Offboarding Plan for Staff

Use this plan as a guide when staff are departing from the University (ending employment by resignation, separation, retirement, reaching appointment end date). Please customize this plan related to the specific needs of your department/unit.

DEPARTMENT RESPONSIBILITIES

☐ **Obtain Resignation Letter**
Accept resignation letter through written communication to include in their personnel file. The letter must include the employee's last day of work.

☐ **Process Separation PAF**
Access to university systems is terminated at the end of business on the last day of employment (appointment end date or separation date) unless the paperwork is submitted to initiate a subsequent active appointment (e.g. affiliate position or transfer to another UNL position). Ensure you process any non-reimbursed travel expenses or other reimbursements

☐ **Schedule Exit Interview** (if desired by employee).
You may use the Exit Interview form if desired. Provide employee with the Offboarding Checklist for their reference

☐ **Notify the UNL Benefits Office**
Recommend that the employee talk with the Benefits Office (472-2600) regarding their Health, Life, TIAA, Fidelity and reimbursement accounts.

☐ **Confirm Vacation/Sick Leave/Floating Holiday Balances and/or Payout for the employee**.
Discuss arrangements for last paycheck direct deposit in bank account. If the employee is moving, they may be changing banks. Remind them that they should update this information now as it takes a full pay period for the change to occur. Or suggest they keep their current account open until the final paycheck has deposited. Be sure to have the employee update their address and phone in Firefly so they will receive their lastW-2.

☐ **Discuss notification and communication plan**.
Discuss status of pending projects and duties with employee to ensure unfinished projects will be reassigned and all interested parties are informed.

Work with employee to create approach to transition internal/external communication.

- Telephone. Transition telephone contacts employee receives
- E-mail. Inform clients/customers employee will no longer be available at this e-mail address.

You should also contact Telecom's Centrex Services (telecomaccount2@unl.edu) to reset voicemail, change name on billing recording, remove phone service or place phone on a temporary disconnect or forward to another person.

<div align="center">Department Responsibilities</div>

☐ **Return of University Equipment**
Confirm with employee that ensure all university equipment assigned to them has been returned. Use the Objects on Loan and Key Management to do so. Items to be returned may include but is not limited:

- PCard. Notify Procurement Card office to cancel the card
- NCard. University photo ID card
- Building, room, cabinet and file keys
- UNL mobile devices (i.e. laptop computer/iPad/tablet)
- University-issued job apparel and accessories
- Laboratory Equipment (I.e., radiation badge/ring)
- Return Departmental Parking Permit and/or Fuel Card

☐ **Electronic Files**
Work with the employee to ensure all electronic files containing university data have been migrated and deleted from personally owned computer, mobile devices, cloud storage (e.g. flash drives, etc.). If any files needed for continuation of business are located on hard drives, OneDrive, or in email, ensure they have been migrated to another person or SharePoint (or network drive). OneDrive and email files are deleted after the separation date.

☐ **Supervisor Files**
Retrieve budgetary records, performance reviews (evaluations, correspondence, etc.), letters or emails containing resource commitments and unit strategic plans are labeled and organized in hard copy files if employee was in a supervisory role.

☐ **University-licensed Software**
Confirm with the employee that all university licensed software on personally owned computer and mobile devices has been uninstalled. Those employees who installed Office products on their home computers will have that license end at the time of the employment.

☐ **Website Update**
Contact department webmaster to ensure references to employee are removed from the web.

☐ **Final Actions**
Obtain completed and signed **Separation of Employment Checklist** from employee. This signed checklist needs to be kept by the department.
Ensure employee submits their final timesheet.