# CTS_ User Manual _ ELE _USI Separations

## Manage USI Employee Exit Dashboard

**Country:** USI

**Entity:** All

**Region:** All

**Serviced by**: CTS in India supporting US

**Overview:**

This document outlines the process which needs to be followed in order to use the USI Employee Exit Dashboard by the 'Resigned Professionals'. The CTS USI Separation Analysts are responsible for processing the USI separations based on the information received from the primary stakeholders. After a sanity check they would roll out the same information to the secondary stakeholders.

**Key Words:**

Manage USI Employee Exit Dashboard, CTS USI Separation Analysts, USI Employee Exit Dashboard, User Manual, Resigned Professionals, Resignation, USI Separation

Defined Words:

- CTS USI ELE Separations Analyst – Core Talent Services USI Employee Lifecycle Events Separations Analyst is the one who will review the exit information and process the respective exit. Analyst is owner of the exit from the time of resignation to the closure of all formalities along with issuance of reliving letter.

- Primary Stakeholder- This role is played by the stakeholder who is providing exit initiation inputs to the USI Separations team by sharing the information in their respective dashboard. The inputs flow to the primary stakeholder after a professional resigns on the TOD. Based on the information provided, the separations team will review and initiate the exit case to other stakeholders.

  Below is the Function wise role specification:

  a) Enabling Areas: Counselor
  b) Global: Counselor
  c) TAX: Engagement Specialist
  d) AERS: CRM
  e) FAS: CRM
  f) Consulting: CRM

- Secondary Stakeholders – They are those stakeholders who work on the inputs shared by the primary stakeholders. They provide inputs / clearances from their team's perspective in the secondary stakeholder's dashboard. Upon receiving the final calculations and a no dues pending clearance from the Finance and Treasury (If applicable), the USI Separations team issues the relieving letter. This clearance is shared by the stakeholders after the last working day only.

List of Secondary Stakeholders**:**

a) Amex
b) Finance
c) Treasury
d) CE Gym
e) Leaves Team
f) CPA
g) Compensation and benefits
h) Badging
i) Operations
j) Policy and Compliance
k) Transport
l) ITS

**Work Intake Method:**

1. The resignation process is triggered when a 'Full Time Employee' on USI headcount resigns and provides information on the resignation form at Talent on Demand.

   a) The professional will receive an acknowledgement of the resignation and a link to the employee dashboard. This is an interactive dashboard which contains the Exit Kit, Exit Guidelines & PF withdrawal forms.

   b) This dashboard will help the exiting professional to interact and check the status of his exit formalities with the primary and secondary stakeholders.

2. The exit case is assigned to USI ELE Separations Analyst as per the set guidelines. The USI ELE Separations Analyst reviews the case details in their respective queue and initiates the primary stakeholder clearance.

3. The primary stakeholders receives a dashboard link to update the exit information after discussions with the professional and respective business.

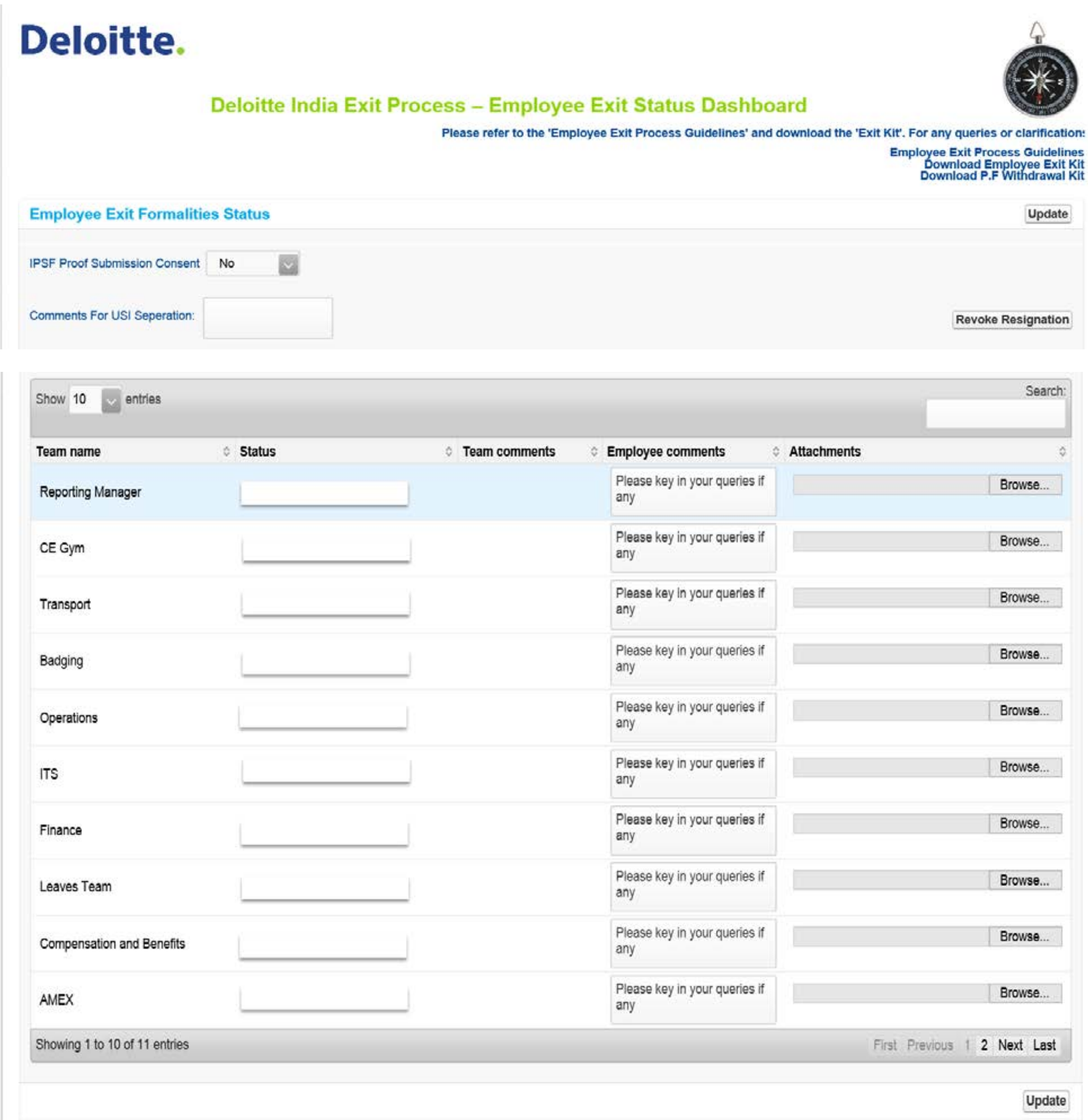
4. Upon receiving the completed inputs from the primary stakeholders. The exit inputs is then rolled out to the secondary stakeholders. The professional will be simultaneously notified over an email about his scheduled last working day with the firm.

5. Thereafter the cases can be viewed by all the secondary stakeholders and worked upon according to their SLA in their respective dashboards.

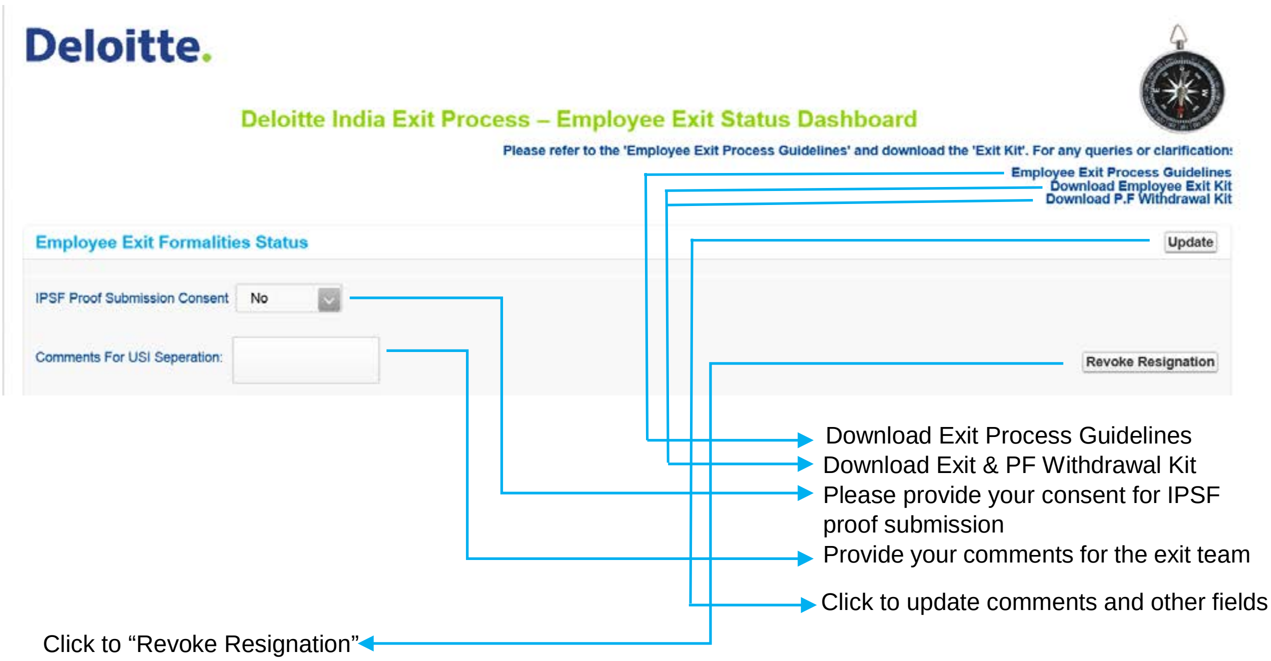
**Employee Exit Dashboard Overview:**

This dashboard is designed to be interactive and user friendly for all the end users. After the resignation is submitted on Talent on Demand, an acknowledgement of the resignation and a link to the employee dashboard is shared with the resigning professional.

Below image shows the dashboard view:

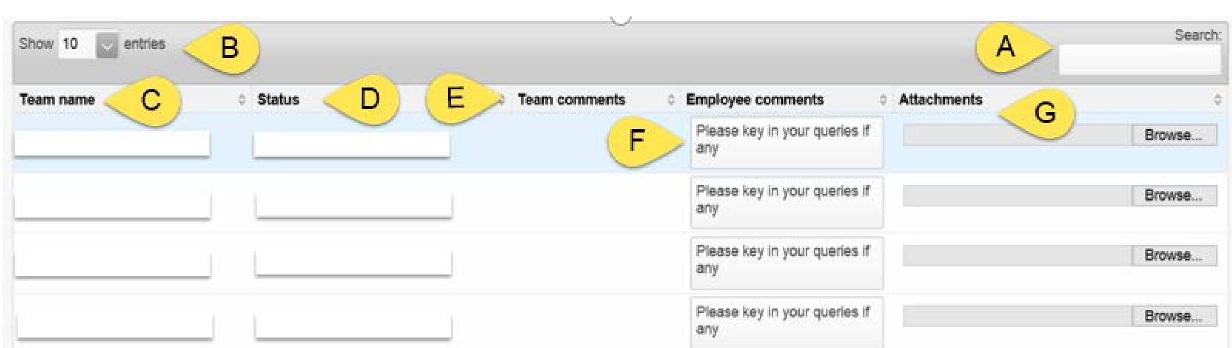


***First Section:***




***Second Section:***

- Once you log in to the dashboard, you will have the stakeholder list empty and the view will be as shown below.




**A -** Search Option field to search by team name or status

**B -** Option to select the number of entries per page

**C -** Field shows the stakeholders who are involved in the exit process

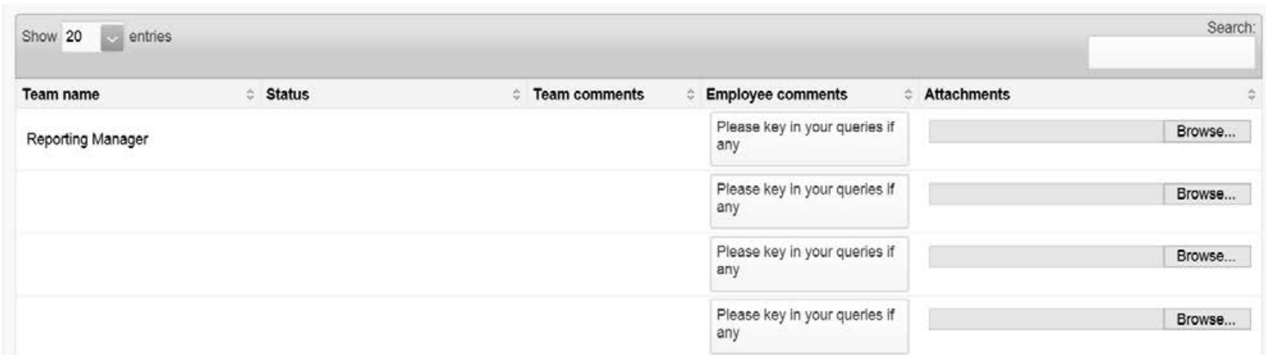
**D -** Field shows the stakeholders clearance status as per their respective SLA

**E -** Comments from the stakeholder to the employee

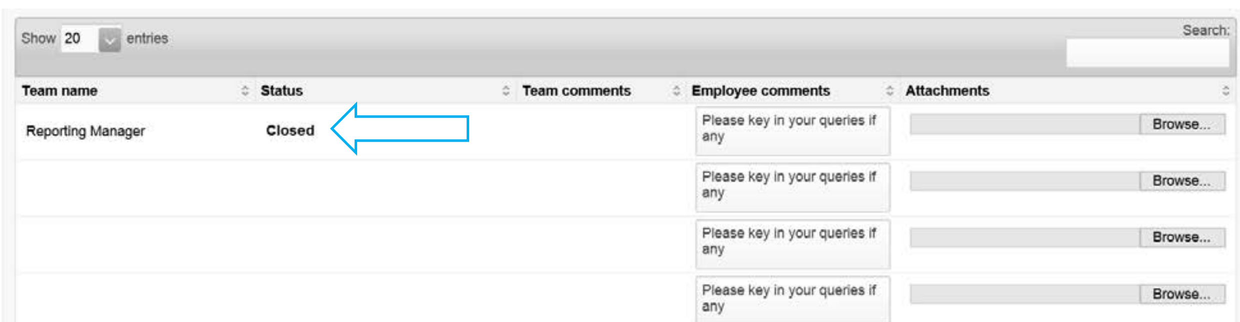
**F -** Comments from the employee to the stakeholders (If required)

**G -** Fields to share attachments with the respective stakeholders (If required)

- After the **primary stakeholder** clearance is initiated by the USI Separations Analyst, the dashboard would now show the primary stakeholder name and the current status. The status of the clearance will be shown after the primary stakeholder closes the case from his side and share the inputs with the USI Separations team.

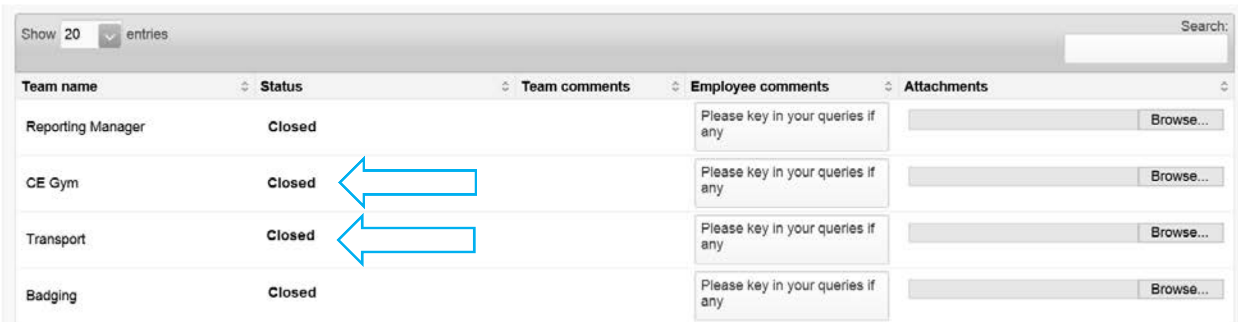



- Once the primary stakeholder closes the case, the status changes to **"Closed"** as shown below.




- The USI Separations analyst pushes the exit inputs to the **secondary stakeholders** and the employee dashboard view changes as shown below.

- Once the respective secondary stakeholder closes the case as per their SLA, the status changes to **“Closed”** as shown below.




**Note:**

- The stakeholders like ITS, Badging, Pedestal keys etc. will not be able to close the case until the assets are submitted to the team at the designated locations.
- The employee dashboard link does not work beyond your last working day.
- For any clearance related queries regarding the status please check with the concerned teams.
- The stakeholders will provide the clearance and update cases as per their respective SLA.
- Please download & refer to the “Exit Guidelines” and the “Exit Kit” before having conversation with the stakeholders.
- For any exit related queries, please reach out to Talent CIC at ‘2222’ or fill a query form on Talent on Demand.