KNOWLEDGE BASE ARTICLE

How to Hand Over Duties When an Employee Leaves (No End Date)

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Overview

Not every absence ends. When an employee leaves the company, changes the role or goes on a long leave with an uncertain return date, someone has to take over their tasks, approvals and shared mailboxes **until further notice**. In Vitextra Absence & Coverage this is a substitution of the kind **Handover of duties**. Unlike a **Temporary** substitution, it does not need an end date and stays active until it is cancelled. The substitute must accept the handover; a declined handover is not active.

This article shows how to create such a handover in the **Substitutions web part**, what the substitute has to do, how the handover looks afterwards and how to end it.

Temporary substitution or handover of duties

	Temporary	**Handover of duties**
Typical case	Vacation, sick leave, business trip	Employee leaves, role changes, long leave without a return date
End date	Required	Optional
How the period is shown	A date range	"from" and the start date, when there is no end date
When it ends	After the end date	After the end date, if you set one; otherwise only when it is cancelled

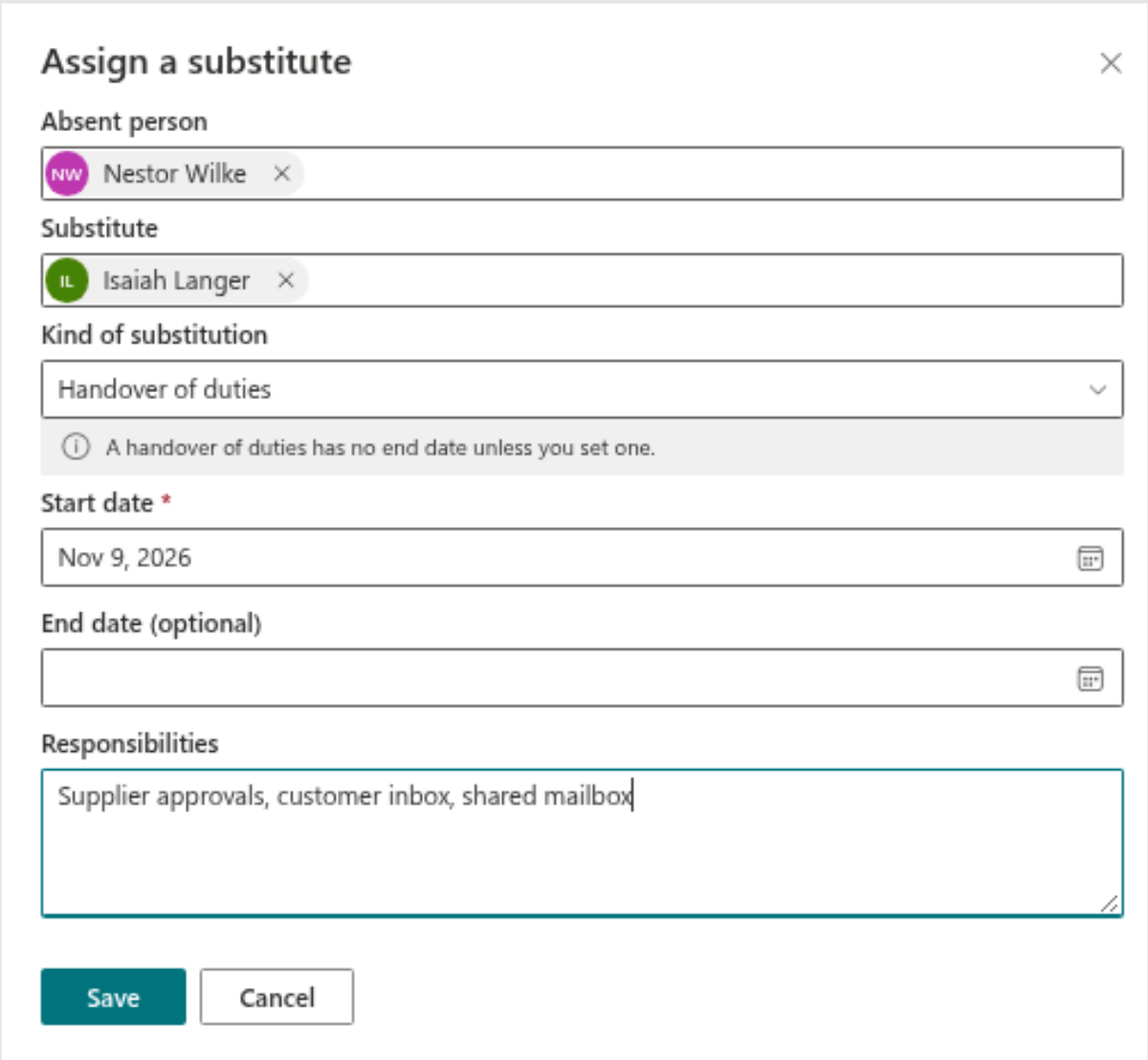
If you already know the last day of the cover, you can set an end date for a handover as well. It then behaves like a temporary substitution that is labelled as a handover.

Before you start

- You need **Member (edit)** access to the **site** that holds the absence lists, and the page with the **Substitutions** web part.
- The substitute needs the same access, because the substitute must open the **Substitutions** web part to confirm the handover.
- Decide what exactly is handed over. A clear text in the **Responsibilities** field saves many questions later.

Create the handover

1 Open the page with the **Substitutions** web part.
2 Select **Assign a substitute**. The panel **Assign a substitute** opens.
3 In **Absent person**, select the employee who is leaving. The field starts with your own name, so replace it. You can pick any person.
4 In **Substitute**, select the colleague who takes over the duties.
5 In **Kind of substitution**, select **Handover of duties**. The message "A handover of duties has no end date unless you set one." appears.
6 In **Start date**, select the first day of the handover, usually the day after the last working day of the employee.
7 Leave **End date (optional)** empty to create an open-ended handover.
8 In **Responsibilities**, describe what the substitute takes over, for example "Supplier approvals, customer inbox, shared mailbox".
9 Select **Save**.



The Assign a substitute panel set up as a handover of duties

The panel closes and the message "The substitution was created. The substitute has to confirm it." appears. If a required value is missing, the panel shows one of these messages instead: "Select the person who is absent.", "Select the substitute.", "The substitute cannot be the absent person.", "Select the start and end dates." (for a missing start date) or "The end date cannot be earlier than the start date."

The substitute confirms

The handover starts with the status **Waiting for confirmation**, like every substitution. The substitute opens the **I cover** tab, checks the **Responsibilities** and selects **Accept** or **Decline**. Details are in KB10347. How to Accept or Decline a Substitution.

The product does not send e-mail or Teams messages, so tell the substitute personally that a handover is waiting.

Note

A substitution created in the toolbar is not tied to any absence request. It stays independent of the requests, and it does not remove an absence from the **No substitute** tab. See KB10350. How Absence Requests and Substitutions Work Together.

How the handover looks

After the confirmation, the handover is visible in three places:

- On the **I cover** tab of the substitute, with the caption "You cover this person" and the text **Responsibilities**.
- On the **Covering me** tab of the employee, as long as the employee can use the web part.
- On the **Who covers whom** tab for everyone who works with the site, so colleagues can find the right contact. See KB10348. How to Find Out Who Covers Whom.

The period is written as "from" and the start date, the kind is **Handover of duties**, and the pill shows **Planned** before the start date and **In progress** afterwards. Without an end date the pill never changes to **Ended**.



An open-ended handover of duties in the Who covers whom list

End the handover

An open-ended handover has no automatic end. Once accepted, it remains **In progress** from its start date until cancelled.

If the employee can still sign in (role change, long leave): the employee opens the **Substitutions** web part and selects **Cancel substitution** on the row. The web part shows "The substitution was cancelled." and the row disappears from every **list**.

If the employee has left: the web part allows only the absent person to cancel a substitution, and a manager cannot cancel it on behalf of the employee. In this case a site administrator opens the **Substitutions** list on the site, finds the item and changes only the column `SubstitutionStatus` to `Cancelled`. Do not change other columns.

Warning

A cancelled handover cannot be restored in the web part. If the duties go to another person later, create a new handover. Cancel the old one first; otherwise **Who covers whom** shows two active substitutes for the same person.

Use the data in other solutions

Note

The **Substitutions** list is a data source for Vitextra People Connector ("who covers X") and for hand-over steps of an offboarding process. A handover without an end date stays active in this data, which is why it is a convenient way to keep the answer to "who covers X?" correct after an employee leaves. The fields used are AbsentUser, Substitute, StartDate, EndDate, Kind and SubstitutionStatus.

Terms

List
A list is a storage unit in SharePoint. A list can contain columns of different types, content types, and views. A document library is a special type of list and therefore inherits the functionality of a list.

Site
A SharePoint site is a container for information within the SharePoint platform. Sites typically offer features such as document libraries, lists, calendars, discussion boards, and workflows, facilitating collaboration, communication, and document management within teams or across departments. Sites can be customized and configured to suit the specific needs and workflows of an organization.

Web Part
A web part is a primary building block of functionality or content placed on a SharePoint page. Some web parts support customization, such as configuring the web part or changing its appearance.