

KNOWLEDGE BASE ARTICLE

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



Disclaimer

For the purposes of this Disclaimer:

- **Company** (referred to as either "the Company", "We", "Us" or "Our" in this Disclaimer) refers to Vitextra SIA, LV-1009 Riga, Matīse iela 61 - 25.
- **Document** refers to the Knowledgebase Article.
- **You** means the individual accessing the Document, or the company, or other legal entity on behalf of which such individual is accessing or using the Document, as applicable.
- **Website** refers to Vitextra, accessible from <https://vitextra.com>

Disclaimer

The information contained in the Document is for general information purposes only.

The Company assumes no responsibility for errors or omissions in the contents of the Document.

In no event shall the Company be liable for any special, direct, indirect, consequential, or incidental damages or any damages whatsoever, whether in an action of contract, negligence, or other torts, arising out of or in connection with the use of the contents of the Document. The Company reserves the right to make additions, deletions, or modifications to the contents in the Document at any time without prior notice.

Errors and Omissions Disclaimer

The information given by the Document is for general guidance on matters of interest only. Therefore, errors can occur even if the Company takes every precaution to ensure that the Document's content is current and accurate. Plus, given the changing nature of laws, rules, and regulations, there may be delays, omissions, or inaccuracies in the information contained in the Document.

The Company is not responsible for any errors or omissions, or for the results obtained from the use of this information.

Fair Use Disclaimer

The Company may use copyrighted material that the copyright owner has not explicitly authorized. The Company is making such material available for criticism, comment, news reporting, teaching, scholarship, or research.

The Company believes this constitutes a "fair use" of any such copyrighted material as provided for in section 107 of the United States Copyright law.

If You wish to use copyrighted material from the Document for your own purposes that go beyond fair use, You must obtain permission from the copyright owner.

"Use at Your Own Risk" Disclaimer

All information in the Document is provided "as is", with no guarantee of completeness, accuracy, timeliness or of the results obtained from the use of this information, and without warranty of any kind, express or implied, including, but not limited to warranties of performance, merchantability and fitness for a particular purpose.

The Company will not be liable to You or anyone else for any decision made or action taken in reliance on the information given by the Service or for any consequential, special or similar damages, even if advised of the possibility of such damages.

Contact Us

If you have any questions about this Disclaimer, You can contact Us by email: support@vitextra.com.

Table Of Contents

Overview	4
Temporary substitution or handover of duties	4
Before you start	4
Create the handover	5
The substitute confirms	6
How the handover looks	6
End the handover	7
Use the data in other solutions	7

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.

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

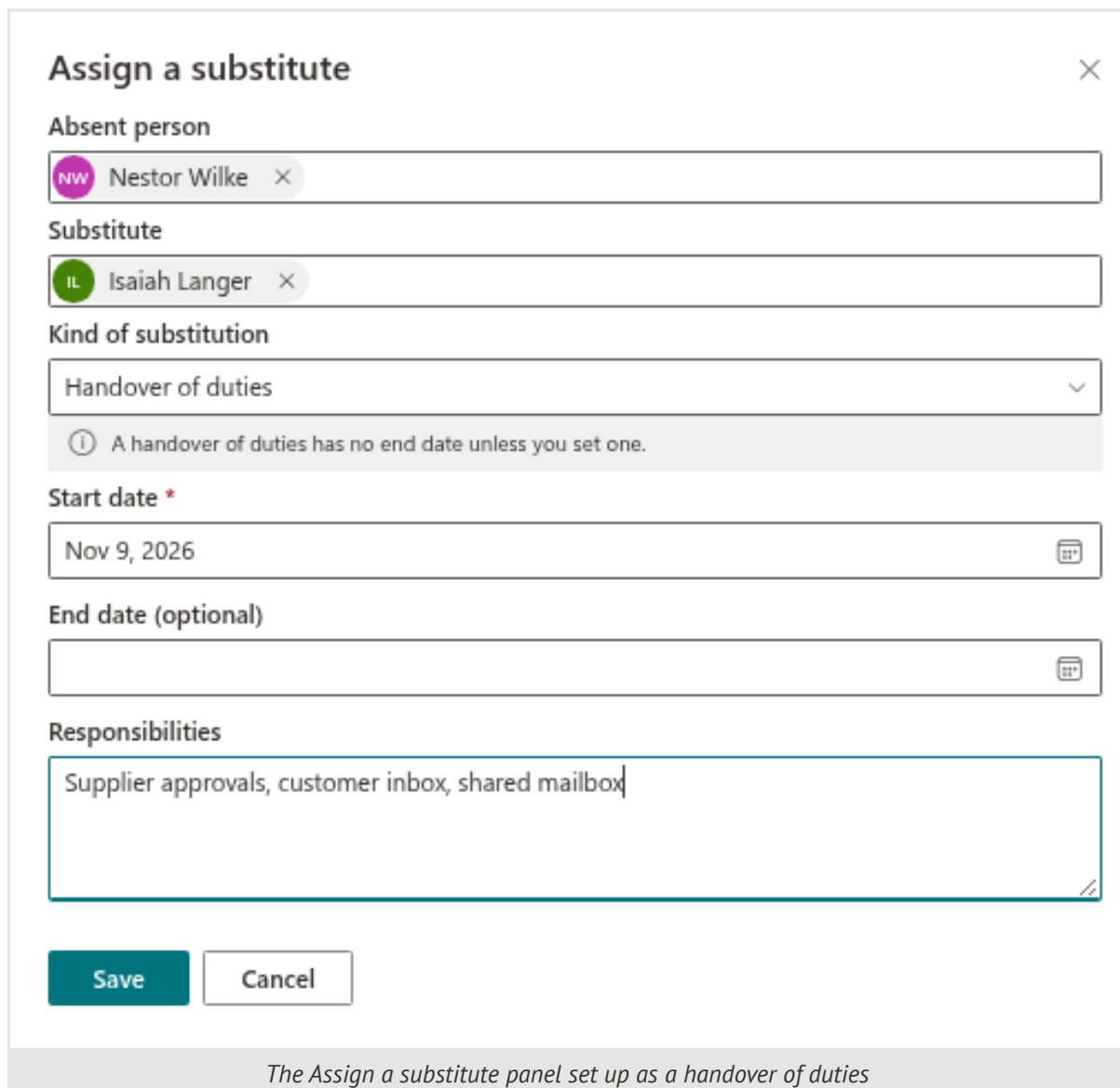
If you already know the last day of the cover, you can set an end date for a handover as well. It then behaves like a temporary substitution that is labelled as a handover.

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 screenshot shows the 'Assign a substitute' panel with the following fields and values:

- Absent person:** Nestor Wilke (with a close button 'X')
- Substitute:** Isaiah Langer (with a close button 'X')
- Kind of substitution:** Handover of duties (with a dropdown arrow 'v'). Below this, a message states: "A handover of duties has no end date unless you set one."
- Start date ***: Nov 9, 2026 (with a calendar icon)
- End date (optional)**: (empty field with a calendar icon)
- Responsibilities**: Supplier approvals, customer inbox, shared mailbox (in a text area with a bottom-right corner icon)

At the bottom are two buttons: **Save** (in a teal box) and **Cancel** (in a white box with a grey border).

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

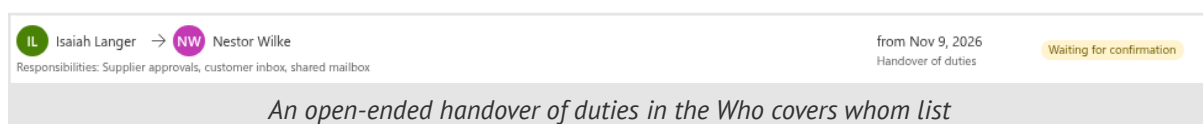
A substitution created in the toolbar is not tied to any absence request. It stays independent of the requests, and it does not remove an absence from the **No substitute** tab. See [KB10350. How Absence Requests and Substitutions Work Together](#).

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**.



End the handover

An open-ended handover has no automatic end. It stays **In progress** until it is 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.