



## **CJC Off-boarding for Supervisors and Managers for processing the Departure of an Employee.**

An effective and consistent off-boarding process is important to protect the interests of both the University and exiting employees. In addition to paying attention to safety, security, and protection of physical assets, it is important to remember that former employees will continue to act as ambassadors regarding CJC's work environment and can serve as a valuable source for applicant referrals.

As a supervisor/manager, it is your primary responsibility to ensure that all separation/transfer steps outlined below are taken when an employee is leaving CJC or transferring to another department. Any questions concerning the off-boarding process can be directed to your CJC-HR Office at [cjc-hr@jou.ufl.edu](mailto:cjc-hr@jou.ufl.edu).

**PRIOR TO DEPARTURE, THE SUPERVISOR/MANAGER SHOULD ENSURE THE FOLLOWING:**

**RETURN OF UNIVERSITY PROPERTY AND OFFICE OPERATIONS AND SECURITY**

- Collect keys (office, desk, file cabinet etc.).
- Collect Gator One card.
- Collect procurement card (P-Card), Departmental credit cards, etc.
- Collect office equipment and property (cell phone, laptop, thumb drive, tablet, disks, tools, uniforms, etc.).
- Work with employee to create an out-of-office voice message and email message if leaving the University.
- Work with employee to move computer files to an accessible location (e.g., shared drives) and ensure access to any password protected electronic files.
- Work with employee regarding access to paper files/documents (workgroup/personnel) including confidential materials.
- Notify CJC IT at [help@jou.ufl.edu](mailto:help@jou.ufl.edu) to inactivate server account.
- Verify removal of all personal property.
- Check with departmental designated staff member for any departmental specific departure procedures.

## KNOWLEDGE TRANSFER

To provide for an orderly transition of responsibilities, it is beneficial for supervisors/managers to dedicate time to collaborate with a departing employee and document current/outstanding projects, upcoming deadlines, contact information for outside vendors, and other institutional knowledge that might be lost during transition. Below are some suggestions for documenting information for a smooth transition.

Consider asking the employee to provide:

- A project status report which might include: (a) A list of all current, outstanding and important upcoming projects, deadlines and tasks (b) A list of ongoing regular tasks (c) Open items on which the employee is currently working, and (d) Contact information for those with whom an employee has been working on tasks, projects, committees, etc.
- A list of key people (internal and external) to whom someone else should be introduced before the current employee leaves their position.
- A list of external agencies or groups (including contact information) with whom the exiting employee interacts in fulfilling one's responsibilities.
- Compilation and location of specific files/records/emails related to current or past projects.

## AFTER DEPARTURE, PLEASE REVIEW RESOURCES:

- UF Reference Employment Reference Policy: <https://hr.ufl.edu/forms-policies/policies-managers/employment-reference-policy/>.