

Checklist When An Employee Resigns Pilch Study Guide

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When an employee resigns, it triggers a series of essential actions that organizations must undertake to ensure a smooth transition. Properly managing this process not only maintains operational continuity but also upholds the company's professionalism and employee relations. A comprehensive checklist when an employee resigns PILCH (Position, Information, Leave, Compensation, and Hiring) provides a structured approach to handling resignation procedures efficiently. This article outlines key steps and considerations to manage resignations effectively, ensuring nothing is overlooked.

Understanding the Importance of a Resignation Checklist

A well-structured resignation checklist helps HR teams and managers navigate the complex process of employee departure. It minimizes risks such as legal issues, data security breaches, and operational disruptions. Implementing a standardized checklist ensures consistency across all resignations, fostering a professional work environment and positive employer-employee relationships.

Pre-Resignation Preparation

Before an employee formally submits their resignation, organizations should prepare to handle the process smoothly. This involves understanding the reasons behind resignation, reviewing policies, and setting internal protocols.

1. Review Company Resignation Policies

- Confirm the notice period required (e.g., two weeks, one month).
- Check for specific exit procedures outlined in employee handbooks.
- Understand contractual obligations, including non-compete or confidentiality clauses.

2. Prepare HR and Management Teams

- Assign responsible personnel for managing the resignation process.

- Schedule a meeting with the employee to discuss resignation details.
- Gather necessary documentation and templates for resignation acknowledgment.

3. Notify Relevant Departments

- Inform IT, payroll, security, and facilities teams about potential upcoming departure.
- Prepare to coordinate the transition with team members.

Employee Resignation Notification and Acknowledgment

Once an employee submits their resignation, the following steps should be taken promptly:

1. Receive and Document the Resignation Letter

- Collect a formal resignation letter, either written or email.
- Record date of resignation and last working day.
- Acknowledge receipt with a formal response.

2. Conduct Exit Interview

- Understand reasons for departure.
- Gather feedback to improve organizational practices.
- Clarify next steps and transition plans.

3. Confirm Resignation Details

- Verify notice period and final working date.
- Discuss any outstanding obligations or commitments.

Transition Planning and Knowledge Transfer

Ensuring a seamless transition reduces disruption and retains organizational knowledge.

1. Assign Transition Responsibilities

- Identify team members to take over duties.

- Create a handover plan detailing ongoing projects and responsibilities.

2. Facilitate Knowledge Transfer

- Schedule sessions for the departing employee to train successors.
- Document processes, contacts, and key information.

3. Update Organizational Charts

- Reflect employee departure in organizational documentation.
- Communicate changes to relevant teams.

Administrative and Legal Procedures

Proper documentation and legal compliance are critical during resignation processes.

1. Finalize Compensation and Benefits

- Calculate final paycheck, including unused leave and accrued benefits.
- Address any outstanding loans or advances.
- Confirm continuation or termination of benefits (e.g., health insurance).

2. Retrieve Company Assets

- Collect ID badges, access cards, laptops, mobile devices, and other equipment.
- Ensure removal of employee access to company systems and facilities.

3. Update Security and Access Controls

- Disable email accounts and system logins.
- Change passwords or revoke access to sensitive data.

4. Address Legal and Compliance Requirements

- Ensure compliance with local labor laws regarding resignation notices.

- Prepare termination or resignation documentation for record-keeping.

Post-Resignation Activities

After the employee departs, follow-up actions help close the process professionally.

1. Conduct Exit Interview (If Not Done Previously)

- Gather insights on organizational improvement.
- Confirm resignation details and final arrangements.

2. Update HR and Payroll Records

- Remove employee from payroll.
- Archive employment files in accordance with legal retention periods.

3. Communicate with the Team

- Announce departure in a professional manner.
- Reassign responsibilities as needed.

4. Evaluate and Improve Processes

- Review the resignation process for efficiency.
- Incorporate feedback for future improvements.

Special Considerations in the PILCH Framework

The PILCH framework emphasizes critical areas when managing resignations: Position, Information, Leave, Compensation, and Hiring.

1. Position

- Determine if the role needs to be filled immediately or temporarily covered.
- Assess the workload redistribution and potential internal promotions.

2. Information

- Secure sensitive data and intellectual property.
- Ensure knowledge transfer protocols are followed.

3. Leave

- Verify accrued leave balances and process payouts if applicable.
- Clarify the status of pending leave requests.

4. Compensation

- Calculate final payments, including bonuses or commissions.
- Address deductions or repayment of advances.

5. Hiring

- Initiate recruitment for the vacated position.
- Update job descriptions and advertising strategies as needed.

Tips for a Smooth Resignation Process

To ensure the process remains professional and efficient, consider the following tips:

- **Maintain Clear Communication:** Keep open lines of communication with the departing employee.
- **Document Everything:** Record all steps taken during the resignation process.
- **Be Respectful and Supportive:** Handle resignations with empathy to foster goodwill.
- **Plan Ahead:** Anticipate the impact on team dynamics and workflow.
- **Ensure Confidentiality:** Protect sensitive information throughout the process.

Conclusion

Managing employee resignations effectively requires a detailed and systematic approach. A comprehensive checklist when an employee resigns PILCH ensures all critical aspects ranging from position management to legal compliance are addressed thoroughly. By following these structured steps, organizations can minimize disruptions, uphold professionalism, and maintain positive

relations with departing employees. Implementing such a checklist as part of standard HR procedures enhances organizational resilience and supports continuous improvement in employee management practices.

Checklist When an Employee Resigns Pilch: A Comprehensive Guide for HR and Managers

When an employee resigns, it triggers a series of critical steps that ensure a smooth transition for both the departing individual and the organization. Having a well-structured checklist when an employee resigns pilch is essential for HR professionals and managers to manage the resignation process efficiently, uphold legal and organizational standards, and maintain a positive company reputation. Proper planning and execution minimize disruptions, protect sensitive information, and foster respectful exit procedures.

In this comprehensive guide, we'll explore the essential components of an effective resignation checklist, detailing the steps to take from the moment an employee announces their departure to final offboarding. Whether you're new to HR or a seasoned manager, understanding this process helps streamline resignations and ensures compliance with best practices.

Understanding the Importance of a Resignation Checklist

A checklist when an employee resigns pilch functions as a roadmap, guiding organizations through each phase of employee departure. It ensures no critical steps are overlooked, reducing risks such as legal liabilities, data breaches, or workplace tensions. Additionally, a structured approach promotes a positive experience for the departing employee, leaving the door open for future collaboration or referrals.

Step 1: Receive and Confirm the Resignation

- Acknowledge Receipt of Resignation
- Formal Acceptance: When an employee submits their resignation letter or email, promptly acknowledge receipt.
- Clarify Details: Confirm the last working day, reason for leaving (if shared), and any transitional arrangements.
- Document the Resignation

- Keep a record of the resignation letter or email.
- Note the resignation date and effective last day of work.
- Record any discussions related to the resignation.

Step 2: Communicate Internally

- Notify Relevant Departments
- Management: Inform the employee's direct supervisor and relevant leadership.
- HR Department: Initiate the offboarding process.
- IT and Security Teams: Prepare for access revocations.
- Announce the Departure (Optional)
- Decide on how and when to communicate the resignation to the broader team, maintaining professionalism and confidentiality.

Step 3: Plan the Transition

- Knowledge Transfer
- Identify key responsibilities and ongoing projects.
- Arrange for the departing employee to document processes and transfer knowledge.
- Assign a successor or interim contact if applicable.
- Set an Exit Interview
- Schedule an exit interview to gather feedback.
- Use insights to improve retention and workplace culture.

Step 4: Administrative and Legal Actions

- Review Employment Contract and Policies

- Confirm notice period requirements.
- Check for non-compete, confidentiality, or other contractual clauses.

- Calculate Final Compensation

- Ensure accurate calculation of accrued leave, bonuses, or other entitlements.
- Prepare final paycheck, including any owed benefits.

- Process Resignation Formalities

- Obtain written confirmation of resignation acceptance.
- Update internal records and HRIS systems.

Step 5: Offboarding Procedures

- Return of Company Property

- List of items to return:
 - Laptop and accessories
 - Mobile devices
 - ID badges and access cards
 - Company credit cards
 - Any other equipment or documents

- Revocation of System Access

- Disable email accounts and user access promptly.
- Remove from internal communication channels and mailing lists.
- Cancel or transfer system permissions.

- Update Organizational Charts and Records

- Reflect the departure in organizational charts.
- Notify payroll and benefits providers.

- Conduct Exit Interview

- Discuss reasons for departure.
- Collect feedback on workplace experience.
- Clarify any post-employment obligations.

Step 6: Post-Exit Considerations

- Confidentiality and Non-Compete Agreements

- Remind the employee of ongoing confidentiality obligations.
- Address any non-compete or non-solicitation clauses.

- Follow-up Communications

- Send a farewell message or appreciation note.
- Maintain positive relations for future networking.

- Record Keeping and Documentation

- Store resignation and exit interview documentation securely.
- Ensure compliance with legal retention requirements.

Additional Tips for a Smooth Resignation Process

- Maintain professionalism and respect throughout the process.

- Be transparent about policies and procedures.
- Ensure confidentiality of the employee's reasons for leaving.
- Tailor the process based on the employee's role and circumstances.
- Prepare for potential challenges, such as sudden resignations or disputes.

Conclusion

A well-executed checklist when an employee resigns pilch is vital for safeguarding organizational interests and fostering a respectful workplace culture. From initial acknowledgment to final offboarding, each step plays a role in ensuring compliance, minimizing disruption, and leaving a positive impression on departing employees. By adhering to these best practices, HR teams and managers can turn employee resignations into opportunities for constructive change and continuous improvement.

Proper planning, clear communication, and diligent documentation are the cornerstones of an effective resignation process. Implementing a comprehensive checklist not only streamlines administrative tasks but also demonstrates professionalism and care—traits that uphold your organization's reputation and morale long after the employee's departure.

Question What are the initial steps to take when an employee resigns from Pilch? Immediately acknowledge the resignation, inform relevant departments, and update the employee's status in the HR system to begin the offboarding process. How should I communicate the resignation to the team? Notify the team professionally and confidentially, respecting the employee's privacy, and outline the transition plan without disclosing unnecessary details. What documentation is required when an employee resigns? Obtain a formal resignation letter, update HR records, prepare exit interview forms, and document all relevant communications and agreements. How do I ensure the employee returns company property? Create a checklist of items such as ID badges, laptops, mobile devices, and access cards. Schedule a return date and verify all items are collected before the employee departs. What steps should be taken regarding the employee's access rights? Revoke system access, email accounts, and any other digital privileges immediately upon resignation to maintain security. How should the final paycheck and benefits be handled? Calculate the final salary, accrued leave, and any owed benefits. Process the final paycheck according to statutory requirements and company policy. What is the process for conducting an exit interview? Schedule an exit interview to gather feedback, discuss the reasons for resignation, and address any remaining concerns or questions the employee may have. How to update internal records after an employee's resignation? Remove or deactivate the employee's profile in HR systems, update payroll records, and notify relevant departments about the departure. What legal considerations should be reviewed during employee resignation? Ensure compliance with employment contracts, non-disclosure agreements, and any applicable labor laws or company policies regarding resignation. How do I handle knowledge transfer and transition planning? Coordinate with the departing employee to document ongoing projects, hand over responsibilities, and identify

colleagues to take over critical tasks.

Related keywords: employee resignation process, exit interview, last working day, knowledge transfer, resignation letter, final paycheck, company property return, IT access removal, update HR records, _offboarding checklist

Employee warning form

employee warning form is a vital document used by organizations to formally address and document employee misconduct or performance issues. It serves as an official record that communicates concerns to the employee, outlines expectations for improvement, and provides a structured approach to discipline. An effective employee warning form helps organizations maintain accountability, ensure compliance with company policies, and foster a fair work environment. Proper utilization of this form can also be critical in legal scenarios, as it provides documented evidence of disciplinary actions taken.

What is an Employee Warning Form?

An employee warning form is a standardized document designed to notify an employee of specific issues related to their conduct or performance. It typically includes details about the incident or performance concern, the expectations for improvement, and the consequences of continued non-compliance.

Purpose of an Employee Warning Form

The primary objectives of an employee warning form include:

- Documenting misconduct or poor performance for future reference.
- Providing clear guidance and expectations to the employee.
- Offering a formal opportunity for the employee to improve.
- Protecting the organization legally by maintaining records of disciplinary actions.

Types of Employee Warnings

Employee warning forms can be categorized into several types, depending on the severity and nature of the issue:

- Verbal Warning (followed by written documentation)
- Written Warning
- Final Warning
- Suspension Notice
- Termination Notice

Most organizations start with a verbal or written warning and escalate to final warnings or other disciplinary actions if issues persist.

Key Components of an Employee Warning Form

An effective employee warning form should be clear, comprehensive, and easy to understand. Here are the essential components:

- Employee Information
 - Full name
 - Employee ID (if applicable)
 - Department
 - Position
 - Date of employment
- Date of Warning
 - The specific date when the warning is issued
- Details of the Incident or Performance Issue
 - Description of misconduct or performance deficiency
 - Date and time of the incident
 - Location or circumstances surrounding the issue
 - Any supporting evidence or witnesses
- Policy or Rule Violated

- Reference to specific company policies, code of conduct, or performance standards breached
- Previous Warnings or Disciplinary Actions
- Record of prior warnings related to this issue, if any
- Employee's Explanation
- Space for the employee to provide their perspective or response
- Corrective Action Required
- Clear expectations for improvement
- Specific behaviors or performance standards that must be met
- Timeline for improvement
- Consequences of Continued Misconduct
- Explanation of potential disciplinary measures if issues are not resolved
- Employee Acknowledgment
- Signature of the employee acknowledging receipt and understanding
- Date of acknowledgment
- Manager/HR Signatures
- Signature of the issuing manager
- Signature of HR representative (if applicable)

How to Fill Out an Employee Warning Form

Filling out an employee warning form should be done with professionalism, clarity, and fairness. Follow these steps:

Step 1: Gather All Relevant Information

Collect details about the incident, previous warnings, and any evidence before completing the form.

Step 2: Clearly Describe the Issue

Use objective language to describe what happened, avoiding personal judgments or emotional language.

Step 3: Reference Policies

Identify the specific policies or standards violated to provide context.

Step 4: Outline Corrective Actions

Be specific about what the employee needs to do to rectify the issue.

Step 5: Obtain Employee Acknowledgment

Ensure the employee reads, understands, and signs the document.

Step 6: Document and File

Keep a copy of the completed form in the employee's personnel file for future reference.

Best Practices for Using Employee Warning Forms

Implementing disciplinary warnings effectively requires adherence to best practices:

Consistency

Apply the same procedures and documentation standards across all employees to ensure fairness.

Clarity

Use clear language and specific examples to avoid misunderstandings.

Timeliness

Issue warnings promptly after the incident to reinforce the connection between behavior and disciplinary action.

Confidentiality

Maintain privacy by limiting access to disciplinary records to authorized personnel.

Follow-Up

Schedule follow-up meetings to monitor progress and provide support.

Benefits of Using an Employee Warning Form

Utilizing a well-designed employee warning form offers multiple advantages:

- Legal Protection: Provides documented evidence in case of disputes.
- Improved Communication: Clarifies expectations and consequences.
- Consistency in Discipline: Promotes fairness and uniformity.
- Performance Improvement: Encourages employees to correct behaviors.
- Record Keeping: Maintains a history of disciplinary actions for future reference.

Sample Employee Warning Form Template

Below is a simplified outline of what an employee warning form might include:

Employee Warning Form

- Employee Name: _____
- Employee ID: _____
- Department: _____
- Position: _____
- Date of Warning: _____

Details of Incident/Performance Issue:

Policy Violated:

Previous Warnings (if any):

Employee's Explanation:

Corrective Action Required:

Timeline for Improvement:

Potential Consequences of Continued Non-Compliance:

Employee Acknowledgment:

I acknowledge receipt of this warning and understand the contents.

Signature: _____ Date: _____

Manager/HR Signature:

Signature: _____ Date: _____

Conclusion

An employee warning form is a critical tool in managing workplace discipline and performance. When used correctly, it facilitates transparent communication, ensures accountability, and helps organizations maintain a positive and compliant work environment. Developing a comprehensive, clear, and fair warning form ? coupled with consistent application and follow-up ? can significantly enhance HR processes and contribute to organizational success.

Additional Tips for Effective Employee Warning Management

- Regularly review and update warning policies and forms to stay compliant with labor laws.
- Train managers on how to deliver warnings professionally and empathetically.
- Use warnings as part of a broader performance management strategy.
- Always prioritize constructive feedback and support employee development.

By understanding the importance and proper application of an employee warning form, organizations can foster a culture of accountability while respecting employee rights and promoting a healthy workplace environment.

Employee Warning Form: An Essential Tool for Workplace Discipline and Documentation

In any professional environment, maintaining a productive, respectful, and compliant workplace is paramount. One of the key instruments used by HR professionals, managers, and supervisors to uphold these standards is the employee warning form. This formal document serves as a record of employee misconduct or performance issues, providing a clear, structured approach to addressing concerns while ensuring fairness and consistency. Proper utilization of employee warning forms not only helps in managing employee behavior effectively but also protects the organization legally, should disputes arise.

Understanding the Employee Warning Form

An employee warning form is a standardized document used to formally notify an employee of specific issues related to their conduct or performance. It acts as an official record that details the nature of the problem, the expectations for improvement, and the consequences of continued non-compliance. By documenting incidents systematically, organizations can track patterns, enforce policies consistently, and demonstrate due diligence in disciplinary procedures.

Purpose of an Employee Warning Form

- **Documentation:** Provides a written record of disciplinary action, which can be referenced in future evaluations or disputes.
- **Communication:** Clearly conveys to the employee what behavior or performance issues are problematic.
- **Improvement Catalyst:** Sets expectations for change and improvement within a specified timeframe.
- **Legal Protection:** Offers evidence of fair and consistent disciplinary procedures, reducing legal risks.

Types of Employee Warning Forms

- Verbal Warning Record: A less formal notice, often documented internally as a preliminary step.
- Written Warning: A formal document issued after initial verbal warnings, emphasizing seriousness.
- Final Warning: Indicates impending termination if issues are not resolved.
- Performance Improvement Plan (PIP): Focuses on specific performance deficits with actionable goals.

Key Components of an Employee Warning Form

A comprehensive employee warning form typically includes several critical sections to ensure clarity and completeness. These components facilitate transparent communication and consistent record-keeping.

Employee Details

- Name, employee ID, department, position, and contact information.
- Date of employment and supervisor/manager details.

Incident Description

- Date and time of the incident or performance issue.
- Specific details describing the misconduct or performance deficiency.
- Any prior related warnings or discussions.

Policy Violations

- Reference to specific company policies, codes of conduct, or performance standards violated.

Nature of the Warning

- Type of warning issued (verbal, written, final).
- Level of severity.

Expected Improvements

- Clear, measurable actions the employee must undertake.
- Deadlines for improvement.

Consequences of Non-Compliance

- Potential disciplinary measures, including suspension or termination.

Employee Acknowledgment

- Signature line for the employee to acknowledge receipt.
- Space for comments or responses.

Manager/HR Signature

- Signatures verifying the accuracy and issuance of the warning.

Features and Benefits of Using Employee Warning Forms

Implementing a structured employee warning form system offers several notable features and benefits:

- **Standardization:** Ensures all disciplinary issues are documented uniformly, reducing bias or inconsistency.
- **Legal Compliance:** Demonstrates that disciplinary procedures are fair, transparent, and in line with employment laws.
- **Traceability:** Maintains a chronological record of employee conduct, aiding performance reviews and investigations.
- **Clarity and Transparency:** Clearly communicates expectations and consequences, reducing misunderstandings.
- **Performance Management:** Facilitates constructive feedback and supports employee development.

Pros and Cons of Employee Warning Forms

Pros:

- Promotes consistency in disciplinary procedures across the organization.
- Protects the company legally by providing documented evidence.
- Enhances communication between manager and employee.
- Encourages employees to improve by clarifying expectations.
- Supports fair treatment and reduces potential discrimination claims.

Cons:

- May be perceived as punitive if not used appropriately.
- Over-reliance on formal warnings without addressing root causes can be counterproductive.
- Excessive formal warnings might create a negative work environment.
- If poorly drafted, can lead to misunderstandings or disputes.
- Requires diligent record-keeping and management to maintain effectiveness.

Best Practices for Effective Use of Employee Warning Forms

To maximize the effectiveness of employee warning forms, organizations should adhere to best practices:

1. Be Clear and Specific

- Clearly articulate the misconduct or performance issue.
- Avoid vague statements; specify dates, times, and behaviors.

2. Maintain Objectivity

- Focus on facts rather than assumptions or opinions.
- Base warnings on documented incidents.

3. Follow Company Policies and Legal Guidelines

- Ensure warnings are issued consistently and fairly.
- Adhere to employment laws relevant to disciplinary actions.

4. Provide an Opportunity for Dialogue

- Allow employees to respond or provide their perspective.
- Engage in a constructive conversation about improvement.

5. Keep Records Secure and Confidential

- Store warning forms securely to protect employee privacy.
- Limit access to authorized personnel only.

6. Use Warnings as Part of a Broader Performance Management System

- Combine warnings with coaching, training, and development efforts.
- Follow up on progress and document improvements.

Legal and Ethical Considerations

When deploying employee warning forms, organizations must be mindful of legal and ethical implications:

- Consistency: Apply warnings uniformly to avoid claims of discrimination.
- Timeliness: Issue warnings promptly after incidents occur.
- Documentation Accuracy: Ensure records are truthful and complete.
- Employee Rights: Allow employees to review and respond to warnings.
- Transparency: Clearly communicate policies and procedures related to disciplinary actions.

Failure to adhere to these considerations can lead to legal disputes, reputational damage, or diminished employee morale.

Technological Integration and Digital Employee Warning Forms

With the advent of HR management software, many organizations now utilize digital employee warning forms. These systems offer several advantages:

- Ease of Use: Streamlined templates and automated workflows.
- Accessibility: Remote access allows managers and HR personnel to update records easily.
- Integration: Connect with performance management, payroll, and other HR systems.
- Audit Trails: Automatically track who issued warnings and when.
- Environmental Impact: Reduces paper usage.

Popular HR platforms like BambooHR, SAP SuccessFactors, and Workday provide modules for disciplinary documentation, including employee warning forms.

Conclusion

The employee warning form is a vital component of effective workplace management and discipline. When used appropriately, it fosters a culture of accountability, transparency, and fairness. It serves as a formal record that can safeguard organizations legally, support performance improvement, and promote clear communication between managers and employees. While it has its limitations and requires careful implementation, a well-structured employee warning form system is an indispensable tool for maintaining organizational standards and ensuring a respectful, productive work environment.

By understanding its purpose, components, and best practices, organizations can leverage employee warning forms not as punitive measures, but as opportunities for growth and constructive engagement. Properly managed, these forms contribute significantly to building a positive workplace culture where expectations are clear, and accountability is shared.

In summary, an employee warning form is more than just a disciplinary record; it embodies a systematic approach to managing employee conduct, supporting organizational integrity, and fostering a fair and respectful workplace.

Question What is an employee warning form and why is it important? An employee warning form is a formal document used by employers to record and communicate employee misconduct or performance issues. It serves as a record for future reference, helps ensure fair disciplinary processes, and clarifies expectations for improvement. When should an employer issue an employee warning form? An employer should issue an employee warning form when an employee exhibits misconduct, violates company policies, or shows inadequate performance that requires formal documentation and corrective action. What are the key components included in an employee warning form? Key components typically include the employee's details, description of the misconduct or performance issue, date of the incident, previous warnings (if any), corrective action required, and the employee's acknowledgment or signature. Can an employee dispute or appeal a warning issued via the warning form? Yes, employees usually have the right to dispute or appeal a warning. Employers often provide a process for employees to respond in writing or request a review to ensure fairness and transparency. How does an employee warning form impact future disciplinary actions? The warning form becomes part of the employee's disciplinary record and can influence subsequent disciplinary measures. Multiple warnings may lead to more severe actions, including suspension or termination, depending on company policies. Are electronic or digital employee warning forms acceptable? Yes, many organizations now use electronic or digital warning forms, which can streamline documentation, improve record keeping, and facilitate easier access and storage, provided they comply with legal and privacy standards. What are best practices for creating

an effective employee warning form? Best practices include being clear and specific about the issue, including relevant details and evidence, maintaining a professional tone, providing guidance for improvement, and ensuring the employee has the opportunity to respond or acknowledge the warning.

Related keywords: employee disciplinary form, employee misconduct report, employee counseling form, employee performance warning, employee reprimand letter, employee notice of violation, employee correction notice, employee improvement plan, employee feedback form, disciplinary action form

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