



The Supervisor's Guide to Offboarding

NOTE - It is recommended that you review the *Executive Office Shared Environment Employee Offboarding Checklist* in order to understand the process the departing employee will be working on.

Submit a separation form to Executive Office Human Resources (EOHR):

- **For student employees:** Submit a [student employee separation form](#).
- **For professional and classified employees:** As soon as you receive notice, submit a [voluntary separation form](#), including the employee's resignation letter.

Approve employee time off and time worked:

- Approve all vacation and time off requests before the employee's departure.
- Approve the employee's final timesheet for hours worked before the end of the employee's last day.

Manage equipment and accesses:

NOTE – If the departing employee has access to Schmitz or Gerberding Hall, fill out the [Executive Office Building Coordination offboarding keys & CAAMS form](#).

- Ensure all equipment and keys are returned.
- Ensure appropriate access is granted to other staff as back-up and/or as needed for systems and documents.
- Remove the employee's access to buildings.
- Remove the employee's access to online systems including iDrive, SharePoint, and any other system relevant to their specific role, such as Workbench.
- Transfer necessary system passwords and update security roles.

Verify records are properly managed:

Ensure the departing employee has completed the [Records Management Offboarding Checklist](#) to ensure proper storage and hand over of documents, including:

- Email
- Electronic records
- Paper records