

OFF-BOARDING GUIDE for Supervisors

Supervisors should meet with a departing employee to document relevant information and institutional knowledge that might be lost during transition. Below are some suggested questions to help facilitate a smooth transition.

1. Ask employee to move all relevant files to a share drive and to provide the file name and location.
2. Ask employee to review his/her position description and provide feedback about updates that could be made.
3. Ensure desk manual is updated and accessible and verify its storage location.
4. Ask the employee to provide the following:
 - A list of ongoing regular tasks and communications the employee is engaged in
 - Current and upcoming projects the employee is assigned to
 - Upcoming deadlines the employee is aware of
 - Key internal and external people/constituents the employee communicates with
 - An organized list of files/records/emails (and their locations) related to current or past projects required to be retained for a period of time
 - A print screen of the employee's security roles
 - Listservs the employee has joined related to his/her current position