipment on or before their last day of work.

The cost of returning equipment is the responsibility of the exiting employee. Where the exiting employee wishes to keep equipment such as desks or chairs, this must be requested in writing and an outstanding cost agreed upon with the internal Director of Organisation, Support and Development.

Additional Assistance

The Offboarding process can be a stressful time. ETBI can refer the exiting employee to the Employee Assistant Programm (EAP) in the event they require additional support. ETBI's Employee Assistant Programme (EAP), provided by Spectrum Life, can help with financial and legal support, emotional support/counselling, as well as other resources and support services that employees may need while exiting from ETBI.

4. REVIEW OF THE POLICY

There will be a review of this policy two years after its introduction or earlier if deemed necessary by ETBI management.

Employee

Letter of Resignation is provided to manager

Handover document is completed

Equipment return date is agreed with the IT Officer

Exit is communicated to the relevant staff

Final expenses submitted before the exit date

Reporting Manager

Informed HR of exit and discussed the next steps

Inform the relevant team of the exit.

New designated approver is communicated to HR for the purposes of Zoho People and P2P, if applicable

Human Resources/Payroll

Exit date agreed

Staff member is informed of exiting procedure

Exit interview is completed

IT and Facilities departments have been notified about upcoming exit.

Access to Zoho People is removed

New designated approver has been applied on Zoho People if applicable

Exit date and annual leave is sent to payroll

Expenses are paid in the next expense payment

Revenue is notified

IT Officer/Facilities

A date is arranged for equipment return

Equipment is checked and cleared.

Access to Microsoft 365 applications including all sharepoint and onedrive access is removed

Access to all other ETBI software is removed

Template for returning equipment is completed and filed

Organisation chart is updated

Staff member is removed from MS teams