



Employee Offboarding Checklist

To be completed by supervisor or separating employee

Supervisors – complete as soon as an employee informs they will be leaving employment with SCSU and submit to HR to close out the employee's personnel file.

Note: Separation includes any staff or faculty separating from the University, and includes resignation, involuntary termination, transfer to another MinnState institution/state agency, or retirement. Retirement announcements are private data unless the retiring employee has given permission to disclose.

Employee Information

Employee Name:	Bargaining Unit:
Position Title:	Separation Date:
Department/College:	Supervisor's Name:

Employee Personal Information

The following information is optional, but allows SCSU Human Resources to follow up with questions regarding payments, benefits, etc.

Employee Cell Phone:
Employee Personal Email:

Section 1: Pre-Separation

As soon as you know an employee will be leaving

Activity	Completed?
<p>As soon as you are informed by your employee, notify HR and IT of the pending employee separation by completing an off-boarding ticket at:</p> <p>https://services.stcloudstate.edu/TDClient/1919/Portal/Requests/ServiceCatalog?CategoryID=16298</p> <p>Entry of a ticket is vital to ensuring that the employee's IT access ends, and that the employee's pay ends on the appropriate date, so there is not an overpayment/mistaken payment.</p>	
<p>If it is a voluntary separation, have the employee enter a resignation into Workday. Direct the employee to HR if they need assistance doing this. Request a written resignation or retirement notice from the employee. If employee refuses to give a written resignation, and only gave a verbal resignation, send HR an email documenting the date of the resignation notice, and what the employee said.</p>	
<p>If involuntary separation, ensure HR approval before attempting to end employment. Once HR approval has been granted, send signed, written documentation to HR.</p>	
<p>Schedule meeting with employee to get an update on projects in progress. Develop a plan for knowledge transfer/job documentation.</p>	

Work with employee to document tasks and processes. Ensure as much knowledge capture as possible to transition work to another employee, and to document for training a replacement. Create a plan for transition of work assignments to other employees.	
Remind separating employee to review HR Separation email. Employee can schedule a meeting with HR if needed . Ensure employee has scheduled a retirement meeting with HR if retiring.	
Consider next steps for filling this vacancy and complete Position Request via DocuSign.	
Determine what work responsibilities the employee will complete prior to departure.	
Instruct employee to move all electronic files from the employee's personal OneDrive to the appropriate department/office Team or Teams folders. If there is no shared Team for the department/office, have the employee copy all files onto a memory stick.	

Section 2: Week of Last Day

Seven (7) or more days prior to employee's last day

Activity	Completed?
Approve Workday leave requests for all vacation, sick leave or overtime used and include notation of last workday. Consult with HR on any questions on leave approvals as separation approaches.	
If the employee is a supervisor, set up delegations to route subordinates to an appropriate leader to approve timesheets, etc. After a supervising employee leaves, request that HR route their subordinate employees to your supervisory org unit, or that of whoever will be supervising those subordinates going forward.	
Collect any purchasing or university credit cards/P-cards.	
Determine the location of and ensure you have access to all of the departing employee's work-related files, including electronic and paper files.	
Remind employee to submit any expense reimbursements and/or repay travel advance monies (if applicable).	
Complete "Space Check-Out Form" and submit to Facilities Management.	
Send announcement of employee's departure, as appropriate. Remember that retirement information is private unless the employee has given approval to advise that they are retiring. Consult with HR on what communication should be made for an involuntary departure.	
Inform employee of voluntary on-line exit survey they will be receiving from HR. Encourage employee to complete.	
Ensure that the employee has created an out of office bounce back message on their email and voicemail effective on the date of their departure, redirecting people to the appropriate person handling their duties after their departure.	
Contact the appropriate VP to rescind delegation of authority, if applicable.	

Section 3: Employee's Last Day

Activity	Completed?
Ensure that employee's last timesheet is submitted and approved before their last day.	
Have employee change their telephone voice mail messages and turn on their Outlook automatic reply with the agreed upon message.	

Employee must turn in their keys to Public Safety in person at the Public Safety Center. If employee has already left, or refuses to turn in keys to anyone other than supervisor or an office manager, then the supervisor or office manager may turn in the keys if the employee cannot/will not do so. However, the employee themselves should turn in the keys if possible.	
If an employee has a parking permit, the employee must turn in that permit themselves at the Public Safety Center. No refunds will be issued if an employee does not turn in the permit.	
Electronic building access will end after the employee's last day. Make sure that you have reported the employee's separation date to HR via a separation ticket so that HR can enter the end date into Workday. This entry drives the end of building access as well.	
Ensure that employee has removed all personal property from their office/workspace	
Collect computers, laptops, tablets, cell phones and other electronics or state-owned property and turn into IT.	
Collect any books, library materials, software, office supplies, uniforms/equipment, etc. that are state property.	
Inform employee to update contact information in the State of MN Employee Self-Service website for future tax forms.	
Transfer and save any Employee files from local computer desktop, Microsoft OneDrive and/or Microsoft Teams before the employee leaves on their last day.	
Return any P-cards issued to supervisor or to Business Services.	

Section 4: Post-Separation

Activity	Completed?
Ensure all MinnState or non-SCSU IT systems access is deactivated (SEMA4, ISRS, (via Employee Home, Supervisor- emails/tickets to system office), etc. Ensure that all third-party vendor account access is ended.	
Follow-up with HR on moving forward with the now vacant position search, as applicable.	
Ensure that department/office website staff/faculty directory/listing page is updated.	
Sign, date and return this completed checklist to HR.	

Complete this form by signing and return to HR within two days following the separation date to ensure a smooth transition.

Supervisor's Name (print):

Supervisor's Signature:

Date: