

This document serves as a guide for supervisors when an employee ends employment. Effective offboarding is essential to employee morale, feedback collection, operational continuity, and security and risk management. Not all items will apply to every situation.

## **SUPERVISOR RESPONSIBILITIES**

### **Attain Notice Letter**

- Obtain written notice (email is acceptable) from the employee, which specifically states their last day of work.
- Respond with written acceptance of the resignation/retirement and copy Human Resources (HR).

### **Notify Human Resources**

- Submit the letter to HR. HR will:
  - Provide the employee with a list of employee offboarding responsibilities.
  - Include the notice letter in the employee's personnel file.
  - Update HR records.
  - Enter the resignation information in [Workday](#).
  - Initiate the **Employee Offboarding Workflow** in WarriorSpace to notify campus stakeholders (Business Office, IT, Facilities, MarCom, Campus Security, Budget, Registrars, and the Library) within 30 days of separation date.
  - Submit payout information to the HR Service Center.

### **Meet with the Employee**

- Schedule time with the employee during the notice period to support a smooth transition and complete all required offboarding tasks.
- Review the status of ongoing projects and responsibilities.
  - Plan for knowledge transfer to the supervisor and/or team.
  - Reassign unfinished projects and notify relevant stakeholders.
- Develop a plan to transition internal and external communications.
- Plan for removal of personal items from work area.
- Obtain feedback, including:
  - Whether the position description accurately reflects the role.
  - Which training, onboarding, or resources were most vital.
  - What the employee found most satisfying about the job.
  - What the employee found least satisfying about the job.
  - Recommendations for changes to the position.
  - Suggestions for improvements within the department or unit.

## Complete Workday and FWM Tasks

- Submit IFO faculty assignment changes in [FWM](#) immediately, if applicable.
- Ensure the employee:
  - Submits their final timesheet in [Workday](#) prior to their last working day.
  - Submits all leave requests in [Workday](#) prior to their last working day.
  - Submits all expenses via [Workday](#) for processing by the [Business Office](#).
- Complete the “Assign Roles” task in [Workday](#) when assigned.
- Complete any Offboarding tasks in [Workday](#) when assigned.

## University Assets and Communications Tasks

- Notify the department and appropriate stakeholders of upcoming departure and updated point of contact.
- Work with the employee to ensure that any electronic files needed for continuation of business are located on hard drives, OneDrive, or in email and migrated to another person or SharePoint (or network drive).
- The [Employee Offboarding Workflow](#) in WarriorSpace will notify you of university assets to be collected in coordination with the Business Office, Facilities, and Information Technology.
- Additional items to be returned may include, but are not limited to:
  - Items purchased with university funds should be returned to the department (e.g. books, software, office items, computer peripherals, phones, etc.).
  - Credit Cards: If the employee’s name is on the credit card, they must contact the credit card company to cancel the card and return the physical card to the Business Office (Somsen 106).
  - Id card and/or department copy cards returned to Campus Card (Somsen 207).
  - Keys:
    - Winona Campus: return to Facilities Services.
    - Rochester campus: return to the supervisor or the Campus Safety Office (Coffman 102).
  - Laptops and/or tablets:
    - Winona Campus: return to the Technical Support Center (Somsen 207).
    - Rochester Campus: return to WSU Walk-In Support (Coffman 122).
    - For assistance transferring personal files to an external drive, contact Teaching Learning and Technology (Maxwell 130).
  - Library materials should be returned directly to the Darrell Krueger Library.
  - Parking permits on the Winona Campus, return to Parking Services (Sheehan 118). Depending on the separation date, the employee may be eligible for a partial refund.
  - Cabinet and file keys.

- Submit a MarComm request through the [Service Portal](#) to remove WSU website references to the departing employee or transition a department/club social media account created with their personal credentials.
- Contact [WSU Tech Support](#) for assistance with:
  - phone routing
  - email account autoreplies or forwards
  - email listservs
  - computer access and/or software
- Update department signage.

## **EMPLOYEE RESPONSIBILITIES**

- Ensure contact information in [Workday](#) is accurate to receive important post-employment information.
- View pay stubs and attain their W-2 / 1095-C on the Employee Self-Service website: [www.state.mn.us/employee](http://www.state.mn.us/employee) (unless consent for electronic tax documents was withdrawn in writing with Minnesota Management & Budget).
- Watch for mailed information regarding benefit continuation under COBRA, which will be sent by SEGIP to the employee's home address.
- Obtain information on retirement account balances and post-employment options by contacting plan administrators directly. HR can assist in identifying applicable accounts.
- Ensure all Winona State University property is returned to the appropriate department. Failure to return property in a timely manner may result in legal action, including filing a police report for stolen property.
- Complete the Exit Interview task assigned in Workday (participation is voluntary).