1. **PURPOSE AND DESCRIPTION**

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| **Project ID** | SGL15009 | | **Project Name** | | | Associate Portal | |
| **Use Case ID** | UC – 028 | | | | | | |
| **Use Case Name** | Associate Exit – Separation by HR | | | | | | |
| **Purpose/Goal** | Capture associate resignation, transition plan and exit clearance, service letter, reliving letter along with exit interview details | | | | | | |
| **Description** | Associate can be separated by the HR with the help of exit process. It will be forwarded to his/her Reporting Manager/ Program Manager. Either Program Manager or Department Head can initialize the exit process and final closure needed from HR Head. | | | | | | |
| **Actors** | * Associate * Reporting Manager * Program Manager * IT * Admin * Finance * HRM / HR Head | | | | | | |
| **User** | * Associate, Program Manager, Reporting Manager, Department Head, HRM, HR Head | | | | | | |
| **Priority** | High | Frequency of Use | | | On Demand | | |
| **Includes** | NA | | | | | | |
| **Prepared By** | Sailaja Chelluri | | | **Date** | | | 11/04/2017 |
| **Reviewed By** |  | | | **Date** | | |  |
| **Last Updated By** |  | | | **Date** | | |  |

1. **TRIGGERS, PRE-CONDITIONS AND POST-CONDITIONS**

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| **Triggers** | When HR wants to separate the associate from the organization. |
| **Pre-Conditions** | * HR logged in to Associate Portal. |
| **Post- Conditions** | * Associate status has to updated with ‘Separation’ and account will be deactivated in HRMS * Organization resources(email, system, etc.) will not be accessed by the associate * Associate feedback (i.e. exit interview session) details should get recorded in application which should be visible only to HR Manager and HR head. |

1. **SEPERATION BY HR MANAGER**

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| User | System | Alternate flow |
| 1. HR manager Clicks on “Associate Resignation” from “Associate Exit” section. | * System displays below fields as pre-populated: * Associate Id * Name * Date of Join * Date of Resignation (Current Date) * Designation * Reporting Manager * Last working Date (it should display after submission the resignation based on configured Notice period) * “Reason” and “Reason Details” should be mandatory fields. * HR inputs resignation details and click on Submit button. * System notifies to Reporting Manager/ Program Manager, Department Head and HRM/ HR Head. | * HR inputs mandatory fields and click on Save as Draft. * On Draft notification should not go to Reporting Manager/ Program Manager, Department Head and HRM/ HR Head. |
| 1. Program Manager Login into application and go to “Pending Requests” | * Program Manager should see all the Resignation requests. |  |
|  | * Select relevant “Associate Resign” Associate record * System should displays the details of the selected Associate with below fields as read-only:   + Associate Id   + Name   + Date of Join   + Designation   + Project/Department   + Last working Date (will be calculated based on notice period) * In addition with, system should ask for below inputs: * Resignation recommendation * Program Manager gives Remarks and accepts the Resignation then it notifies to Reporting Manager, Department head, Associate and to all the service departments (Admin, IT, Finance, HR) |  |
| 1. Department head Login into application and go to “Pending Requests” | * System displays all the Resignation requests. * Select relevant “Associate Resign” Associate record * System should displays the details of the selected Associate with below fields as read-only:   + Associate Id   + Name   + Date of Join   + Designation   + Project/Department   + Last working Date (will be calculated based on notice period) * In addition with, system should ask for below inputs: * Resignation recommendation * Department head gives Remarks and accepts the Resignation then it notifies to Program Manager, Reporting Manager, Associate and to all the service departments (Admin, IT, Finance, HR) with last working date. |  |
| 1. Reporting Manager Logins into the application and go to “Pending Requests” | * System should displays all Resigned Associate list (Approved) * Select relevant associate * Click on “Click here to define Transition plan” hyperlink. It will navigate to “Associate Transition Submit Form” screen. * Reporting manager add the tasks and clicks Submit the Transition plan. * Application should notify to the Associate regarding the transition plan and the tasks need to be completed before last working date. |  |
| 1. Associate login into the application and go to “Transition Plan” sub-menu from “Associate Exit” menu | * System displays all the tasks need to be completed before last working date. * Associate has provide the inputs for each and every task in the transition plan and clicks submit. * System notifies the to the Reporting Manager and Program manager. |  |
| 1. Reporting Manager Logins into the application and go to “Pending Requests” | * System should displays all Resigned Associate list (Approved) * Select relevant associate * System should displays the details of the selected Associate with below fields as read-only:   + Associate Id   + Name   + Date of Join   + Designation   + Project/Department   + Last Working Date   + Transition plan * Reporting Manager verifies the status of each task under the transition plan and approves it. * NOC status from Reporting Manager should be updated as completed * Else some tasks are pending then Reporting Manager should update with proper Remarks with the Status as “Incomplete” to the Associate |  |
| 1. IT Department logins into Associate Portal and go to “Pending Request” | * System should displays all “Resigned” (Approved) details with IT Department * Click on particular Associate Resigned details. * System should displays the details of the selected Associate with below fields as read-only:   + Associate Id   + Name   + Date of Join   + Designation   + Project/Department   + Release Date (will be calculated based on notice period) * IT Department has to give clearance: * **No Dues** * **Remarks** * **Dues** * **Remarks** * After clearances, IT Department issues the NOC then application notifies to Associate and to HRM/ HR Head and Status should be updated as “Completed”. |  |
| 1. Admin Department logins into Associate Portal and go to “Pending Request” | * System should displays all “Resigned” (Approved) details with Admin Department * Click on particular Associate Resigned details. * System should displays the details of the selected Associate with below fields as read-only:   + Associate Id   + Name   + Date of Join   + Designation   + Project/Department   + Release Date (will be calculated based on notice period) * Admin Department has to give clearance: * **No Dues** * **Remarks** * **Dues** * **Remarks** * If Admin issues NOC clearance then application will notify to Associate and to HRM/ HR Head and Status should be updated as “Completed” |  |
| 1. Finance Department logins into Associate Portal and go to “Pending Request” | * System should displays all “Resigned”(Approved) details with Finance Department * Click on particular Associate resignation details. * System should displays the details of the selected Associate as mention along with checklist   + Associate Id   + Name   + Date of Join   + Designation   + Project/Department   + Release Date (will be calculated based on notice period) * Finance Department has to give clearance:   + **No Dues** * **Remarks**   + **Dues** * **Remarks** * When Finance Department issues the NOC then it should be notified to the Associate and to HRM/ HR Head and Status should be updated as “Completed” |  |
| 1. HRM logins into Associate Portal and go to “Pending Request” | * System should displays all Resigned (Approved) details with HR department * Click on particular Associate record * System should displays the details of the selected Associate with below fields as read-only:   + Associate Id   + Name   + Date of Join   + Designation   + Project/Department   + Release Date (will be calculated based on notice period) * HR Department has to give clearance: * **No Dues** * **Remarks** * **Dues** * **Remarks** * If HRM clicks on “Reject” button for a particular request then it should prompt for below inputs: * Status * Remarks * If HRM rejects the request then it should be notified to the Associate and the rest of the service departments with proper Remark. * Associate Exit Feedback section should visible to Associate only after gets NOC clearance from all Service departments except HR department. Associate has to login to the application and submit his feedback. * To issue NOC clearance, HRM has to fill the above checklist and other inputs * If HRM issues the NOC then it should be notified to the Associate, Reporting Manager / Program Manager * Upload the Associate service letters * Update Associate status to “Eligible to rehire / Not eligible for rehire” * Close the request |  |
| 1. Resignation NOC Summary | NOC Summary should be visible only to Associate and HRM/ HR Head |  |

1. **ALTERNATIVE FLOW**

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| Change in Last Working Date:   * Program Manager log-in into the application then click “Associate Resignation” sub-tab from “Associate Exit” menu, system displays associate details with Last working date. * Program manager modifies the Last Working Date (Prepone or Postpone), remarks and Submit the changes. * System notifies the change in Last Working Date to Associate, Reporting Manager, Department Head, HRM, HR Head and service departments.   Revert the Resignation:   * Associate login into the application then click “Associate Resignation” sub-tab from “Associate Exit” menu, if he/she clicks on “Withdraw the Resignation” chick-box then then application should prompt for the below fields to revert the resignation * Reason to withdraw * Remarks * If Associate clicks on Submit button then application should send notification to Reporting Manager/Program manager * Reporting Manager/ Program Manager has to approve the withdrawal. * If Reporting Manager/ Program Manager approves the withdrawal then system should notify to Associate, HRM/ HR Head, Reporting Manager/ Program Manager, Delivery Head and to rest of the service departments. |

1. **EXCEPTIONS**

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| NA |

1. **BUSINESS RULES**

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| * Notice period will be configured as a business rule * All department’s checklist should be database master table configurable * Status list should be database master table configurable. * Reasons’ list should be database master table configurable. |

1. **SPECIAL REQUIREMENTS**

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| NA |

1. **ASSUMPTIONS**

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| * Status dropdown box will be from master table * Reasons for Resignation dropdown box will be from master table * Reasons to withdrawal the Resignation |

1. **NOTES AND ISSUES**

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| NA |

1. **ACCEPTANCE CRITERIA AND TESTS**

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| * Associate status has to updated with ‘Resigned’ and account will be deactivated in HRMS * Organization resources(email, system, etc.) will not be accessed by the associate * Associate feedback (i.e. exit interview session) details should get recorded in application which should be visible only to HR Manager and HR head. * Service certificates should be uploaded by the HR * Associate status should be updated to “Eligible to rehire / Not eligible for rehire” |