

Offboarding Checklist for Supervisors

- ☐ Receive a resignation letter.
 - ☐ If it is a verbal resignation, provide the employee with a written confirmation of receipt of their resignation.
- ☐ Thank the employee for their time with the university.
- ☐ Provide the employee with the Departure Information sheet and the Departure Form. These documents are available on the Forms page in the Human Resources section of the university's website: <https://www.pugetsound.edu/human-resources/forms>
- ☐ Determine the employee's last day of work. *(In accordance with [university policy](#), the "Intended Last Day of Work" cannot fall on a holiday or a day that includes leave. If the date changes, please notify HR.)*
- ☐ Once completed, sign the departure form and submit it to Human Resources. *HR will reach out to the employee regarding separation information (benefits, exit interview, etc.). On the employee's last day of work, Tech Services will revoke account access. If this needs to be done earlier, please consult with HR.*
- ☐ If this position will need to be backfilled, please begin the job posting request process by submitting the following form through Asana: [Staff Job Requisition Form](#). *Please note: all positions must be approved by the President in order to begin recruitment.*

If Applicable, on last day worked, please:

- ☐ Collect university assets:
 - ☐ Return technology (laptop, power supply, etc.) to Technology Services.
 - ☐ Return key(s) to Security Services.
 - ☐ Return P-Card to Finance.
 - ☐ Collect any additional university property (tools, equipment, supplies, etc.). and return to the appropriate parties.
- ☐ Arrange for the transfer of the employee's electronic files (including Google) to the designated individual authorized to access the files. You can do this by submitting a ticket with Technology Services.
- ☐ Ensure the employee removes all personal items from their office, locker, etc.
 - ☐ Work with Facilities if cardboard boxes are needed to transport belongings.

To be considered:

- ☐ Prepare communication regarding the employee's departure for the team/university as appropriate.
- ☐ Update any records and documents (org chart, department website, emergency phone lists, etc.)

- ☐ Request a Project Status Report/Knowledge Transfer. An example might include:
 - ☐ List of all current, outstanding, and important upcoming projects, deadlines and tasks
 - ☐ List of ongoing regular tasks
 - ☐ Update/create Standard Operating Procedures (SOPs) for current processes
 - ☐ List of open items on which the employee is currently working
 - ☐ List of internal employees or external agencies (including contact information) with whom the employee has been working on tasks, projects, committees, etc.
 - ☐ Compilation of relevant files/records/emails pertaining to current or past projects