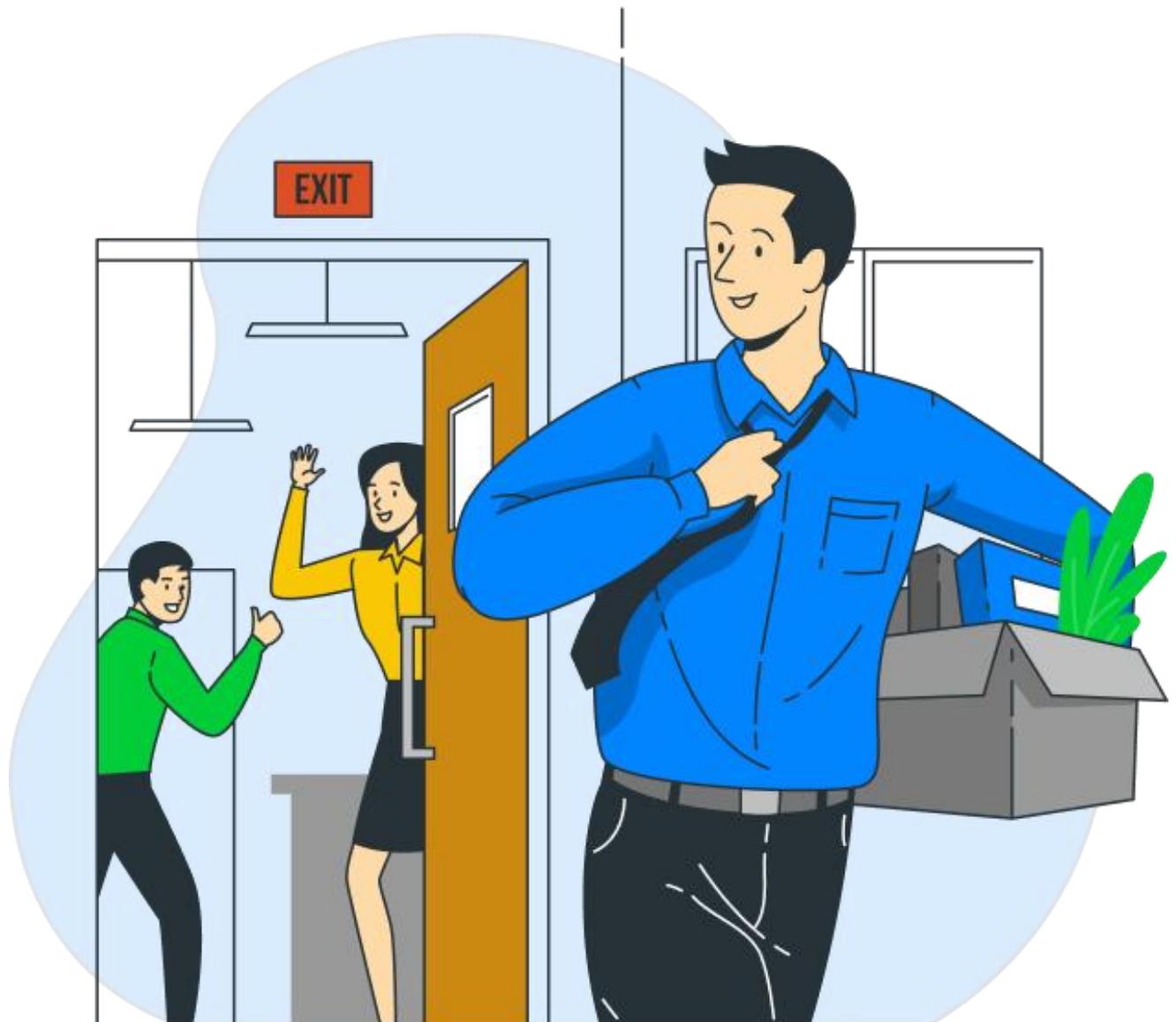




Employee Offboarding with Zimyo.



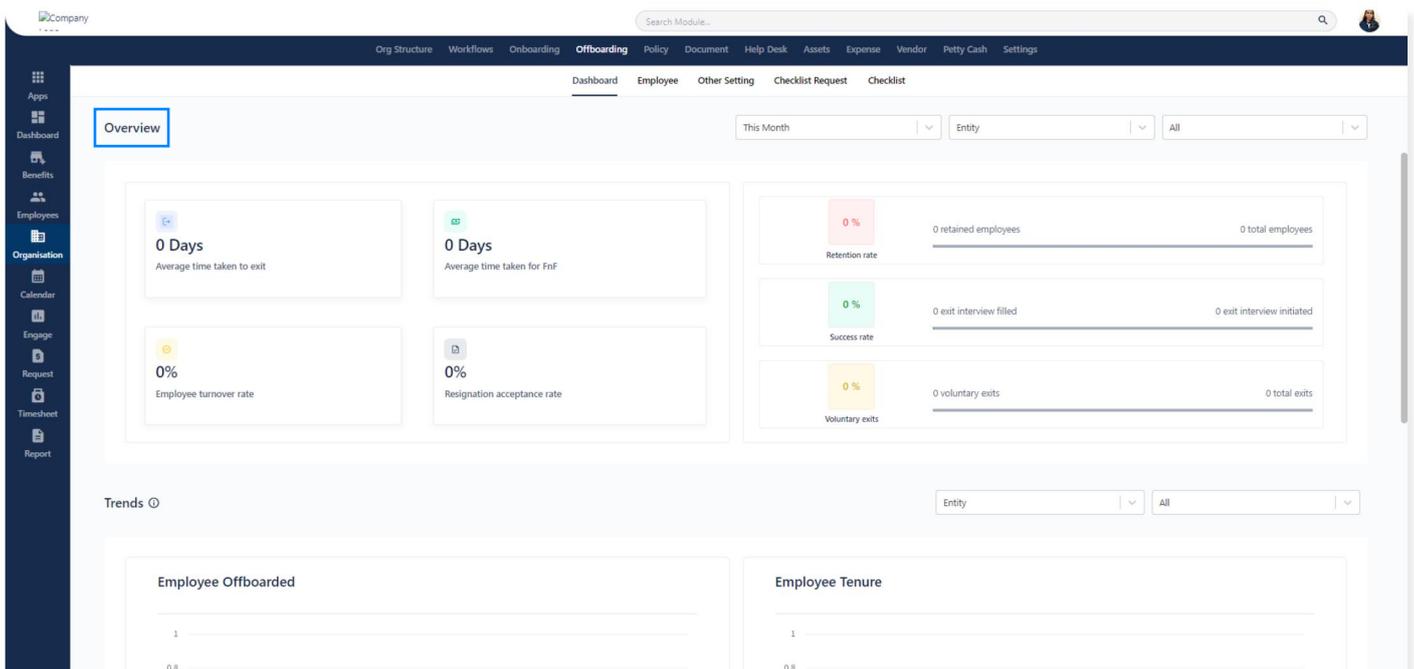
Offboarding:

Off-boarding process is a series of steps that streamline the formal separation of an employee from a company while taking care of various dimensions such as expertise sharing, exit interviews, asset recovery, and finishing up the necessary forms and formalities. It can have a major impact on your branding.

Your employees might leave the organization through resignation, retirement, or termination. The off-boarding process must align with every scenario and provide employees a positive experience that makes them feel valued.

In Zimyo HRMS you can seamlessly manage all these mentioned scenarios seamlessly. To access the Off-boarding module, follow below mentioned steps:

When you open the off-boarding module, you land at the overview page as shown below. Here, you can access and identify important metrics and analytic related to attrition and exit of employees in your organization and use these insights for a better future experience.



02 Overview:

In the overview section, you can view following metrics:

Employee Off boarded: Shows the count of off boarded employees in last 30/60/90 days.

Total Employee Left: Shows the count of employees off boarded vs manual exit.

Manual Exit: Shows the count of employees manually exit in last 30/60/90 days.

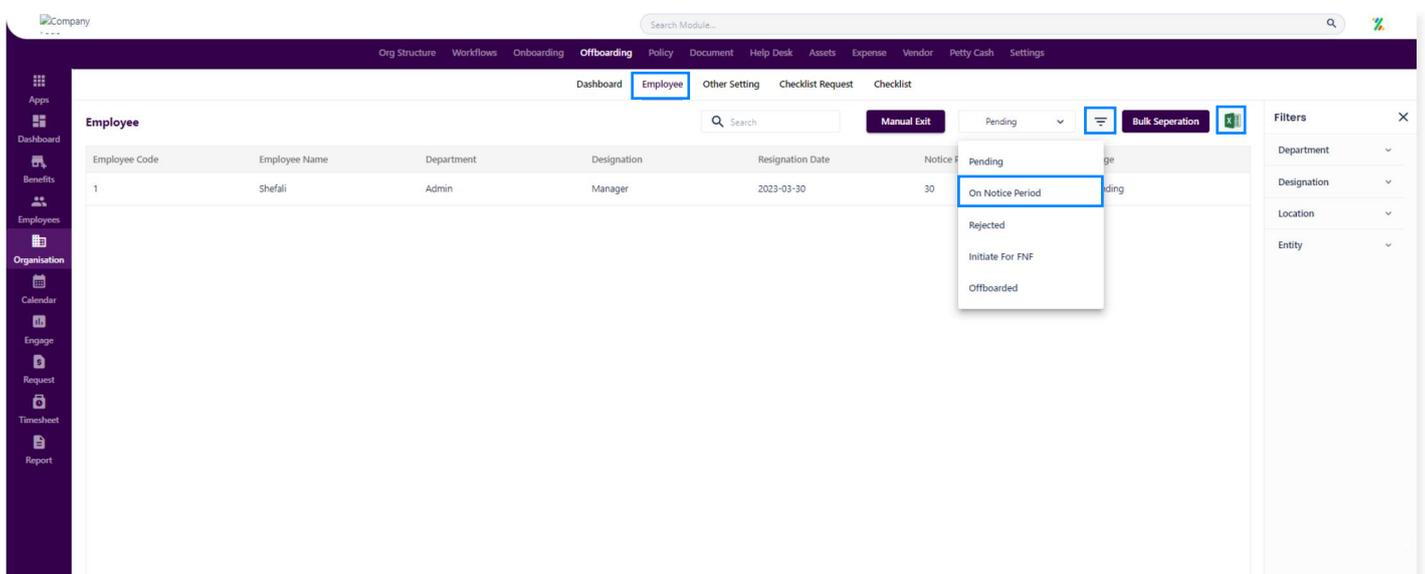
Average Off boarding Time: Shows the average time taken from the resignation date of the employee to the FNF settlement.

Off boarding Status: Shows the count of employees as per the off-boarding status i.e. Pending, Notice period, FNF, Rejected or Off-boarded.

Separation Reasons: Shows the reasons of separation. This may give an indication to the employer about the reasons for which employees are leaving the organisation and take steps in that direction if need be.

02 Employee :

In this section, you can view the employee details as per their status, download the report, initiate bulk separation and take actions to send exit interview, clearance form, assets clearance etc.



The screenshot shows the 'Employee' section of the Zimyo application. The interface includes a top navigation bar with various modules like 'Org Structure', 'Workflows', 'Onboarding', 'Offboarding', 'Policy', 'Document', 'Help Desk', 'Assets', 'Expense', 'Vendor', 'Petty Cash', and 'Settings'. The 'Employee' module is currently active, showing a table of employee details. A dropdown menu is open over the 'Pending' status of the first employee, listing actions: 'On Notice Period', 'Rejected', 'Initiate For FNF', and 'Offboarded'. The table has columns for Employee Code, Employee Name, Department, Designation, Resignation Date, and Notice Period. The first row shows Employee Code 1, Employee Name Shefali, Department Admin, Designation Manager, Resignation Date 2023-03-30, and Notice Period 30. The interface also includes a search bar, a 'Manual Exit' button, a 'Bulk Separation' button, and a 'Filters' panel on the right side.

Employee Code	Employee Name	Department	Designation	Resignation Date	Notice Period	Status
1	Shefali	Admin	Manager	2023-03-30	30	Pending

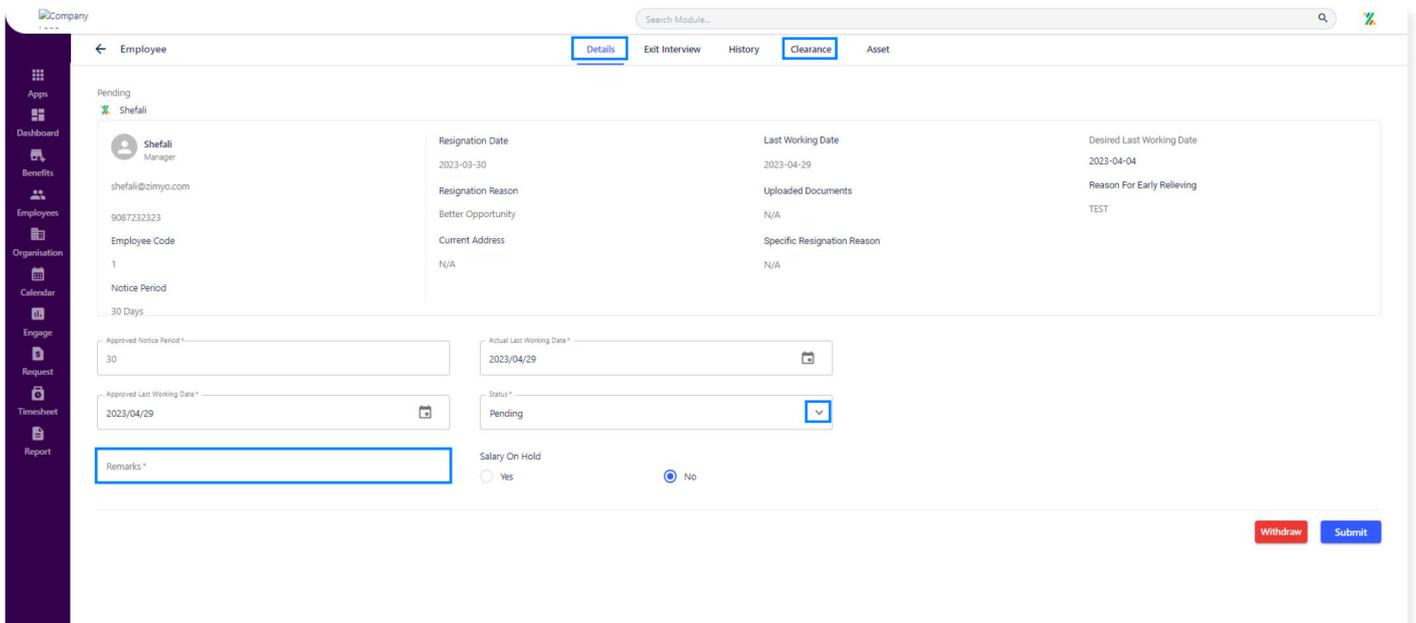
When you click on the employee's name a pop-up will appear, where you can take few actions in the off-boarding process as described below:

Initiate Off boarding: You can review and accept the resignation request raised by the employee here.

Exit Interview: In this section, you can take an exit interview to understand the reasons for off-boarding.

Clearance Form: You can share the clearance form to the employee from here.

Asset clearance: You can initiate the asset clearance from here.

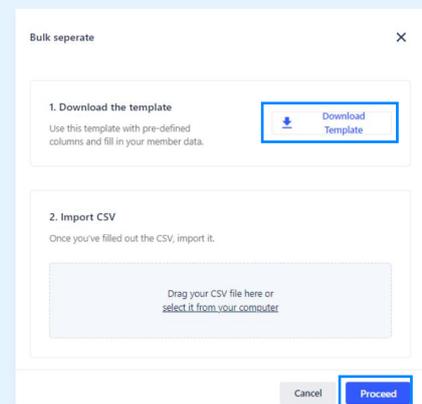


The screenshot shows the 'Employee Clearance' form for Shefali, Manager. The form is titled 'Employee' and has tabs for 'Details', 'Exit Interview', 'History', 'Clearance', and 'Asset'. The 'Clearance' tab is active. The form contains the following fields:

- Employee Information:** Name (Shefali, Manager), Email (shefali@zimyo.com), Employee Code (9087232323), Current Address (N/A).
- Resignation Details:** Resignation Date (2023-03-30), Resignation Reason (Better Opportunity), Specific Resignation Reason (N/A).
- Working Dates:** Last Working Date (2023-04-29), Desired Last Working Date (2023-04-04).
- Documents:** Uploaded Documents (N/A), Reason For Early Relieving (TEST).
- Notice Period:** Notice Period (30 Days).
- Approval Fields:** Approved Notice Period (30), Actual Last Working Date (2023/04/29), Approved Last Working Date (2023/04/29), Status (Pending).
- Remarks:** A text area for entering remarks.
- Salary On Hold:** Radio buttons for Yes and No (No is selected).
- Buttons:** Withdraw (red) and Submit (blue).

Bulk Separation: You can take actions to bulk separate employees.

“Bulk Separation” allow user to take actions to bulk separate Employees.



The screenshot shows the 'Bulk separate' dialog box with the following steps:

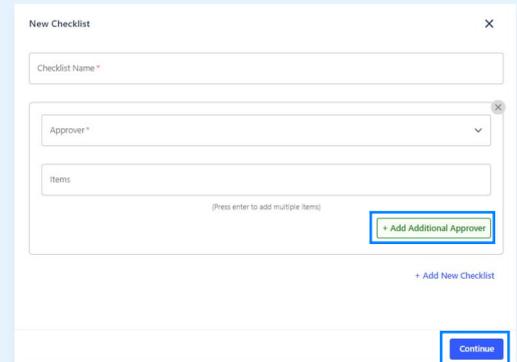
- 1. Download the template:** Use this template with pre-defined columns and fill in your member data. A 'Download Template' button is available.
- 2. Import CSV:** Once you've filled out the CSV, import it. A text area for uploading the CSV file is provided, with the instruction: 'Drag your CSV file here or select it from your computer'.

Buttons: Cancel (grey), Proceed (blue).

03 Checklist :

You can configure settings related to the off-boarding process. You can create different checklists for assets clearance as per applicability.

“Create New ” allow user to create different checklists for assets clearance as per applicability.



Other Settings:

Few other settings can be configured here, like:

RM can resign on behalf of employee: By enabling this, you authorize the reporting manager to resign on behalf of his/her team members.

Auto-trigger Exit Form: You can set auto trigger for the exit form before ‘n’ (configured number) days of last working days.

Checklist Reminder on last working day: A reminder will be sent to ensure checklist clearance acknowledgement.

Automate Checklist Trigger: You can automate the process of checklist trigger from here before ‘n’ (configured number) days of last working day.

