Offboarding Checklist | Managers of Academic Staff

Refer to the Offboarding Academic Staff page for more information.

Preparation for Exit/Transfer
- Send departing academic offboarding checklist
- Submit written letter (if applicable)

For Project Budget Owners
- Discuss plan for their research project(s) (if applicable)
- Ensure Primary Investigator informs key stakeholders (if applicable)
- Decommission Laboratory (if applicable)

Connect with the Employee
The following activities are typically completed just prior to the employee's departure.
- Plan for knowledge and data transfer
- Complete reference request (if applicable)
- Finalize outstanding expenses and/or advances (if applicable)
- Relocation repayment (if applicable)
- Vacation policy
- Return university equipment/software
- Cancel university credit card(s) (if applicable)
- Return ID cards/keys
- Cancel swipe access
- Return SecurID device (if applicable)

Administrative Preparation
- Communicate the departure
- Submit access removal form
- Cancel HR/Finance delegation (if applicable)
- Termination or change of telephone (if applicable)
- Update contact lists and website

For Employees Retiring
- Confirm Retirement party/gift (if applicable)