

## **OFFBOARDING PROCESSES FOR RUTGERS EMPLOYEES**

### **Purpose:**

The following checklists are designed to ensure the consistent off-boarding of university employees including voluntary resignations, involuntary layoffs or terminations, terminations due to the death of an employee, retirements, departmental transfers, etc. Please be sure to review [Rutgers Policy 70.1.7](#) to understand your role and responsibilities in the deprovisioning process in addition to the guidelines found in the checklist below.

### **VOLUNTARY RESIGNATION or RETIREMENT CHECKLIST**

A voluntary resignation and subsequent termination of employment occurs when an employee decides to separate from the university on their own accord and informs their supervisor or UHR of their intent to resign or retire.

**Please note:** If an employee resigns to take a position in a different unit/department within Rutgers University without a break in service, do not terminate their record. This will adversely impact the employee including causing a break in benefits. These cases should be handled as a transfer, not a resignation.

1. **Received employee's resignation letter.**   
The employee should provide a written resignation letter to their manager and HR Liaison/UHR Representative. The letter must include the employee's last date of employment. If the separation is a retirement, the employee should also submit retirement forms to UHR Benefits.
2. **Provided employee with written confirmation of receipt of letter.**   
Upon receipt of an employee's resignation, the manager shall send written confirmation of the receipt of their resignation letter to the employee, reiterating the last date of employment, copying their HR Liaison/UHR Representative. The manager contacts their HR Liaison/UHR Representative to discuss next steps.
3. **Verified that absence record is up-to-date.**   
Manager verifies that the employee's absence record is up-to-date to accurately reflect any unused PTO.
4. **Gathered information regarding job details, project deadlines, and proposed transition plans.**   
If applicable, ask the employee to write up outstanding job details and duties including ongoing tasks, current and upcoming projects/deadlines, and necessary contact information. Also, have the employee provide a list of all systems, including any internal department systems, social media accounts, Google Drive, databases, etc. they have access to as part of their Rutgers employment.
5. **Discussed next steps regarding the impending vacancy.**   
The manager should contact their Department Head/Dean/Chancellor to discuss next steps regarding the impending vacancy (for example, who will cover the work until someone new is hired, re-evaluate the position to determine your unit's needs prior to recruiting to backfill the position, etc.)
6. **Communicated news of the separation.**   
Create an internal communications plan to deliver news of the separation to the employee's team, department, organization, etc. The Manager should update the unit/department directory, website, organization charts, etc. If possible, route emails to

the employee's manager or set up an automated email response to notify the sender that the employee is no longer with Rutgers.

**7. HR Liaison/UHR representative scheduled employee's Exit Appointment.**

A HR Liaison/UHR representative will coordinate the employee's Exit Appointment, sending an invite to the employee, with a copy to the manager.

**8. Manager or appropriate staff member collected the following items (if applicable):**

- Disabled security codes, if necessary.
  - Keys (\_\_office \_\_building \_\_desk \_\_file cabinets \_\_other)
  - ID card/building access card
  - Business cards
  - University cell phone
  - University laptop, mouse, printer, etc.
  - Uniform
  - Tools
  - Notify system owners to remove access from the employee and reassign roles to someone else in the unit, if applicable.
  - Other (please specify): \_\_\_\_\_
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***NOTE: If the employee works directly with Hazardous or Controlled Materials, these additional steps may be required.***

- Ensure all chemicals, radioactive materials, and other hazardous materials or samples are properly labeled, stored, and/or disposed.
- Visually inspect your work area prior to separation for any hazardous or controlled materials that are not stored properly. Secure all hazardous materials. Contact [Rutgers Environmental Health and Safety](#) (REHS) if you have specific questions.
- Require employee to turn in any radiation dose monitoring badges to [REHS](#).

**9. The following steps were taken by OIT or appropriate departmental IT staff:**

- Disabled email account
- Removed employee's name from email-group distribution lists, internal/office phone list, website, building directories.
- Disabled computer access and access to systems, including any internal department systems, social media accounts, Google Drive, databases, etc. they have access to as part of their Rutgers employment.
- Disabled phone extension/voicemail.
- Retirees have been notified that email access will be immediately removed; however, they have the option to obtain a Scarlet Mail account.

**10. Exit Appointment with HR Liaison/UHR representative completed.**

During Exit appointment, run through the "Important Exit Interview Information" email that was sent to the employee to ensure everything is understood by the employee.

- All necessary separation paperwork and forms should be completed by the employee and collected by the HR Liaison/UHR Representative.

- The HR Liaison/UHR Representative should ensure that the proper separation details are communicated to the department for processing.
- Send an email to OIT, Facilities & Security to ensure that employee's access and accounts are deactivated. See Email Template.

**University Property:**

Employee should bring **ALL** property receipts with them to the Exit Appointment.

- IT Equipment Return Receipt/Confirmation
- Rutgers University Employee ID Return Receipt/Confirmation
- Parking Permit Return/Cancellation Receipt/Confirmation

**Benefits:**

- Provided employee with termination/continuation of employment insurance benefits information (COBRA, life insurance, etc.)
- Checked dependent care FSA participation and informed employee of remaining funds and reimbursement deadlines, if applicable.
- Checked PTO balance and informed employee of any remaining PTO and how it will be processed at termination of employment.
- If applicable, informed employee about retirement plan account options.

**Compensation:**

- Notified payroll department to process final paycheck and informed employee when they will receive final paycheck.

**11. Employee removed personal belongings from work area.**

Form completed by: \_\_\_\_\_ Date: \_\_\_\_\_

## **INVOLUNTARY RESIGNATION CHECKLIST**

An involuntary termination of employment, including layoffs and terminations. The inability of an employee to perform the essential functions of his or her job with or without a reasonable accommodation may also result in an involuntary termination. An employee may also be discharged for any legal reason, e.g., misconduct, tardiness, absenteeism, unsatisfactory performance or inability to perform.

In some cases, progressive discipline may be used, prior to termination, to correct a performance problem. However, certain types of employee misconduct are so severe that one incident of misconduct will result in immediate dismissal without prior use of progressive discipline.

Before any action is taken to terminate, dismiss or discharge an employee, the employee's manager must:

- Work with the department's HR Liaison and/or a representative from UHR or Workplace Culture to determine next steps.
- For union employees, please work with the Office of University Labor Relations.

**DEATH OF AN EMPLOYEE CHECKLIST:**

A termination due to the death of an employee will be made effective as of the date of death.

**Procedure:**

- Upon receiving notification of the death of an employee, the employee's manager should immediately notify their HR Liaison and UHR Representative.
- UHR will process all appropriate steps to ensure the appropriate parties are notified of the employee's death.

## Exit Interview Process Checklist for Resignations

This checklist is to be used as a guide when an employee leaves the DOB for reasons that may include resignations, transferring or retirement. Employees leaving the organization should be made aware of pertinent information, rights and benefits that may affect them.

Employee Name: _____	Last Day Worked: _____
Separation Type: _____	Separation Date: _____
Phone #: _____	Exit Interview Day/Time: _____
Position Title: _____	Job Code Title: _____
Department/Unit: _____	Union/#: _____
Supervisor: _____	HR Liaison: _____

### Employee Responsibility

- Resigning employee should ensure that written notice is given in timely and professional manner.
- Resigning employee should ensure that a letter or Separation Form is given to appropriate parties, e.g., Hiring Manager, HR Liaison and UHR.
- Resigning employee should contact their leave administrator to review their leave balances and ensure that all time and leave issues are addressed prior to last day worked.
- Resigning employee should ensure that any and all Rutgers University property is returned to appropriate departments prior to the last day worked.
- Resigning employee should ensure that all contact information on file is accurate should the university need to contact them for any future correspondence.

### Working Unit Responsibility

- The resigning employee's supervisor/manager should acknowledge the receipt of the employee's resignation.
- Supervisor/Manager should contact their HR Liaison and UHR to discuss next steps.
- The Unit Manager should work with their Department Head/Dean/Chancellor to evaluate the vacancy and submit a request to backfill the vacancy.

### Human Resources Responsibility

- The HR Liaison/UHR Representative receives/accepts the employee's resignation letter/Separation form. Scan and save resignation letter/Separation
- HR Liaison/UHR Representative sends a "Confirmation of Resignation" email to the employee. CC: employee's supervisor/manager, Department senior leader, IT, Payroll and Timekeeper.

- After scheduling the Exit Interview/Appointment, the HR Liaison/UHR representative sends an Outlook Calendar appointment to the resigning employee and copy the Employee, all necessary university representatives (Benefits, IT, Security, etc.)
- HR Liaison/UHR Representative sends an “Important Exit Interview Information” email to employee, CC: the employee’s supervisor all necessary university representatives (Benefits, IT, Security, etc.).
- Provide the department with guidance on the communication that should be sent to HCM for processing; information should include the employee’s Name and Resignation details.
- Send email to all university representatives that need to be informed that the employee will be leaving the university.
- Determine if Financial Disclosure/COIB is required: Yes or No
  - If yes, ensure the employee is notified at the Exit Interview.