VOLUNTARY OFF-BOARDING CHECKLIST

## Instructions: Please check the appropriate box.

* Voluntary Termination
* Other (Death or Military Orders) - **Notify** **payroll immediately in the event of an employee’s death.**

## Completed by Manager – Check as completed

* Complete the Termination Form (Kuali) by accessing this link [Termination Form Kuali](https://butler.kualihub.com/build/space/favorites/my/drafts/6877b26d9fcd7e220107ffcd/view) and upload the written resignation letter. If the departing employee has direct reports, include in the form to whom those employees will now report.
* Meet with employee to create a transition plan for job responsibilities.
* Follow IT offboarding instructions at this [link](https://butleru.my.site.com/askbutler/s/article/What-do-I-need-to-do-if-one-of-my-employees-is-leaving-Butler-offboarding-termination). Contact the IT help desk for assistance.
* Change known passwords of department systems, vendor accounts/portals, and social media accounts that do not use Butler network credentials.
* If employee is listed on the department webpage, contact the designated person in your department to have the listing removed.
* **Communication Plan:** As the manager, it is important for you to notify those individuals the employee communicates and interacts with on a regular basis. Internal and external groups should be considered when creating a communication plan to include:
  + Direct reports
  + Department and division employees
  + Other departments and/or employees impacted by the departure
  + External key constituents

Make sure you provide information on whom to contact upon the employee’s departure and update remaining department employees on the reassignment of duties (if applicable).

* Prior to the last day of work, have employee organize, compile, and transfer all essential electronic files (from Teams, Google Drive, OneDrive, desktop, etc.). Contact IT Help Desk if assistance is needed.
* Contact purchasing to remove access to purchasing card.
* Contact the Business Office if the employee has a cell phone stipend.
* Collect laptop/iPad/loaned equipment (if applicable). IT can provide an equipment list (if needed).
* Refer employee to HR to turn in keys and ID badge on their last day of employment. If employee has parked in the garage, instruct the employee to hit the red button upon exit to leave the garage (employee must provide name). Contact parking services to alert them of exit. Depending on the time of the year, a partial refund on the parking pass might be eligible.

## HRBP Responsibilities

* Upon receiving termination notice, send employee Exit Survey and contact them to request an exit interview.
* Ensure manager submits a Termination Form (Kuali) and provide approval after review.
* *If employee is currently a Butler student, notify IT for the creation of a separate network account.*
* On the last day of work, collect all keys and Butler ID. If ID is not collected, call Facilities/BUPD for immediate shutoff. *If employee will continue in an Emeritus or Affiliate status, they must turn in their badge and be issued a new one by Parking Services.*
* Collect Procurement card (if applicable) and contact purchasing.