WILLIAM & MARY

Employee Offboarding Checklist

Employee Name____________________________ Employee (93#)______________________

Position Title ____________________________ Position #__________________________

Supervisor Name ____________________________ Last Day of Work ______________________

Prior to your departure, you are responsible for the following:

- ❑ **Provide written notice of your resignation to your supervisor** – This should be done as early as possible, OR at least 2 – 4 weeks prior to departure, to help with transition planning.
- ❑ **Complete Interim Performance Evaluations on all direct reports** (Supervisors only)
- ❑ **Tribe Knowledge Transfer Form (optional)** – Please work with your supervisor to develop a transition plan for your responsibilities and help W&M retain any undocumented knowledge.
- ❑ **Update your contact information in Workday** – Mailing address, personal email, phone number, etc. Your W-2 and health insurance (COBRA) communications will be sent to the Workday mailing address.
- ❑ **Review Employee Benefits (Leave, Health Insurance, Retirement)** – Review benefits information on the UHR webpage and contact UHR with any questions through the Workday Get Help portal.
- ❑ **State Agency Transfers (if applicable)** – Your last date on payroll at W&M and your first day at the new agency should be back-to-back to avoid a break in service and facilitate a smooth transition of benefits.
- ❑ **Resolve outstanding payments prior to your last day** – Pay any outstanding charges such as travel advances, payroll overpayments, telecommunication charges, library fines, parking fines, or other fees. *Outstanding amounts can be deducted from your final leave payout.*
- ❑ **Turn in your ID Badge** to your supervisor or Tribe Card Services upon departure.

You are responsible for returning all university property and resolving all outstanding balances for the following stakeholders (additional details can be found on the UHR Offboarding webpage):

- ❑ **Department** – Return all equipment such as laptops, monitors, etc. prior to your departure.

  NOTE: Any equipment purchased under ADA should be returned to University Human Resources.
- ❑ **W&M Libraries (Swem)** – Return all borrowed books and materials. Resolve any fines.
- ❑ **Procurement Services** – Close buyW&M account and transfer any contract/SPCC responsibilities. Return any small purchase credit cards.
- ❑ **Bursar's Office** – Pay all outstanding fines, fees, advances, and obligations due to the university.
- ❑ **Parking** – Unreturned passes will result in a fine for the remaining academic year balance. If you return your hangtag and/or decal prior to your last day of work, you can be issued a temporary parking pass.
- ❑ **Information Technology** – Return all equipment borrowed from IT. This does not include equipment provided by your department.
- ❑ **Office of Sponsored Programs (OSP)** – Ensure reports and deliverables are completed for sponsored funding. An employee who plans to transfer an award to another university must process the request through OSP. This generally applies to faculty only.
- ❑ **Reves Center** – Contact Reves Center concerning your H-1B, J-1, or other visa, or if not a U.S. citizen/permanent resident.
- ❑ **Statement of Economic Interest** – If your position has been identified as required to file a "Statement of Economic Interest" please follow state instructions found at ethics.dls.virginia.gov. Contact Compliance & Equity for any questions.
- ❑ **For VIMS employees** – Facilities Management (keys), IT, Safety, Finance, and OSP are key stakeholders.

Learn more about Offboarding here: https://www.wm.edu/offices/uhr/employees/currentemployees/exiting/