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

<table>
<thead>
<tr>
<th>Employee Name:</th>
<th>Manager Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>UVA Employee ID:</td>
<td>Position Title:</td>
</tr>
</tbody>
</table>

- [ ] Receipt Resignation Letter
- [ ] Resignation Date: ____________  Last Day of Work: ____________
- [ ] Confirm Resignation Date: ____________  Employee termination date in Workday: ____________

### Recommended Communication: Manager – Employee:

- [ ] Recommend Employee Offboarding Checklist provided via Workday
- [ ] 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

### 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

### 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