

Employee Offboarding Checklist for Managers

Employee Name:	
Employee ID Number:	
Department:	
Manager Name:	

Instructions: This checklist should be used as a guide for managers when an employee voluntarily resigns or will be transferring to a new department. Once all the *applicable* items have been checked, please sign and date the form and forward to your Human Resources strategic partner.

- Please send the resignation letter/email to the HR strategic partner as soon as you receive it** for payroll / HR processing. Include the last day the employee will work and the general reason for leaving (if not already provided in the letter/email).

- Create a transition plan with the employee
 - Discuss what tasks will be:
 - Handed off to another employee(s)
 - Completed by the employee before their last day
 - Put on hold
 - Discuss plans for setting up automatic forwarding or reply for their email account

- Encourage the employee to update their mailing address and personal email in myHR
 - Keeping this information up to date will ensure they receive future important information about benefits, tax information and the UM System Exit Survey email. **Note:** Benefit-eligible employees who voluntarily resign will receive an email from UM System with the link to the Exit Survey.

- Ensure that University property is returned to the department (unless otherwise indicated), including:
 - Laptop/computer and IT security key
 - S&T Employee ID card (manager can destroy)
 - Parking permit tag (employee returns tag to Parking)
 - Keys associated with the employee (employee returns to Facilities Services)
 - Purchasing card
 - Other department specific items, i.e., name tag, business cards, shirts, uniforms, etc.

- Offer the employee an exit interview with HR and encourage the employee to contact HR if they have questions about their last check, vacation payout, insurance, etc.

MANAGER'S NOTES:

Manager's Signature: _____ Date completed: _____