



Off-Boarding Guidance for KU Supervisors and Managers who are Processing the Departure of an Employee

An effective and consistent off-boarding process is important to protect the interests of both the University and exiting employees. In addition to paying attention to safety, security, and protection of physical assets, it is important to remember that former employees will continue to act as ambassadors regarding the University work environment and can serve as a valuable source for applicant referrals.

The immediate supervisor/manager has primary responsibility for ensuring that all separation/transfer steps outlined below are taken when an employee is leaving KU or transferring to another department. Any questions concerning the “off-boarding” process can be directed to your Shared Service Center (SSC) and/or Department of Human Resource Management (HRM).

University Support and Unclassified Professional Staff:

The minimum notification time required is two (2) weeks. Notification by the employee should be in writing. Failure to give this minimum notice may warrant inserting a statement (insufficient notice) in the employee’s permanent record and could be grounds for non-reemployment.

- Resignation and/or retirement letters should be forwarded to the appropriate vice provost, Dean, director, etc. or designated representative, who will acknowledge the resignation or retirement in writing on behalf of the University.
- The employee’s written resignation and/or retirement and the department’s written acceptance shall be forwarded to the appropriate Shared Service Center (SSC) for Personnel Action Form (PAF) completion.

**If the employee only provides verbal resignation, the department is to confirm the resignation in writing to include the date the verbal resignation was provided, to whom, and a short summary of employee’s statement of resignation, e.g. You stated you have another position and they wish you to start tomorrow.*

Employees who are retirement-eligible or interested in receiving retirement information should be directed to contact the Benefits Office to secure information about the benefit plan options available at retirement. Please note a PAF will not need to be completed for retirements, as the Benefits Office will provide retirement date information to HRM Appointment Specialists (phased retirements do require a completion of a PAF by the SSC).

- Direct the employee, if applicable, to enter all time and leave into HR/Pay.
- Encourage the employees to visit the Human Resource Management website to complete the Exit Interview Questionnaire (<http://humanresources.ku.edu/document/employee-exit-questionnaire>).
- Inform the exiting employees to update their current address if necessary, so that their W-2 and other relevant documentation will be sent to the correct address. Employees can update their address at

hr.ku.edu, then after logging in follow the path: *Self Service » Personal Information » Home and Mailing Address*.

- Inform the employee that leave payout information is provided at the HRM website at <http://humanresources.ku.edu/leaves-and-holidays>, and that if they have questions they may contact HR/Pay at hrpay@ku.edu or 785-864-0600.
- Inform the employee that the HRM Benefits Office will provide a letter with information about continuing health insurance, accessing retirement funds, etc. If you or the employee have questions, please contact the HRM Benefits Office at 785-864-7402, stop by their offices in Room 150 of Carruth-O'Leary Hall between 8 AM and 5 PM, Monday – Friday, or email them at benefits@ku.edu.
- Remind the employee to submit any pending travel reimbursement prior to the last day of work.
- If applicable, the supervisor may wish to inform the employee of supervisor's willingness to provide future employment reference. Guidelines for providing references are provided on the HRM website at <http://humanresources.ku.edu/document/guidelines-providing-references-document>. The University of Kansas uses "The Work Number" (TALX Corporation) to provide automated employment and income verifications for our employees. Instructions on how to use "The Work Number" can be found at: humanresources.ku.edu/employment-and-salary-verification.

Unclassified Academic and Faculty:

- Notices of resignation and retirement should be made in accordance with [Resignation and Retirement Dates of Academic-Year Faculty, Policy on](#); resignations and retirements should always be submitted in writing to the Dean, chairperson, director; or designee.

Prior to departure, the supervisor/manager should ensure the following:

Return of University Property and Office Operations and Security

- Collect keys (office, desk, file cabinet etc.).
- Collect procurement card (P-Card), Departmental credit cards, etc.
- Collect office equipment & property (cell phone, laptop, thumb drive, tablet, disks, tools, uniforms, etc.).
- Work with employee to create out of office voice message and email message if leaving the University.
- Work with employee to move computer files to an accessible location (e.g., shared drives) and ensure access to any password protected electronic files.
- Work with employee regarding access to paper files/documents (workgroup/personnel) to include confidential materials.
- Notify computer support personnel to inactivate server account.

- Notify HRM if the University Administrative systems (including email, DEMIS, etc.) must be disabled.*
- Determine if there are specific departmental off-boarding procedures and complete as applicable, e.g. KU Center for Research - transfer of grants/equipment/property assignment.
- Verify removal of all personal property.
- Check with departmental designated staff member for any departmental specific departure procedures (for example: [Research Employee Separation Checklist](#) for research staff and PIs that depart)

** NOTE: Access to University Administrative Systems (including email and DEMIS) is not the same as access to web-based employee services. A former employee will be able to view the MyKU Portal for paycheck and leave balances for 400 days after the effective date of the termination of employment.*

Unless deactivated at an earlier date upon request of the Department, KU email account access is retained for 210 days after departure. At 240 days, the inbox is deleted and the user will drop from the address book.

Knowledge Transfer

To provide for an orderly transition of responsibilities, it is beneficial for supervisors/managers to dedicate time to collaborate with a departing employee to document current/outstanding projects, upcoming deadlines, contact information for outside vendors, and other institutional knowledge that might be lost during transition. Below are some suggestions for documenting information for a smooth transition.

Consider asking the employee to provide:

- A project status report which might include: (a) A list of all current, outstanding and important upcoming projects, deadlines and tasks (b) A list of ongoing regular tasks (c) Open items on which the employee is currently working (d) Contact information for those with whom an employee has been working on tasks, projects, committees, etc.
- A list of key people (internal and external) to whom someone else should be introduced before the current employee leaves their position.
- A list of external agencies or groups (including contact information) with whom the exiting employee interacts in fulfilling one's responsibilities.
- Compilation and location of specific files/records/emails related to current or past projects.

Departmental staff

Coordinate these activities:

- Farewell gathering (if appropriate).

- Move departmental personnel file (if applicable) to inactive status.
- Supervisor confirm with employee how his/her departure will be announced to the department.

Retirements

Employees who are retirement-eligible (the HRM Benefits Office is available to assist in determining retirement eligibility) or interested in receiving retirement information should be directed to contact the Benefits Office to secure information about the benefit plan options available and access to University services at retirement.

Death of an Employee

The supervisor should immediately notify HRM at 4-4946 or hrdept@ku.edu and departmental leadership.

Involuntary or Emergency Separations

- Discuss all involuntary separations with HRM -Employee Relations Section. HRM staff are available to assist with the employee notification of involuntary separation.
- Determine who will be provided access to the employee's University email account and request that HRM direct IT Account Management to cancel access to University data and systems and provide access to the designated staff member.
 - Once IT Account Management has disabled the University email account and provided access to the designated staff member set the 'out of office' message if applicable, e.g. *"As of <date> I am no longer with the University. Please direct all work related matters to <insert staff member's name> at <insert email address> or <insert phone number>. Thank you."*
- Contact the IT Customer Service Center (CSC) at (785) 864-8080 for access to the Employee's voicemail if necessary.
- Determine the appropriate process for removal of employee's contents from office (if applicable) or workspace and securing computer networks and files. HRM staff are available to assist with coordinating the removal of personal belongings with the departing employee.

After Departure

- Contact department webmaster to remove reference to employee on departmental website
- If applicable, reassign direct reports to a new supervisor and notify the SSC to issue a PAF reflecting the reassignment.