

Manager – Offboarding Checklist

Please note: As part of the Offboarding Checklist, the Termination Business Process must be entered in Workday in order to ensure appropriate separation/retirement from the University. If you need assistance with entering the Termination, see the [Termination Job Aid](#).

Workday information

Employee Name: _____ Manager Name _____
UVA Employee ID _____ Position Title _____
 Receipt Resignation Letter Resignation Date _____ Last Day of Work _____
 Confirm Resignation Date _____ Employee termination date in Workday _____

Recommended Communication: Manager – Employee:

- Employee Offboarding Checklist provided via Workday
- Recommend the employee work on the [Knowledge Transfer Template](#)
- Recommend that the employee review the [IT Checklist for Leaving UVA](#)
- Recommend that the employee review relevant benefits information and contact the HRSC Benefits, Leave and Payroll Team
- Consider the appropriate messaging and appropriate acknowledgement for the employee's service (thank you card, lunch, or party for example)
- Remove of personal items (offices, lockers, tools, safety equipment, uniforms etc.)

Work Group:

- Confirm departure with work unit and issue appropriate communications
- Discuss transition plan to manage workflow

Manager Responsibilities: Your review and record of this checklist is an important step and is required for audit purposes to meet state requirements.

Financial Responsibilities:

- Review any necessary financial status information from current role with manager or delegate to ensure information transfer (i.e. outstanding bills, budget information or similar)
- Process any non-reimbursed travel expenses through the department prior to termination date
- Confirm that the employee has not used more University Leave than accrued, and inform the employee if payment is required
- Confirm that the employee does not owe other reimbursement such as a signing bonus or moving and relocation reimbursement
- Destroy employee's University credit card (Purchasing card) and complete purchasing card change form online. <https://travelandexpense.procurement.virginia.edu/te-card/te-card-change-request>

Prior to Departure:

- Confirm return of University-owned equipment (UVA Identity Token, computers, mobile devices, laptop/cellphone/p-card/calling or copy cards)
- Confirm (ITS) deletion of all electronic files containing University data from personally owned computers, mobile devices, cloud storage, and storage media (e.g. flash drives, etc.).
- Confirm employee to uninstall (ITS) any University licensed software
- Ensure employee's access to systems external to UVA for UVA-related work are terminated prior to their departure
- Confirm return of any paper documents containing University data

Last day, prior to exit - Verify return of (as applicable):

- Employee's keys and ID badge(s) – Return to UVA ID Office
- Parking Permits and Service Parking Passes return to Parking and Transportation (Note: failure to return may result in additional charges)
- University computer/cell phone/pager/long distance calling card/photocopy ID
- Verify termination date in systems; ensure any laptop hard drives are wiped clean – Information Technology Services