



# Off boarding Checklist for Managers

This checklist will assist with the departments off boarding process. Off boarding is the process of managing the transition when an employee leaves an organization, whether voluntary or involuntary. It includes a variety of tasks, including communicating the employee's departure, retrieving company assets, disabling system access and completing an exit interview.

## Employee's Responsibility

- Employee provides [resignation notice](#) in writing to supervisor. An email is sufficient. It is common practice to give at least 2 weeks' notice.
- Employee [uploads resignation notice in Workday](#).
- After last day, employee will no longer have access to Workday or networks. Therefore, employee [should update/verify address and contact information](#) for any future correspondence (i.e. tax documents, etc.).

## Manager Responsibilities

- Manager should communicate the departure of the employee to the immediate team/organization, consulting with HR if needed.
- Manager [approves resignation in Workday](#).
- Manager should review planned travel or other planned expenditures prior to employee departure.

## HR Responsibilities

- HR approves the resignation/termination and determines re-hire eligibility.

## Employee Responsibility

- After HR approves the resignation/termination, the exit interview will appear as a task in the employees Workday inbox. Employee should complete and submit the exit interview. If desired, the employee can contact HR for an in-person exit interview.
- Employee completes their Workday timecard and gets approval at least 2 days prior to the last day worked.
  - Non-Exempt (hourly) employees require actual time worked (in/out times) and enter any PTO. [See Staff Paid Time Off Policy](#).



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## Manager Responsibilities

- Manager approves timecard in Workday.
  
- Manager ensures that travel advance/expense report balances equal zero and makes sure that any outstanding expense reports are submitted for payment.
- Manager ensures that employee leaves all University reference materials (i.e. department files, manuals, computer files, etc.) and returns any library materials.
  - Financial Services will cancel university credit cards upon notification of termination via Workday. Contact [Financial Services](#) for additional information if needed.
- Manager or employee returns all keys, University ID, and Furman property, including credit cards, to HR on/prior to the last day of employment.
- Manager cancels or transfers access to vendor websites, external systems and University paid professional memberships. This includes [transferring ownership for files and folders shared from the employee's Box account](#) that need to be retained for business purposes.
- Manager should seek approval, from HR, if access to employee e-mail, Box folder or and/or network drive is required.
- Manager should consider security matters such as changing passwords on shared computer accounts and disabling access to shared files, alarm and/or entry codes.
- Employee may reach out to Human Resources, at any time, if guidance is needed.

## Benefit Information for Employee

- Medical, Dental and Vision coverage ends on the last day of the month in which the termination takes place. You may continue coverage, via COBRA, for up to 18 months. You will receive information from Flores regarding your ability to keep COBRA.
- Other benefits, such as Disability, Life Insurance and Voluntary Products, will end on the last day worked. Individuals may have to option to port or convert certain voluntary products.



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- Vacation hours will be paid out based on the [Paid Time Off Policy](#).
- Retirement – contact [TIAA](#) directly at 1-800-842-2252.