**STAFF & NON-FACULTY P&A**

**OFF-BOARDING CHECKLIST**

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| --- | --- | --- | --- |
| **Employee Name:**  **Employee ID:**  **Employee x.500:**  **Employee Manager:**  **RESIGNATION** | |  |  |
|  | TASK | RESPONSIBLE | COMPLETED |
|  | Send resignation letter to supervisor & HR. Notify HR if transferring to a different University Department. | Employee |  |
|  | Notify stakeholders of employee exit (HR, finance, chairs office, admin assistant, etc.) | Supv/Unit |  |
|  | Forward resignation letter to HR | Supv/Unit |  |
|  |  |  |  |
| **LAST DAY PREPARATION** | |  |  |
|  | TASK | RESPONSIBLE | COMPLETED |
|  | Send this off-boarding checklist and FAQs to both employee and supervisor | HR |  |
|  | Send exit survey to employee | HR |  |
|  | Coordinate departmental exit interview with employee and HR consultant (if applicable) | Supv/Unit |  |
|  | Upload projects/databases that are not on a shared folder to a department shared space | Employee/Supv |  |
|  | Meet with employee to discuss progress of current work projects and create plan for coverage and transfer of job duties | Supv/Unit |  |
|  | Submit all outstanding timesheets and absence records via MyU – My Time  \*If absences occurred more than 6 weeks ago, notify appropriate HR contact to enter into system. | Employee |  |
|  | Review and approve all outstanding timesheets and absence records for the employee via the MyU Portal. | Supv/Unit |  |
|  | Contact OHR Employee Benefits (612-624-8647) or appropriate HR contact to discuss benefits upon termination/transfer (Medical, dental, sick, vacation, retirement, COBRA, etc.) | Employee |  |
|  | Visa Information – Contact ISSS (only if on a Visa) | Employee |  |
|  |  |  |  |
| **LAST DAY** | |  |  |
|  | TASK | RESPONSIBLE | COMPLETED |
|  | Return University door/locker keys, pagers, laptops, or other University owned equipment/supplies and AHC ID badge (if applicable) to the appropriate party | Employee |  |
|  | Purchasing Card – Return to appropriate budget/accounting department | Employee |  |
|  | Parking Card – Cancel parking/Metropass contract, 612-626-7275, pts@umn.edu and return the card to 300 Transportation and Safety Building, <http://pts.umn.edu/> | Employee |  |
|  | Update voicemail password on work phone to the last 5 digits of work phone number | Employee |  |
|  | Update voicemail /email with a message that indicates you are no longer available | Employee |  |
|  | Forward email account, <https://support.google.com/mail/answer/10957?hl=en>  \*You will be able to access your email account for up to three weeks after end date. Alumni and retiree email access will continue indefinitely. | Employee |  |
|  | Update personal information (for W-2 and COBRA)on the My U Portal – My Info Tab | Employee |  |
| **AFTER TERMINATION/TRANSFER** | |  |  |
|  | TASK | RESPONSIBLE | COMPLETED |
|  | Contact Department Facilities Representative to inactivate building access assigned to Employee’s UCard | Supv/Unit |  |
|  | Complete [Data/File Server Access Request Form](https://secure.ahc.umn.edu/ahc/forms/wform_start.cfm?wform=user) to delete user's access to the server. Terminate access to any other job-specific systems via the appropriate processes. | Supv/Unit |  |
|  | Confirm last day worked with HR (if different than original end date) | Supv/Unit |  |
|  | Key end of appointment in PeopleSoft (N/A if employee is transferring) | HR |  |
|  |  |  |  |
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**IMPORTANT FAQ’S - STAFF & NON-FACULTY P&A END OF APPOINTMENT**

* It is University policy that the resigning employee works onsite their last day.
* **BENEFITS:** Medical, dental, and life insurance coverage ends on the last day of the month in which the employee actively worked. Disability coverage ends the day after the employee’s last day of employment. <http://humanresources.umn.edu/benefits/leaving-u>
* **COBRA:** Employees have the option to continue UPlan benefit coverage at their own cost upon leaving the University. Information regarding the right to continue medical, dental and life insurance as well as the health care flexible spending account will be mailed to the Employee’s home address upon resignation. For additional information, contact Employee Benefits at (612) 624-8647 or <http://humanresources.umn.edu/leaving-u/cobra-continuation-coverage>
* **VACATION PAYOUT:** Each employee group has its own policy for paying out unused vacation hours. No employees in any employee group are paid for unused sick leave when they leave the University. The vacation payout will occur on a separate pay check following the employee’s final paycheck. <http://humanresources.umn.edu/benefits/leaving-u>
  + **P&A:** When aP&A staff member has worked 67% time or greater for 11 months, any unused vacation days (up to the maximum of one year’s accumulation of 22 days) may be paid out when the employee ends University employment.
  + **AFSCME Clerical or Technical:** An employee who leaves University employment and still has remaining vacation available is entitled to be paid for unused vacation.
  + **Civil Service:** Civil service staff who leave the University with 10 years or more of service and 200 or more hours of vacation have their payout deposited into an individual, tax-free account, called a Health Care Savings Plan, to be used to reimburse post-employment medical expenses. Employees who leave University employment with fewer years of service or hours of remaining vacation are entitled to be paid for unused vacation.
  + **Teamsters:** An employee who voluntarily resigns will receive pay for unused, accumulated vacation, provided he or she submits written notice of resignation to the assigned supervisor at least two calendar weeks prior to the effective date of resignation. However, employees who leave the University with 10 years or more of service and 80 or more hours of vacation have their payout deposited into an individual, tax-free account, called a Health Care Savings Plan, to be used to reimburse post-employment medical expenses.
* **FSA:** FSA contributions will come out of the employee’s final paycheck, but they will not be deducted from the vacation/comp time payout paycheck. <http://humanresources.umn.edu/flexible-spending-accounts/leaving-u-and-your-fsa>
* **SECURIAN FINANCIAL 401(a) RETIREMENT PLAN (P&A):** For Information on fund distribution options upon termination visit the [Securian website](https://umnplans.securian.com/UofMWebDyn/faces/jsp/public/uofmhome.jsp) or contact Securian at (651) 665-3670 or umnplans@securian.com
* **MN STATE RETIREMENT SYSTEM (Civil Service/Bargaining Unit):** For information on vesting and early retirement, visit the [MSRS website](http://www1.umn.edu/ohr/benefits/retiresave/msrs/early/index.html). To learn about MSRS fund distribution options upon termination, contact MSRS directly at (651) 296-2761 or [msrs@state.mn.us](mailto:msrs@state.mn.us).
* **EMAIL:** Former employees will be able to access their email account for three weeks after their department enters their end date into the HR system. University Alumni and retirees will have continued email access indefinitely. <http://humanresources.umn.edu/benefits/leaving-u>
* **HOME ADDRESS:** The former employee’s W-2 form will be sent to the last address on record at Central Payroll. To update address information, go to the MyU Portal – My Info Tab. The University x500 and password will remain active until December 31st of the year following the resignation. This will allow continued access to the MyU Portal to be able to update an address. <http://humanresources.umn.edu/benefits/leaving-u>