From Welcome To Farewell: Maximising The Employee Life Cycle [Part 2: Offboarding]

Session FAQs

Global

Once you've set up offboarding checklists, is it possible to NOT trigger the checklist when offboarding an employee?	Currently no, your offboarding checklists will be auto-triggered based on how you've set the checklist up (team, location, all employee's etc.)
Can you set a task to a team?	No tasks can't currently be assigned to a whole team. Bear in mind, each person who is issued a task would be prompted to action this.
I don't see checklist settings under my settings. Is this only applied to Platinum package?	Under your Settings -> Menu Customisation, you'll find Tasks enabled for visibility.
Does the asset checklist link to the asset register?	The checklist won't link to the asset register but is designed to bring that to your attention allowing you to return or recover the assets.
What is the systems trigger for commencing offboarding?	You have to manually trigger offboarding under the employee's file
Can you send the exit interview after they have left the organisation? Often people are more honest after they leave.	No the interview will only be able to be captured when the employee is active. It is feedback that we will pass onto the team though.
What is the work around if i do not want the lengthy question survey?	You can edit the existing template by removing questions, editing questions etc. If you would like to create your own template, depending on your subscription type, you could opt to use a Custom Survey instead of our Exit Interview feature.
We have too many employees to send the exit interview manually, can this be an automatic sent?	Ideally yes and that is feedback that has been submitted in the past. We will submit your feedback and hopefully it will become available in the future.
Can we enter their verbal comments on the exit interview form on their behalf (after an inperson exit interview)?	You won't be able to add comments for the employee but you could store that within the management notes tab within their profile.
If using this exit interview template, will this be recorded on the employee file? As opposed to via 1:1's where the only person that can view that is the person who conducted the exit interview?	Currently the Exit Interview template will not be stored under the employee's file and will remain under the module itself for record-keeping purposes. You can download the interview responses and upload this to their Uploaded Documents tab.
I understand that the custom survey cannot be saved though, so what is a work around?	Do you mean you can't save the Custom Survey to the employee's file? You are able to download the responses to your Survey and upload this under your employee's uploaded documents tab. Alternatively, all newly created Custom Survey templates will be saved to your platform and you can re-use this in future.

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From Welcome To Farewell: Ensuring a Smooth Farewell | Session FAQs (continued)

Is there capacity to make comments on the survey when you conduct a face to face interview after the survey?	You can add a comment under your Exit Interview responses specifically. Alternatively, you could couple this with a 1:1 and apply comments and documents to this 1:1.
If multiple people are assigned tasks on the checklist, does the task disappear from everyone's task list once one person completes it?	No each person assigned the task would be responsible for completing that task (each person assigned has their own task).
Is there a report on the exit data where responses are collated?	If you are referring to the Exit Interviews, you can download the data via Engagement > Exit Interviews > Download.
We have been advised that the custom surveys are unable to saved as a template to forward to all employees, is this correct?	You are absolutely able to create new Custom Survey Templates to then be used in future. Within your custom Survey module, click over to the Templates tab and click New Survey Template. This will then save as a Custom Template.
My termination types available in Hero are very different to yours?	If you're seeing different options, please raise a support ticket so we can look into this further for you.
When I do offboarding, the option of employee access does not appear ? How do I have this option added to my offboarding?	This may be due to the date of the termination. If you select a date a little further into the future, do the options appear?
Is it possible for people to continue to access their pay information - or should we include in the tasks for employees to get them to download their payslips?	All terminated employees have access to their Hero Passport. Click here to learn more.
When I do offboarding, I don't have the payroll cut off date option either?	You need to set a future date and you'll need to be using Employment Hero payroll for this.
What time was the automatic employee access set to when you set a date only?	Their cut off time will be midnight of the date selected where a time has not been selected.
Does it have something to do with my access level as a admin?	This won't have anything to do with your access level. As an admin you are able to perform these functions if you have Employment Hero Payroll connected.
We do our payroll with MYOB, where do I set the termination date in EH or in MYOB? I think I can't process payroll in MYOB if the termination date has been set.	You will need to firstly offboard in EH HR and set the termination details. The termination date will then sync to MYOB.
Can the payroll cut-off date be configured within Payroll?	The payroll cut off date needs to be set in the HR system and then once the cut off date is met the access is revoked.
Can you reactivate an employee's access after termination?	Yes you can. You can filter to view any terminated employees and from Actions, you would then see the option to Re-activate.

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Can you change the payroll date after you initially set it?	The payroll cut off date needs to be set in the HR system and then once the cut off date is met the access is revoked
Can you reactivate an employee's access after termination?	Yes you can. You can filter to view any terminated employees and from Actions, you would then see the option to Re-activate.
Can you change the payroll date after you initially set it?	You would need to remove the termination and then re-offboard.
Where are the candidates pulled from (beta option)?	Candidates who create a Swag jobs profile, and opt into this.
Can you generate a report with the responses to your exit surveys for a specific time period, that will show trends etc.?	Currently no. You are only able to download all responses for each Exit Interview template issued.
If you select termination date is the same as last day what time is the default?	If the termination date is today's date, you won't be able to set a date and time and access will be cut off immediately.
When you cancel offboarding does it delete all distributed tasks from the offboarding checklist automatically too?	You will have the option to cancel any off boarding tasks tied to the employee.
Thanks for your response re: asset register - if we do have Xero and manage assets there, can that register be connected with EH to populate its Asset Register?	It can't be connected but you could import those assets into EH to have them stored there but there is no connection between the two.
What is the best option for a staff member that is going on long term leave?	I would just have them put leave in the system, and ensure the accruals are correct. You can of course offboard them and then reactivate them but that is up to you.
How often are reminders sent?	If you are referring to reminders sent for outstanding tasks, people can manage the frequency of these individual reminders under settings > notifications > notification settings/notification frequency
How do I add my signature to the HR documents e.g. in the Confirmation of Resignation template?	It depends on the document type when you have created it. Please see the Content Management System Webinar here which talks to this in more detail.
So this could mean multiple team member might all complete the same task if assigned to a team?	If you were assigning a task to multiple people then yes it could. Tasks actually cannot be assigned to a team (that is not an option when creating a task). Dependent on the task you'll want to consider whether you assign this to an individual from the dropdown, or any of the other options
If I need to change the termination date of an employee, do the dates of the offboarding tasks update too? Or do I need to cancel the first termination and then trigger another offboarding again?	As you cannot edit the termination date, you would need to cancel your offboarding and re-do their termination. This will then update your checklist task due dates.

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If there was a timesheet submitted for last week and the employee was terminated before they were paid, will they still be paid based on their timesheet?	If the timesheet is within that pay period, it will be available to be included in the pay run even though the employee is terminated, and can then have that timesheet paid for you.
I have a team member joining again. We only started using EH a year ago, so this team member is not yet synced. What do you recommend, we are using MYOB for payroll.	If they have an existing MYOB employee file but never had an EH HR file, you can re-activate their MYOB file, create a new EH HR employee file and reach out to Support who will be able to map these two employee files for you!
As an admin, if I update the notification settings / notification frequency - will this adjust just my settings, or will it filter down to others in the organisation?	Under your Notification Settings & Frequency section, each individual is responsible for managing their own notification settings. If an Owner/Admin adjusts these settings, they will only apply to new employees and not existing. We strongly encourage each user to set their own settings.
What I meant was if you tick termination date is same as resignation date, for example 31 August, when will access be cut off, at 5pm? midnight?	Thank you for clarifying! The default access cut-off time is midnight on the termination date. So for the day of 31st August, they won't have access to the normal EH HR Platform.
How does EH handle the different periods once a team member joins the company again? Is it clearly separated?	If an employee rejoins and the dates fall outside the typical pay periods then there would be some manual adjustment required.
How do you create an ad-hoc pay run for an offboarded employee in Hero Pay?	You can either have an ad-hoc pay schedule or use the pay schedule for that employee. When you create, rather than adding all staff, just add that person and then process the pays you need
If an employee username is their work email address, should they be advised to change it to a personal email address before they finish with the company?	Yes you can change this to their personal email to allow access to their Hero Passport
Can you send them a custom survey after termination?	Not at this current time. This should be completed prior to termination.
Can the company regain the unused Hero Dollars?	Once Hero Dollars have been issued to an employee, they are not able to be returned to the employer. Once assigned, they are owned by the individual user so they can use them within the discount store.