

Offboarding Checklist

Employee Checklist upon Transfer/Separation

To be completed by the supervisor/manager and the employee

The following is a standardized checklist that must be completed for wage and salaried employees who end their employment, whether through resignation, retirement, termination, or transfer. Faculty has a separate checklist maintained by the Provost that should be followed, <http://www.virginia.edu/provost/facultyexit.pdf>. Professional Research Staff (PRS) should use the checklist provided by the School of Medicine.

The checklist provides the steps the supervisor/manager and the employee need to complete in order for the employee to officially exit from the department. This checklist includes important Human Resources information and departmental logistics. Following the steps outlined in the checklist will facilitate the transition of the employee from active employment to her/his eventual departure date.

Offboarding Checklist - (To be completed by the departing employee)

Employee Member's Name (Last, First, Middle)

Position Title

Employee ID #

Department

Date of Departure

Forwarding Address: _____
(Please update your address in Employee Self-Service)

New Phone Number: _____ New Email: _____

The following checklist must be completed for employees who are separating employment with a Department.

Part I: Employee's Responsibilities

Upon Notice of Departure Date:

Done N/A

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Submit resignation letter to the manager/supervisor |
| <input type="checkbox"/> | <input type="checkbox"/> | Obtain letter from manager/supervisor accepting employee resignation |
| <input type="checkbox"/> | <input type="checkbox"/> | Obtain Knowledge Transfer Template from supervisor |
| <input type="checkbox"/> | <input type="checkbox"/> | Contact University Human Resources Service Center to set up appointment if you have questions regarding any of the following: |
- Continuation of health coverage under COBRA
 - Conversion or continuation of life insurance
 - Distribution of retirement contributions
 - Paid Time Remaining
 - Leave Balances

- Retirement accounts including email account
- Employment verification process for future reference

Two Weeks in advance of Departure Date:

Done N/A

- Settle any cash advances, petty cash accounts, pending reimbursements, parking or library fines, or any other unsettled accounts. Confirm that University Leave has not been overused. *NOTE: Any debts owed to the University should be settled with the Accounts Receivable Office. If any amount remains unpaid after Accounts Receivable has contacted the employee it will be handed over to a collection agency and additional fees may be applied.*
- If in a supervisory role, insure that budgetary records, HR reviews (evaluations, correspondence, etc.), letters or emails containing resource commitments and unit strategic plans are labeled and organized in hard copy files for the supervisory successor
- Consult with department Local Support Partner (LSP) and Information Security, Policy, and Records (ISPRO) for retention and/or disposition of email, home directory files, websites, and any other electronic materials
- Complete the Knowledge Transfer Template

Within Last Few Days of Departure Date:

Done N/A

- Remove all personal items from offices or lockers
- Return ALL keys, ID badge(s), University credit cards or travel cards, and parking permit/parking garage smart tag (to Parking and /Transportation) *Employees transferring within the University should retain their ID cards. The departments which employees transfer out of/ into are responsible for removing/ assigning ID card building access as applicable for their locations*
- Return ikey to your department LSP or ITS, return any University items such as portable computer/cell phone/pager/PDA/long distance calling card/copy card to appropriate office, and consult with LSP to delete all remaining electronic files containing University data or University licensed software from your personally owned computers, handheld devices, and electronic media.
- Complete Conflict of Interest Statement if applicable
- If a foreign national, set up an appointment with Compliance and Immigration Services to discuss importance of maintaining status
- Provide UHR with new address so that U.S. Mail can be forwarded

After Departure:

Done N/A

- Notify the UHR Payroll office online of any change of address during the year so that a W-2 tax Statement can be sent in January

Signatures:

| | | |
|-------------------------|-----------|------|
| | | |
| Employee Name | Signature | Date |
| | | |
| Supervisor/Manager Name | Signature | Date |

Part II: Department Responsibilities

At First Notice of Departure:

Done N/A

- Obtain a resignation letter from the employee
- Provide employee a written acceptance of the resignation
- Give employee the Offboarding Checklist
- Give employee the Knowledge Transfer Template
- Recommend that the employee meet with U.Va. HR Benefits office if necessary
- Enter employee termination date in University Integrated System and enter appropriate reason code
- Process any non-reimbursed travel expenses through the department prior to termination date
- Confirm that the employee does not owe reimbursement of a signing bonus or moving and relocation reimbursement
- Confirm that the employee has not used more University Leave than has been accrued, and inform the employee if payment is required.

On last day:

Done N/A

- Obtain the Offboarding Checklist from Employee (verify it is complete and signed by employee)
- Confirm with the employee that University-owned equipment, including UVa Identity Token, computers, mobile devices, pagers, long distance calling and/or copy cards, has been returned to your department LSP or ITS.
- Confirm with the employee that all electronic files containing University data from personally owned computers, mobile devices, cloud storage, and storage media (e.g. flash drives, etc.) have been migrated and deleted.
- Confirm with the employee that all University licensed software on personally owned computers and mobile devices has been uninstalled.
- Confirm with employee that all paper documents containing University data have been returned to the department
- Confirm that department has access and passwords for any electronic files being left at U.Va.
- If applicable, email researchuva-help@virginia.edu to request that the user's ResearchUVA account or role be deactivated.
- Contact department webmaster to ensure references to employee are removed from web content
- Obtain employee's keys and ID badge(s)
- Obtain University portable computer/cell phone/pager/long distance calling card/copy
- Destroy employee's University credit card (Purchasing card) and complete the Purchasing card change form online. <https://www.procurement.virginia.edu/netbadge/pagepcardchangeform>
- Verify return of Parking Permits and Service Parking Passes
- Verify removal of personal items from offices or lockers

- Verify return of tools, safety equipment, and uniforms
- Verify return of any other University property
- Confirm departure with Department

After employee's last day:

Done N/A

- Cancel all locally provisioned user access via the local department support partner (LSP), including access to shared drives.
- Clear/change all passwords including AIS, Voicemail, and PC station
- Verify that a termination date has been entered in Oracle which will end access to HR/Finance, Student Information System (SIS), Document Imaging System (ImageNow), Lead@, Jobs@, and SharePoint
- Contact the local department support partner (LSP) to make sure that the employee's phone number has been deactivated, or, confirm that the number has been forwarded
- Remove from recurring meetings in Outlook as an attendee
- Verify removal of any access to state systems
- Return employee's University ID to the ID office
- Reassign any direct reports to a new supervisor in the University Integrated System, if necessary
- Verify building access and security cards have been deactivated
- Verify cancellation of signature authority over university accounts
- Cancel telephone long distance access code number through ITS
- Cancel photocopy access number
- Verify the computer drives have been cleared
- Change signature authority for approving time cards (*only applicable when a Supervisor is leaving, update the system not the Payroll Office*)

Supervisor/Manager Name

Signature

Date

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