WILLIAM & MARY

Manager Offboarding Checklist

Employee Name_____ Employee (93#)_____

Position Title _____ Position #_____

Supervisor Name _____ Last Day of Work _____

Prior to the employee's departure, the Manager is responsible for the following:

- ❑ **Enter the employee's termination in Workday** – This should be done as early as possible, OR at least 2-4 weeks prior to departure, to help with transition planning. Include an electronic copy of the communication of resignation.
- ❑ **Tribe Knowledge Transfer Form** – Work with the employee to document valuable information related to current projects, frequent contacts, and such. Help W&M retain any undocumented knowledge so it does not leave with them.
- ❑ **Ensure the employee completes the Employee Offboarding Checklist** – Employees should return all university property and resolve all balances due to university stakeholders. A listing of stakeholders can be found on the UHR Offboarding webpage (link).

  NOTE: If the employee's last day in office was prior to the termination being entered into Workday, the Manager should ensure that items noted in the **Employee Offboarding Checklist** are completed satisfactorily in their stead.
- ❑ **Complete Interim Performance Reviews for any direct reports** (if departing employee is a Supervisor)

Additionally, Managers are responsible for the following:

Finance related:

- ❑ Confirm that any contracted sign-on bonus, retention bonus, or moving and relocation stipend meets the minimum employment dates (typically 1 year) - notify the Office of Payroll if the minimum date has not been achieved. Payroll will prorate the remainder of the contracted time frame for recovery (include a copy of the contract).
- ❑ If applicable, make sure the buyW&M account is closed out and contract/small purchase charge card (SPCC) responsibilities are transferred.

Information related:

- ❑ Make sure project information and necessary files ownership are transferred to the manager or other designated employee and not stored solely in a private area such as the employee's computer.

University property related:

- ❑ Employee has returned TribeCard ID and parking pass.
- ❑ Employee has returned all University-owned equipment such as laptops, SPCC, books, files, keys, etc.
- ❑ Any equipment purchased under ADA should be returned to University Human Resources.