

OFF-BOARDING CHECKLIST

Employee (E): _____

Manager (M): _____

Employee Signature: _____

Manager Signature: _____

Title: _____

Last Date Worked: _____

Key Contact (KC): _____

Today's Date: _____

Prior to Last Day

- | | |
|---|--|
| <ul style="list-style-type: none"> <input type="checkbox"/> M: Obtain letter of resignation from employee & forward to Key Contact <input type="checkbox"/> M: Confirm remaining PTO with employee <input type="checkbox"/> KC: Complete the Offboard an Employee form in the HR Service Center <input type="checkbox"/> M: Send email notifying division of employee's departure <input type="checkbox"/> E: Submit final Concur report | <ul style="list-style-type: none"> <input type="checkbox"/> E: Cancel University AMEX <input type="checkbox"/> M: Offer optional exit interview with department HR contact and/or HRBP <input type="checkbox"/> M: Refer Benefits questions to HR <input type="checkbox"/> M: Ensure files, documents, etc have been transferred |
|---|--|

Last Day

- | | |
|---|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> M: Collect technology (computer, cell phone, etc.) <input type="checkbox"/> M: Collect key(s) | <ul style="list-style-type: none"> <input type="checkbox"/> M: Collect Husky ID and other access cards <input type="checkbox"/> M: Collect any additional University property |
|---|---|

After Departure

- | | |
|---|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> Remove name plate & clean work space <input type="checkbox"/> Remove employee from telephone list & cancel phone line (if applicable) <input type="checkbox"/> Remove employee from org charts/website | <ul style="list-style-type: none"> <input type="checkbox"/> Remove employee from distribution lists <input type="checkbox"/> Remove employee mailbox <input type="checkbox"/> Remove employee system access (if not automatic) |
|---|---|

Optional Additional Tasks
