How to Handle Employee Departure

TOOLS:

- DATABASE USERS & TEAMS
- TODAY PAGE
- ACTIVITIES
- REPORTS
- TEAM NOTICES
- NOTE TEMPLATE

Observation: Employee departures are either incredibly frustrating or for the best. Either way, these are the steps you'll need to take to remove your ex-employee's access to the CRM and reassign their responsibilities.

Directions:

1. To remove access from an ex-employee, change the password and email associated with the Redtail user account.
   MANAGE YOUR ACCOUNT > MANAGE DATABASE USERS & TEAMS > ACTION ICON > CHANGE PASSWORD
2. Reassign or delete activities in bulk from the Today page.
   TODAY > ACTIVITIES > 'ME' > SELECT THE NAME OF THE EX-EMPLOYEE > REASSIGN/ DELETE
3. Remove or replace that employee on any teams they were on.
   MANAGE YOUR ACCOUNT > MANAGE DATABASE USERS & TEAMS > TEAMS > EDIT
4. Re-assign open workflow tasks to other users.
   REPORTS > WORKFLOW REPORTS > WORKFLOW TASK REPORT
5. Re-assign tasks in workflow templates to other users.
   MANAGE YOUR ACCOUNT > WORKFLOW TEMPLATES > EDIT
6. Once you feel comfortable that a full transition has taken place, fully disable the user.
   MANAGE YOUR ACCOUNT > MANAGE DATABASE USERS & TEAMS > DISABLE USER
7. Update the Team Notices with any notifications or messages to the office regarding the employee's departure.
   MANAGE YOUR ACCOUNT > MANAGE TEAM NOTICES > NEW TEAM NOTICE
8. Use a Note Template to record the employee's exit interview.
   CONTACT > QUICK ADD (+) > ADD NOTE > NOTE TEMPLATE

Result: Restricting access to a former employee is a safe guard for any potential issues they may create after their termination. Although it is rare, a disgruntled employee can retaliate on your office when allowed continuous access to your CRM. While it may be tempting to fully disable the user immediately, we recommend keeping the user active for a short period to ensure a smooth transition of activities and workflow tasks.

Helpdesk Link: *http://bit.ly/howtoRTU*

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Note Template

Exit Interview—Employee	
Category:	Administrative
Description:	Reason for leaving: Feedback for management; Employee may return?

Departing Employee Workflow

Target date = Date of termination of employment

STEPS	TASKS	OUTCOMES
1	**TO DO** *(On target date)* • Change email & password in Redtail • Reassign activities • Remove from teams in Redtail • Re-assign open workflow tasks • Replace user in any workflow templates • Retrieve keys & passwords • Conduct exit interview • Notify payroll/benefits • Send final pay	*No Outcomes Recommended

**All of Redtail's best practice recommendations in these "How to Handle" documents are intended to provide a starting point for each office or database to develop their own processes from. These are not intended to comprehensively represent industry standards or compliance requirements. Terminology used in the examples may vary depending on the Database Lists, Templates, and other personalizations unique to each database.*