Manager – Offboarding Checklist

Please note: As part of the Offboarding Checklist, the Termination Business Process must be entered in Workday in order to ensure appropriate separation/retirement from the University. If you need assistance with entering the Termination, see the [Termination Job Aid](#).

Workday information

Employee Name:_____   Manager Name _____

UVA Employee ID_____   Position Title_____

☐ Receipt Resignation Letter   Resignation Date_____   Last Day of Work _____

☐ Confirm Resignation Date _____   Employee termination date in Workday _____

Recommended Communication: Manager – Employee:

☐ Employee Offboarding Checklist provided via Workday

☐ Recommend the employee work on the [Knowledge Transfer Template](#)

☐ Recommend that the employee review the [IT Checklist for Leaving UVA](#)

☐ Recommend that the employee review relevant benefits information and contact the HRSC Benefits, Leave and Payroll Team

☐ Consider the appropriate messaging and appropriate acknowledgement for the employee's service
     (e.g., thank you card, lunch, or party)

☐ Remove of personal items (offices, lockers, tools, safety equipment, uniforms etc.)

Work Group:

☐ Confirm departure with work unit and issue appropriate communications

☐ Discuss transition plan to manage workflow

☐ As applicable, ensure removal of employee reference information from web content

Manager Responsibilities: Your review and record of this checklist is an important step and is required for audit purposes to meet state requirements.

Financial Responsibilities:

☐ Review any necessary financial status information from current role with manager or delegate to ensure information transfer (e.g., outstanding bills, budget information or similar)

☐ Process any non-reimbursed travel expenses through the department prior to termination date

☐ Confirm that the employee has not used more University Leave than accrued, and inform the employee if payment is required

☐ Confirm that the employee does not owe other reimbursement such as a signing bonus or moving and relocation reimbursement

☐ Return University credit cards and travel cards to department

Prior to Departure – Consult with LSP or ITS to:

☐ Confirm ownership transfer of employee files stored in the cloud (e.g., UVA Box, OneDrive, etc.) to the manager or shared location (e.g., Microsoft Teams)

☐ Confirm migration or deletion of all electronic files containing University data from personally owned computers, mobile devices, cloud storage, and storage media (e.g., flash drives, etc.)

☐ Confirm employee to uninstall any University licensed software

☐ Ensure employee's access to systems external to UVA for UVA-related work are terminated prior to their departure

☐ Confirm return of any paper documents containing University data

Last Day, Prior to Exit – Verify Return of (as applicable):

☐ Employee's keys and ID badge(s) – Return to UVA ID Office

☐ Parking Permits and Service Parking Passes return to Parking and Transportation (Note: failure to return may result in additional charges)

☐ University-owned equipment (computers, mobile devices, phones, pagers, copy cards, storage media, etc.); ensure any laptop hard drives are wiped clean

☐ Verify termination date in systems