SUPERVISOR OFFBOARDING CHECKLIST

Employee Name: _____   Supervisor's Name: _____

Department/Position: _____   Effective Date: _____

Date Completed	Decision to Leave
	Written letter of resignation provided to supervisor and appropriate notice given
	Copy of resignation letter to HR
	Input resignation into Manager Self Service
	Discussion regarding rehire status
	Discussion regarding retirement, pension, rehire rules, and recognition options as appropriate
	Verify address and contact information for W-2 and Cobra information
	Off Boarding documentation saved in employee file
	If involuntary: Documentation regarding termination of employment on file
Date Completed	**Exiting Processes and Procedure**
	Set up exit interview
	Exit survey: Email the employee the Exit Survey to be completed. Copy and paste the below. **https://methodistcollege.sjc1.qualtrics.com/jfe/form/SV_6J7ilCdrGvTc2R8**
	Update any org charts
	Document post-employment contact information
	Transfer of Knowledge, have employee complete and return to you the following: **CLICK HERE**
	Explanation of Benefits
	• PTO
	• Pay
	• Insurance
	• Disability
	• TAP/tuition exchange
Date Completed	**Communication**
	Communication to college, department, division and NMHS as needed. Email Template: **CLICK HERE**
	Thank you to employee
	Transfer of knowledge to new or existing employees
	Letter of reference if appropriate
	Recognition Retirement – Ask Bookstore (Susan Fisher-Idt) for glass starfish to gift employee. Blessing Ceremony – **CLICK HERE**
Date Completed	**Security, Access, Technology**
	Collect employee badge on last day and give to Security
	Collect keys for office and any other work related keys on last day and return to security
	Collect any equipment, supplies, or other work property (laptops, iPads, cell phones, credit cards, etc.) iPad: The employee needs to complete and give the iPad Return Checklist Form to Ed Tech with the iPad and accessories – **CLICK HERE**
	Determine disposition of H drive contents. If employee leaves abruptly the supervisor will need to request access (this could take weeks for IT and HR approval).
	Determine disposition of past emails and managing incoming emails
	Determine access to and forwarding of voice mails
	Remove employee access to computer, system, voicemail, building access on last day
Date Completed	**Department Transition**
	Assess impact of employee departure related to ongoing departmental functioning
	Identify priority needs or concerns
	Take steps to address department grief/transition
	Assess impact on functionality of other departments
	Enact succession plans as appropriate
	Special Considerations: department of one, executive level employee, etc.

Updated August 4, 2021