USER GUIDE

HR Guide: People and Employee Lifecycle

Keep employee records right, manage changes, letters and policies, contractors, exits and clearance, and help employees use self-service.

WHO IT'S FOR

HR administrators and HR operators

COVERS

Employee records, org chart, employment changes, probation, matrix managers, documents and letters, contingent workforce, separations, exit clearance, assisting employees, self-service help

HR4ON · People First. Payroll Always. · ARTRA Technologies · 2 November 2026

About this guide

This guide is for the HR team. It follows the life of an employee in HR4ON: the employee record, changes to their job, the letters and policies they receive, the contractors who work alongside them, and finally their exit and clearance.

The screenshots show Meera Nair, the HR administrator of the Alpha Demo company, who can see every company. HR operators (for example Arjun Kapoor) have the same screens and buttons, limited to the company they look after. Where an HR operator sees something different, the guide says so.

Hiring and onboarding new joiners are covered in the separate guide *HR Guide: Hiring and Onboarding*. Pay, salary revisions and final settlements are covered in the payroll and compensation guides.

What you can do in HR4ON

- Find any employee, filter and export the register, and read every part of the employee file
- Add an employee, correct details and record dated assignment changes
- Check bank account and family changes that employees request
- Propose and track transfers, promotions, confirmations and other employment changes with effective dates and approvals
- Run probation reviews and give matrix managers access for people outside their line
- Generate letters from templates, publish policies and track acknowledgements, and verify documents
- Register contractors, manage vendor contracts and deployments
- Initiate exits, agree notice and last working days, run exit clearance, record exit interviews and close cases
- See where an employee's requests stand, and keep the self-service help answers up to date

Before you start

- Open HR4ON in a web browser on your laptop, or on your phone. On a phone you can add it to your home screen and use it like an app.
- Sign in with your **username or work email** and your password. Use **Accept an invitation** the first time, or **Can't sign in?** if you are locked out.
- What you see depends on your role. If a menu or button in this guide is missing for you, ask your HR administrator.

A red outline in a screenshot shows where to click or look.

Button Words shown like this are labels you will see on screen.

The screenshots use the HR4ON demonstration company, so the names, numbers and dates are examples. Names, companies, vendors and amounts in the screenshots are demo data.

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01 Getting started

Where the HR work lives in HR4ON, what an HR operator sees, and how approvals reach you.

1.1 Your home page

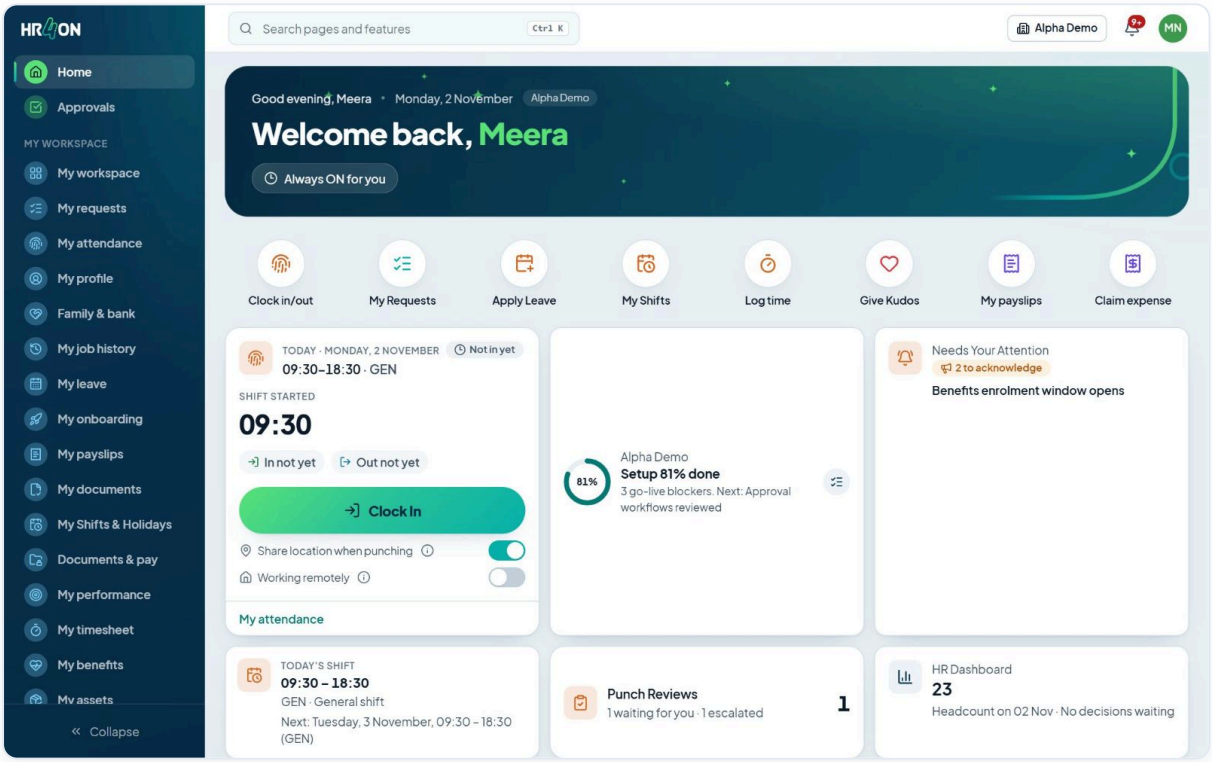
After you sign in, Home shows what needs your attention today: approvals, tasks, people joining and leaving, and quick actions for the things HR does most.

WHAT YOU SEE

- The **left menu** groups the HR screens. Most of this guide uses the **People** group: Employees, Org chart, Employment changes, Matrix managers, Documents & letters, Assets, Contingent workforce, Separations, Exit Clearance and Assist an employee.
- The **quick actions** on Home open common jobs in one tap, for example **Propose change** or **Initiate Exit**.
- Cards such as pending documents, employment changes and clearance tasks link straight to the right list.

HOW TO DO IT

1. Sign in with your username or work email and password.
2. Look at the cards on Home and select one to open the list behind it.
3. Use the left menu to move between HR screens.

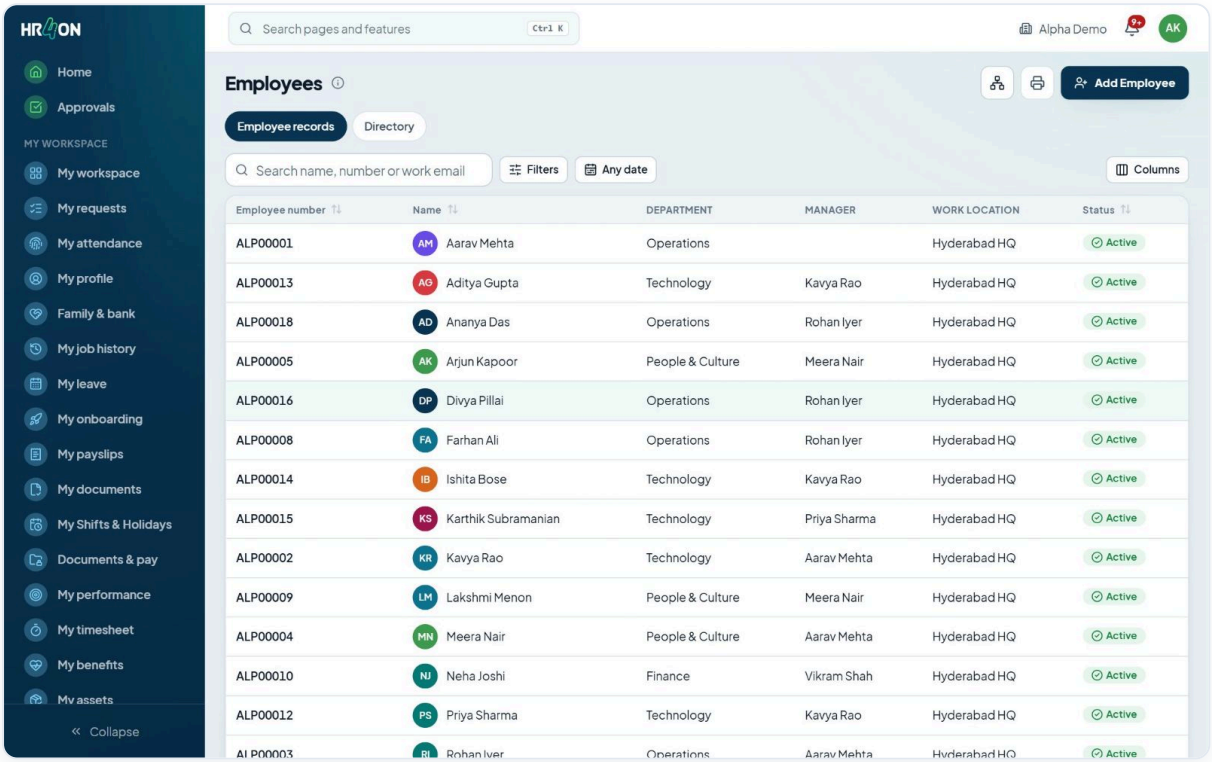


1.2 HR administrator and HR operator

HR4ON has two HR roles. The HR administrator sees all companies. An HR operator does the same day-to-day work for one company only.

WHAT YOU SEE

- An HR operator sees employees, changes, letters, contractors and exits **only for their own company**. Filters such as **Company** list only that company.
- Some settings stay with the HR administrator, for example letter signatories, custom profile fields and checklist templates.
- Neither role can approve their own request. HR4ON sends it to another approver.



The employee list as Arjun Kapoor, HR operator for Alpha Demo: only Alpha employees are shown.

1.3 Approvals that come to HR

Bank account changes, family detail changes, employment changes, letters and many other HR actions need a second person. When one is waiting for you it appears in **Approvals**.

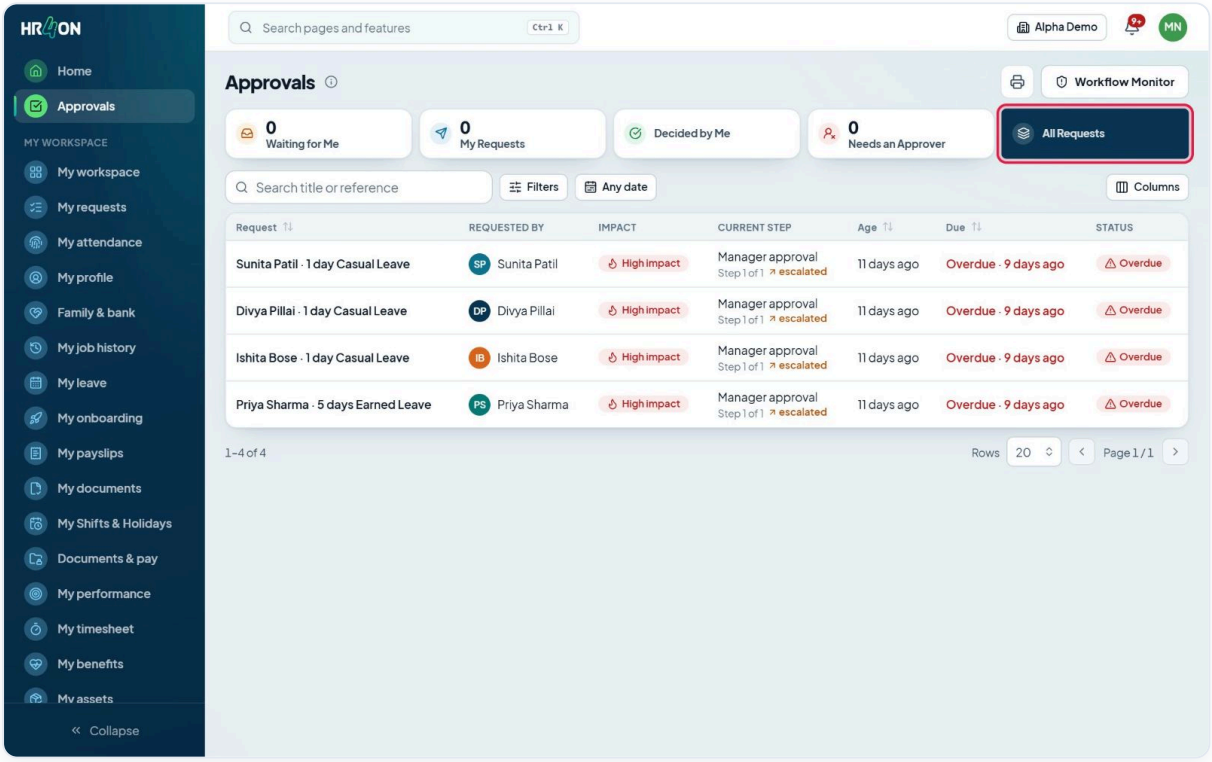
WHAT YOU SEE

- **Waiting for Me** lists requests you can decide now. **My Requests** lists what you have sent.
- **Decided by Me** keeps a record of your decisions. **All Requests** (HR and administrators) shows every request in your scope, with the current step and how overdue it is.
- Open a request to see the before and after values, attachments and history, then approve, return or reject it.

HOW TO DO IT

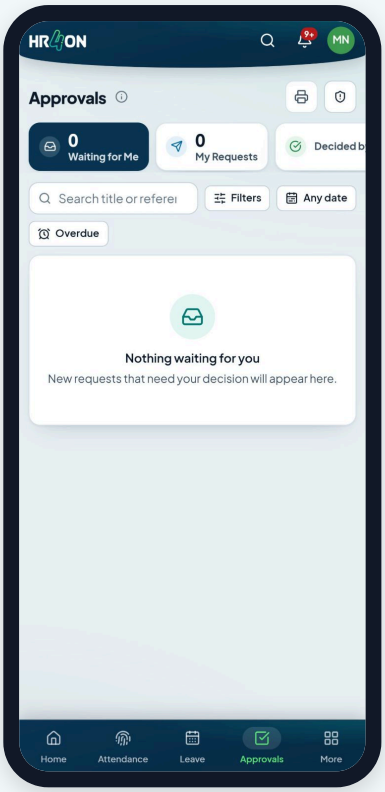
1. Select **Approvals** in the menu.
2. Open **Waiting for Me**.
3. Select a request to open it and decide.

> **GOOD TO KNOW**
> - You cannot approve a request you raised yourself.
> - Overdue requests escalate automatically to the next approver.



ON YOUR PHONE

Approvals on a phone: the same tabs, with one card per request.



02 Employee records

The employee register is the single source of truth for who works for you. Everything else in HR4ON reads from it.

2.1 The employee list

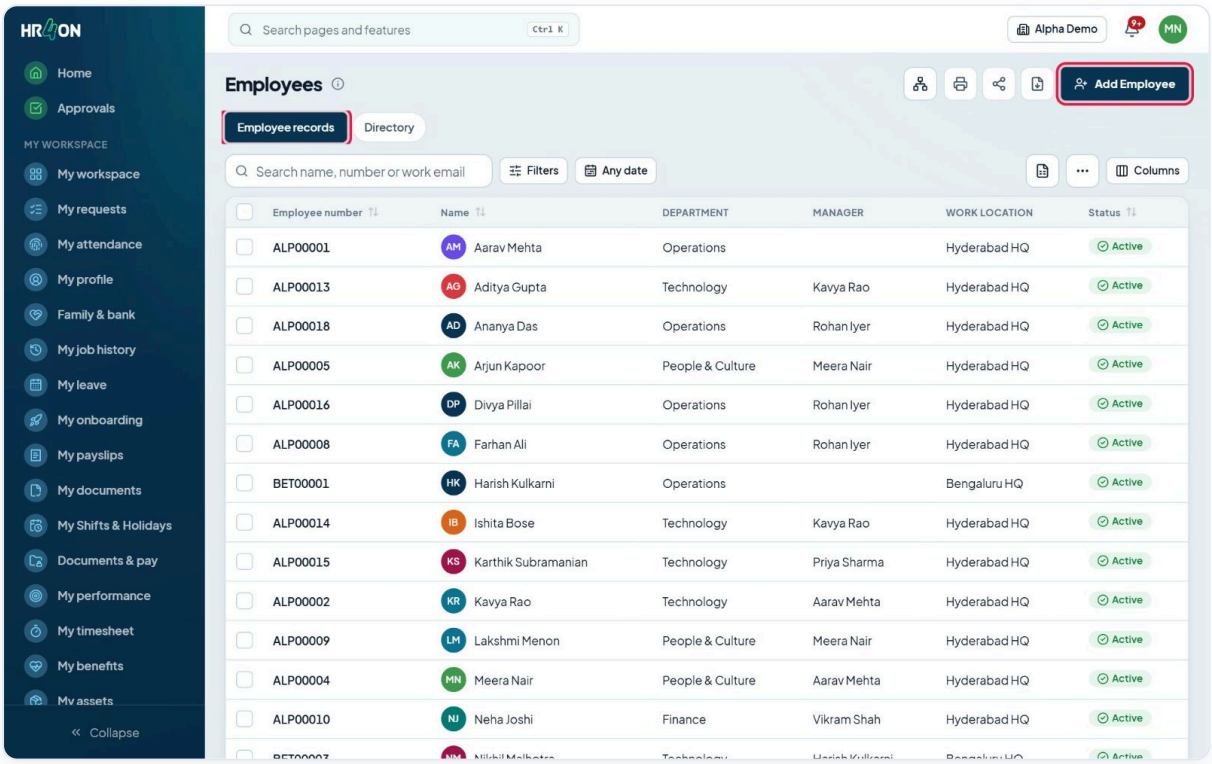
Open **Employees** to see everyone in your scope. Use it to find a person, check who manages whom, or export a list.

WHAT YOU SEE

- **Employee records** is the HR view with employee number, name, department, manager, work location and status.
- **Directory** is the colleague view with work email and phone, the same view employees see.
- Status shows **Active**, **Preboarding**, **On notice**, **Separated** and so on. Separated and cancelled records are hidden unless you ask for them in the filters.

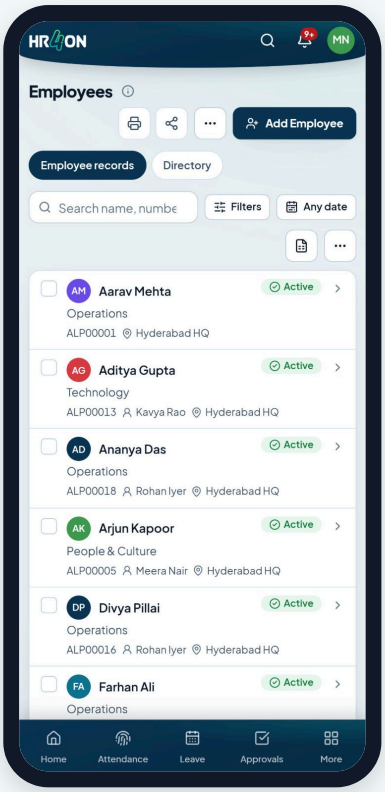
HOW TO DO IT

1. Select **Employees** in the **People** menu.
2. Type a name or number in the search box.
3. Select a row to open the employee file.



ON YOUR PHONE

On a phone each employee is a card with department, manager and location.



2.2 Filter, choose columns and export

Narrow the list to a company, department, location, manager, worker category or status, or see the organisation as it was on an earlier date.

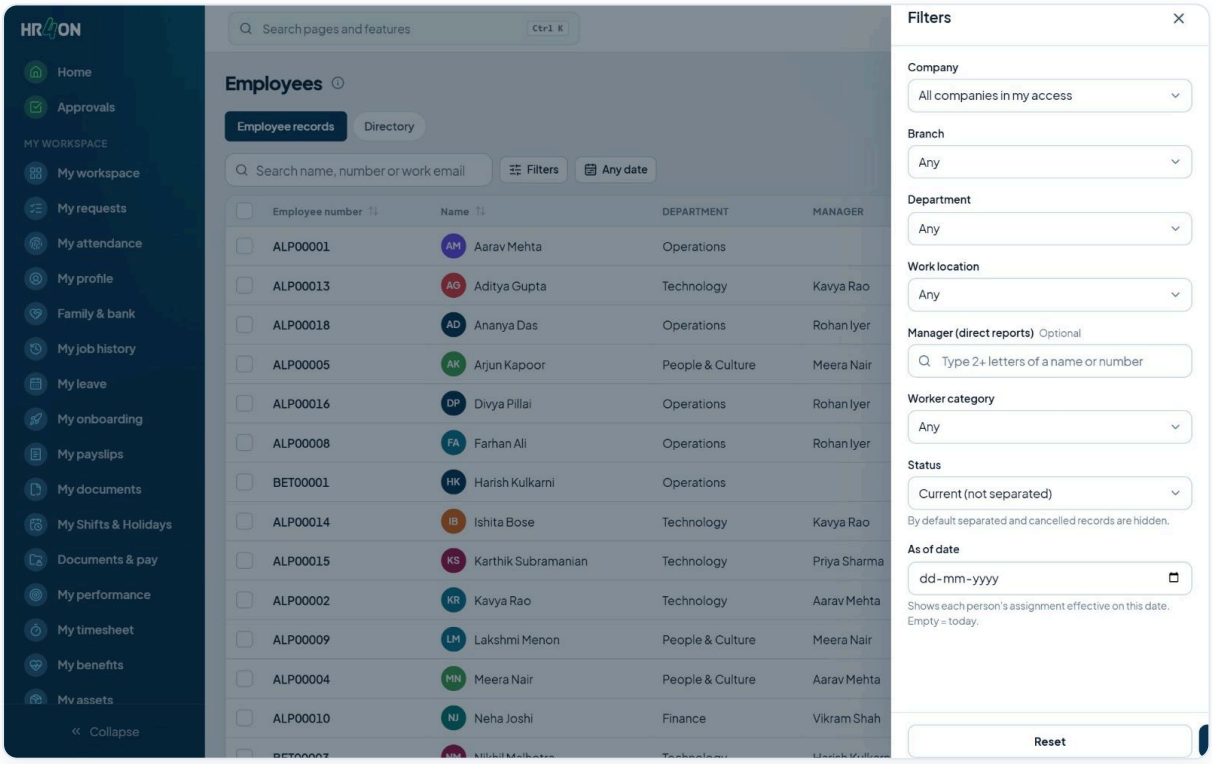
WHAT YOU SEE

- **Company**, **Department**, **Branch** and **Work location** filter by organisation unit.
- **Manager (direct reports)** shows one manager's team. **Worker category** separates employees, interns and others.
- **Status**: by default separated and cancelled records are hidden. **As of date** shows each person's assignment on that date.
- **Any date** filters on joining date. Active filters show as chips above the list; select a chip's cross to remove it.
- **Columns** adds fields such as legal name, employment type, joining date, confirmation date, probation end, cost centre and pay group.

HOW TO DO IT

1. Select **Filters**.
2. Choose the values you want and apply them.
3. Select **Columns** to add or hide columns.
4. Select the **Export** icon to download the list as a spreadsheet, or use the print icon for a PDF.

> **TIP**
>
> - **More actions** (three dots) holds the spreadsheet imports for bulk loading and, for HR administrators, **Custom fields**.



2.3 The employee file: Overview

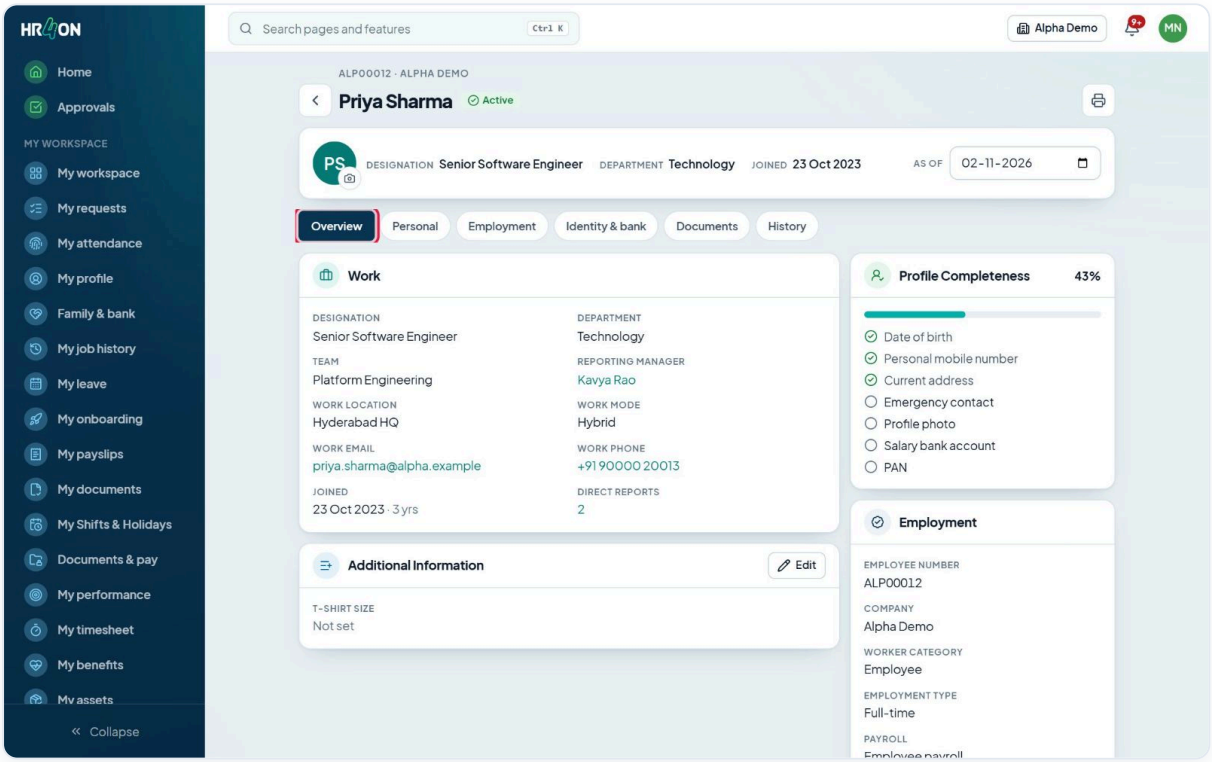
Select a person to open their digital employee file. The header and the Overview tab give you the essentials at a glance.

WHAT YOU SEE

- The header shows employee number, company, status and the summary line (designation, department, joining date).
- **As of** lets you look at the person's assignment on any date, past or future. A blue notice reminds you when you are not looking at today.
- **Work** lists manager, location, grade and contact details. **Profile Completeness** shows which details are still missing.
- **Employment Episodes** lists each employment if the person has left and rejoined.
- If a change to this person is waiting for approval, a notice at the top links to the request.

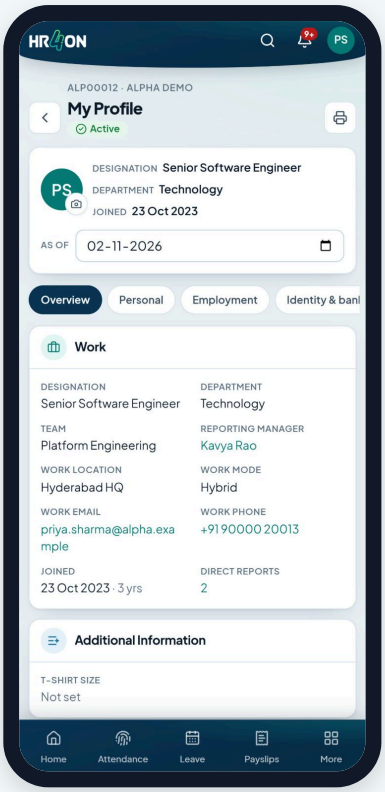
HOW TO DO IT

1. Open **Employees** and select the person.
2. Read the **Overview** tab.
3. Use the tabs to move to Personal, Employment, Identity & bank, Documents and History.



ON YOUR PHONE

Employees see their own file under **My profile**, here on a phone.



2.4 Personal details, addresses and family

The **Personal** tab holds the person's own details: personal details, addresses, emergency contacts, family and dependants, qualifications and previous employment.

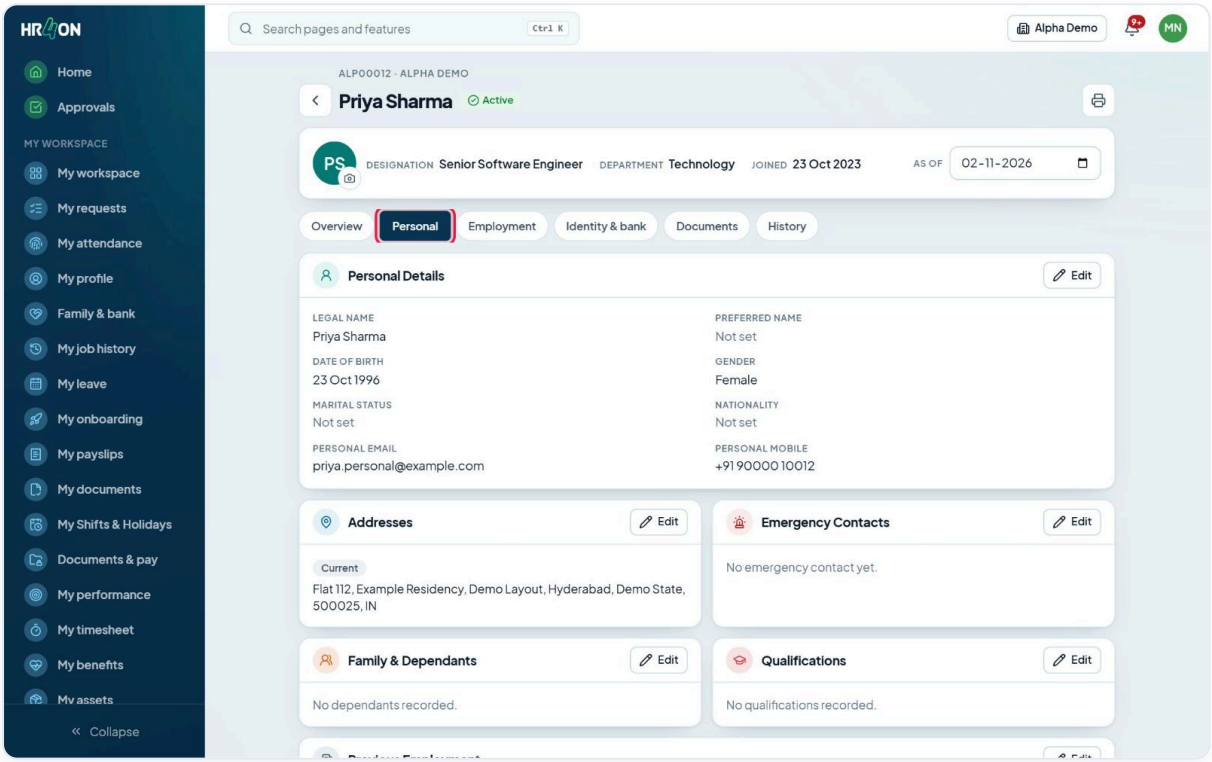
WHAT YOU SEE

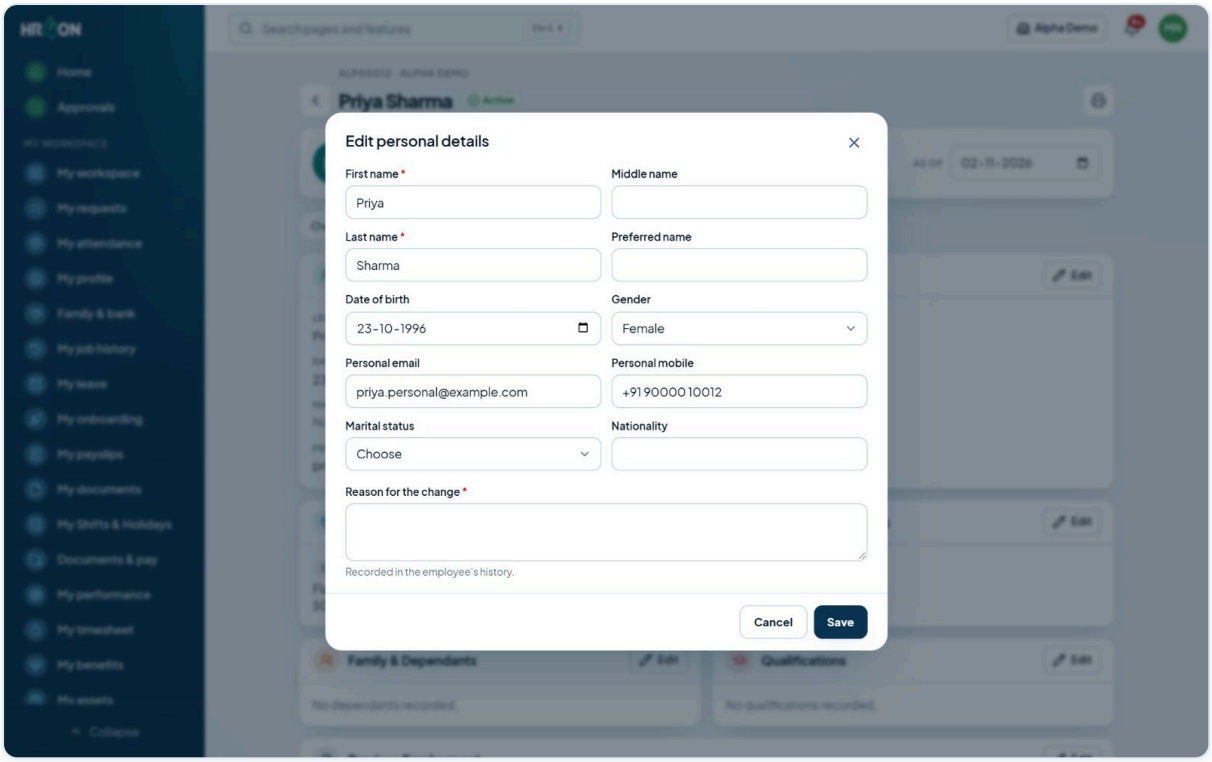
- Each section has its own **Edit** button. HR edits directly; every change is recorded in History with your name and reason.
- Employees change their contact details, addresses and emergency contacts with **Request Change**; family members and nominees are changed through **Family & bank**. Those requests come to HR for approval.

HOW TO DO IT

1. Open the employee and select **Personal**.
2. Select **Edit** on the section you need.
3. Make the change, give a reason and select **Save**.

> **GOOD TO KNOW**
> - Do not edit a family member here while the employee has a family change waiting for approval; decide the request first.





The **Edit personal details** dialog. Every change asks for a reason.

2.5 Employment and assignment history

The **Employment** tab shows the employment terms and the person's assignment: department, location, establishment, manager, grade and so on, with the full dated history.

WHAT YOU SEE

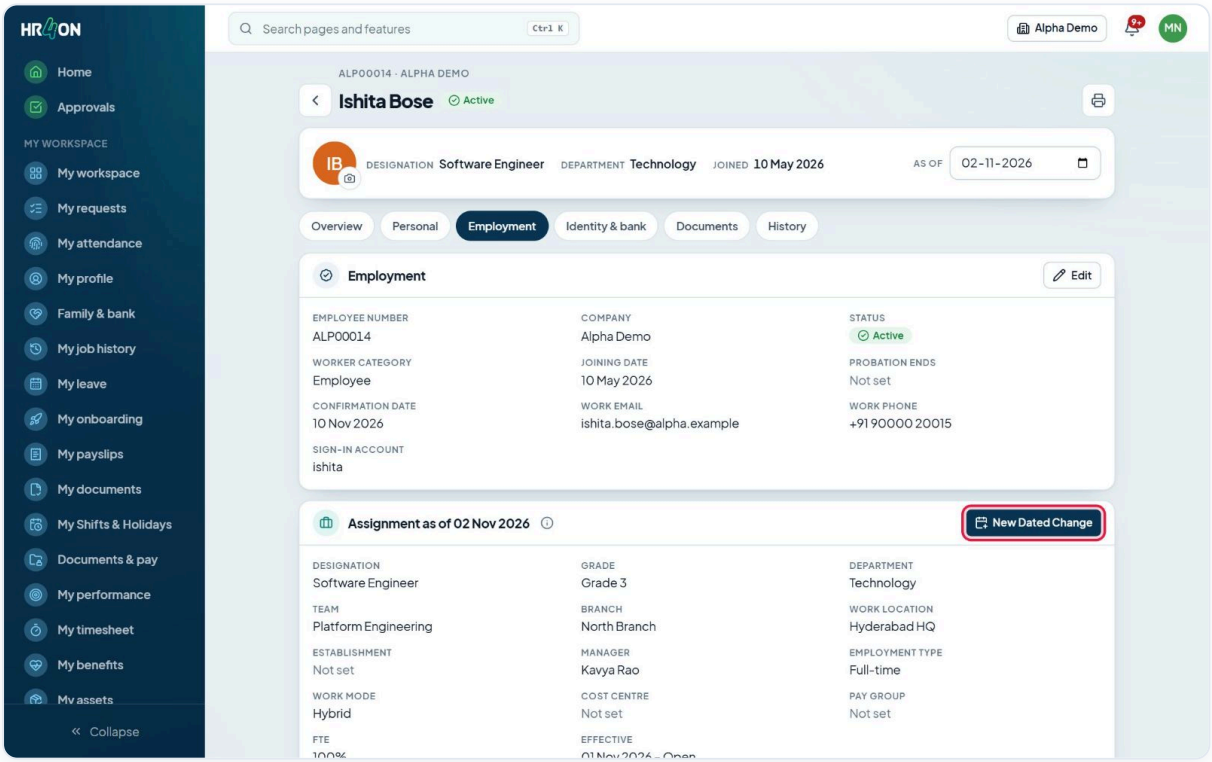
- **Employment** holds joining date, worker category, probation and confirmation dates. **Edit** corrects them.
- **Assignment as of** shows the assignment on the selected date. **New Dated Change** adds a new row from an effective date.
- **Assignment History** lists every row with its dates. Badges show **Current**, **Future** (starts later) and **Corrected**. The spanner icon corrects a row that was wrong from the start.
- For a preboarding employee a notice offers **Activate** on the joining day, or **Cancel Hire**.

HOW TO DO IT

1. Open the employee and select **Employment**.
2. Select **New Dated Change** to record a change from a date, or the spanner icon to correct a past row.
3. Fill **Effective from**, the new values and the reason code, then save.

GOOD TO KNOW

- For transfers, promotions, manager changes and other changes that need approval, use **Employment changes** (chapter 4). New Dated Change is for HR corrections and simple dated updates.
- Each row covers its start date up to the day before the next row starts.



2.6 Identity documents and salary bank account

The **Identity & bank** tab holds identity numbers (such as PAN and Aadhaar) and the salary bank account. Values are masked.

WHAT YOU SEE

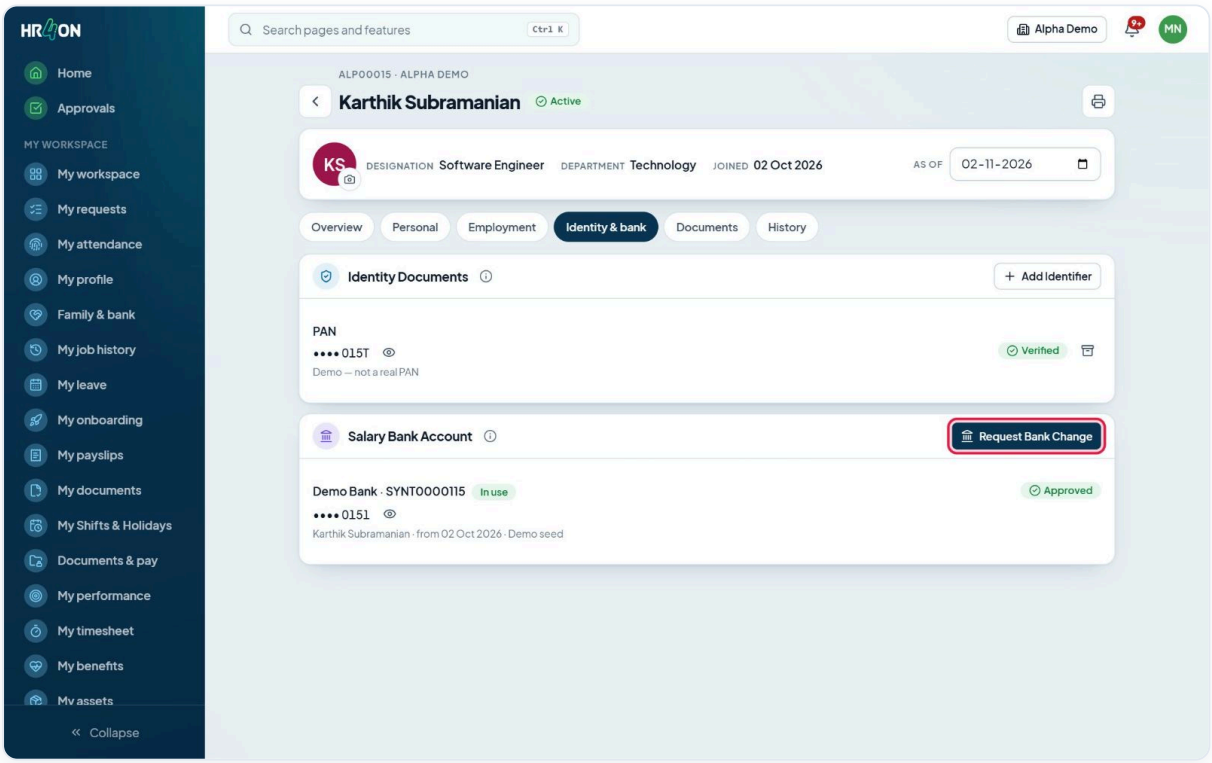
- **Identity Documents** lists each identifier with its verification state. **Add Identifier** adds a new one; it replaces the active value of the same type. **Mark verified** records that you have checked the original. **Retire identifier** ends one that is no longer valid.
- The eye icon reveals a masked value. HR4ON asks for a reason and records who looked.
- **Salary Bank Account** lists each account version. **In use** marks the account payroll uses today; **Waiting for approval** marks a new version still being approved.
- **Request Bank Change** starts a bank change on the employee's behalf. It goes to payroll for approval.

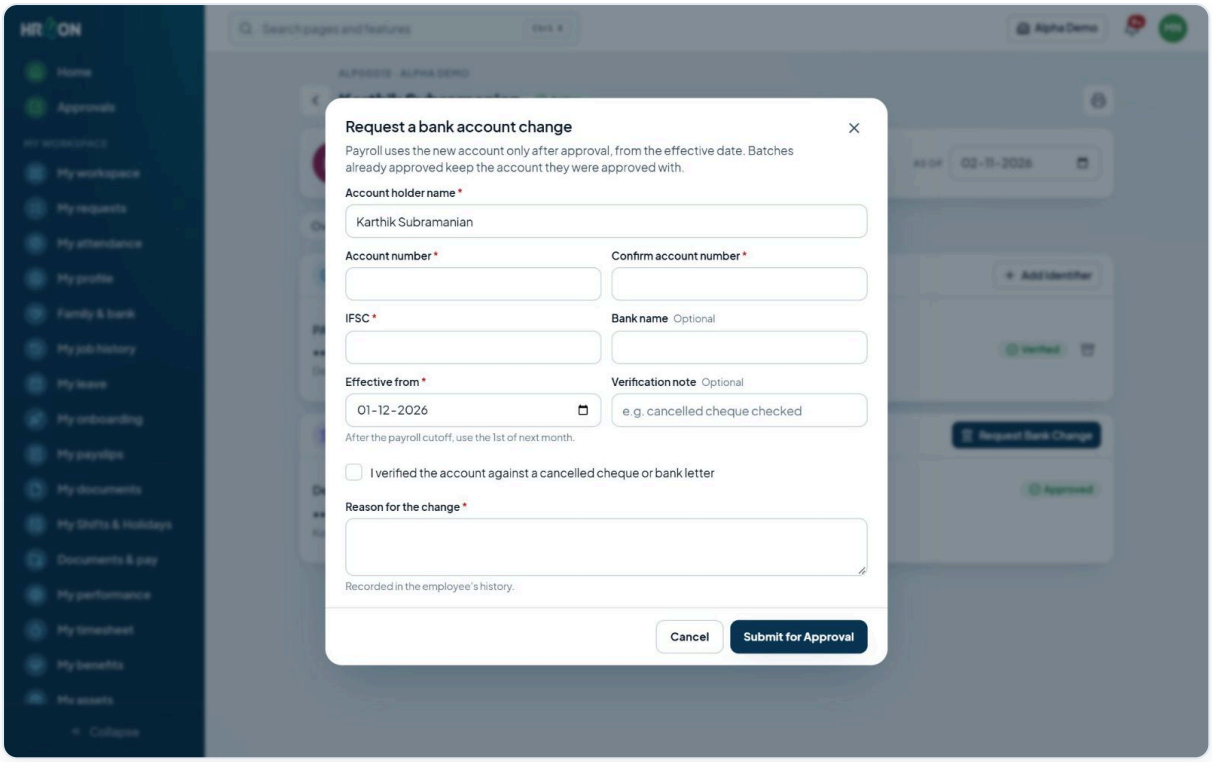
HOW TO DO IT

1. Open the employee and select **Identity & bank**.
2. To verify an identifier, check the original and select **Mark verified**.
3. To change the bank account, select **Request Bank Change**, fill the account, IFSC and effective date, tick the evidence check and select **Submit for Approval**.

GOOD TO KNOW

- Only people allowed to see sensitive data see this tab.
- Salary keeps going to the current account until the new one is approved.
- After the payroll cutoff, use the 1st of next month as the effective date.





Request a bank account change. The account number is typed twice.

2.7 Documents and history

The **Documents** tab is the person's private file of offer letters, ID proofs, certificates and contracts. The **History** tab is the audit trail of every change to the record.

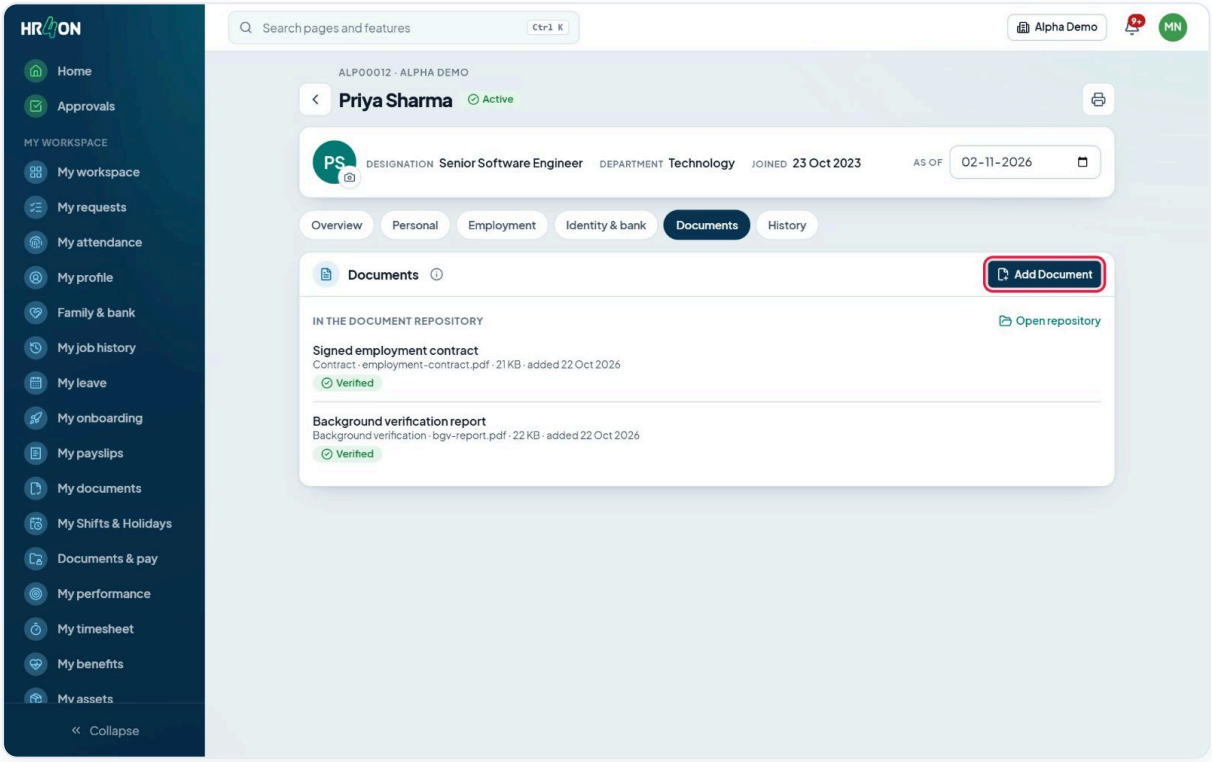
WHAT YOU SEE

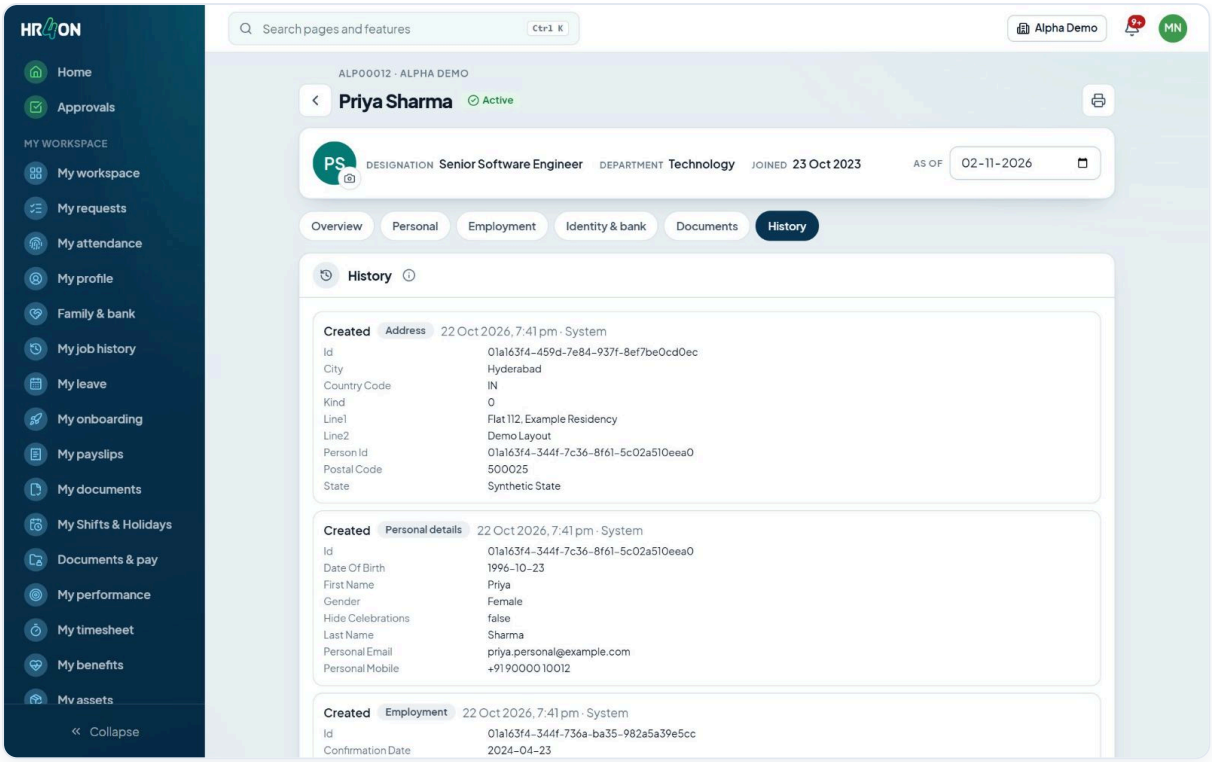
- **Add Document** uploads a file with a category, title, issue and expiry dates. Tick **Confidential** for files only the employee and sensitive-data holders may see.
- Each document shows **Verified** or **Pending**. **Mark verified** records that you checked it; **Archive document** removes it from the active list.
- History shows who changed what, when and why. Sensitive values appear as [redacted].

HOW TO DO IT

1. Open the employee and select **Documents**.
2. Select **Add Document**, choose the file, category and title, then upload.
3. Select **History** to see the audit trail.

> **GOOD TO KNOW**
> - Every download of a confidential file is recorded.




HR4ON
Search pages and features
Ctrl K
Alpha Demo
9+
MN
Home
Approvals
MY WORKSPACE
My workspace
My requests
My attendance
My profile
Family & bank
My job history
My leave
My onboarding
My payslips
My documents
My Shifts & Holidays
Documents & pay
My performance
My timesheet
My benefits
My assets
Collapse
ALP00012 · ALPHA DEMO
Priya Sharma
Active
PS
DESIGNATION Senior Software Engineer
DEPARTMENT Technology
JOINED 23 Oct 2023
AS OF 02-11-2026
Overview
Personal
Employment
Identity & bank
Documents
History
History
Created Address 22 Oct 2026, 7:41 pm · System
Id 01a163f4-459d-7e84-937f-8ef7be0cd0ec
City Hyderabad
Country Code IN
Kind 0
Line1 Flat 112, Example Residency
Line2 Demo Layout
Person Id 01a163f4-344f-7c36-8f61-5c02a510eea0
Postal Code 500025
State Synthetic State
Created Personal details 22 Oct 2026, 7:41 pm · System
Id 01a163f4-344f-7c36-8f61-5c02a510eea0
Date Of Birth 1996-10-23
First Name Priya
Gender Female
Hide Celebrations false
Last Name Sharma
Personal Email priya.personal@example.com
Personal Mobile +91 90000 10012
Created Employment 22 Oct 2026, 7:41 pm · System
Id 01a163f4-344f-736a-ba35-982a5a39e5cc
Confirmation Date 2024-04-23

2.8 The org chart

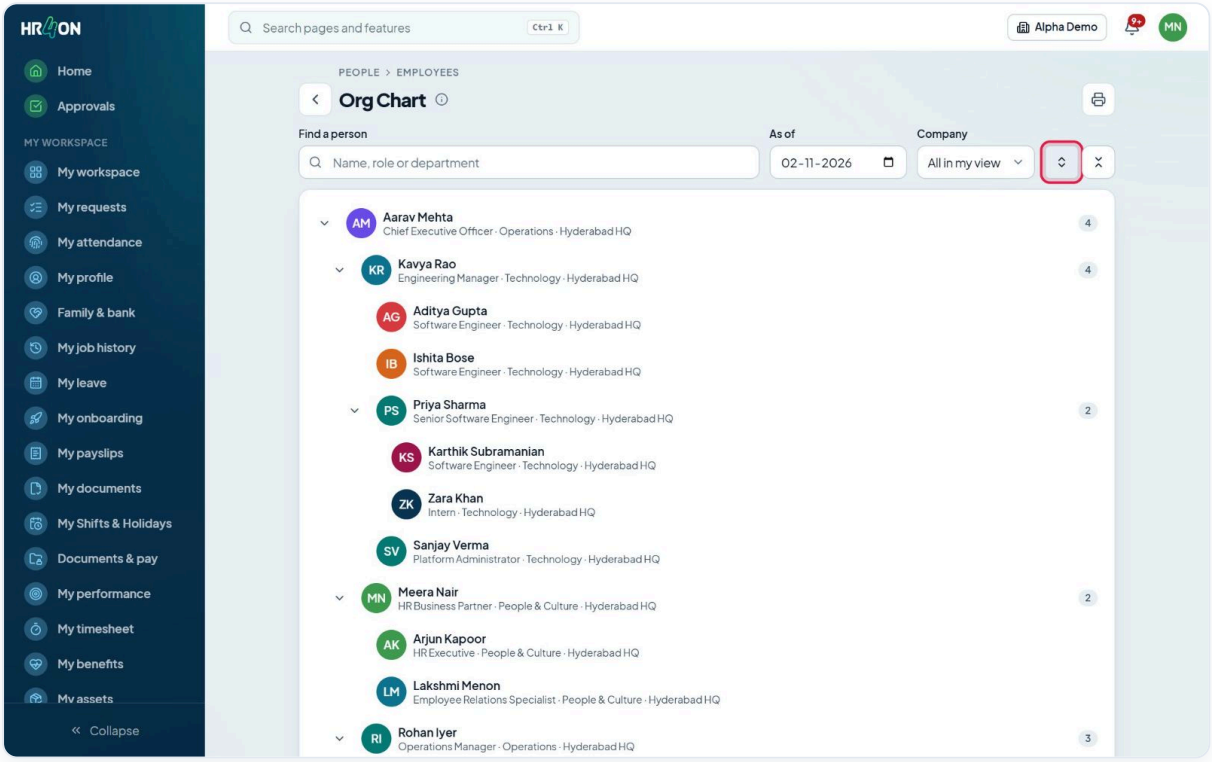
The org chart shows reporting lines as of a date. Use it to check who reports to whom before a change, or to explain the structure to a new manager.

WHAT YOU SEE

- Each card shows name, designation, department, location and the number of direct reports.
- **Find a person** highlights matching people. **As of** shows the chart on another date. **Company** limits it to one company.
- **Expand all** and **Collapse all** open or close every team.

HOW TO DO IT

1. Select **Org chart** in the **People** menu.
2. Select a card's arrow to open that person's team.
3. Select a name to open the employee file.



03 Adding and correcting employee details

New starters normally arrive from recruitment and onboarding. You can also add an employee directly, and you keep the record accurate as things change.

3.1 Add an employee

Use **Add Employee** for people who did not come through recruitment, for example transfers in from another group company. HR4ON checks for duplicates before anything is saved.

WHAT YOU SEE

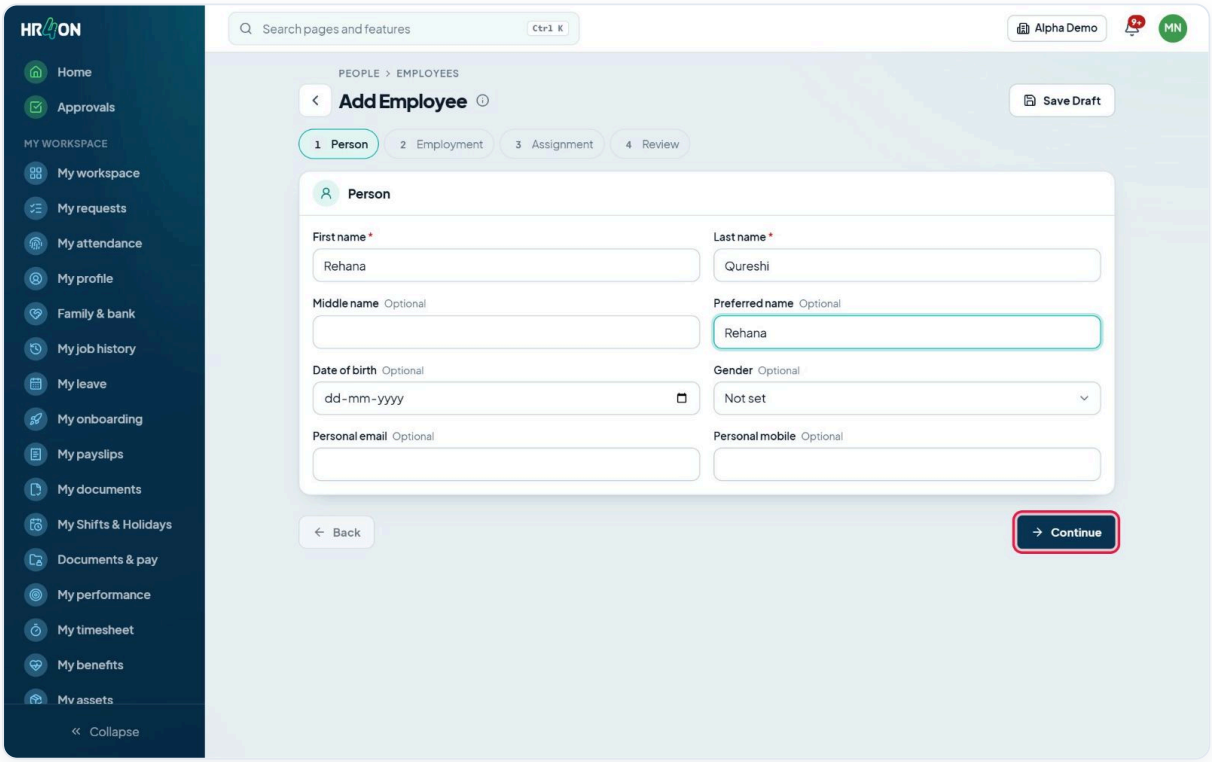
- The form has four steps: **Person**, **Employment**, **Assignment** and **Review**.
- **Person**: first and last name, preferred name, date of birth, gender, personal email and mobile.
- **Employment**: company (legal employer), employee number (empty uses the company's number series), joining date, worker category, work email and phone, probation end.
- **Assignment**: department, designation, grade, location and manager from the joining date. **Review** checks everything before you create the record.

HOW TO DO IT

1. Open **Employees** and select **Add Employee**.
2. Fill the **Person** step and select **Continue**.
3. If HR4ON finds a possible duplicate, open it and choose **Rehire Same Person** or continue as a new person.
4. Complete **Employment** and **Assignment**, check **Review** and create the employee.

> **TIP**
> - Select **Save Draft** to keep your entries and continue later on the same device.

> **GOOD TO KNOW**
> - People are never merged automatically. If the person worked for you before, rehire them instead of creating a second person.
> - A future joining date creates a preboarding record. It becomes active on the joining day.



3.2 Activate or cancel a preboarding employee

People who have accepted an offer appear with the status **Preboarding** until their first day.

HOW TO DO IT

1. Open the employee and select **Employment**.
2. On the joining day select **Activate**, or select **Cancel Hire** if they will not join.

GOOD TO KNOW

- **Activate** is only available from the joining date onwards.
- Most joiners are activated from the onboarding case instead; see the hiring and onboarding guide.

3.3 Custom fields

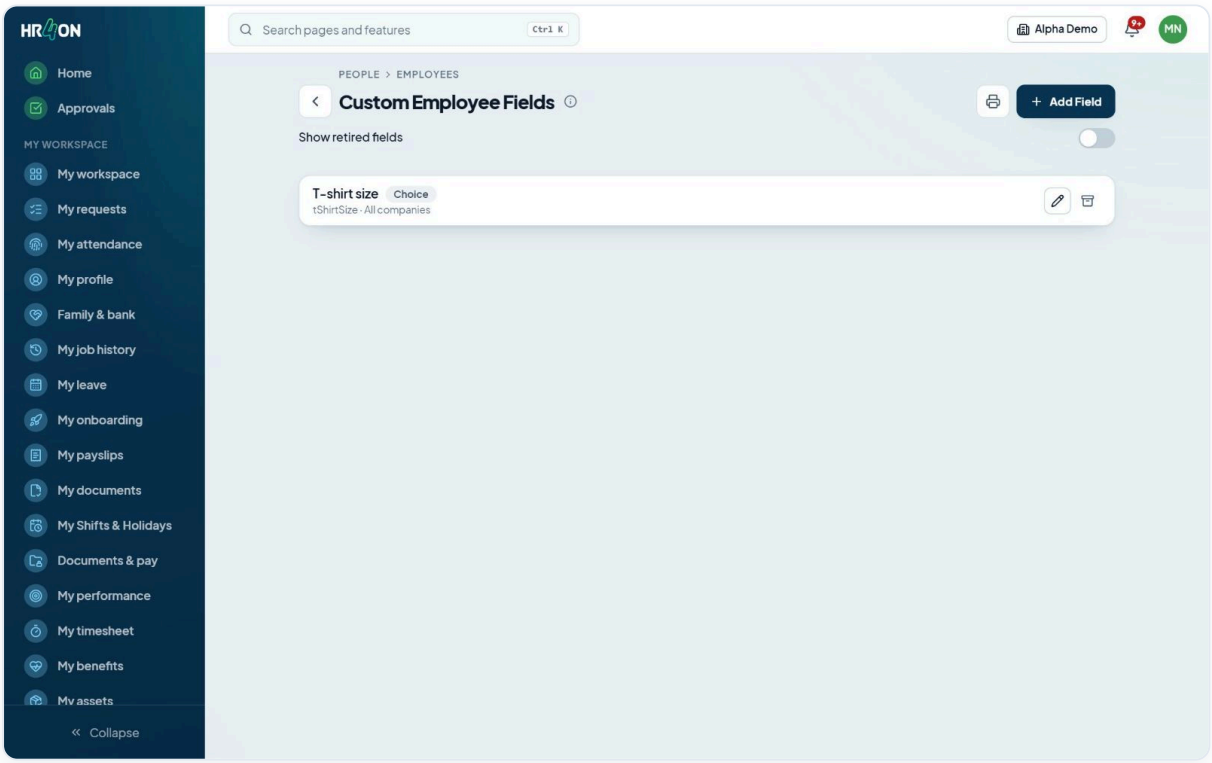
Custom fields add company-specific details to the employee file, for example a uniform size or a union membership number. They appear under **Additional Information** on the Overview tab.

HOW TO DO IT

1. Open **Employees**, select **More actions** and then **Custom fields**.
2. Select **Add Field**, choose its type and whether it is required, and save.
3. Retire a field you no longer need; past values stay on file.

GOOD TO KNOW

- Only HR administrators manage custom fields.



3.4 Check a bank account change

When an employee asks to change their salary account under **Family & bank**, HR checks the evidence (a cancelled cheque or bank letter) before payroll approves the new account.

WHAT YOU SEE

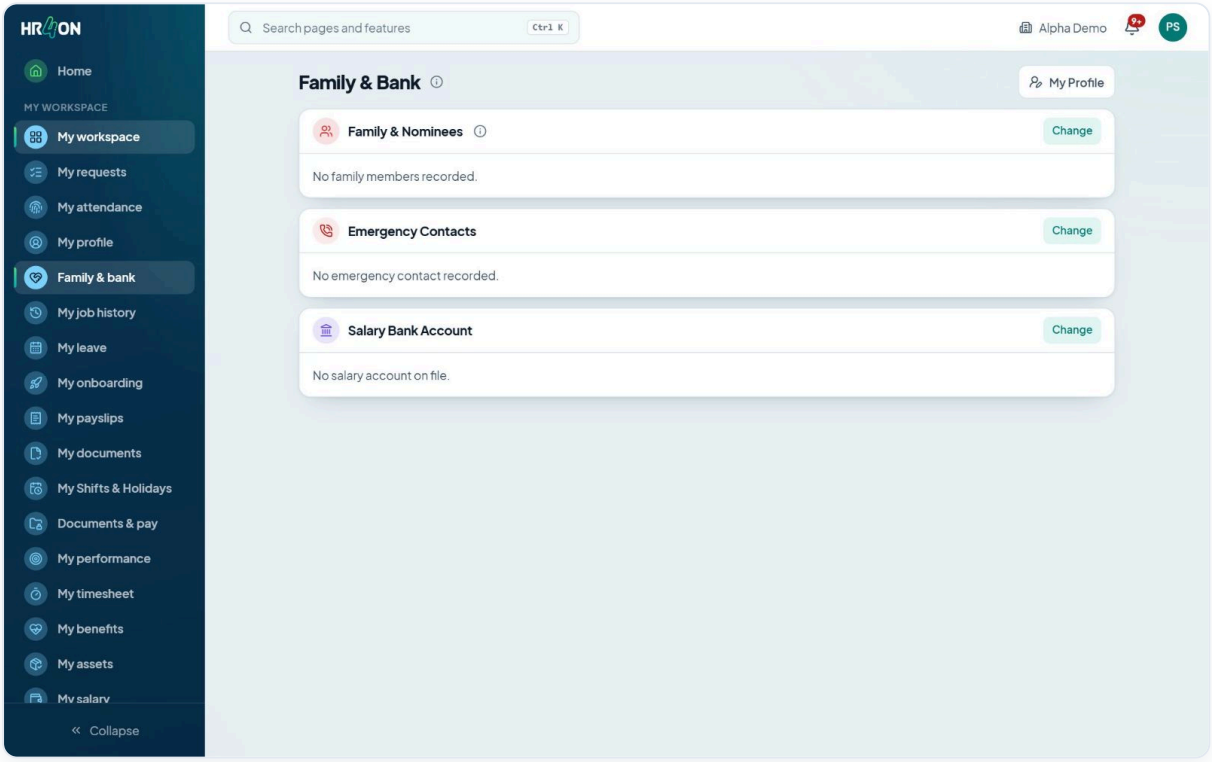
- The request reaches you in **Approvals**. Open it to see the new account (masked), IFSC, account holder, bank and the date it should apply from.
- **Evidence** shows the uploaded proof. Check the name and number match.
- After HR verifies, the request moves to payroll for approval. The employee follows progress in **My requests**.

HOW TO DO IT

1. Open **Approvals** and select the bank change request.
2. Open the evidence and compare it with the details.
3. Approve to verify, or return it with a note telling the employee what is missing.

GOOD TO KNOW

- Salary goes to the current account until payroll approves the new one.
- The account number is wiped from the request once the change is handed over.



What the employee sees in **Family & bank**: family members, nominees and the salary account, each changed through a request that HR reviews.

3.5 Check a family details change

Employees add a spouse, children or parents, and set nominees, from **Family & bank**. The change comes to an HR operator for approval before it is saved to the employee file.

WHAT YOU SEE

- On **Family & bank** the employee selects **Change** next to **Family & Nominees**, uses **Add Family Member**, adds an optional note and selects **Send to HR**.

HOW TO DO IT

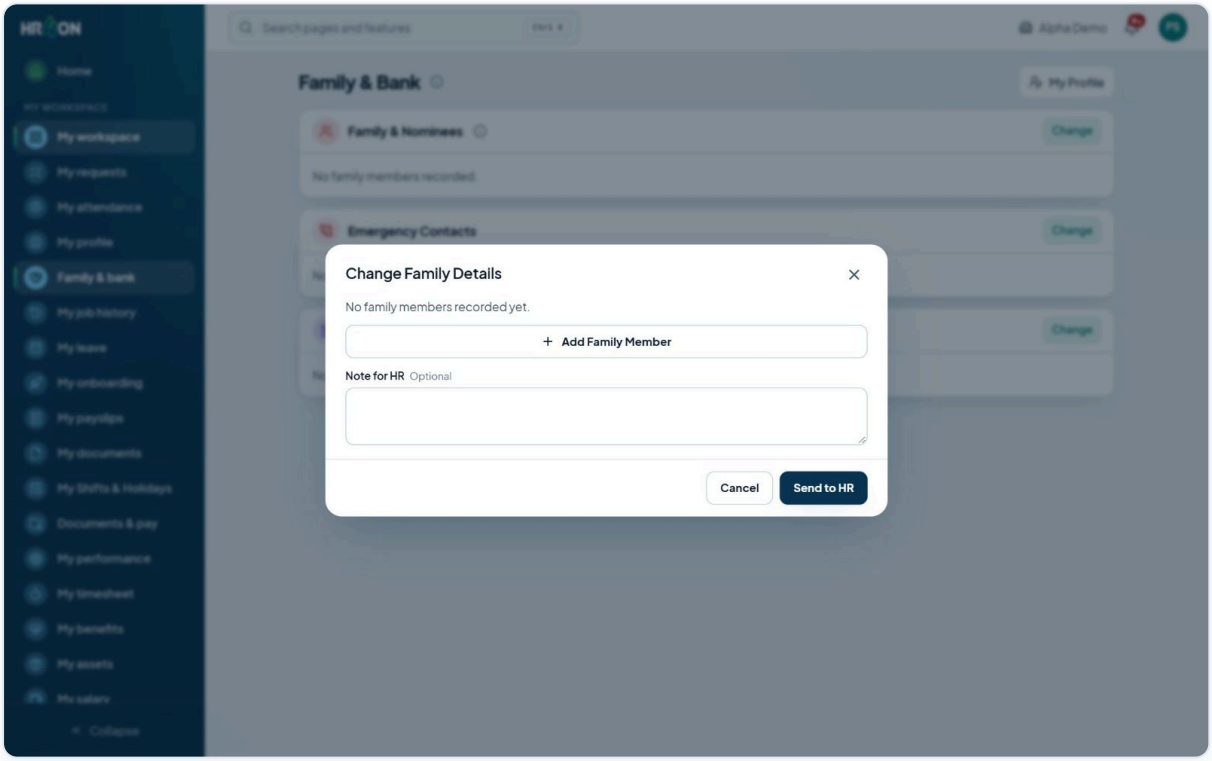
1. Open **Approvals** and select the family change request.
2. Compare the before and after lists of family members and nominee shares.
3. Approve, or return it with a note.

TIP

- To make a correction yourself, use the **Personal** tab of the employee file, **Family & Dependants**, **Edit**.

GOOD TO KNOW

- If the employee file changed after the request was sent, HR4ON stops the request and the employee sends a new one.
- Approved family members are used by Benefits, for example for insurance cover.



The employee's **Change Family Details** form.

04 Employment changes

Transfers, promotions, manager changes, confirmations and other changes to someone's job go through **Employment changes**. Each change has an effective date, goes through approval and is applied automatically on that date.

4.1 The changes workbench

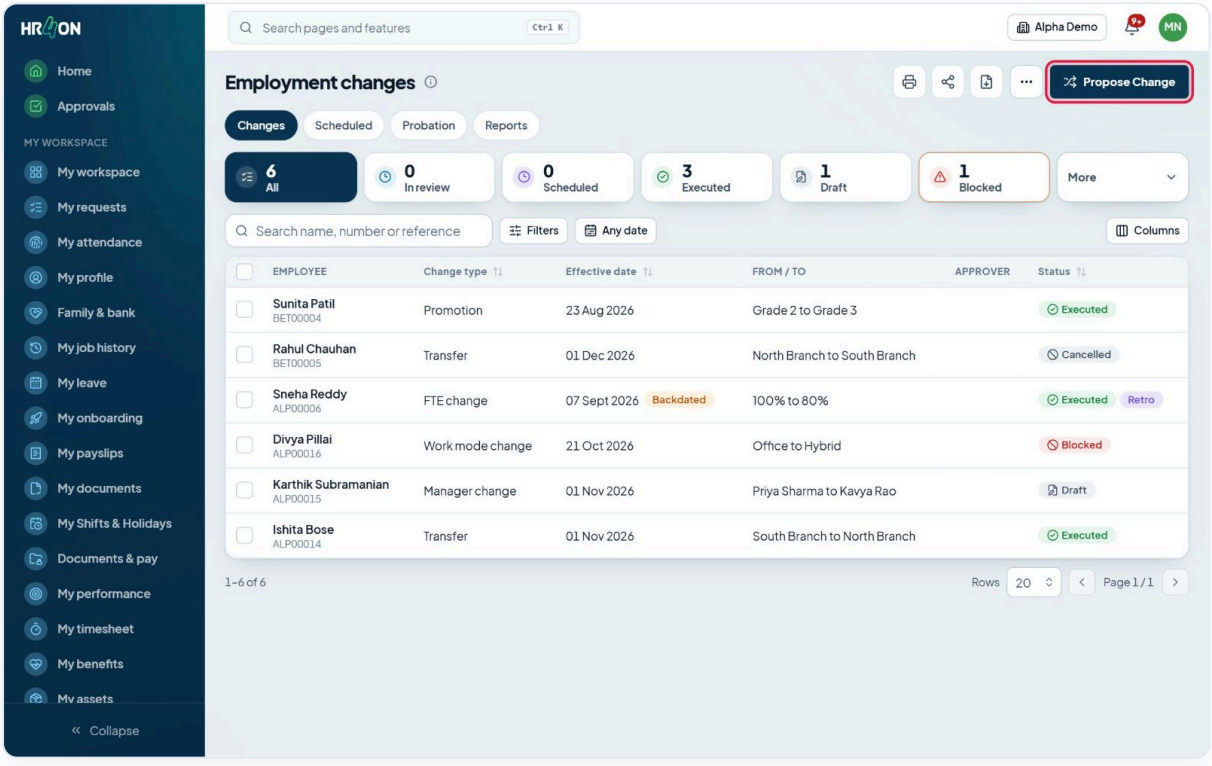
Employment changes lists every change in your scope with its type, effective date, the before and after values and its status.

WHAT YOU SEE

- The count tabs filter by status: **All**, **In review**, **Scheduled** (approved and waiting for its date), **Executed** (applied), **Draft** and **Blocked**. **More** holds the rest, such as returned and cancelled.
- **Backdated** under the date means the change took effect in the past. **Retro** means payroll recalculates earlier periods.
- The tabs at the top move to **Scheduled**, **Probation** and **Reports**.

HOW TO DO IT

1. Select **Employment changes** in the **People** menu.
2. Choose a count tab or use **Filters**.
3. Select a row to open the change.



4.2 Propose a change

Use **Propose Change** for a transfer, promotion, demotion, manager change, employment type, work mode, FTE or cost centre change, confirmation, probation extension, deputation, contract renewal, suspension or legal-entity transfer.

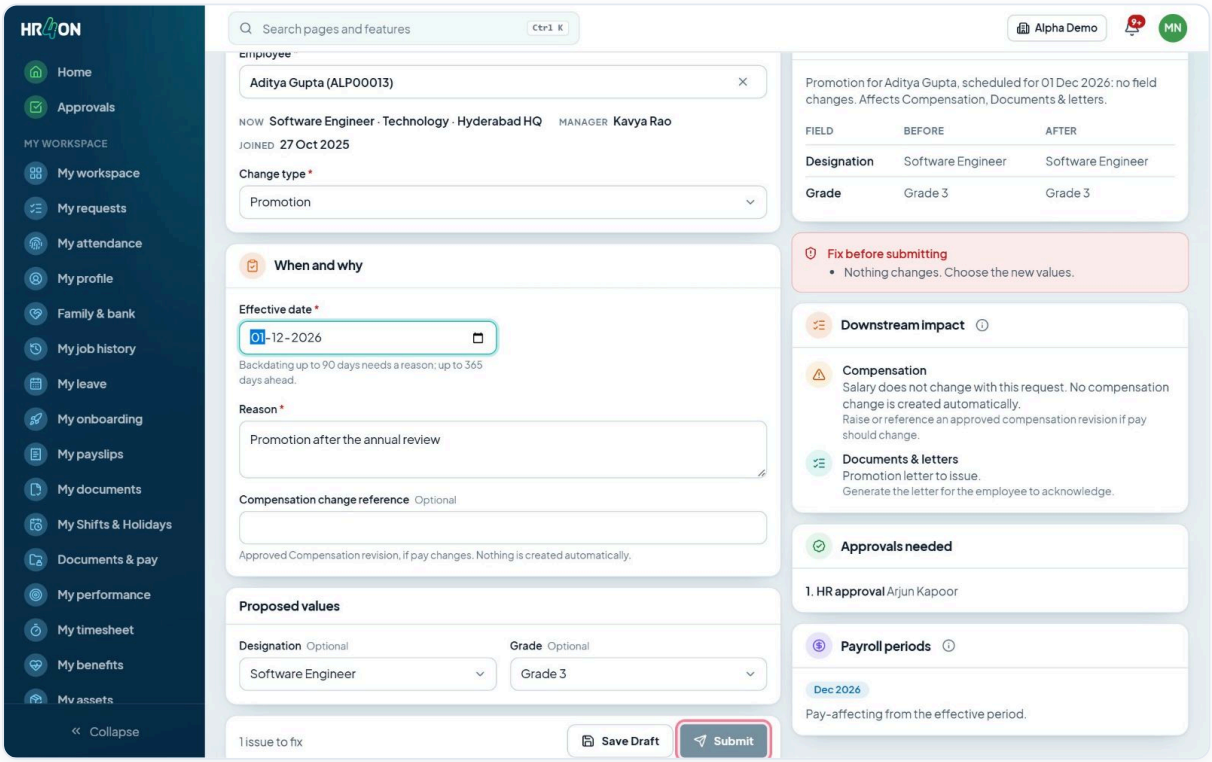
WHAT YOU SEE

- **Who and what**: choose the employee and the change type. The card shows their current role, manager and any open changes.
- **When and why**: the effective date, an end date where needed (for example a deputation), and the reason. A date in the past asks for a **Backdate reason**.
- **Proposed values** shows only the fields this change type can alter, for example designation and grade for a promotion.
- **Impact preview** on the right shows what changes, which areas are affected (compensation, documents, shifts, leave, access), the **Approvals needed** and the **Payroll periods** touched. **Fix before submitting** lists anything still missing.
- **Compensation change reference** links an approved salary revision; HR4ON does not change pay by itself.

HOW TO DO IT

1. Select **Propose Change**.
2. Type the employee's name and pick them from the list.
3. Choose the **Change type**.
4. Enter the **Effective date** and **Reason**, then the proposed values.
5. Check the impact preview and select **Submit**, or **Save Draft** to finish later.

> **GOOD TO KNOW**
>
> - Managers can propose some change types for their own team; HR handles the rest.
> - To bring back a former employee, switch on **Rehire a former employee**. It creates a new employment; earlier payroll history stays closed.



A promotion being prepared for Aditya Gupta. The preview says what still needs fixing (here, the new designation or grade) before you can submit.

4.3 Follow a change through approval

Open a change to see where it stands and what happens next. The coloured strip at the top tells you the next step.

WHAT YOU SEE

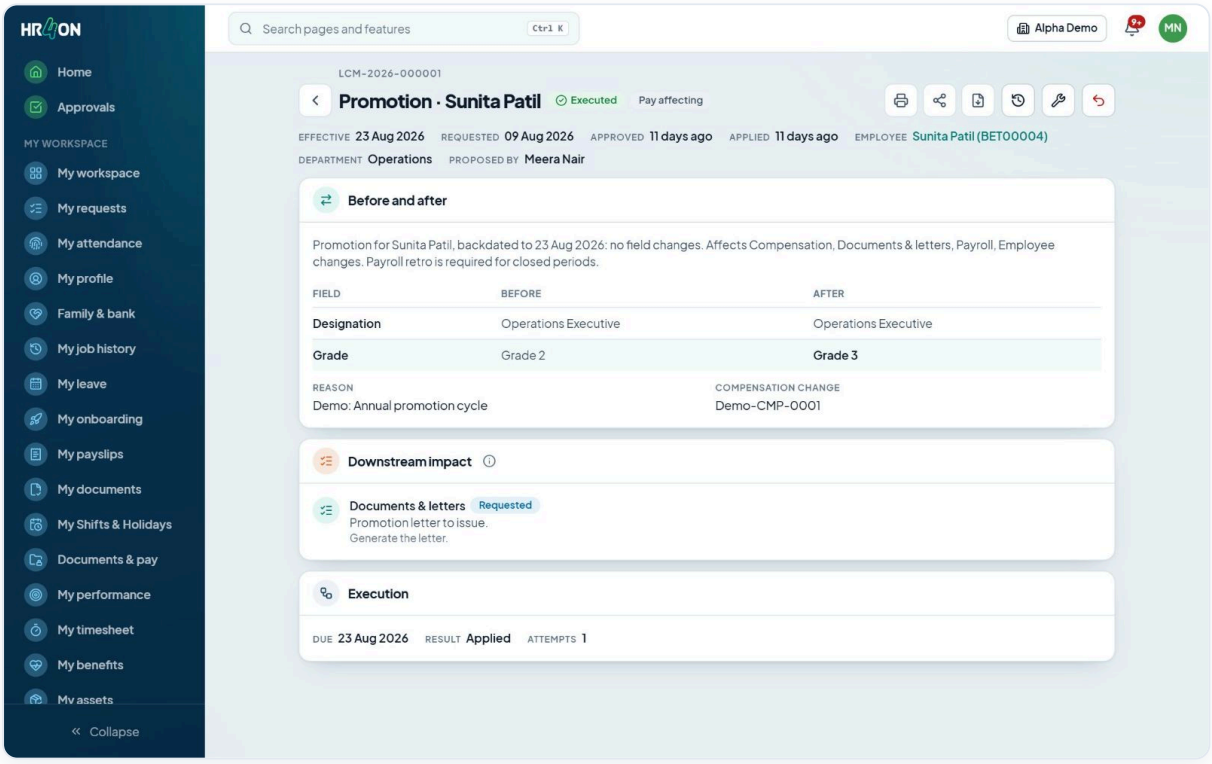
- **Before and after** lists every field with the old and new value and a plain summary of what the change does.
- **Downstream impact** lists the areas told to reassess (for example leave or shifts). **Execution** shows when it was applied.
- **Evidence** holds supporting files. **Add File** attaches one.
- Header icons: **Employment timeline**, **Edit** (drafts and returned changes), **Reschedule**, **Correct this change** and **Cancel change** or **Reverse (compensating change)** for applied changes.

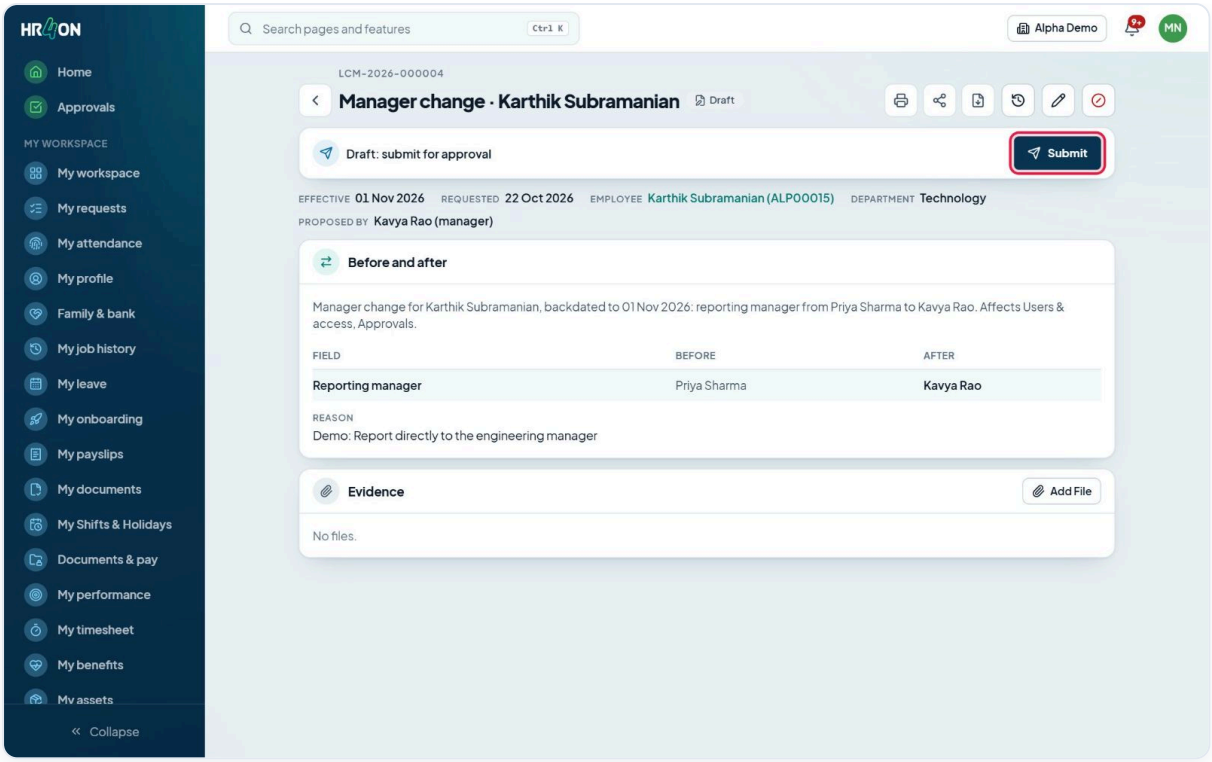
HOW TO DO IT

1. Open the change from the workbench.
2. Follow the instruction in the strip, for example **Draft: submit for approval** with **Submit**.
3. Once approved, the change shows **Scheduled** until its date and **Executed** once applied.

GOOD TO KNOW

- A change is applied automatically on its effective date. You do not need to do anything on the day.
- A reversed change is not deleted: HR4ON adds a compensating change so the history stays complete.





A draft manager change proposed by a manager, waiting to be submitted.

4.4 Scheduled and blocked changes

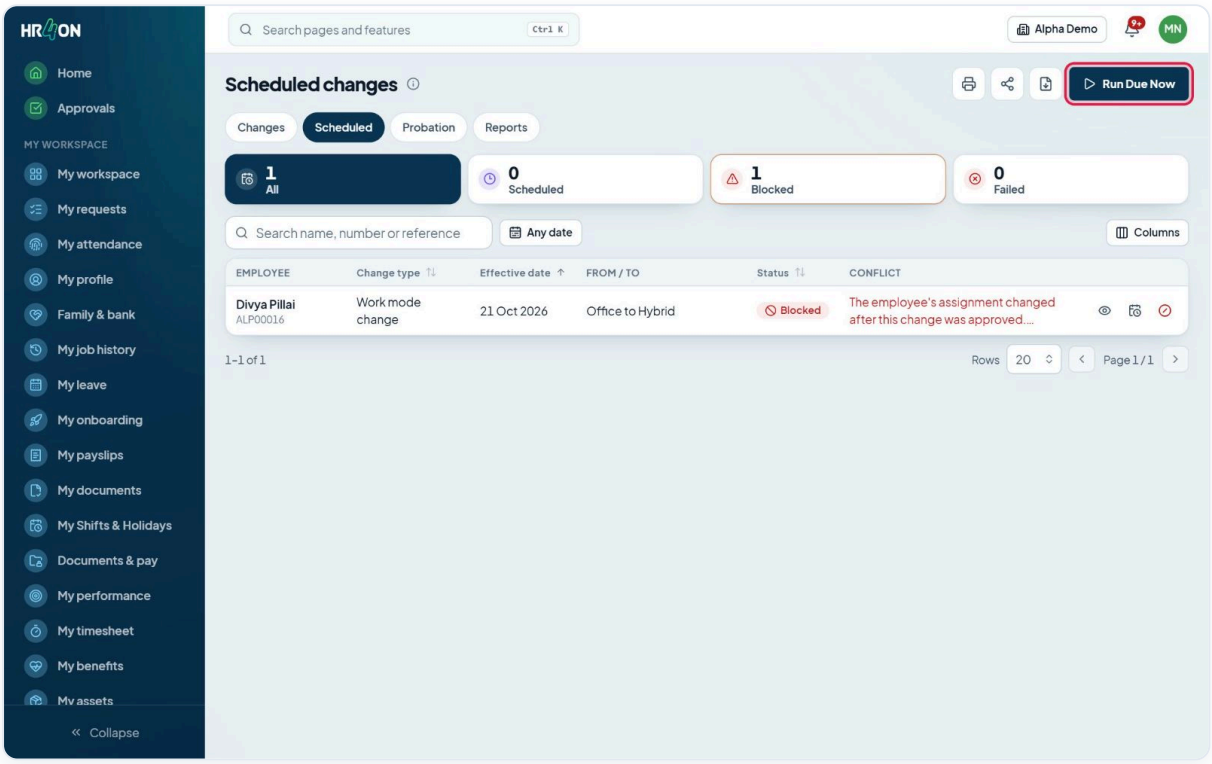
Scheduled lists approved changes waiting for their date, and any that could not be applied.

WHAT YOU SEE

- **Blocked** means something changed after approval, for example the employee's assignment was edited. The **Conflict** column explains why.
- **Failed** means applying the change hit an error. Retry from the change or its approval.
- **Run Due Now** applies every change that is due today without waiting for the nightly run.

HOW TO DO IT

1. Open **Employment changes** and select **Scheduled**.
2. Open a blocked change and select **Reschedule** to check it again and send it for re-approval.



4.5 Employment timeline

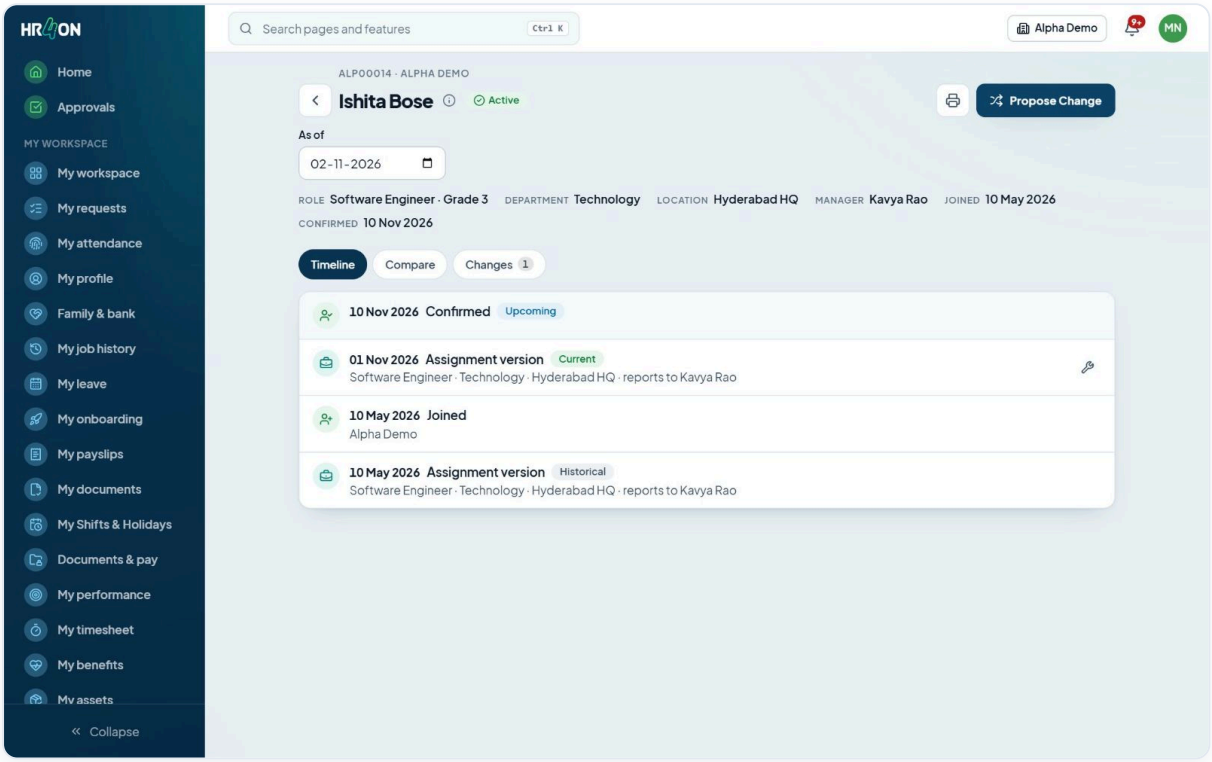
The timeline shows one person's whole employment story: joining, every change, probation reviews, contracts and deputations.

WHAT YOU SEE

- **Compare assignment versions** puts two dates side by side.
- Employees see their own timeline in **My job history** and are asked to acknowledge changes that affect them.

HOW TO DO IT

1. Open a change and select the **Employment timeline** icon, or open the timeline from the Reports page.
2. Select **Propose Change** to start a new change for this person.



4.6 Change reports

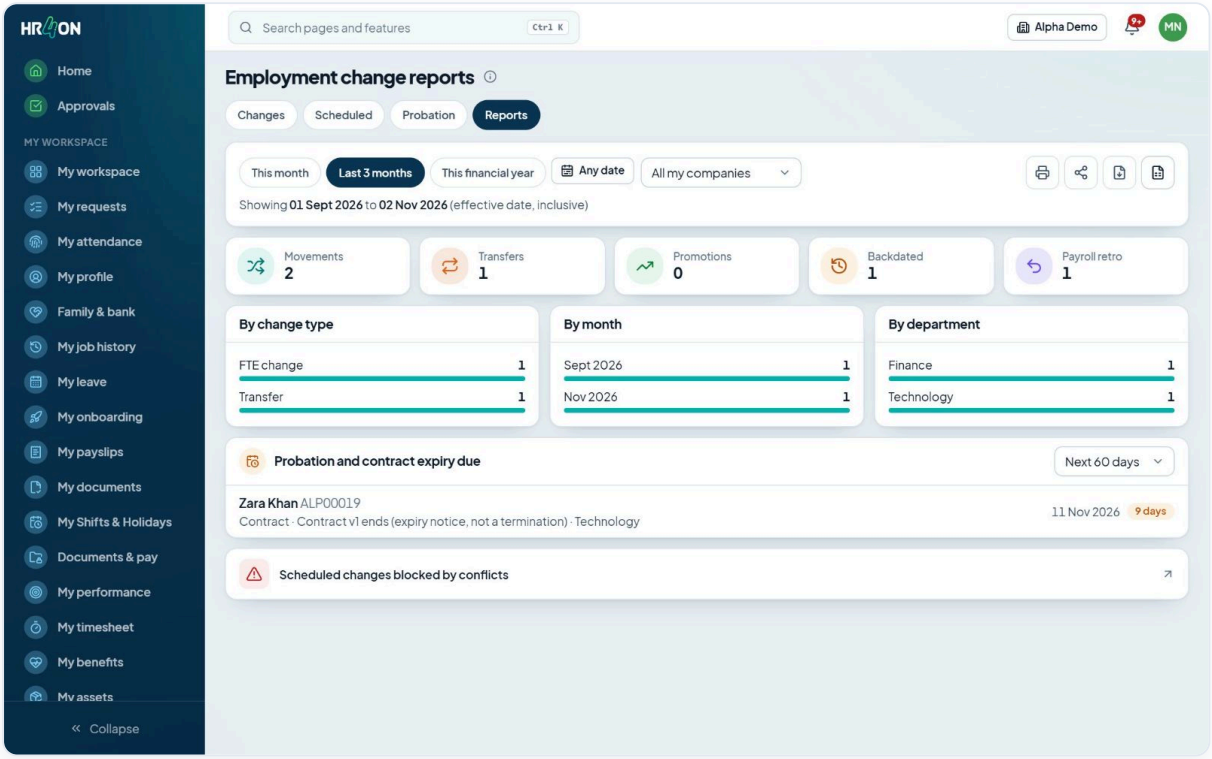
Reports summarises movements in a period: transfers, promotions, backdated changes and payroll retro, by change type, month and department.

WHAT YOU SEE

- **Probation and contract expiry due** lists people whose probation or fixed-term contract ends in the next 30 to 180 days.
- **Scheduled changes blocked by conflicts** links to the changes that need you.

HOW TO DO IT

1. Open **Employment changes** and select **Reports**.
2. Choose the period and company.

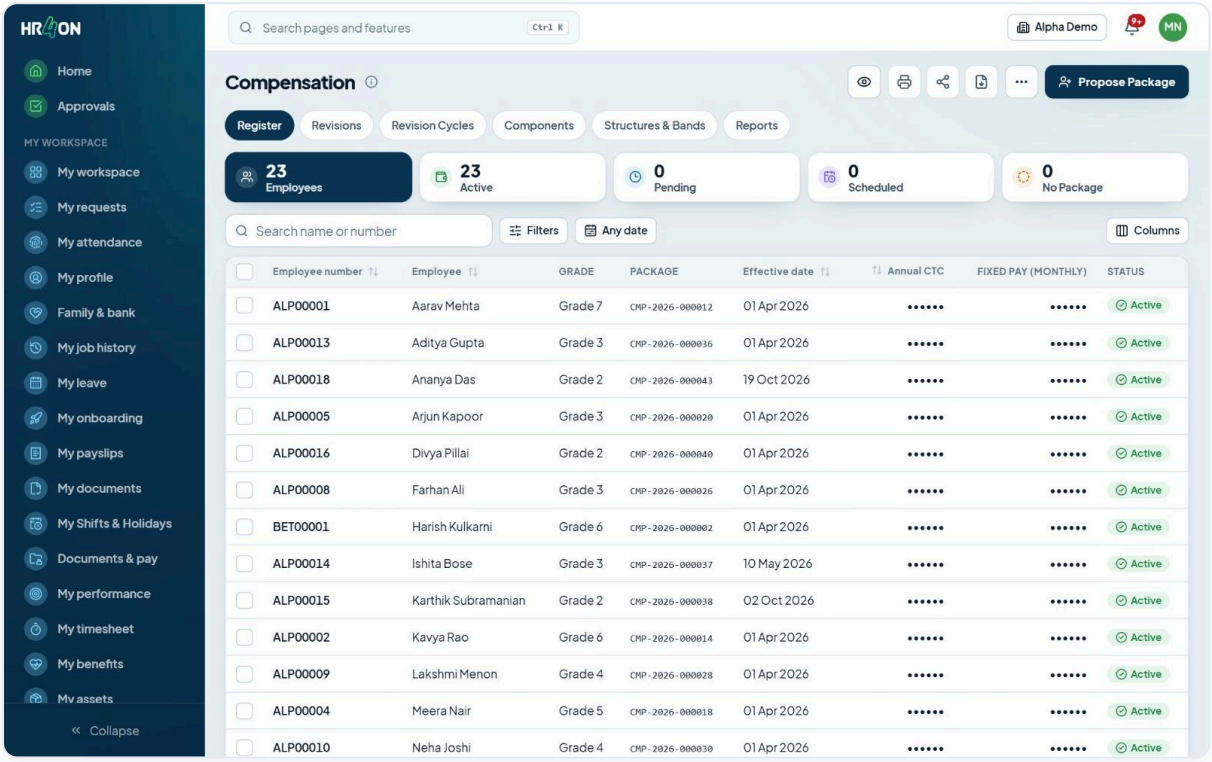


4.7 Changes in pay

Salary revisions are prepared and approved in **Compensation**, not in Employment changes. When a promotion comes with a pay rise, link the approved revision in **Compensation change reference** so approvers see both together.

GOOD TO KNOW

- Approving a promotion never changes pay by itself.
- Salary revision letters are generated in **Documents & letters** from the **Salary revision letter** template.



05 Probation and confirmation

New joiners serve a probation period. The evaluator (usually the manager) reviews them before it ends, and the outcome becomes a confirmation, an extension or an exit.

5.1 Probation reviews

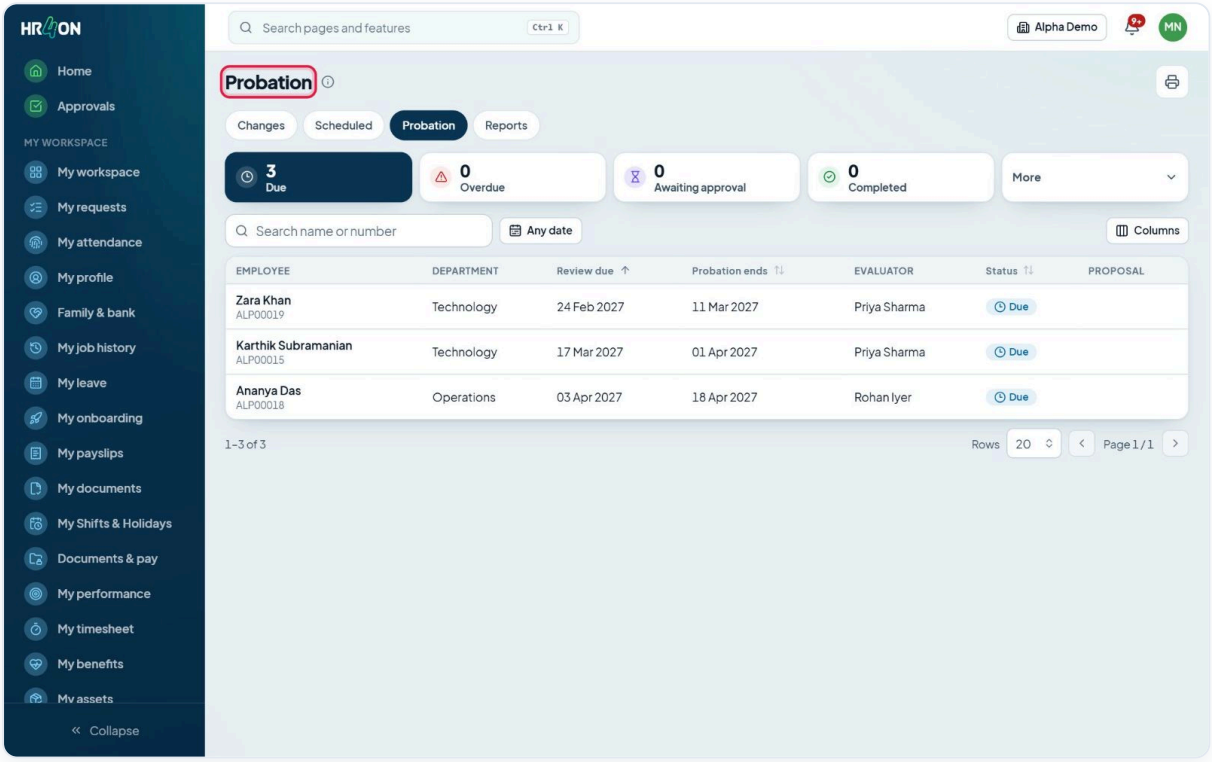
Probation lists reviews that are due, overdue, waiting for approval or completed.

WHAT YOU SEE

- **Review due** is when the evaluator should complete the review; **Probation ends** is the last day of probation.
- **Evaluator** is who rates the person. **Proposal** shows the resulting change once submitted.

HOW TO DO IT

1. Open **Employment changes** and select **Probation**.
2. Select a row to open the review.



5.2 Complete or return a probation review

The review rates each configured criterion from 1 to 5 and records the outcome with evidence.

WHAT YOU SEE

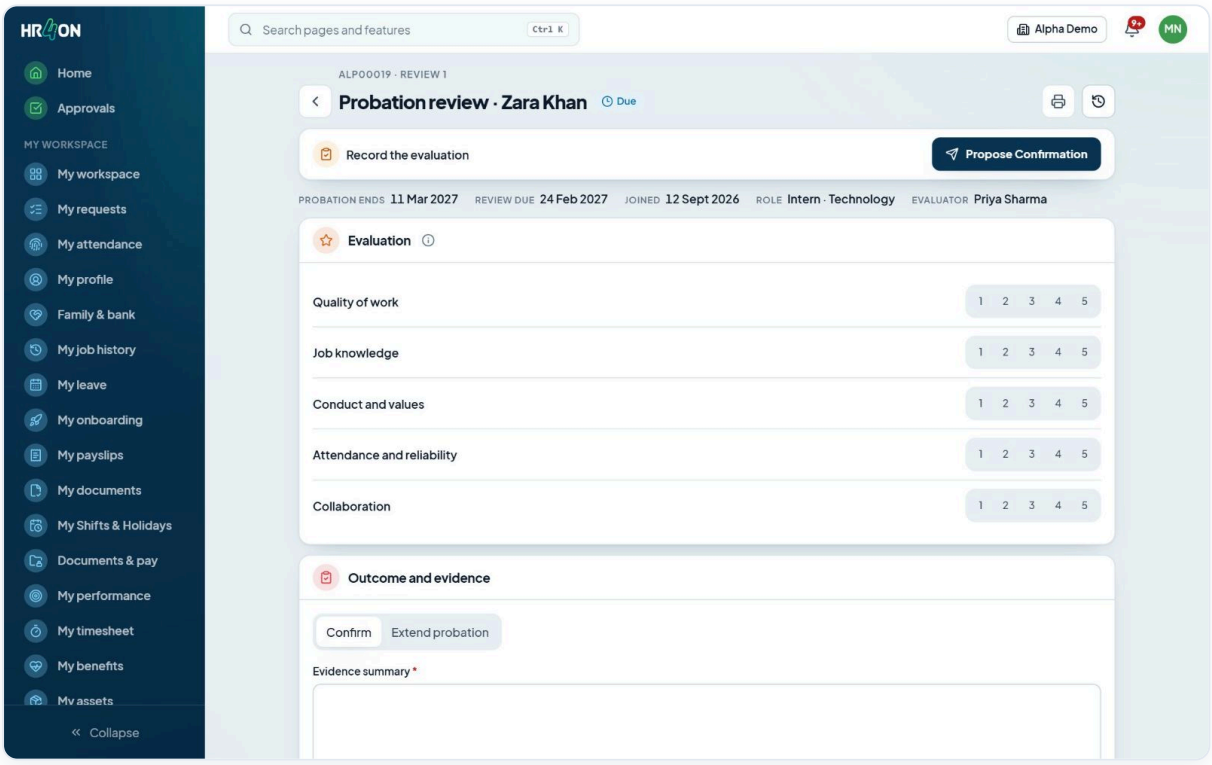
- **Evaluation** lists the criteria with a 1 to 5 rating each. **Outcome and evidence** chooses **Confirm** or **Extend probation** and asks for an **Evidence summary**; **Attach Evidence** adds a file.
- The main button (for example **Propose Confirmation**) creates a confirmation or probation extension change that goes for approval like any other change.
- **Return to evaluator** (HR) withdraws the pending proposal and asks the evaluator to rework the review.

HOW TO DO IT

1. Open the review.
2. Rate each criterion and choose the outcome.
3. Write the evidence summary, attach evidence if needed and select **Propose Confirmation** (or the extension button).

GOOD TO KNOW

- An extension cannot go beyond the company's maximum extension period.
- Confirmation letters are generated from the **Confirmation letter** template in Documents & letters.



06 Matrix managers

A matrix manager is someone outside the reporting line who needs to act for an employee, for example a project lead approving timesheets.

6.1 See and add matrix assignments

Matrix managers lists who has been given which capabilities for whom, and for how long.

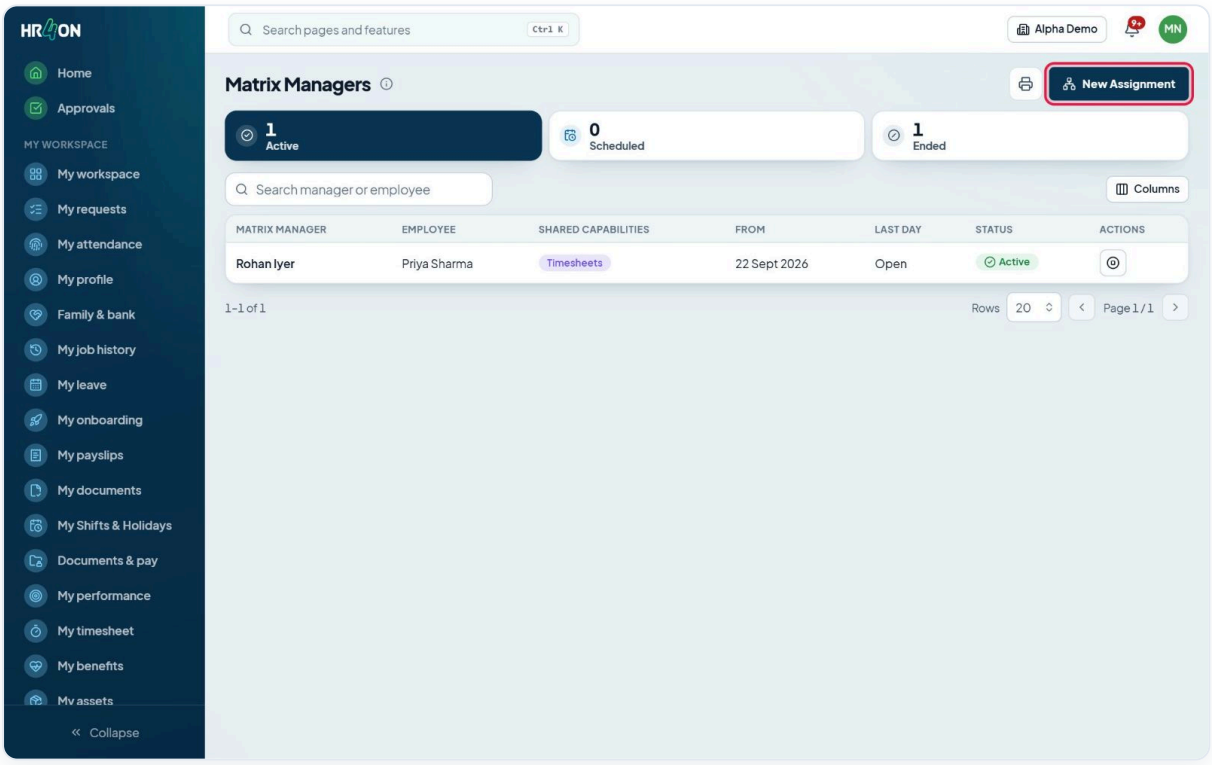
WHAT YOU SEE

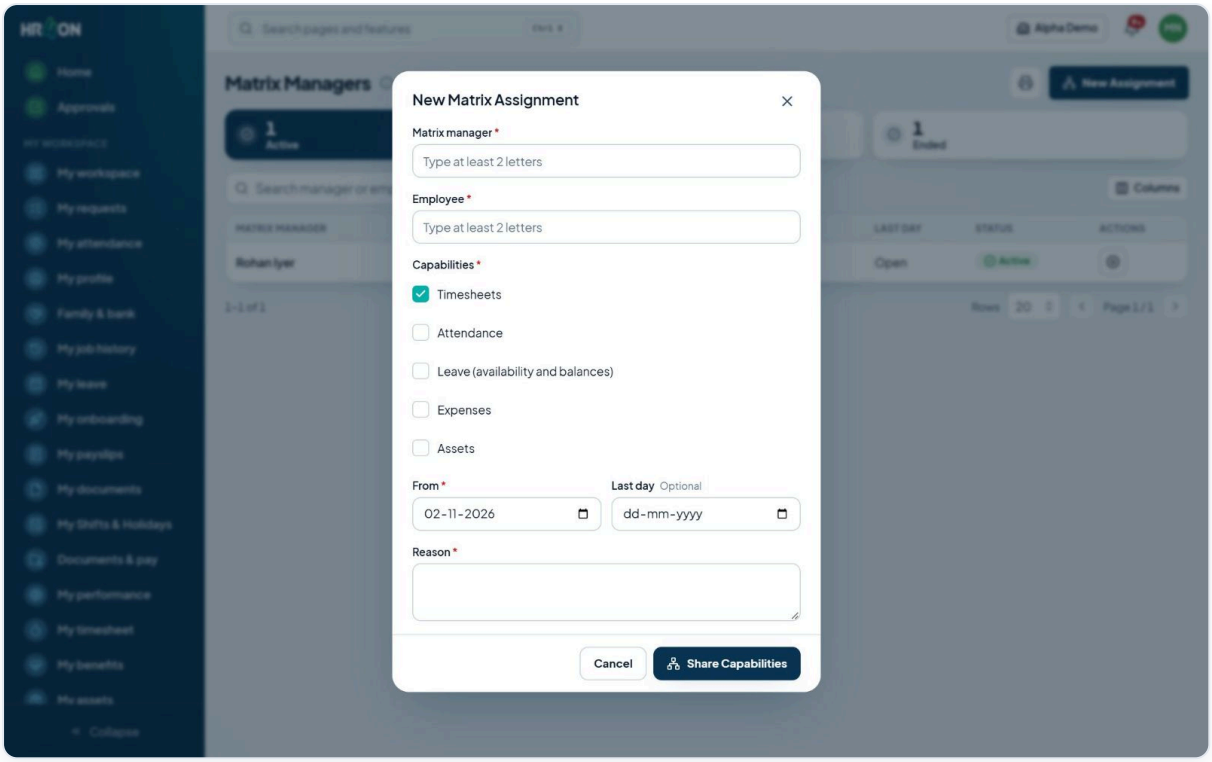
- **Shared capabilities** lists exactly what the matrix manager can do, for example approve timesheets. They see nothing else.
- Status is **Active**, **Scheduled** (starts later) or **Ended**.

HOW TO DO IT

1. Select **Matrix managers** in the **People** menu.
2. Select **New Assignment**.
3. Pick the **Matrix manager** and the **Employee**, tick the **Capabilities**, set **From** and optionally **Last day**, and give a reason.
4. Select **Share Capabilities**.

> **GOOD TO KNOW**
> - Line managers already see their own teams; only add matrix managers for people outside the line.
> - Use **End Access** on a row to stop an assignment early.




Matrix Managers
New Matrix Assignment
Matrix manager *
Type at least 2 letters
Employee *
Type at least 2 letters
Capabilities *
Timesheets
Attendance
Leave (availability and balances)
Expenses
Assets
From *
02-11-2026
Last day Optional
dd-mm-yyyy
Reason *
Cancel
Share Capabilities

07 Documents, letters and policies

Documents & letters is where HR generates letters from templates, publishes policies, tracks acknowledgements and keeps the document repository.

7.1 Letters

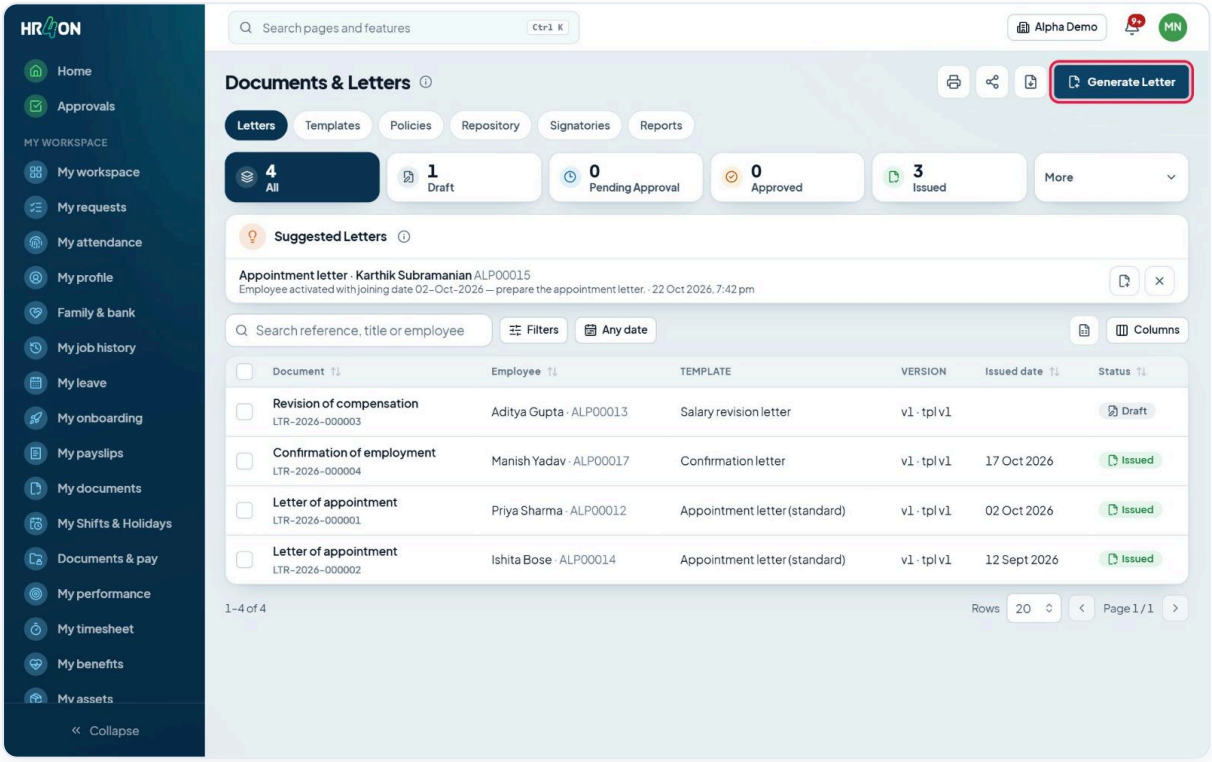
The **Letters** tab lists every letter generated for employees with its template, version and status.

WHAT YOU SEE

- Status: **Draft** (not yet an issued document), **Pending Approval**, **Approved** (ready to issue), **Issued**, and under **More** cancelled and revoked letters.
- **Suggested Letters** proposes letters when something happens, for example an appointment letter when an employee is activated.

HOW TO DO IT

1. Select **Documents & letters** in the **People** menu.
2. Choose a count tab or search.
3. Select a letter to open it.



7.2 Generate a letter

Generate one letter or a batch of the same letter for several employees from a published template.

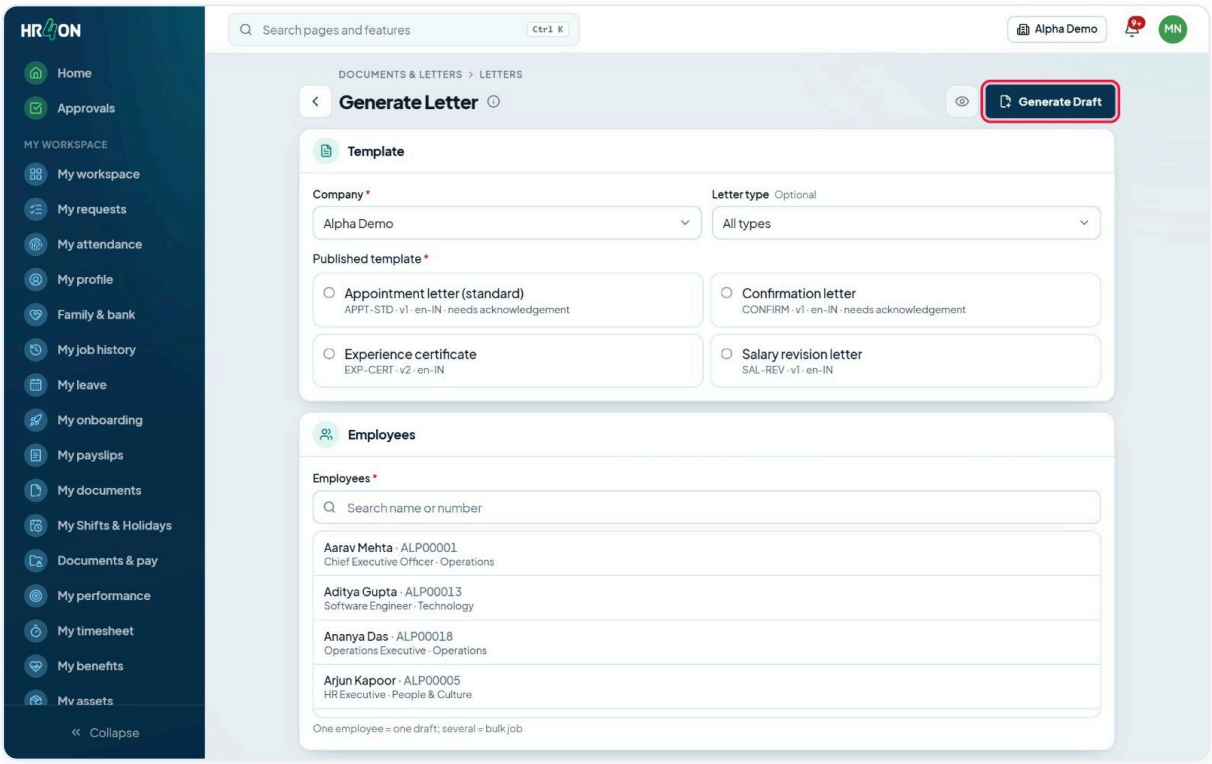
WHAT YOU SEE

- **Template**: choose the company, optionally the letter type, then the published template. Templates marked *needs acknowledgement* ask the employee to acknowledge.
- **Employees**: pick one or more. Picking several creates a bulk job.
- **Letter Details** asks for the values the template needs, such as the new salary or effective date. They are frozen with the letter.
- **Signatory** lists people authorised to sign this letter type today.

HOW TO DO IT

1. Select **Generate Letter**.
2. Choose the company and template.
3. Pick the employee and fill the letter details.
4. Select the eye icon to preview, then **Generate Draft**.

> **GOOD TO KNOW**
> - A generated letter is a draft until it is approved and issued.



7.3 Approve and issue a letter

Open a letter to submit it for approval, issue it and track delivery and acknowledgement.

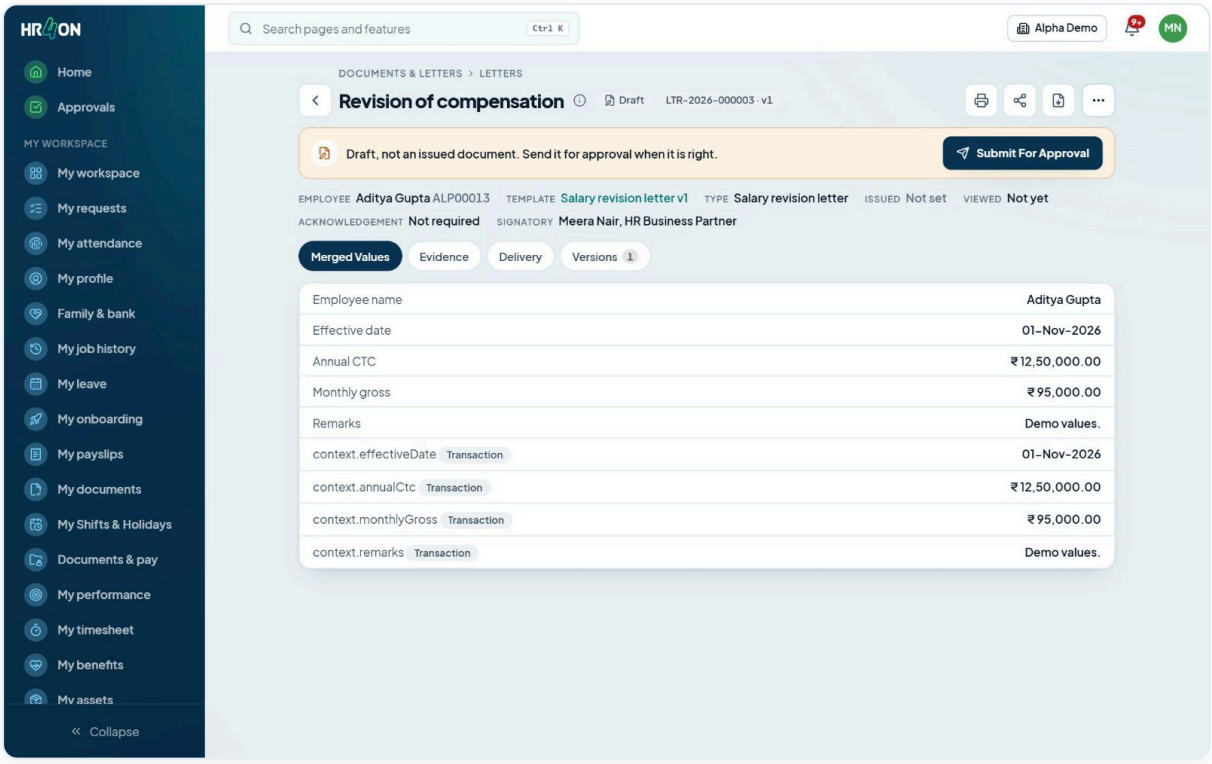
WHAT YOU SEE

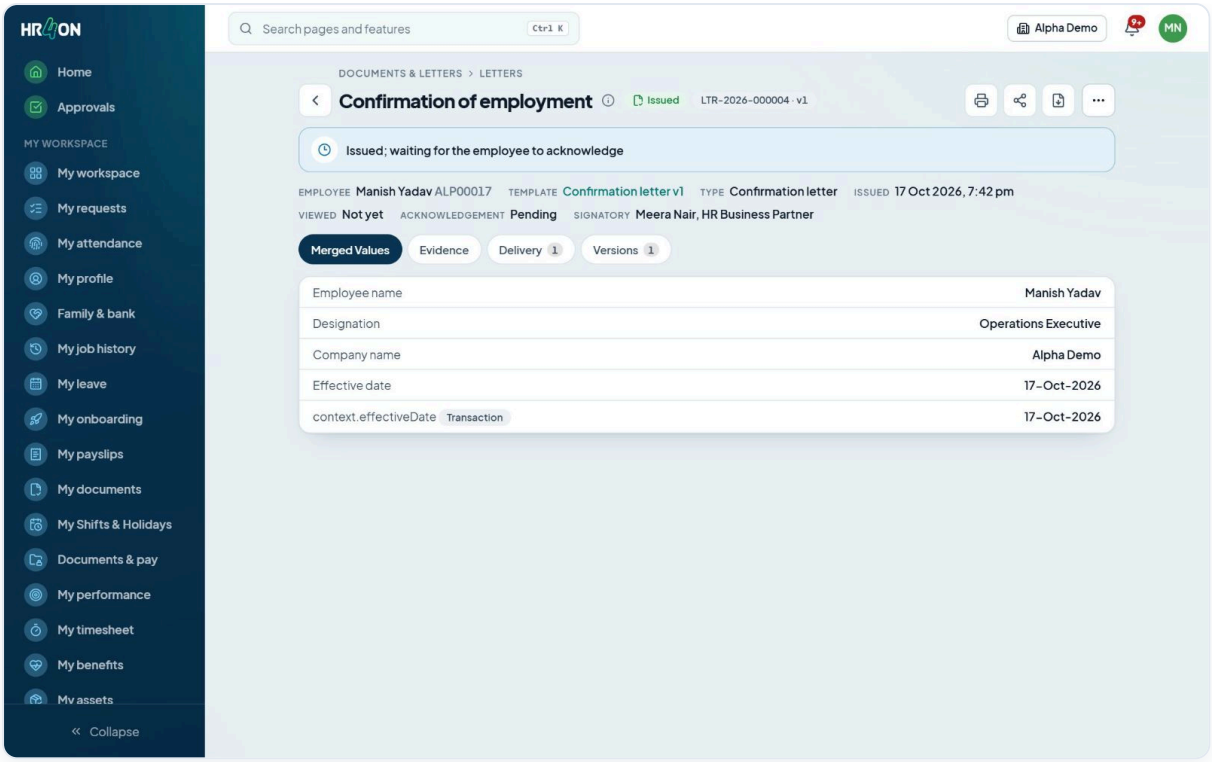
- The strip says what to do next: submit a draft, wait for a second approver, or **Issue Letter** once approved.
- **Merged Values** shows the values printed on the letter. **Evidence** shows hashes and the approval record. **Delivery** lists in-app and e-mail delivery. **Versions** lists earlier versions.
- **More actions**: **Copy Secure Link**, **Regenerate As New Version**, **Cancel Draft** and **Revoke**.
- The header shows when the employee first viewed it and whether they acknowledged it.

HOW TO DO IT

1. Open the letter.
2. For a draft, select **Submit For Approval**.
3. Once approved, select **Issue Letter** and choose how to notify the employee.

> **GOOD TO KNOW**
> - An issued letter cannot be edited. Regenerate it as a new version or revoke it with a reason.





An issued confirmation letter with its delivery and acknowledgement details.

7.4 Letter templates

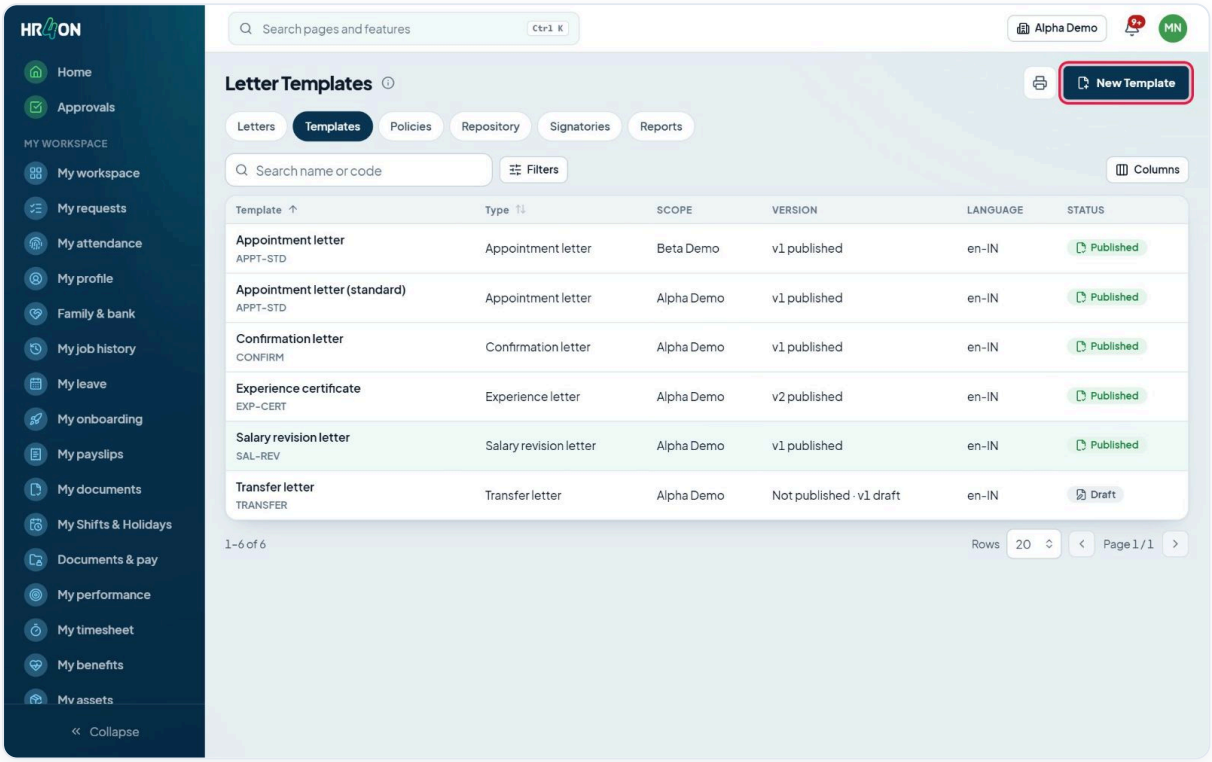
Templates are versioned and use only approved merge fields. Only published versions can generate letters.

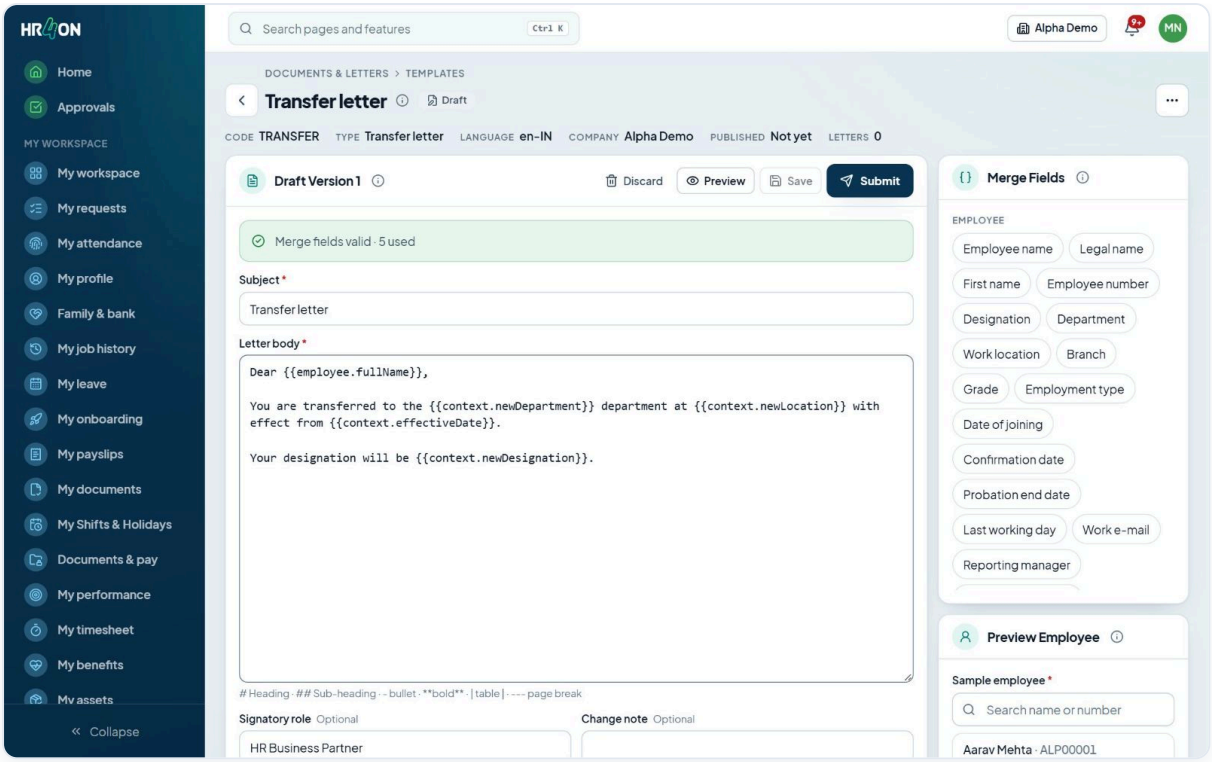
WHAT YOU SEE

- Each template shows its letter type, company, version and status (**Draft**, **Published**).
- **New Template** starts version 1 as a draft with starter content.
- Publishing a template needs a second person's approval.

HOW TO DO IT

1. Open **Templates**.
2. Select **New Template**, or open a template to edit its draft version.
3. Preview, then send the version for publishing.





A draft template open in the editor.

7.5 Policies and acknowledgements

Publish company policies and see who has acknowledged them.

WHAT YOU SEE

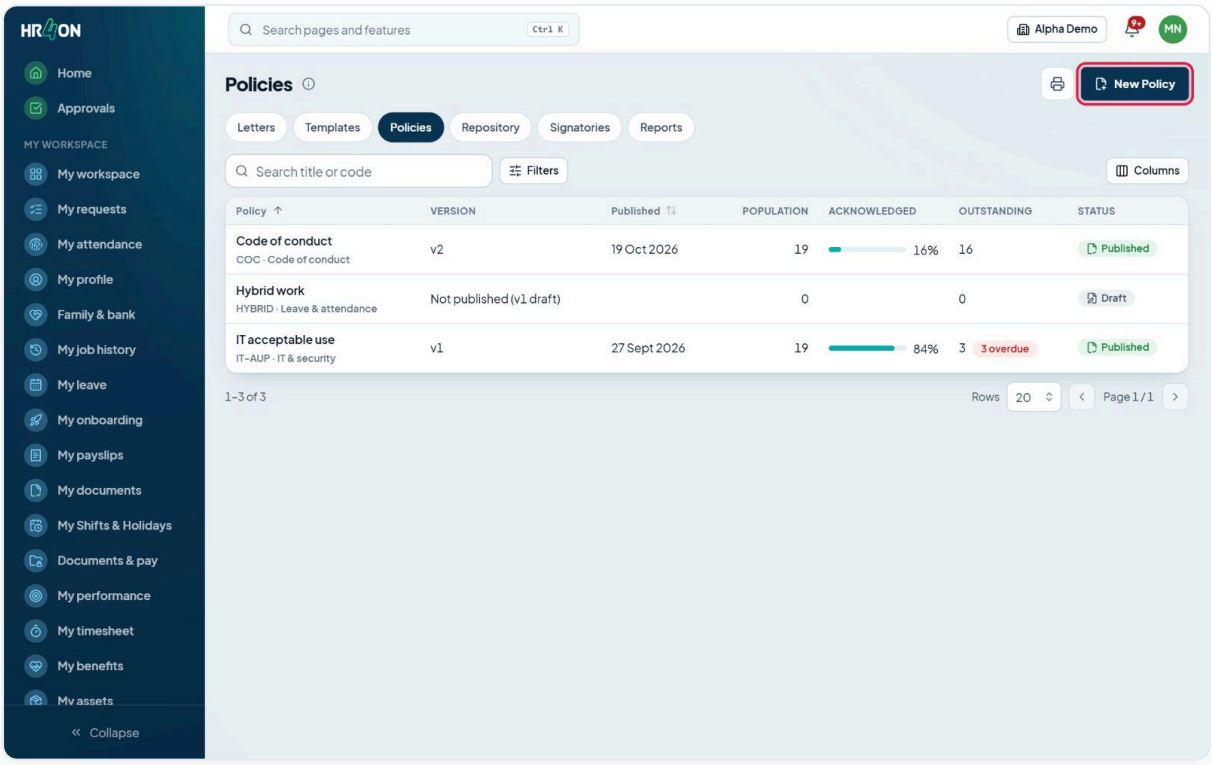
- The list shows the version, published date, population, the percentage acknowledged and how many are outstanding or overdue.
- Open a policy to see who has acknowledged (**Acknowledgements**) and the text (**Content**). **Remind All Pending** reminds everyone who has not acknowledged yet.
- **New Version** creates the next draft; it can ask everyone to acknowledge again.

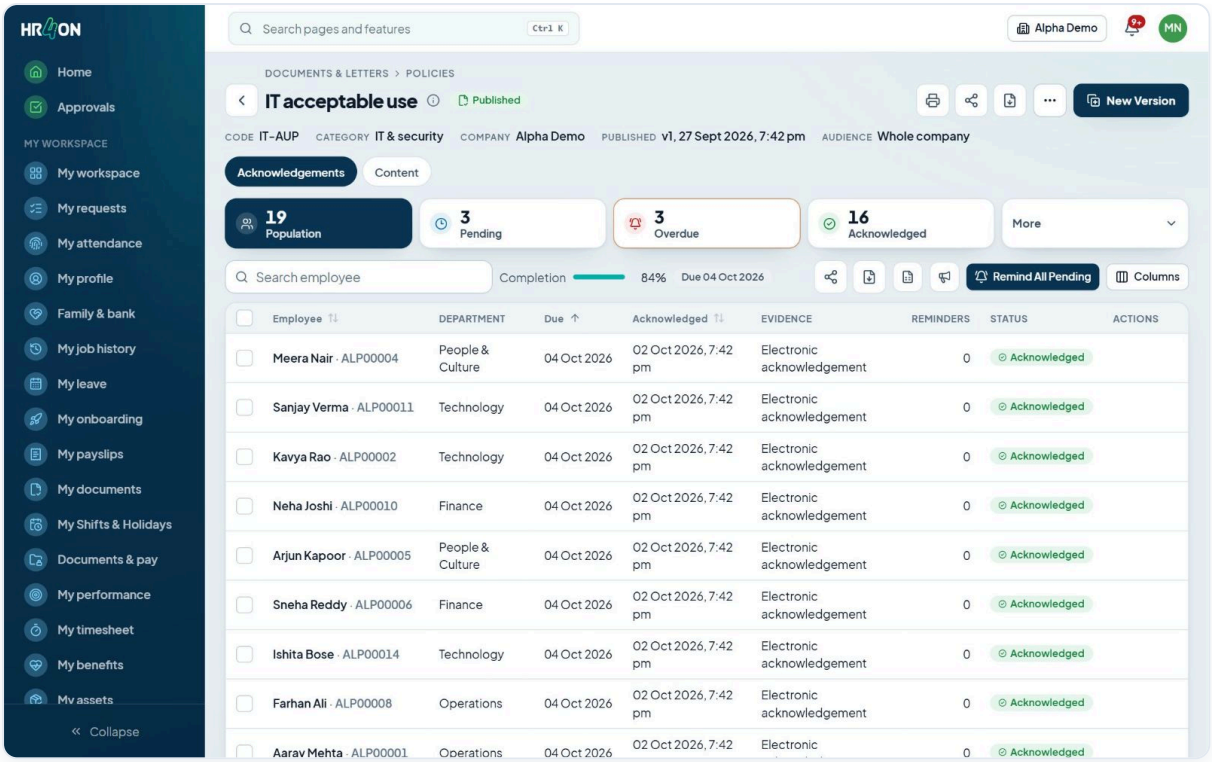
HOW TO DO IT

1. Open **Policies**.
2. Select **New Policy**, fill company, category, code, title, summary and text, choose whether employees must acknowledge and in how many days, then **Create Draft**.
3. Open the draft and send it for publishing.

GOOD TO KNOW

- Publishing needs approval.
- Employees see the policy under **My documents** and on their Home page until they acknowledge.




HR4ON
Search pages and features
Ctrl K
Alpha Demo
MN
Home
Approvals
MY WORKSPACE
My workspace
My requests
My attendance
My profile
Family & bank
My job history
My leave
My onboarding
My payslips
My documents
My Shifts & Holidays
Documents & pay
My performance
My timesheet
My benefits
My assets
Collapse
DOCUMENTS & LETTERS > POLICIES
IT acceptable use
Published
New Version
CODE IT-AUP CATEGORY IT & security COMPANY Alpha Demo PUBLISHED v1, 27 Sept 2026, 7:42 pm AUDIENCE Whole company
Acknowledgements
Content
19 Population
3 Pending
3 Overdue
16 Acknowledged
More
Search employee
Completion
84%
Due 04 Oct 2026
Remind All Pending
Columns
Employee
DEPARTMENT
Due
Acknowledged
EVIDENCE
REMINDERS
STATUS
ACTIONS
Meera Nair · ALP00004 People & Culture 04 Oct 2026 02 Oct 2026, 7:42 pm Electronic acknowledgement 0 Acknowledged
Sanjay Verma · ALP00011 Technology 04 Oct 2026 02 Oct 2026, 7:42 pm Electronic acknowledgement 0 Acknowledged
Kavya Rao · ALP00002 Technology 04 Oct 2026 02 Oct 2026, 7:42 pm Electronic acknowledgement 0 Acknowledged
Neha Joshi · ALP00010 Finance 04 Oct 2026 02 Oct 2026, 7:42 pm Electronic acknowledgement 0 Acknowledged
Arjun Kapoor · ALP00005 People & Culture 04 Oct 2026 02 Oct 2026, 7:42 pm Electronic acknowledgement 0 Acknowledged
Sneha Reddy · ALP00006 Finance 04 Oct 2026 02 Oct 2026, 7:42 pm Electronic acknowledgement 0 Acknowledged
Ishita Bose · ALP00014 Technology 04 Oct 2026 02 Oct 2026, 7:42 pm Electronic acknowledgement 0 Acknowledged
Farhan Ali · ALP00008 Operations 04 Oct 2026 02 Oct 2026, 7:42 pm Electronic acknowledgement 0 Acknowledged
Aarav Mehta · ALP00001 Operations 04 Oct 2026 02 Oct 2026, 7:42 Electronic 0 Acknowledged

7.6 Document repository and verification

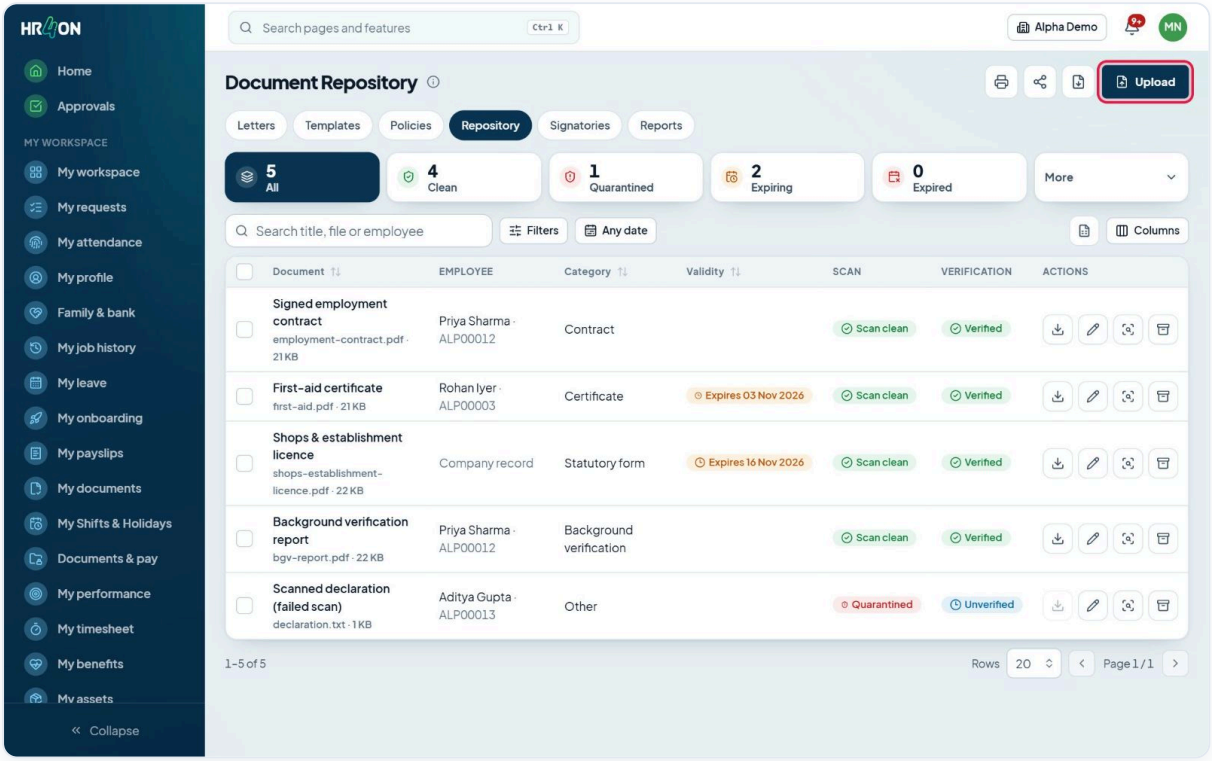
The repository holds every uploaded employee and company document, with virus scan results, validity and verification.

WHAT YOU SEE

- **Clean** and **Quarantined** show the virus scan result. Quarantined files cannot be opened.
- **Expiring** and **Expired** list documents with a validity date, such as certificates and licences.
- **Verification** shows **Verified** or **Unverified**; verify a document after checking the original.

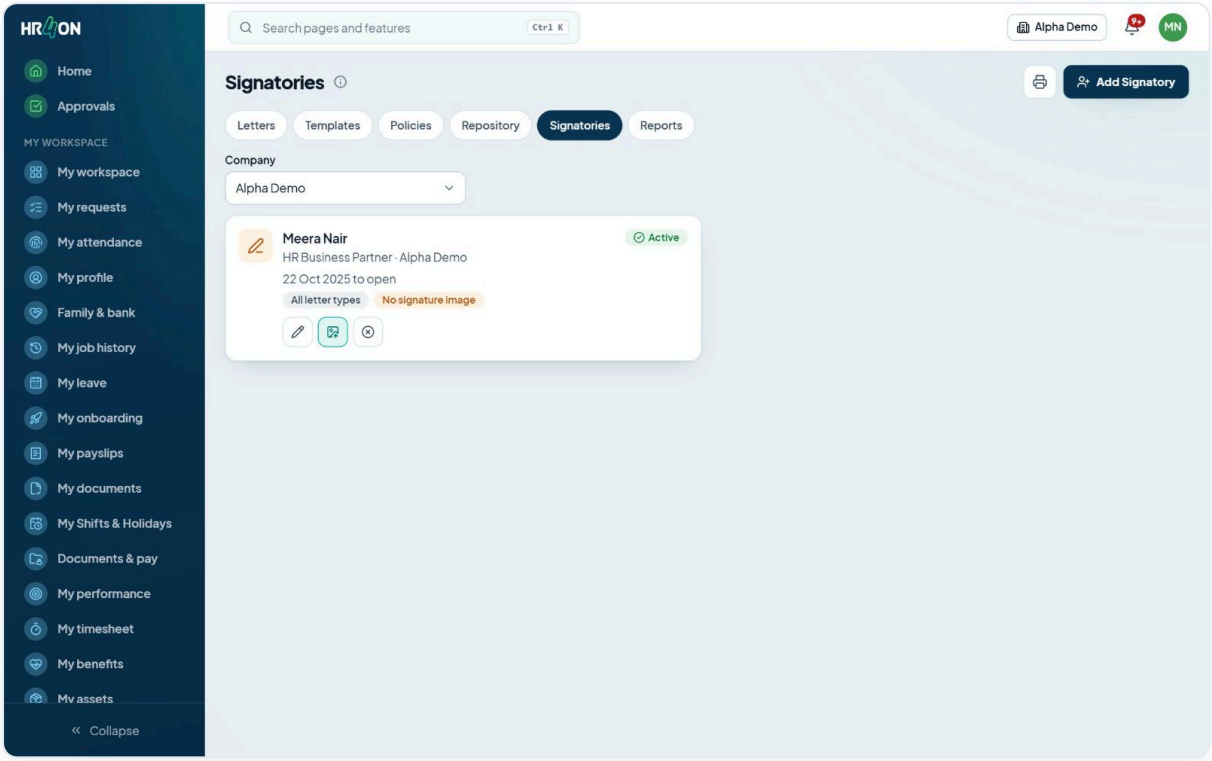
HOW TO DO IT

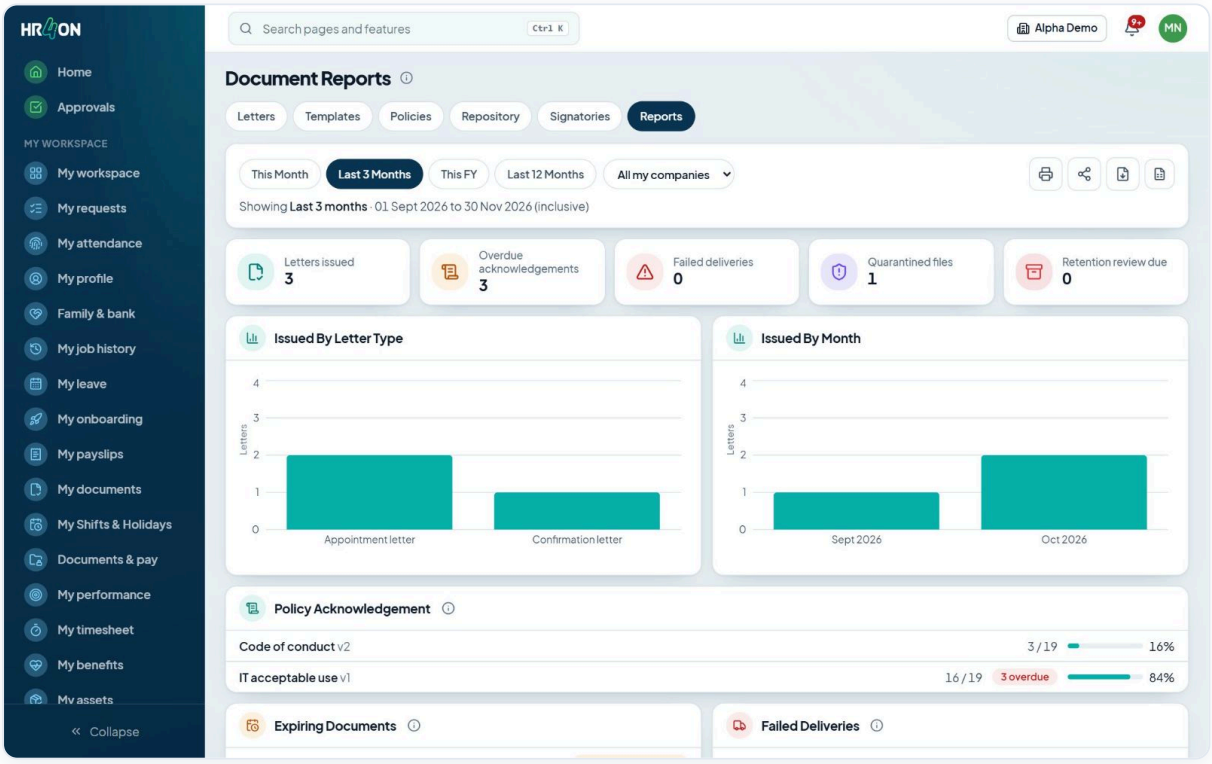
1. Open **Repository**.
2. Use the count tabs to find expiring or unverified documents.
3. Use the row actions to download or verify, or **Upload** a new document.



7.7 Signatories and reports

Signatories (HR administrators) sets who may sign which letter types and until when; **Add Signatory** adds one. **Reports** shows letter volumes, acknowledgement rates and expiring documents.





08 Assets as HR sees them

The asset custodian issues and receives laptops, phones and other equipment. HR uses the asset screens to check what a person holds, especially before an exit.

8.1 Asset overview

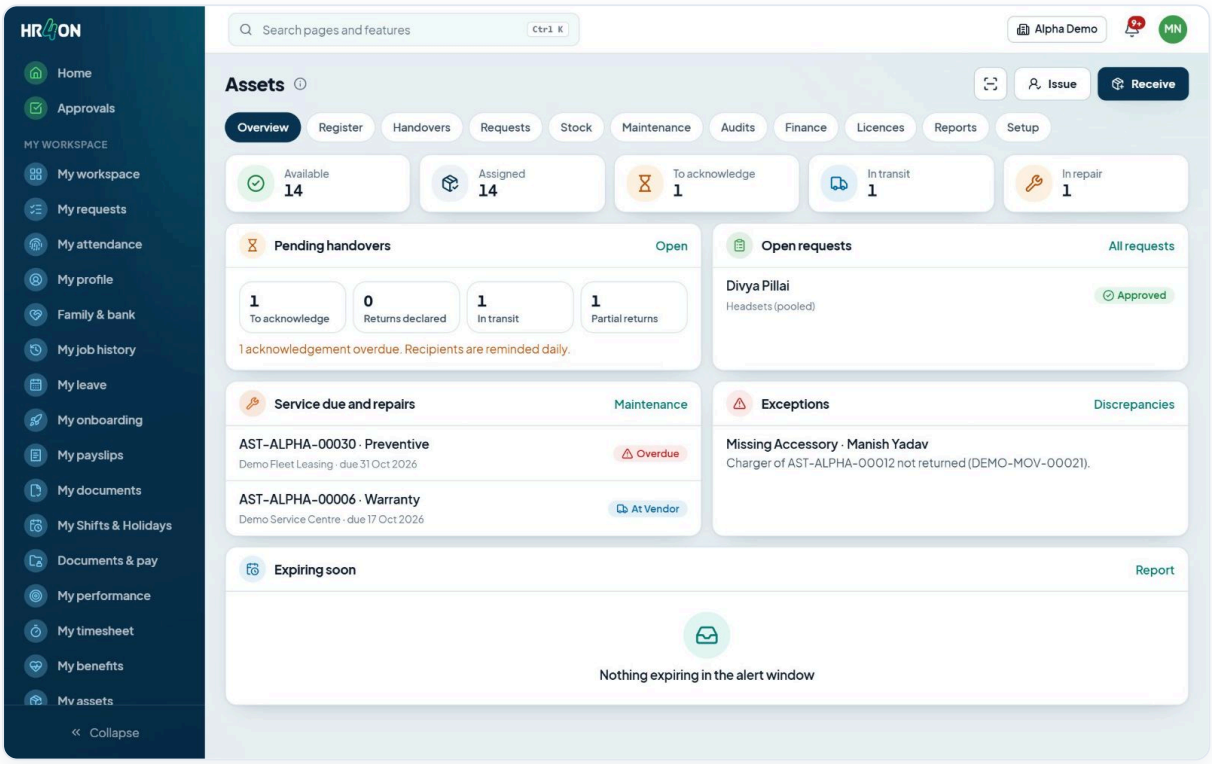
Assets shows how many assets are available, assigned, waiting for acknowledgement, in transit or in repair, plus pending handovers and exceptions such as missing accessories.

HOW TO DO IT

1. Select **Assets** in the **People** menu.
2. Open **Register** to search for a person's assets.

GOOD TO KNOW

- Unreturned assets show up as clearance items when someone leaves.
- The asset custodian guide explains issuing, returns, audits and maintenance in detail.



09 Contingent workforce

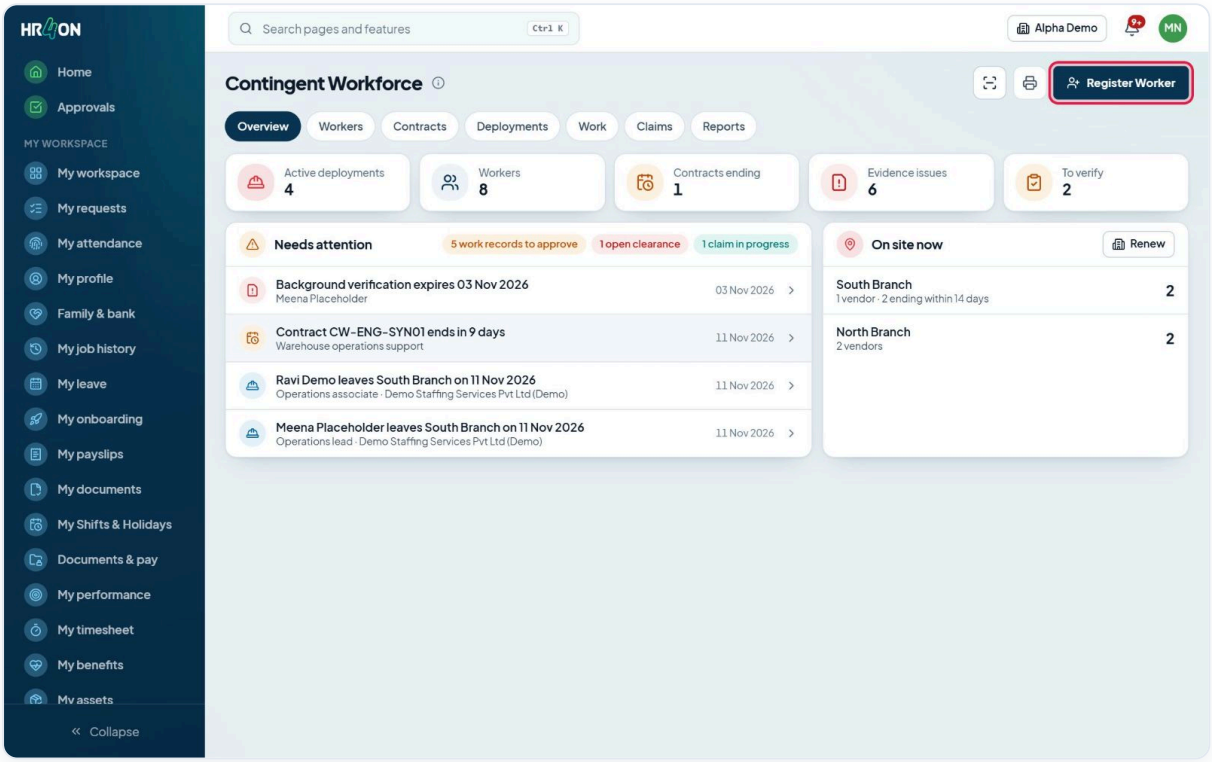
Contractors, agency staff, consultants and security guards work for you through a vendor. **Contingent workforce** keeps their contracts, verification, site deployments, approved work and vendor claims in one place.

9.1 Overview

The overview shows active deployments, workers, contracts ending, evidence issues and workers to verify, then a **Needs attention** list and who is **On site now**.

HOW TO DO IT

1. Select **Contingent workforce** in the **People** menu.
2. Select an item under **Needs attention** to deal with it.



9.2 Vendors and contracts

Contracts lists each vendor contract (engagement) with its sponsor, end date and how many workers are on site. **Vendors** lists the agencies themselves.

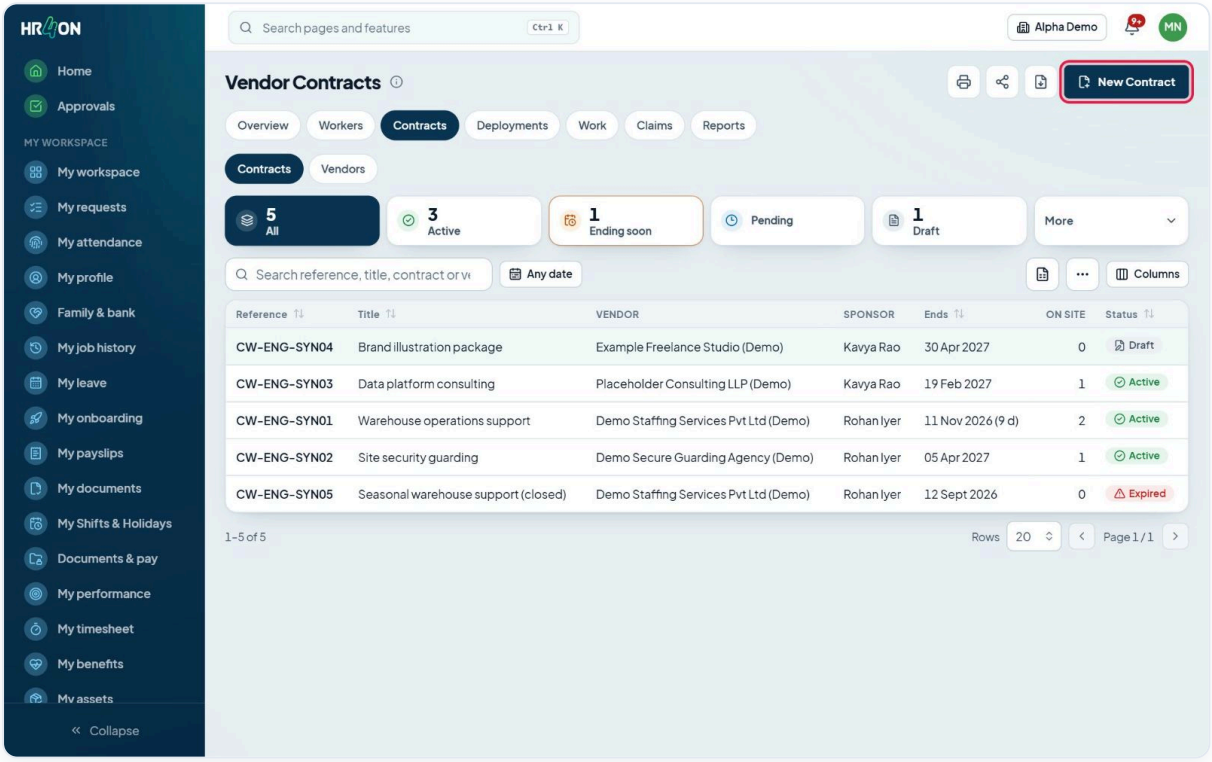
WHAT YOU SEE

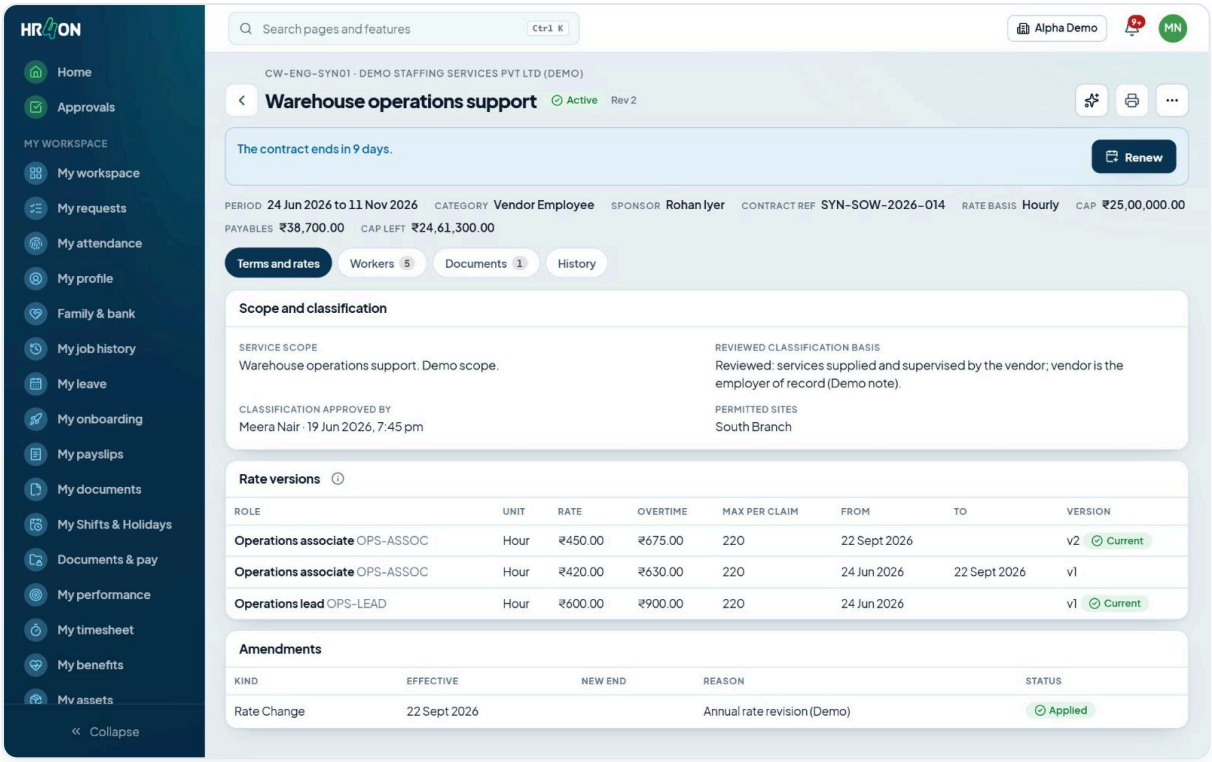
- Status: **Draft**, **Pending** (approval), **Active**, **Ending soon**, **Expired** and **Ended**.
- A contract sets the rates, sites and the evidence each worker needs before deployment.
- From a contract's **More actions**: **Amend or renew**, **Register worker**, **Upload vendor document**, **Validate a claim** and **End contract**.

HOW TO DO IT

1. Open **Contracts**.
2. Select **New Contract**, fill the vendor, dates, sites and rates, and submit for approval.
3. Use **Vendors** and **New Vendor** to add an agency first.

> **GOOD TO KNOW**
> - Workers can only be registered against an approved, active contract.




HR4ON
Search pages and features
Ctrl K
Alpha Demo
MN
Home
Approvals
MY WORKSPACE
My workspace
My requests
My attendance
My profile
Family & bank
My job history
My leave
My onboarding
My payslips
My documents
My Shifts & Holidays
Documents & pay
My performance
My timesheet
My benefits
My assets
Collapse
CW-ENG-SYN01 · DEMO STAFFING SERVICES PVT LTD (DEMO)
Warehouse operations support
Active
Rev 2
The contract ends in 9 days.
Renew
PERIOD 24 Jun 2026 to 11 Nov 2026
CATEGORY Vendor Employee
SPONSOR Rohan Iyer
CONTRACT REF SYN-SOW-2026-014
RATE BASIS Hourly
CAP ₹25,00,000.00
PAYABLES ₹38,700.00
CAP LEFT ₹24,61,300.00
Terms and rates
Workers 5
Documents 1
History
Scope and classification
SERVICE SCOPE
Warehouse operations support. Demo scope.
REVIEWED CLASSIFICATION BASIS
Reviewed: services supplied and supervised by the vendor; vendor is the employer of record (Demo note).
CLASSIFICATION APPROVED BY
Meera Nair · 19 Jun 2026, 7:45 pm
PERMITTED SITES
South Branch
Rate versions
ROLE
UNIT
RATE
OVERTIME
MAX PER CLAIM
FROM
TO
VERSION
Operations associate OPS-ASSOC
Hour
₹450.00
₹675.00
220
22 Sept 2026
v2 Current
Operations associate OPS-ASSOC
Hour
₹420.00
₹630.00
220
24 Jun 2026
22 Sept 2026
v1
Operations lead OPS-LEAD
Hour
₹600.00
₹900.00
220
24 Jun 2026
v1 Current
Amendments
KIND
EFFECTIVE
NEW END
REASON
STATUS
Rate Change
22 Sept 2026
Annual rate revision (Demo)
Applied

9.3 Register and verify a worker

Workers lists every contingent worker with vendor, sponsor, engagement dates, location and status.

WHAT YOU SEE

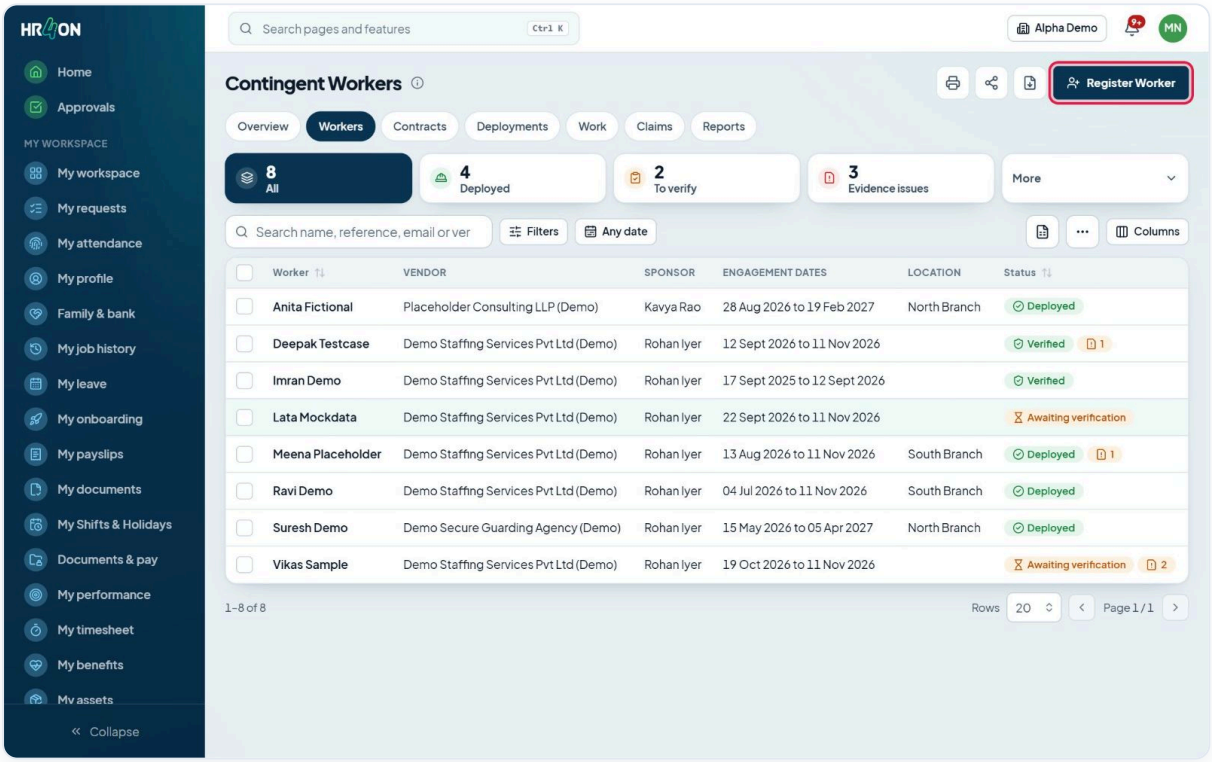
- Status: **Awaiting verification**, **Verified**, **Deployed**, and under **More** converted and rejected.
- **To verify** and **Evidence issues** show who needs your attention.
- The worker page shows the next step (**Verify**, **Deploy** or **Upload Evidence**) and tabs for **Engagement**, **Qualifications**, **Access**, **Assets** and **History**.

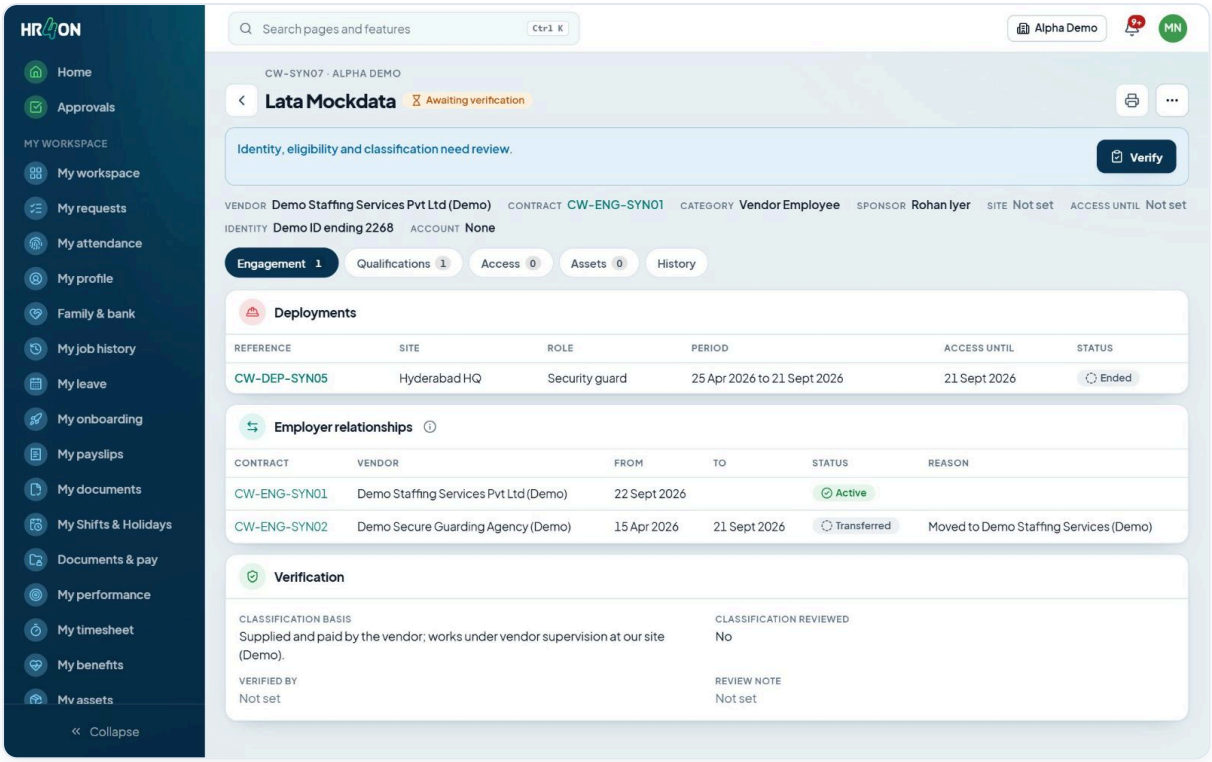
HOW TO DO IT

1. Select **Register Worker** and fill the worker's details against a contract.
2. Open the worker and upload the required evidence (ID, background check, certificates).
3. Select **Verify** once identity, eligibility and classification are checked.
4. Select **Deploy** to place them at a site.

GOOD TO KNOW

- A worker cannot be deployed while required evidence is missing or expired, unless an exception is approved.
- **Convert to employee** (More actions) starts hiring the worker as an employee; their contractor history stays separate.




HR4ON
Search pages and features
Ctrl K
Alpha Demo
MN
Home
Approvals
MY WORKSPACE
My workspace
My requests
My attendance
My profile
Family & bank
My job history
My leave
My onboarding
My payslips
My documents
My Shifts & Holidays
Documents & pay
My performance
My timesheet
My benefits
My assets
Collapse
CW-SYN07 · ALPHA DEMO
Lata Mockdata
Awaiting verification
Identity, eligibility and classification need review.
Verify
VENDOR Demo Staffing Services Pvt Ltd (Demo) CONTRACT CW-ENG-SYN01 CATEGORY Vendor Employee SPONSOR Rohan Iyer SITE Not set ACCESS UNTIL Not set
IDENTITY Demo ID ending 2268 ACCOUNT None
Engagement 1
Qualifications 1
Access 0
Assets 0
History
Deployments
REFERENCE SITE ROLE PERIOD ACCESS UNTIL STATUS
CW-DEP-SYN05 Hyderabad HQ Security guard 25 Apr 2026 to 21 Sept 2026 21 Sept 2026 Ended
Employer relationships
CONTRACT VENDOR FROM TO STATUS REASON
CW-ENG-SYN01 Demo Staffing Services Pvt Ltd (Demo) 22 Sept 2026 Active
CW-ENG-SYN02 Demo Secure Guarding Agency (Demo) 15 Apr 2026 21 Sept 2026 Transferred Moved to Demo Staffing Services (Demo)
Verification
CLASSIFICATION BASIS
Supplied and paid by the vendor; works under vendor supervision at our site (Demo).
CLASSIFICATION REVIEWED
No
VERIFIED BY
Not set
REVIEW NOTE
Not set

9.4 Deployments, work and claims

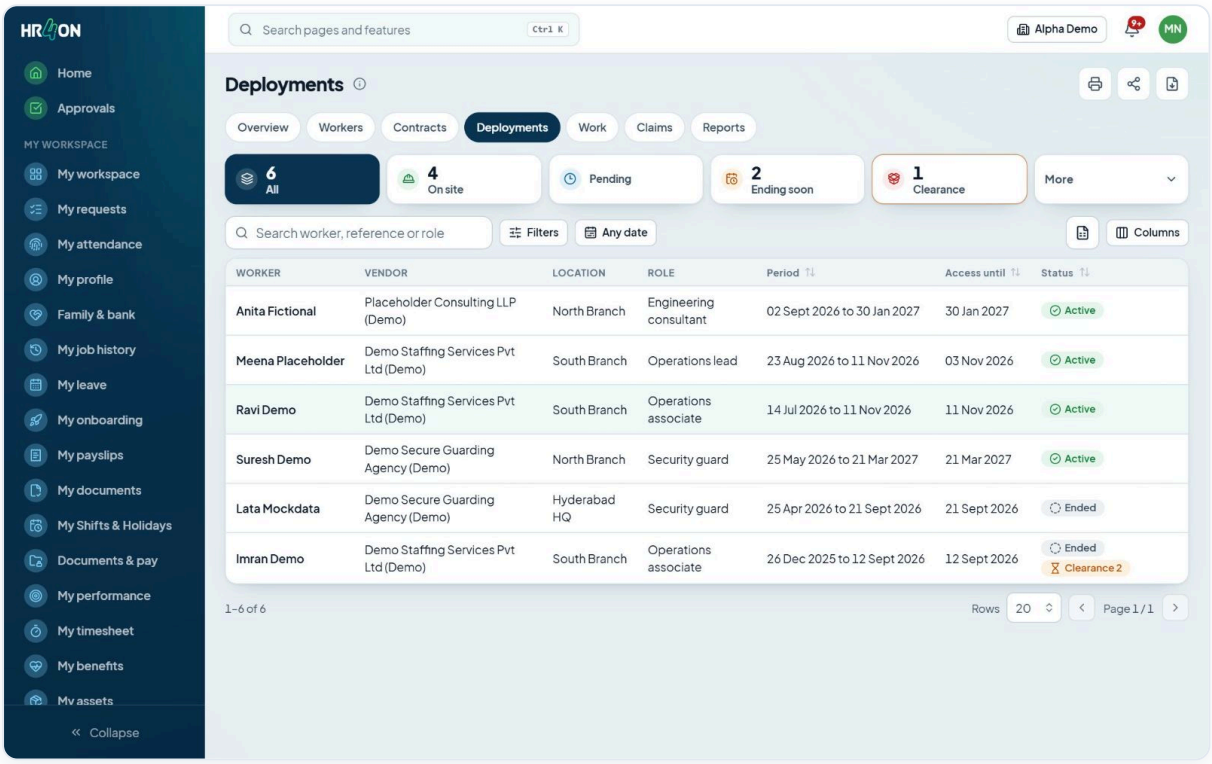
A deployment places a worker at a site for a period, with access until a date. Approved work records what they did, and vendor claims are checked against that work.

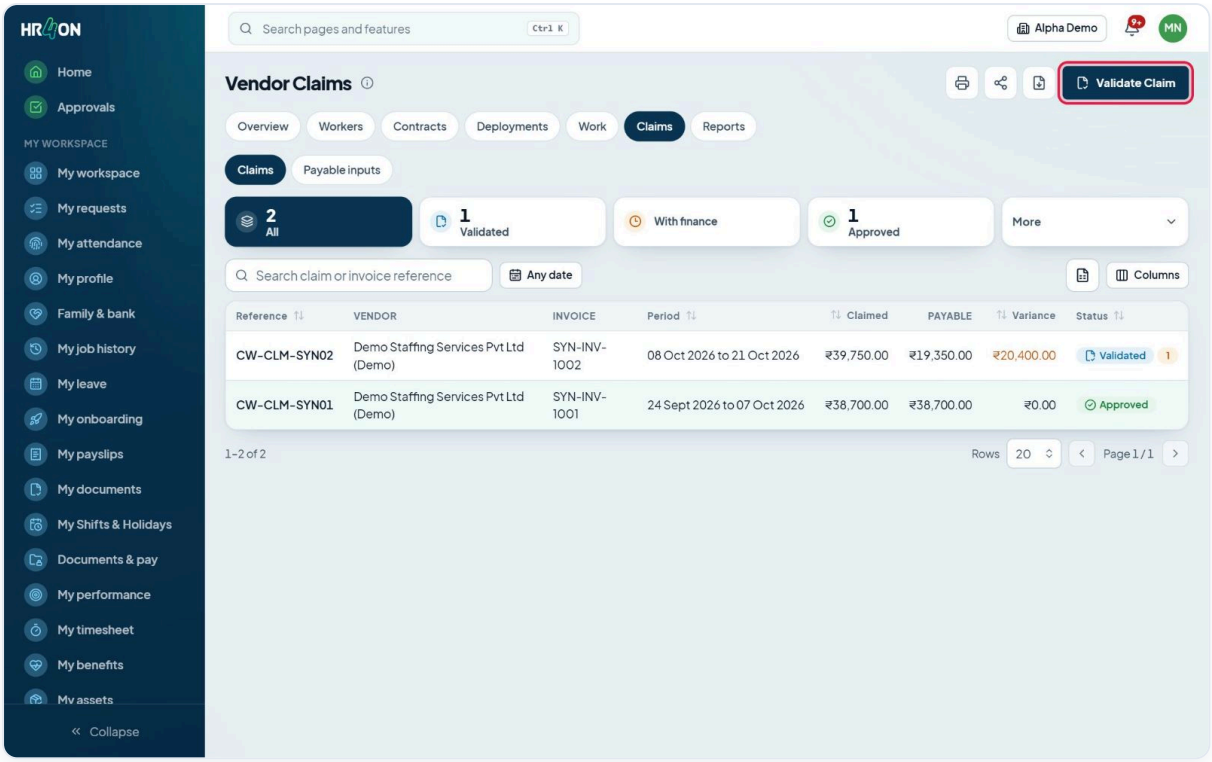
WHAT YOU SEE

- **Deployments** shows who is on site, pending, ending soon or in clearance.
- **Work** lists attendance and hours from sites; site managers approve them.
- **Claims** compares the vendor invoice with approved work and shows the variance before it goes to finance.

HOW TO DO IT

1. Open **Deployments** to extend or end a deployment.
2. Open **Claims** and select **Validate Claim** to check a vendor invoice.




HR4ON
Search pages and features
Ctrl K
Alpha Demo
MN
Home
Approvals
MY WORKSPACE
My workspace
My requests
My attendance
My profile
Family & bank
My job history
My leave
My onboarding
My payslips
My documents
My Shifts & Holidays
Documents & pay
My performance
My timesheet
My benefits
My assets
Collapse
Vendor Claims
Validate Claim
Overview
Workers
Contracts
Deployments
Work
Claims
Reports
Claims
Payable inputs
2 All
1 Validated
With finance
1 Approved
More
Search claim or invoice reference
Any date
Columns
Reference
VENDOR
INVOICE
Period
Claimed
PAYABLE
Variance
Status
CW-CLM-SYN02
Demo Staffing Services Pvt Ltd (Demo)
SYN-INV-1002
08 Oct 2026 to 21 Oct 2026
₹39,750.00
₹19,350.00
₹20,400.00
Validated
1
CW-CLM-SYN01
Demo Staffing Services Pvt Ltd (Demo)
SYN-INV-1001
24 Sept 2026 to 07 Oct 2026
₹38,700.00
₹38,700.00
₹0.00
Approved
1-2 of 2
Rows
20
Page 1 / 1

10 Separations

Separations manages every exit: resignations, terminations, retirements and contract ends. Each case goes from initiation through notice and clearance to exit and closure.

10.1 The separations pipeline

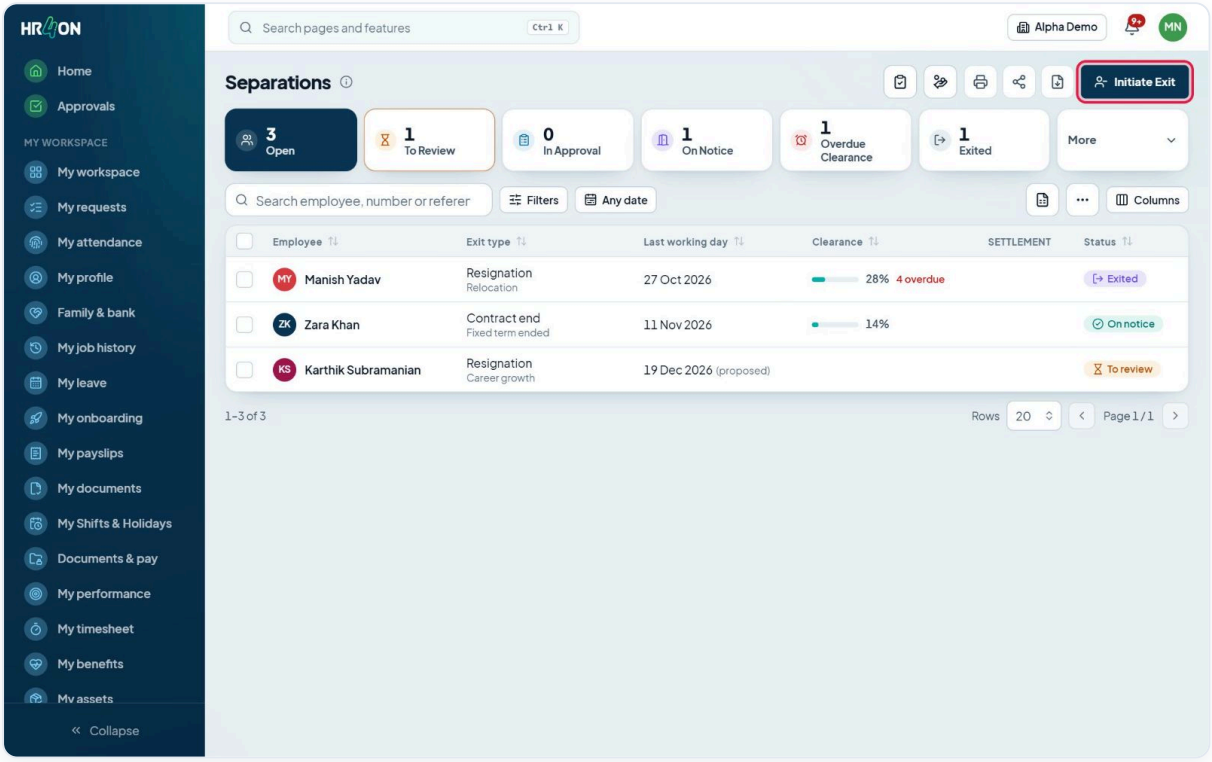
The pipeline lists every exit case with type, last working day, clearance progress, settlement and status.

WHAT YOU SEE

- Count tabs: **Open**, **To Review** (new resignations to check), **In Approval**, **On Notice**, **Overdue Clearance** and **Exited**. **More** holds **Closed**, **Drafts**, **Withdrawn**, **Rejected** and **All Cases**.
- **Clearance** shows the percentage done and any overdue items. **(proposed)** after a date means it is not yet approved.
- **Filters** include company, exit type, coordinator and **Coordinated by me**.

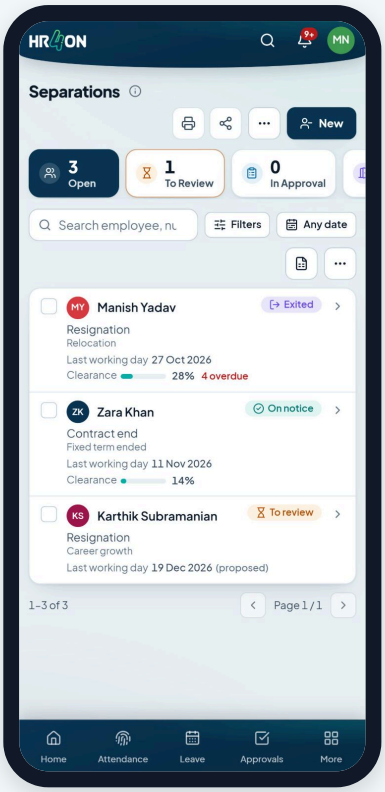
HOW TO DO IT

1. Select **Separations** in the **People** menu.
2. Choose a count tab.
3. Select a row to open the case.



ON YOUR PHONE

The same screen on a phone. Menus collapse into the bottom bar and the ··· button.



10.2 Initiate an exit

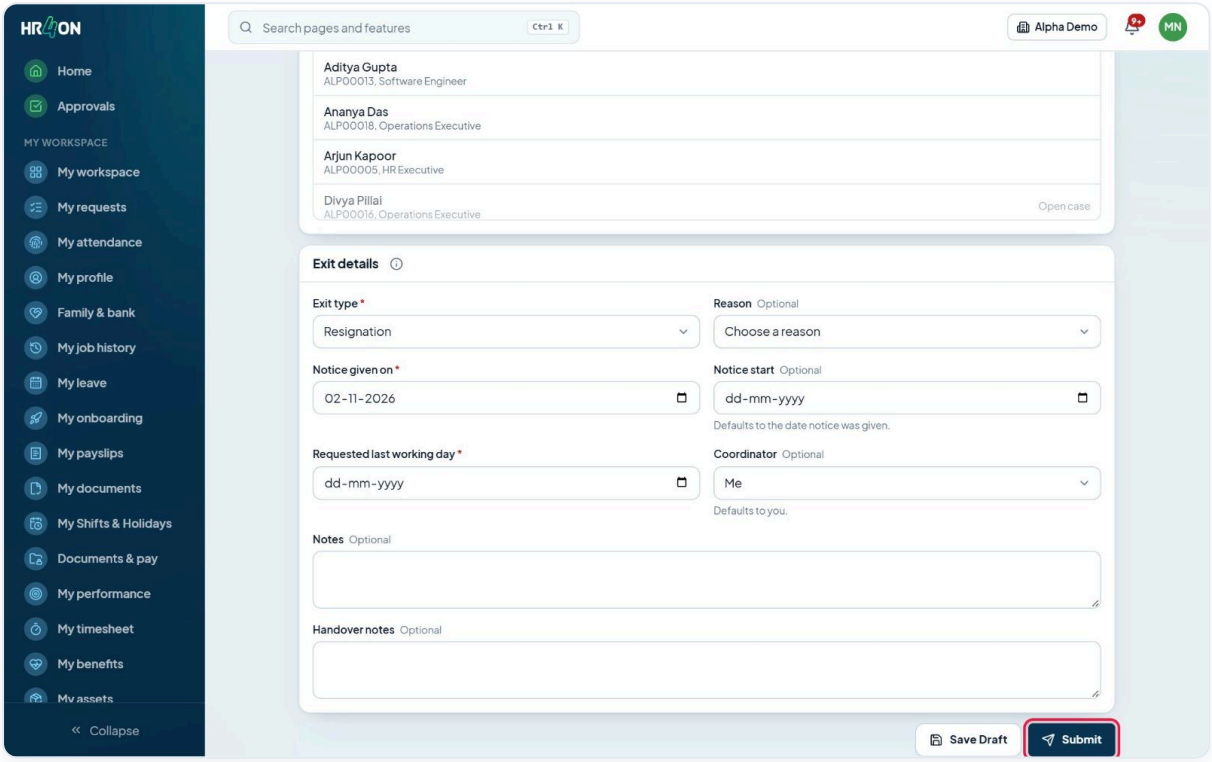
Employees resign from **My exit**. HR uses **Initiate Exit** for terminations, retirements, contract ends, or to record a resignation received on paper or by e-mail.

WHAT YOU SEE

- **Exit type** decides the policy notice period, shown in the section header.
- **Notice given on**, **Notice start** and **Requested last working day** set the dates. **Coordinator** defaults to you.
- **Notes** and **Handover notes** are shared with the people working on the case.
- Some exit types are restricted: only authorised HR can see them.

HOW TO DO IT

1. Select **Initiate Exit**.
2. Find the employee.
3. Choose the **Exit type** and **Reason**, fill the dates and notes.
4. Select **Submit**, or **Save Draft** to finish later.



10.3 Review dates and notice

A new resignation arrives as **To review**. HR agrees the notice start, last working day and how any notice shortfall is treated, and the proposal goes for approval.

WHAT YOU SEE

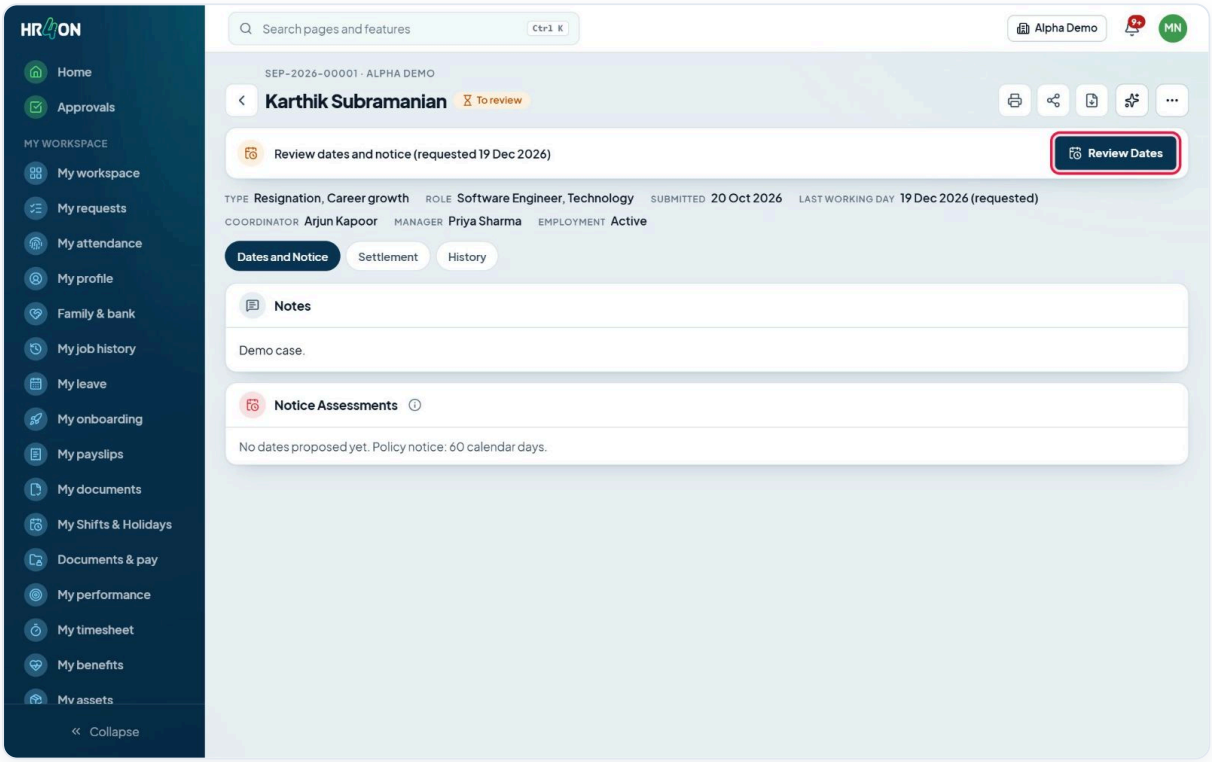
- The dialog compares the required notice with the days served and shows any shortfall.
- **Shortfall treatment** can waive the shortfall, recover it from the employee, or pay in lieu, with the amount and tax treatment.
- **Propose dates** is the normal choice. **Return** sends the case back to the initiator with a comment.

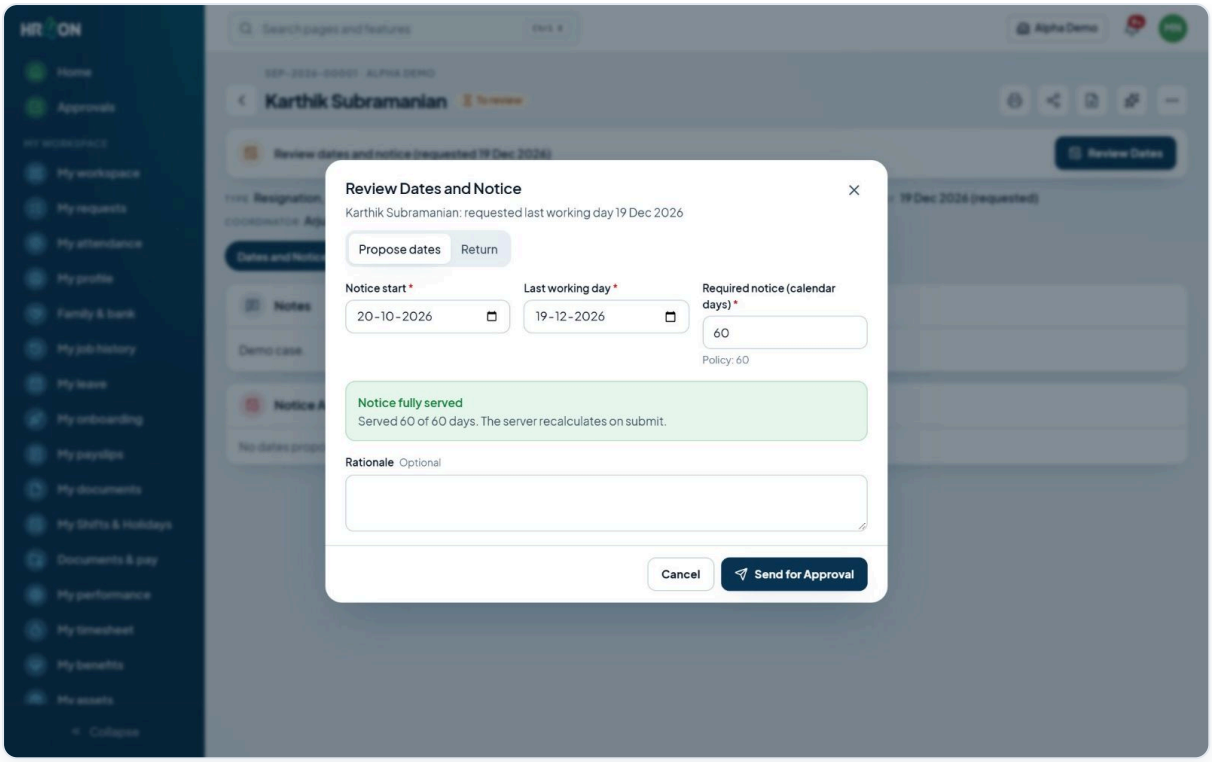
HOW TO DO IT

1. Open the case and select **Review Dates**.
2. Set **Notice start**, **Last working day** and the required notice.
3. Choose the shortfall treatment and give a rationale where asked.
4. Select **Send for Approval**.

GOOD TO KNOW

- Only an approved assessment changes the case. Each proposal is approved on its own.




Review Dates and Notice
Karthik Subramanian: requested last working day 19 Dec 2026
Propose dates
Return
Notice start *
20-10-2026
Last working day *
19-12-2026
Required notice (calendar days) *
60
Policy: 60
Notice fully served
Served 60 of 60 days. The server recalculates on submit.
Rationale Optional
Cancel
Send for Approval

10.4 The exit case

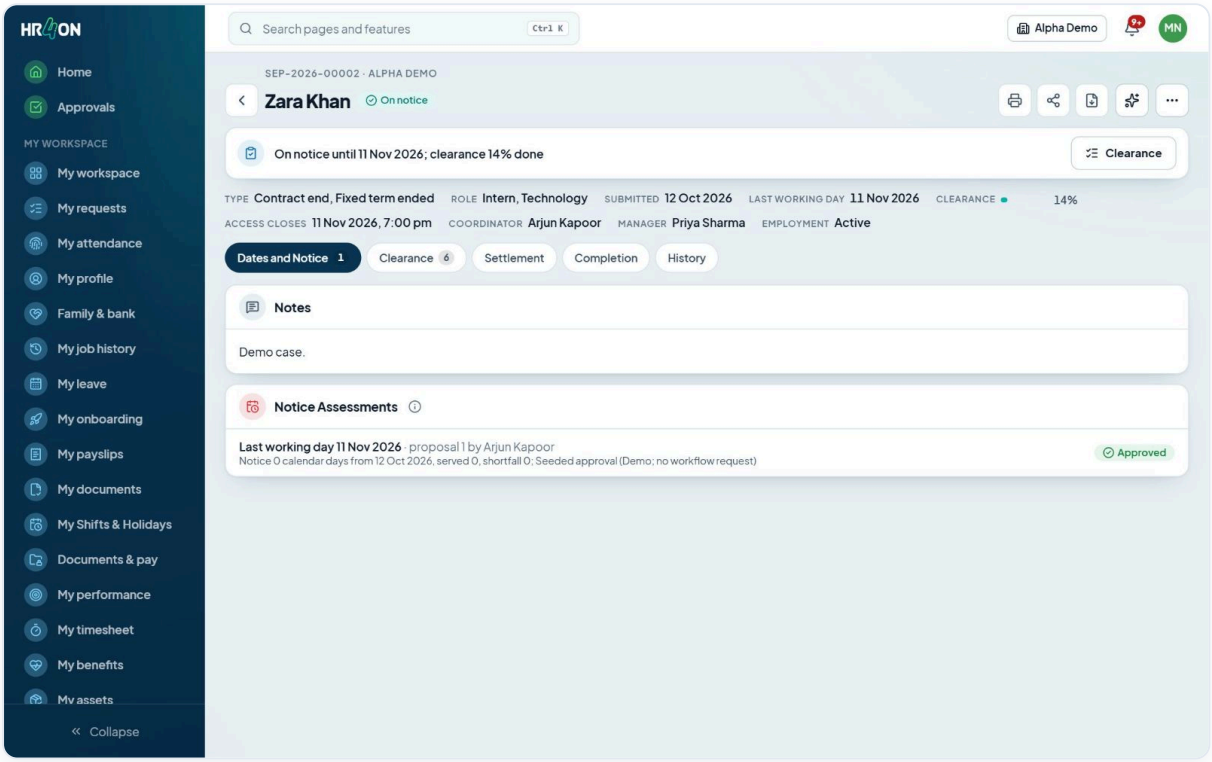
Everything about one exit is on its case page.

WHAT YOU SEE

- The header shows type, role, dates, clearance progress, when access closes, the coordinator and manager.
- Tabs: **Dates and Notice**, **Clearance**, **Settlement**, **Completion** and **History**.
- **More actions** holds **Change Exit Dates**, **Assign Coordinator**, **Rehire and Alumni**, **Refresh Clearance Sources** and **Withdraw** (or **Request Withdrawal**).
- The sparkle icon, **Outstanding and Handover Summary**, lists what is still open for the leaver.

HOW TO DO IT

1. Open the case.
2. Follow the instruction in the strip, for example **Execute Exit** when the last working day is reached.



10.5 Completion: access, documents, exit interview and rehire

The **Completion** tab brings together the last steps: closing access, exit documents, the exit interview and rehire eligibility.

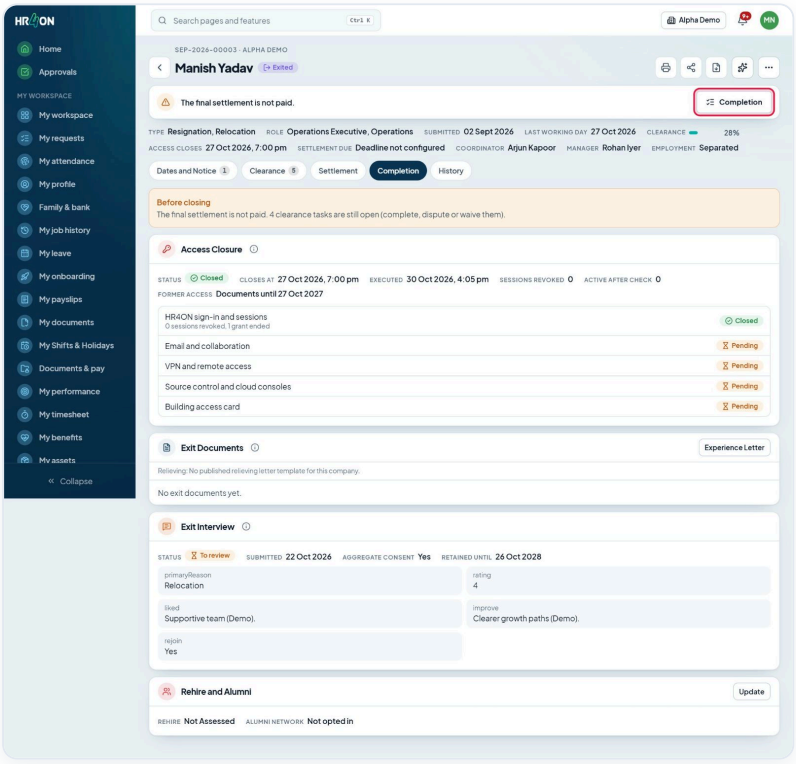
WHAT YOU SEE

- **Access Closure** sets when sign-in closes and what former-employee access remains (for example documents only, until a date). **Edit Plan** changes it.
- **Exit Documents** generates the **Relieving Letter** and **Experience Letter** as drafts in Documents & letters.
- **Exit Interview** shows whether the leaver has answered. **Record Answers** records answers given in a meeting. Answers are seen only by authorised HR, never the manager.
- **Rehire and Alumni** records rehire eligibility and whether the person joined the alumni network.

HOW TO DO IT

1. Open the case and select **Completion**.
2. Check the access plan, generate exit documents and record the exit interview.
3. When all outcomes are reconciled, select **Close Case**.

> **GOOD TO KNOW**
> - A case cannot be closed while blockers remain, for example an unpaid final settlement. The notice at the top lists them.



11 Exit clearance

Clearance makes sure every department signs off a leaver: IT takes back accounts, assets collects equipment, finance settles advances, and so on.

11.1 The clearance checklist on a case

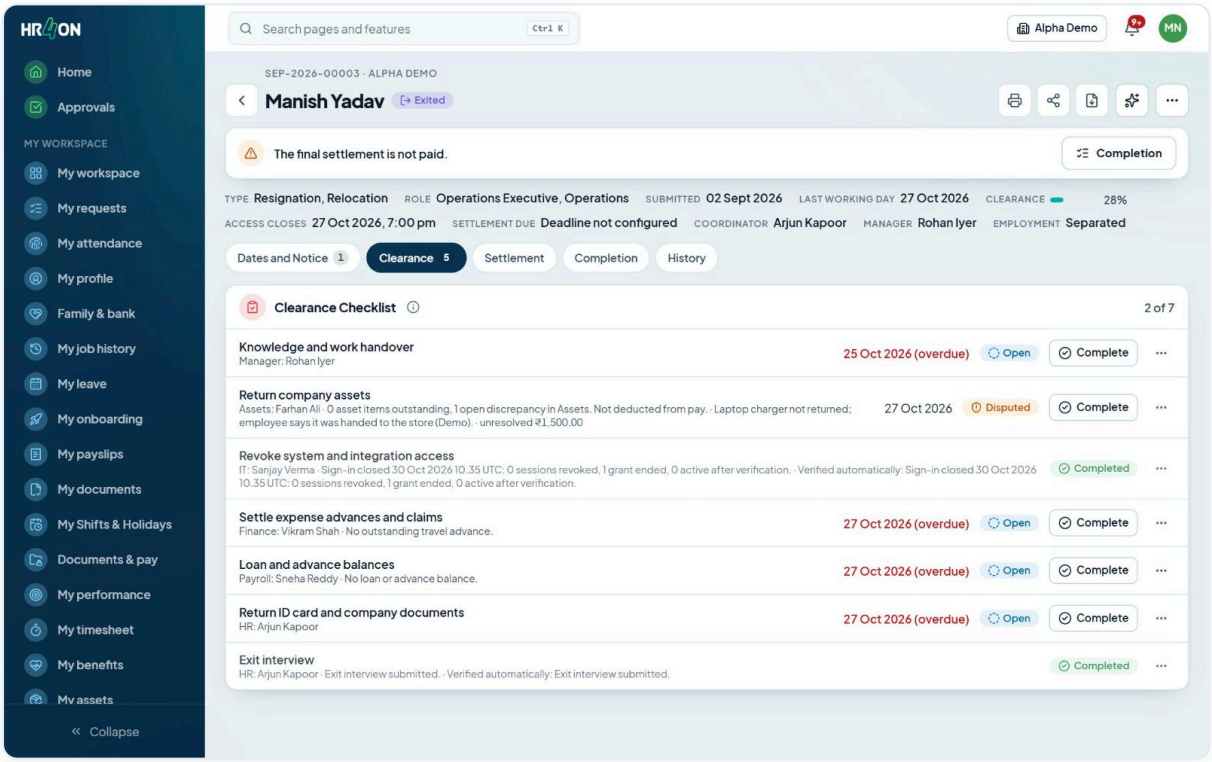
The **Clearance** tab on a case lists each task with its department, owner, due date and state.

WHAT YOU SEE

- States: **Open**, **Completed**, **Disputed**, **Waived** and overdue. **Escalated** marks a task sent to the owner's manager.
- **Complete** records the task done with evidence. **Task actions** holds **Record Dispute**, **Escalate**, **Reassign or Change Due Date**, **Waive** and **Reopen**.
- A dispute records an unresolved amount as a receivable; statutory pay is never withheld for it.

HOW TO DO IT

1. Open the case and select **Clearance**.
2. Select **Complete** on a task, add the evidence note or file and confirm.
3. Use **Task actions** to dispute, escalate, reassign or waive.



11.2 The Exit Clearance board

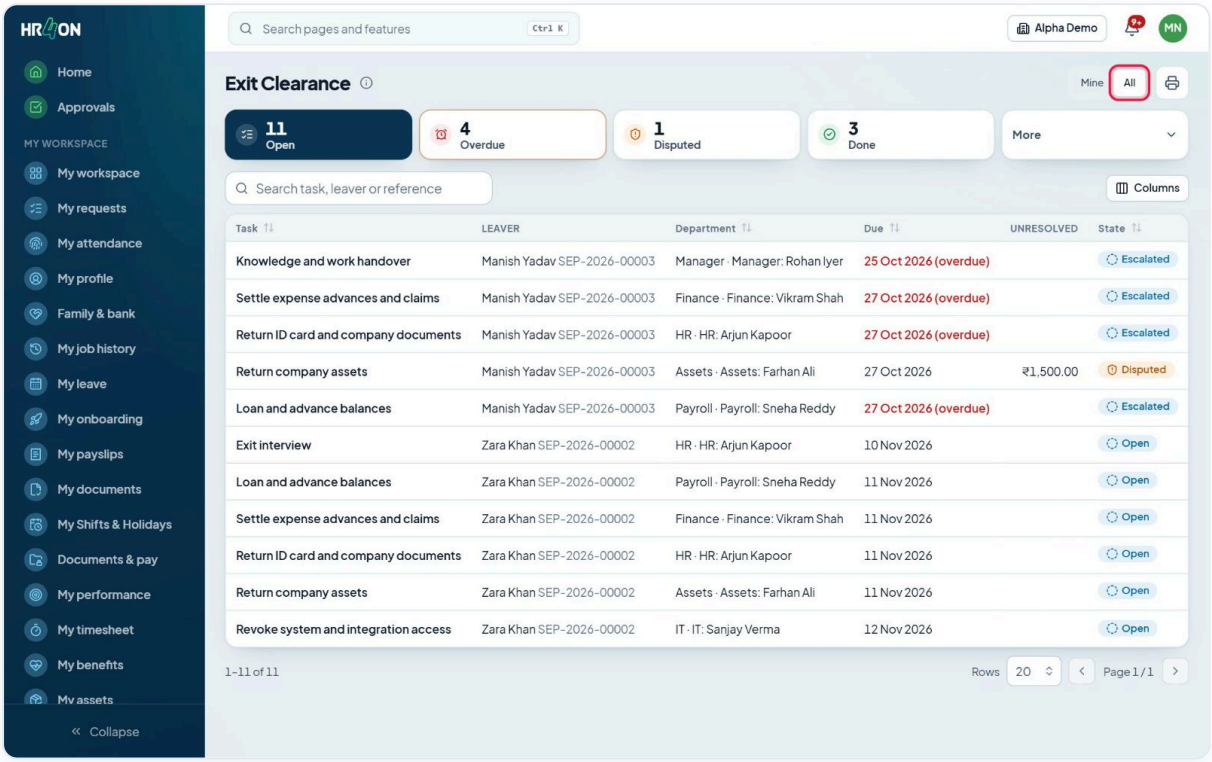
Exit Clearance lists clearance tasks across all leavers. Owners see their own tasks; HR can switch to all tasks.

WHAT YOU SEE

- **Mine** and **All** switch between your tasks and everyone's.
- Count tabs: **Open**, **Overdue**, **Disputed**, **Done** and **All Tasks**.
- Select a row to open the case and act on the task.

HOW TO DO IT

1. Select **Exit Clearance** in the **People** menu.
2. Select **All** to see every open task.
3. Open a task to complete it on the case.



12 Helping employees with self-service

Most employees use HR4ON on their own. When someone asks for help, you can see where their requests stand, and you keep the help answers they search.

12.1 Assist an employee

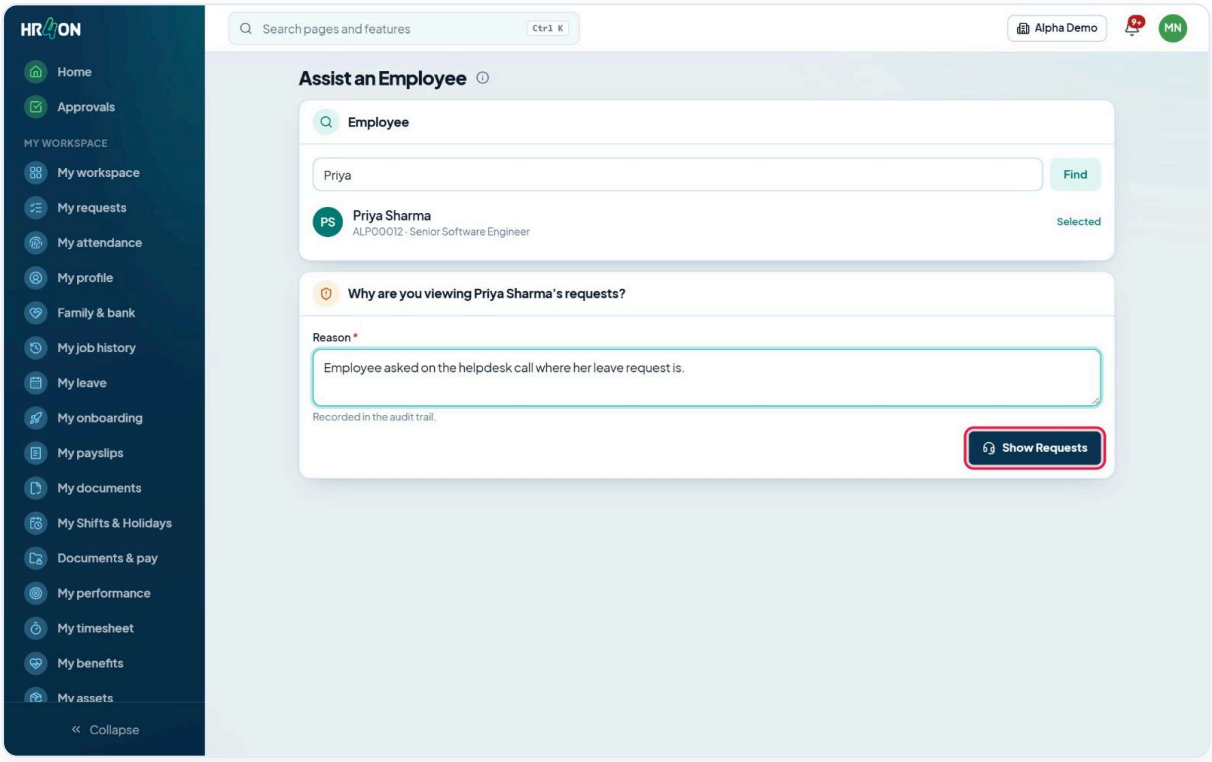
Use **Assist an employee** when someone calls or writes to ask where a request is. You see the status of their requests, without amounts or request summaries.

HOW TO DO IT

1. Select **Assist an employee** in the **People** menu.
2. Type the employee's name or number and select **Find**.
3. Select the person, write why you are viewing their requests and select **Show Requests**.
4. Tell the employee where the request stands, or open it if you are the approver.

GOOD TO KNOW

- Every view is recorded with your reason.
- You cannot act on the employee's behalf from here; guide them through the step on their own phone or computer.



12.2 Self-service help answers

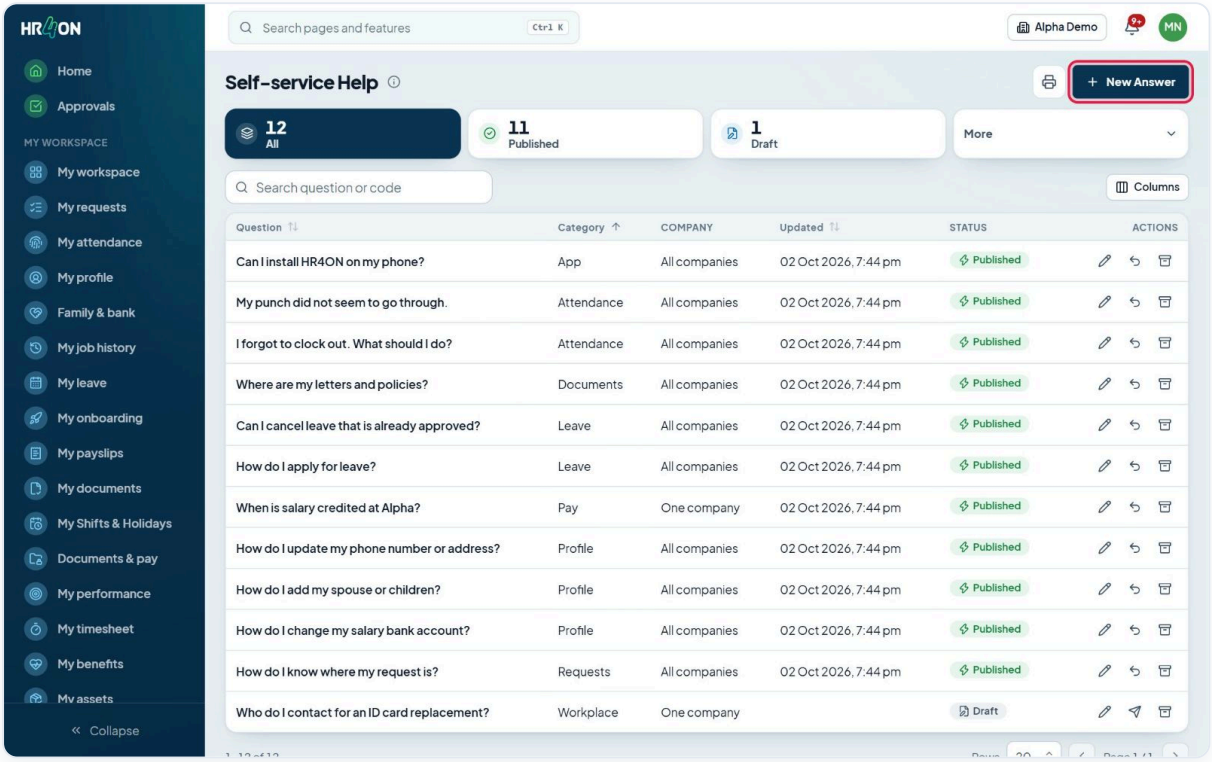
Self-service help holds the answers employees find when they search **Help & preferences**. Keep them short and point to the right screen.

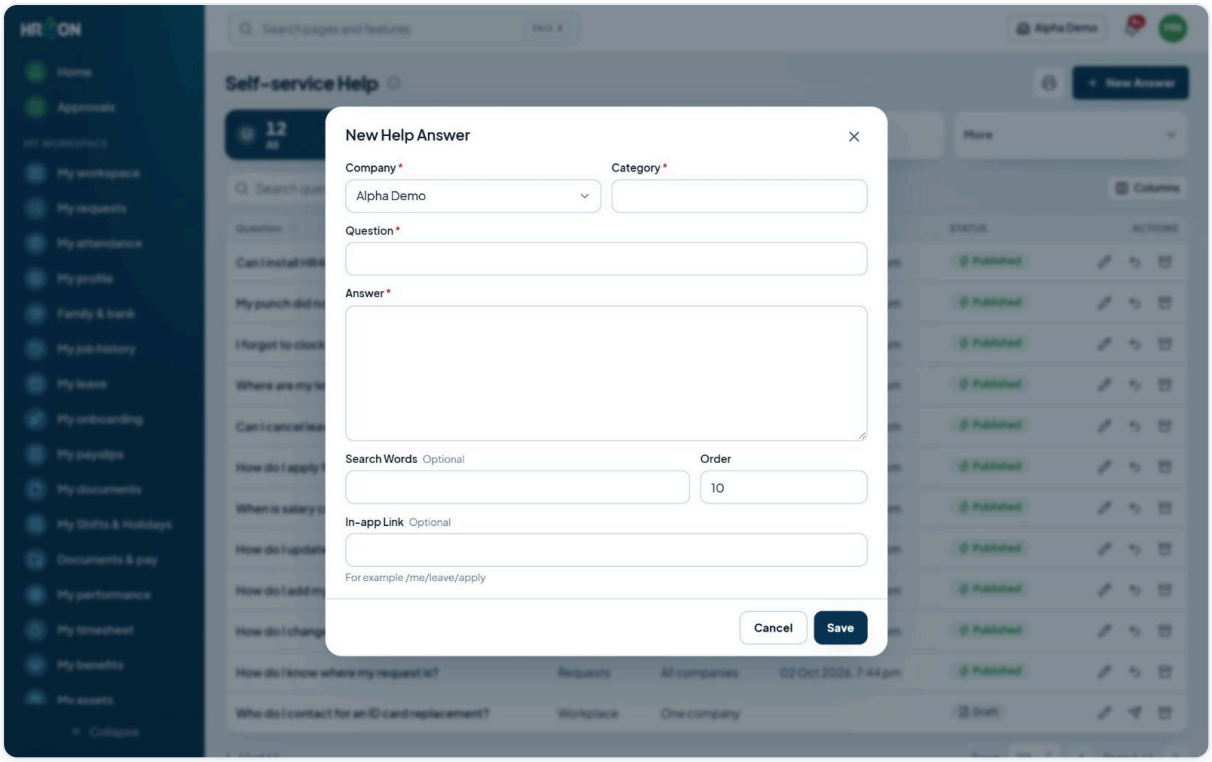
WHAT YOU SEE

- Each answer has a company (or all companies), category, question, answer, search words and an optional in-app link such as /me/leave/apply.
- Only **Published** answers are searchable. **Draft** answers are work in progress.
- Row icons: **Edit**, **Publish**, **Unpublish** and **Retire**.

HOW TO DO IT

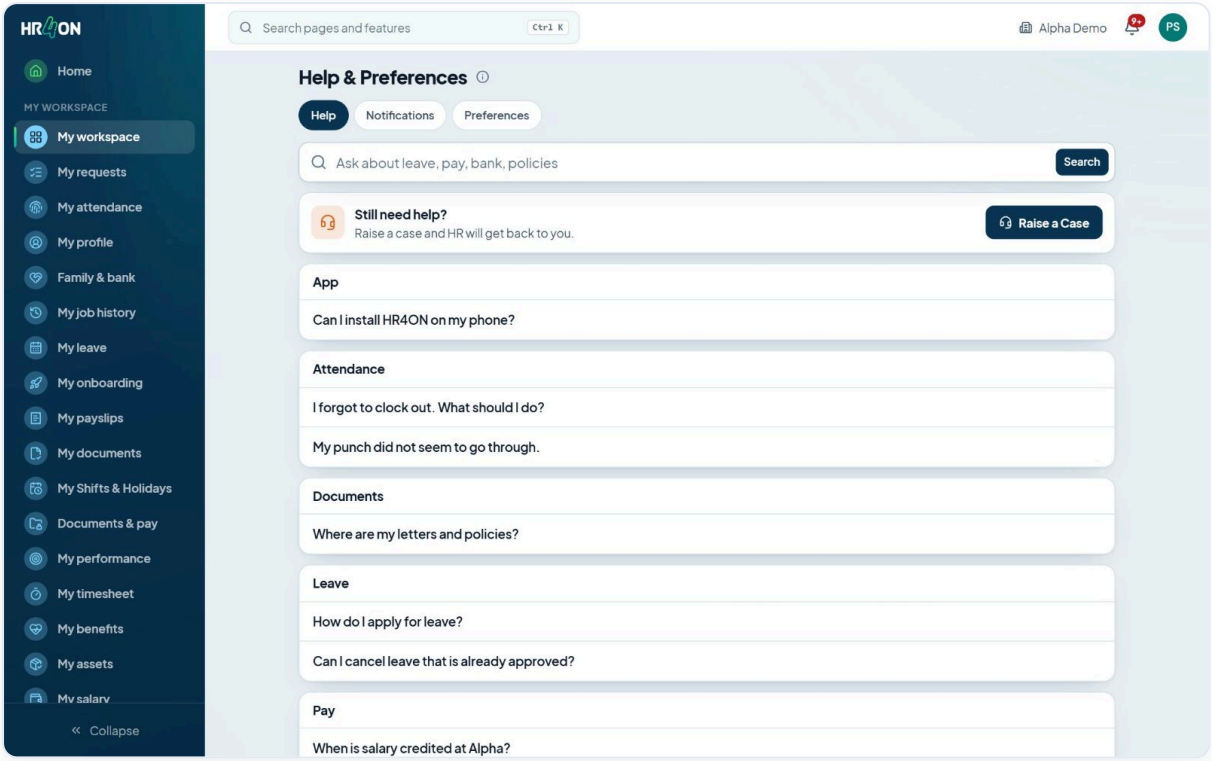
1. Select **Self-service help** in the **Administration** menu.
2. Select **New Answer**, fill the question and answer and select **Save**.
3. Select the **Publish** icon to make it searchable.




Self-service Help
New Help Answer
Company *
Alpha Demo
Category *
Question *
Answer *
Search Words Optional
Order
10
In-app Link Optional
For example /me/leave/apply
Cancel
Save

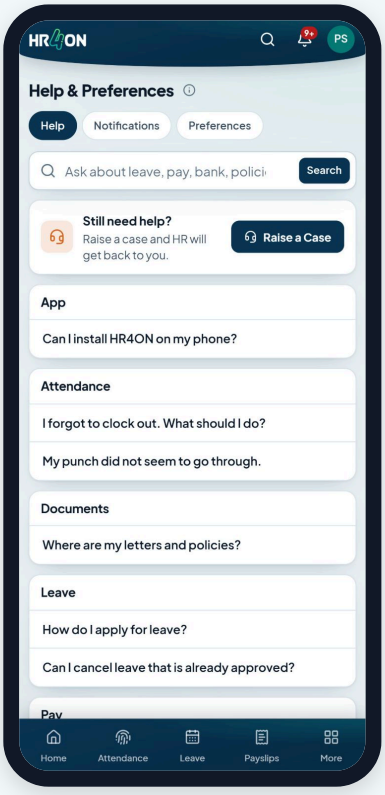
12.3 What employees see in Help

Employees search the published answers from **Help & preferences**. Check new answers here after you publish them.



ON YOUR PHONE

The same screen on a phone. Menus collapse into the bottom bar and the ··· button.

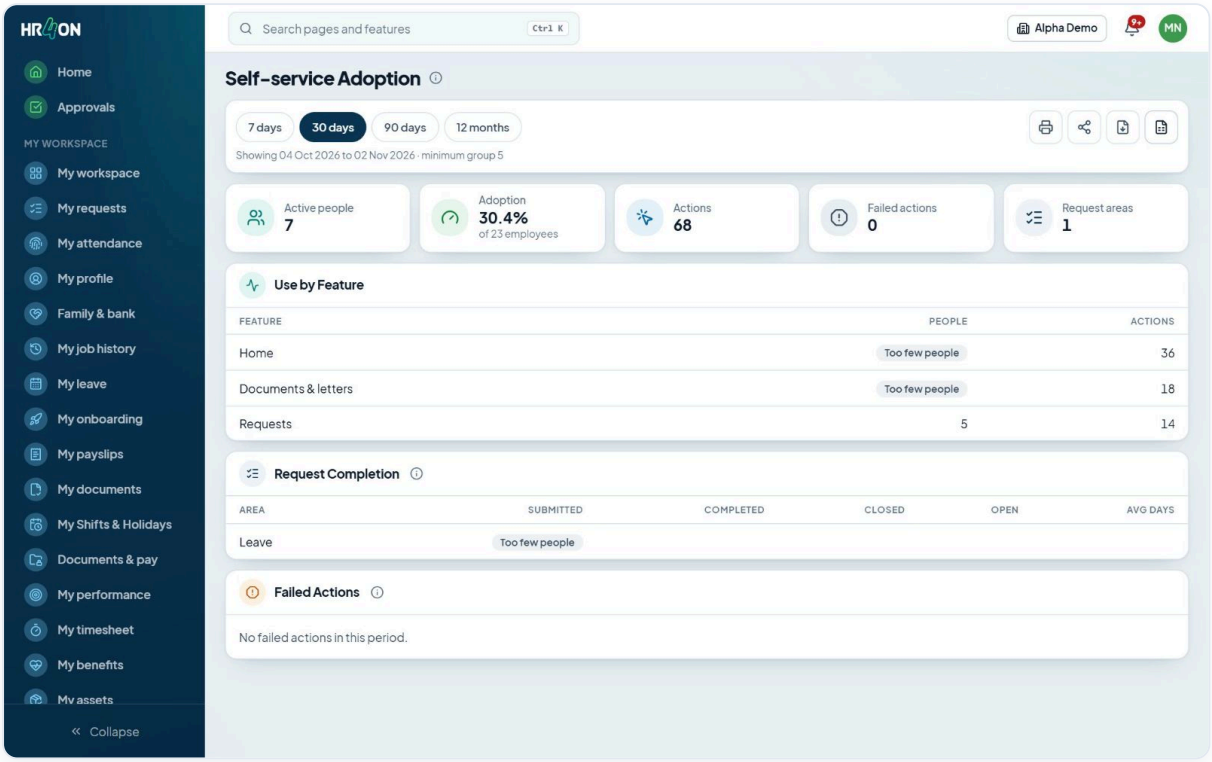


12.4 Self-service adoption

Self-service adoption (under **Insights**) shows how many people use self-service, which features they use, how requests are completed and any failed actions.

WHAT YOU SEE

- Choose 7 days, 30 days, 90 days or 12 months.
- Groups smaller than the minimum group size show **Too few people** or **Hidden** to protect privacy.



A Words used in this guide

Employee file
Everything HR4ON holds about one employment: overview, personal, employment, identity and bank, documents and history.

Assignment
Where and how someone works from a date: department, designation, grade, location, manager and cost centre.

As of date
Shows the record as it was, or will be, on a chosen date.

Dated change
A new assignment row that starts on an effective date. Earlier rows stay in the history.

Correction
Fixing a row or change that was wrong from the start. It is recorded with a reason.

Employment change
A transfer, promotion, manager change, confirmation or similar change that goes through approval and is applied on its effective date.

Backdated
A change whose effective date is in the past. It needs a backdate reason.

Retro
Payroll recalculates earlier pay periods because of a backdated change.

Blocked
An approved change that could not be applied because the record changed after approval.

Preboarding
An employee who has accepted an offer but not yet joined.

Probation review
The evaluation before probation ends; it leads to confirmation, extension or exit.

Matrix manager
Someone outside the reporting line given specific capabilities for an employee.

Template
A versioned letter layout with merge fields. Only published versions generate letters.

Signatory
A person authorised to sign a type of letter.

Acknowledgement
The employee's confirmation that they have read a letter or policy.

Quarantined
A file that failed the virus scan and cannot be opened.

Contingent worker
A contractor, consultant or agency worker engaged through a vendor contract, not on payroll.

Deployment
A contingent worker's placement at a site for a period.

Separation case
The record of one employee's exit, from notice to closure.

Last working day
The final day the leaver works.

Notice shortfall
Notice days required but not served. It can be waived, recovered or paid in lieu.

Clearance
Department sign-offs needed before a leaver is fully cleared.

Coordinator
The HR person who looks after an exit or onboarding case.

Exit interview
The leaver's feedback, seen only by authorised HR.