

Employee Off-boarding Checklist

For Managers & Supervisors

UBC Student Housing and Community Services

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Employee Off-boarding Checklist

This checklist is here to help you effectively off-board your employees.

- ✓ Complete a paper copy.
- ✓ Check, initial, and date items once you have completed them.
- ✓ Skip items that are not applicable.
- ✓ Keep the original on file.

Questions?

Please contact your SHCS HR Coordinator.

Employee Info

Employee's name:

Employee's ID #:

Employee's personal email address:

Employee's personal phone number:

Please provide their non-UBC contact information for forwarding purposes.

Before your employee's last day

Task	Done?	Mgr/Supvr Initials	Date Completed
Receive employee's letter of resignation (email or paper hard copy).	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Submit a termination request for processing, with a copy of the resignation letter, to HR or Payroll, as applicable in your department.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Provide Payroll with the number of vacation days taken by the employee (for monthly staff only).	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

Task	Done?	Mgr/Supvr Initials	Date Completed
Settle all outstanding expenses.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Ask employee to cancel, settle and return any company credit cards. Find cancellation instructions at bit.ly/2WpNjFs (requires CWL login to access).	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Verify whether employee's departure date affects the amount of PD funds they are eligible for. If they are now eligible for less than they used, they must repay a portion.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Communicate departure to unit (i.e., Child Care Services) or department (i.e., SHCS), as applicable.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Organize handover of tasks/responsibilities to new owner, including files, processes, tasks, non-personal login credentials and any other applicable information.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Remind employee to cancel all reoccurring/future meetings and room bookings they have created in Outlook.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Prepare a card, gift, or gathering for the employee's last day, if desired/warranted.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Perform an exit interview (if desired).	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Remind employee to cancel any parking permits if they are leaving UBC.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Refer employee to determine next steps for their pension if they are leaving UBC. Link: staff.pensions.ubc.ca/life-events/leaving-ubc	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Prompt employee to request their Record of Employment (ROE) if they expect to make a claim for Employment Insurance. Link: finance.ubc.ca/payroll/your-pay	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

On your employee's last day

Task	Done?	Mgr/Supvr Initials	Date Completed
Receive all university-owned property, including mobile devices (phone/tablet/laptop), uniform(s), tools, PPE, books, etc.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Receive all access/Ving cards and keys (office, desk, locker, and/or cabinet).	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Request the cancellation of employee's building access codes.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Verify that any university credit cards held by the employee were cancelled and settled.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Remind employee to change their voicemail message and set a general password.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Ask employee to add a generic out-of-office message to their email account.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Ensure that employee removes belongings from office, desk, locker, and/or fridge.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Send exit survey to employee. Link: bit.ly/30tyam1	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

After your employee's departure

Task	Done?	Mgr/Supvr Initials	Date Completed
Ask your IT administrator to revoke access to: <ul style="list-style-type: none">• Computer(s)• SHCS/UBC-wide drives and files• UBC email address	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Remove access from all other systems used by the department (e.g., Slack, Google Drive, etc.).	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Ask your departmental administrator to update the UBC Directory, SHCS contact list, and website (if applicable).	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>



Off-boarding complete!

Appendix 1—Retirement Procedures

Retirement is a major milestone in your employee's career and life. In addition to helping us standardize retirement procedures across SHCS, this guide will help you prepare for your retiring employee's last day and provide them with a fitting acknowledgment for their career at UBC and the contributions they have made.

There are 3 primary components to the retirement process for an SHCS employee, in terms of the notification and acknowledgment.

- ✓ Employee's retirement letter/email.
- ✓ Event/party for the retiring employee.
- ✓ Gift for the retiring employee.

Retirement letter

- ✓ Receive employee's letter notifying you of their retirement (email or paper hard copy).
- ✓ Submit a termination request, as identified in the off-boarding checklist above, and forward their letter to:
 - Your department's Director.
 - Andrew Parr, Associate Vice-President, SHCS (andrew.parr@ubc.ca).
 - Erin Harley, Administration Manager, SHCS (erin.harley@ubc.ca).
- ✓ Contact your employee to confirm that you received their letter and ask employee if/how they would like to be acknowledged (e.g., party, email, etc.).

Retirement procedure questions?

If you have any questions about the SHCS retirement procedures or about best practices for planning a retirement party, please contact Erin Harley at erin.harley@ubc.ca.

Retirement party

In case it is helpful, here is a list of what you need to do to plan your employee's retirement party.

- ✓ Create a budget, including catering, decorations, etc. and any gifts in addition to the standard SHCS retirement gift.
- ✓ Verify the desired party date, time, location, other key details and book an event space.
- ✓ Request your SHCS retirement gift and purchase/prepare any additional gifts.
- ✓ Prepare the invitation list and invite your guests.
- ✓ Place a catering order.

Retirement gift

A standardized gift is provided by SHCS (at no cost to the department). Your department may provide additional gifts as well.

To request the standardized retirement gift, contact Erin Harley at erin.harley@ubc.ca.

SHCS standardized gifts

- UBC Book
- SHCS Tote Bag
- SHCS Branded Emergency Roadside Kit*

*Only for staff with 16+ years of service at UBC.

