Richmond Public Schools Offboarding Checklist

Employee Checklist upon Transfer/Separation
To be completed by the supervisor/manager and the employee

The following is a standardized checklist that must be completed for wage and salaried employees who end their employment, whether through resignation, retirement, termination, or transfer.

The checklist provides the steps the supervisor/manager and the employee need to complete in order for the employee to officially exit from the department. This checklist includes important Human Resources information and departmental logistics. Following the steps outlined in the checklist will facilitate the transition of the employee from active employment to her/his eventual departure date.

Offboarding Checklist - (To be completed by the departing employee)

_________________________ _______________________
Employee Name (Last, First, Middle) Position Title

_________________________ _______________________
Employee ID # Department

_________________________
Date of Departure

_________________________
Forwarding Address: (Please update your address in Employee Portal)

_________________________ _______________________
New Phone Number: New Email:

The following checklist must be completed for employees who are separating employment with a Department.

Part I: Employee’s Responsibilities

Upon Notice of Departure Date:

Done N/A
☐ ☐ Submit resignation letter to the manager/supervisor
☐ ☐ Obtain letter from manager/supervisor accepting employee resignation
☐ ☐ Obtain Knowledge Transfer Template from supervisor
☐ ☐ Contact RPS Human Resources Service Center to set up appointment if you have questions regarding any of the following:

- Continuation of health coverage under COBRA
- Conversion or continuation of life insurance
- Distribution of retirement contributions
- Paid Time Remaining
- Leave Balances
- Retirement accounts including email account
- Employment verification process for future reference

**Two Weeks in advance of Departure Date:**

Done N/A

☐ ☐ Settle any cash advances (teacher relocation advances),

☐ ☐ If in a supervisory role, insure that budgetary records, HR reviews (evaluations, correspondence, etc.), letters or emails containing resource commitments and unit strategic plans are labeled and organized in hard copy files for the supervisory successor

☐ ☐ Consult with supervisor for retention and/or disposition of email, home directory files and any other electronic materials

☐ ☐ Complete the knowledge transfer

**Within Last Few Days of Departure Date:**

Done N/A

☐ ☐ Remove all personal items from offices or lockers

☐ ☐ Return ALL keys, ID badge(s), parking permits and smart tags as applicable

☐ ☐ Delete all remaining electronic files containing RPS data or RPS licensed software from your personally owned computers, handheld devices and electronic media

☐ ☐ Provide UHR with new address so that U.S. Mail can be forwarded

**After Departure:**

Done N/A

☐ ☐ Notify the RPS Payroll office online of any change of address during the year so that a W-2 tax Statement can be sent in January

**Signatures:**

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Signature</th>
<th>Date</th>
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</table>

<table>
<thead>
<tr>
<th>Supervisor/Manager Name</th>
<th>Signature</th>
<th>Date</th>
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Part II: Department Responsibilities

At First Notice of Departure:

Done N/A

☐ ☐ Obtain a resignation letter from the employee
☐ ☐ Provide employee a written acceptance of the resignation
☐ ☐ Give employee the Offboarding Checklist
☐ ☐ Give employee the knowledge transfer form
☐ ☐ Recommend that the employee meet with RPS Benefits office
☐ ☐ Enter employee termination date in AS400 and enter appropriate reason code Process any non-
☐ ☐ Process any non-reimbursed expenses through the department prior to termination date
☐ ☐ Confirm that the employee does not owe reimbursement of a signing bonus or moving and relocation reimbursement

On last day:

Done N/A

☐ ☐ Obtain the Offboarding Checklist from Employee (verify it is complete and signed by employee)
☐ ☐ Confirm with the employee that RPS-owed equipment, including computers and mobile devices; have been returned to your department.
☐ ☐ Confirm with the employee that all electronic files containing RPS data from personally owned computers, mobile devices, cloud storage, and storage media (e.g. flash drives, etc.) have been migrated and deleted.
☐ ☐ Confirm with the employee that all RPS licensed software on personally owned computers and mobile devices has been uninstalled.
☐ ☐ Confirm with employee that all paper documents containing RPS data have been returned to the department
☐ ☐ Confirm that department has access and passwords for any electronic files being left with Supervisor
☐ ☐ Contact department webmaster to ensure references to employee are removed from web content
☐ ☐ Obtain employee’s keys and ID badge(s)
☐ ☐ Obtain RPS portable computer/cell phone/pager/long distance calling card/copy
☐ ☐ Verify return of Parking Permits and Parking Passes
☐ ☐ Verify removal of personal items from offices or lockers
Verify return of tools, safety equipment, and uniforms
Verify return of any other RPS property
Confirm departure with Department

After employee's last day:

Done N/A

Cancel all locally provisioned user access including access to shared drives.
Clear/change all passwords including Voicemail, and PC station
Verify that a termination date has been entered in AS400 which will end computer access
Contact the department to make sure that the employee’s telephone number has been forwarded
Return employee’s RPS ID to the supervisor
Reassign any direct reports to a new supervisor in the if necessary
Verify the computer drives have been cleared
Change signature approval authority (if applicable)

Supervisor/Manager Name ___________________________ Signature ___________________________ Date ___________________________