



Employee Name:

Department:

Employee Manager:

Last Day of Employment:

Manager's Checklist for Off-Boarding Staff

This checklist assists managers in processing an off-boarding staff employees to ensure that University property is returned and systems security updated to provide for a smooth transition. Not all items listed below will apply to each staff member.

If the termination is involuntary, or for questions regarding the off-boarding process, please contact **Human Resources at humanresources@rmu.edu or 412.397.6270**. The Termination of Employment policy is located at rmu.edu/hrpolicies.

Submit the off-boarding checklist, or any related documents to Human Resources on or by the employee's last working day.

| Actions required when employee notifies manager of resignation. | | | | |
|---|--|--------------------------|--------------------------|--|
| Action Item | Complete | N/A | Notes: | |
| General | | | | |
| Resignation Letter and/or Email | Send employee letter/email of resignation to Human Resources. Letter/email must have an effective date ten working days before the anticipated last work day. For employees who hold a position of director and above, notice must be provided at least 20 working days before the anticipated work day. | <input type="checkbox"/> | <input type="checkbox"/> | |
| Miscellaneous | Confirm employee completes the Employee Off-Boarding Checklist | <input type="checkbox"/> | <input type="checkbox"/> | |
| Resignation Letter and/or Email | Submit a revised letter of resignation to Human Resources indicating the new date, if employee's last day of employment changes. | <input type="checkbox"/> | <input type="checkbox"/> | |
| Exit Interview | Verify employee schedules their exit interview with Human Resources on their last day of work. | <input type="checkbox"/> | <input type="checkbox"/> | |
| PTO <i>PTO eligible employees</i> | Ensure employee's remaining PTO information is communicated to Human Resources to allow for a final pay check to be generated. | <input type="checkbox"/> | <input type="checkbox"/> | |
| Team Communication | Ensure a plan has been set up to communicate the employee's departure to the department and other internal/external contacts. | <input type="checkbox"/> | <input type="checkbox"/> | |
| Knowledge Transfer | Ensure a plan has been set up to redistribute the employee's duties. | <input type="checkbox"/> | <input type="checkbox"/> | |
| Talent Acquisition | Will the position be replaced? If yes, submit an open position requisition in TalentTrack and submit for approval. | <input type="checkbox"/> | <input type="checkbox"/> | |

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|------------------------|--|--------------------------|--------------------------|--|
| IT Access | <p>Complete the Request for Access to Email and Computer Accounts form and submit to Human Resources prior to employee's last day.</p> <p>Remind employee and person to whom the account will be delegated that all emails documents or other materials on employee's computer should be preserved and not deleted. Create a shared folder where employee can move all important documents to which you or others will need access.</p> <p>Employee must return all hard and soft copies of University saved files on any personal drives prior to final day of employment.</p> | <input type="checkbox"/> | <input type="checkbox"/> | |
| IT Access | <p>If the employee has sole access or administrative rights to files, shared drives, software applications, etc. new administrative rights should be created for any individual taking over the responsibilities for such files, databases, shared drives, applications, etc.</p> <ol style="list-style-type: none"> 1. Contact Joan Sabo if changes are required to a purchasing card. 2. Contact Human Resources for changes related to time approval (e.g. employee leaving is an approver of time). 3. Contact Michael Baughman if a new cost center manager needs assigned in Unit 4. 4. Contact Human Resources if approval workflow needs changed in TalentTrack. 5. Contact IT if department specific software needs updated, changed or modified. | <input type="checkbox"/> | <input type="checkbox"/> | |
| Miscellaneous | <p>Remove any University business related documents, files, etc. from personal devices.</p> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Litigation Hold | <p>Confirm whether employee is currently subject to a litigation hold from the Office of General Counsel, If yes, all emails, documents or other materials on your computer should be preserved and not deleted.</p> | <input type="checkbox"/> | <input type="checkbox"/> | |

