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.*

<table>
<thead>
<tr>
<th>Workday information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Name: ___________________</td>
<td>Manager Name ___________________</td>
</tr>
<tr>
<td>UVA Employee ID ___________________</td>
<td>Position Title ___________________</td>
</tr>
<tr>
<td>☐ Receipt Resignation Letter</td>
<td>Resignation Date ___________________</td>
</tr>
<tr>
<td>☐ Confirm Resignation Date</td>
<td>☐ Employee termination date in Workday ________________</td>
</tr>
</tbody>
</table>

**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 (thank you card, lunch, or party for example)
- ☐ 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 (i.e. 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
- ☐ Destroy employee’s University credit card (Purchasing card) and complete purchasing card change form online. [https://travelandexpense.procurement.virginia.edu/te-card/te-card-change-request](https://travelandexpense.procurement.virginia.edu/te-card/te-card-change-request)

**Prior to Departure:**

- ☐ Confirm return of University-owned equipment (UVA Identity Token, computers, mobile devices, laptop/cellphone/p-card/calling or copy cards)
- ☐ Confirm (ITS) 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 (ITS) any University licensed software
- ☐ 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 computer/cell phone/pager/long distance calling card/photocopy ID
- ☐ Verify termination date in systems; ensure any laptop hard drives are wiped clean – Information Technology Services