BALL STATE UNIVERSITY

Off-boarding Checklist

Employee Checklist upon Separation/Retirement

Off-boarding Checklist (Completed by Employee):

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

_____ _____

Employee's Name (Last, First, Middle) Employee BSU ID #

_____ _____

Position Title Department

_____

Employee's Last Day of Work

Forwarding Address: _____
(Please update your address in Self-Service Banner)

Contact Phone Number:_____ Contact Email: _____

The following checklist must be completed by employees who are separating employment with a department. Please return this form to your immediate supervisor upon completion.

Upon Notice of Departure Date:

☐ Submit resignation/retirement letter to your supervisor and complete the Employee End of Service Form. Reach out to Employee Relations to schedule and Exit Interview.

☐ Contact Payroll Office and/or Employee Benefits Office (765-285-1834) if you have questions regarding any of the following:

- Continuation of health and dental coverage under COBRA
- Conversion or continuation of life insurance
- Distribution of retirement contributions
- Paid time off remaining
- Leave balances and to participate in Leave Donation
- Retirement accounts including email account
- Employment verification process for future reference
- Provide updated mailing address to Payroll and your supervisor for future W-2 forms, etc.

Two Weeks in Advance of Departure Date:

☐ Settle any cash advances, petty cash accounts, pending reimbursements, parking or library fines, or any other unsettled accounts. Confirm that Leave Balances (Vacation, Sick, and/or PTO) has not been overused.

- *NOTE: Any debts owed to the University should be settled with the Student Financial Services Office. If any amount remains unpaid after the Student Financial Services Office has contacted the employee, it will be handed over to a collection agency and additional fees may be applied.*

☐ If the separating employee is in a supervisory role, ensure that budgetary records, People and Culture 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 the department for retention and/or deletion of email accounts, ownership of shared Outlook calendars, website management access (SiteCore), OneDrive file ownership, and any other electronic materials.

Within Last Few Days of Departure Date:

☐ Remove all personal items from offices or lockers.

☐ Return University credit card to Purchasing.

☐ Return ALL keys, ID card, and parking permit. Regarding ID Cards, there are two options:

1. Give your ID card to the individual in the department that is handling the offboarding
2. Turn in the ID card to the ID Card Office in Bracken Library BL001.

- If transferring within the University please retain your ID card(s). The departments which you transfer out of/into are responsible for removing/assigning ID card building access as applicable for their locations.

- If retiring, please turn in your employee ID. You are eligible to receive a retiree ID (or Emeritus/Honoratus ID if retiring with Emeritus/Honoratus status). If you bring your employee ID directly to the ID Card Office, it does expedite the process, as they can take your employee ID, record and shred it, and issue the new retiree ID.

☐ Return all University owned equipment.

☐ Return departmental handbooks and training materials to your supervisor.

☐ Return all University issued uniforms.

☐ Contact Parking Services if you have a red parking permit as a partial refund may be available. Yellow permits are non-refundable and remain in effect through the expiration of the permit. If parking fees are collected through paycheck deduction, the total unpaid balance will be collected from your final paycheck. Under Indiana law, an employee may end a payroll deduction by providing the Payroll Office 10 business days advance notice.

☐ If you are a foreign national on a university sponsored visa, contact Kate Stoss regarding your status.

☐ Set an out-of-office reply on voicemail and email directing clients to contact the departmental office or designated point of contact.

After Departure:

☐ Notify the Payroll Office (765-285-1834) of any change of address during the year so that your tax statement can be sent in early January.

Signatures:

Employee Name	Signature	Date

Supervisor Name	Signature	Date