

## Off-Boarding Process

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### OVERVIEW:

In the spirit of ensuring compliance with CUNY policies and implementing a consistent and uniform off boarding procedure, this document serves a guidance for separating Hunter College employees.

### THE OFF-BOARDING PROCEDURES

#### Departmental Procedures

It is customary for employees who are voluntarily separating to provide timely and appropriate written notice of their intent to resign. The customary notice time is at least two weeks. As soon as a manager receives notice of a voluntary separation, the manager should confirm receipt of the request via email.

The manager/supervisor and department head should work closely with the Office of Human Resources or managers/supervisors and the Legal Counsel/Labor Designee. It is the responsibility of the manager/supervisor to ensure that all separation procedures are followed when an employee leaves the college or transfers to another department.

### THERE ARE THREE BASIC STEPS IN THE OFF-BOARDING PROCESS:

#### *STEP I. INITIATE OFF-BOARDING PROCESS*

1. ***THE DEPARTMENT IS RESPONSIBLE FOR*** notifying the Office of Human Resources via Personnel Action Form (PAF). A resignation letter should be included (if applicable).

The Department will collect all college property including Identification Cards, College Credit Cards and equipment

2. ***HUMAN RESOURCES IS RESPONSIBLE FOR*** initiating the exit process for all staff on tax levy payrolls by notifying Payroll, Benefits, Timekeeping and memorializing the action in CUNY first.
3. ***ICIT IS RESPONSIBLE FOR*** running a separation report daily and will deactivate network access, emails, Identification Cards and CUNY First roles.
4. ***PROPERTY MANAGEMENT IS RESPONSIBLE FOR*** following-up to ensure that the college property assigned to the staff member has been collected by the appropriate authority.
5. ***PUBLIC SAFETY IS RESPONSIBLE FOR*** managing the building access in the event of a challenging termination. Public Safety will initiate the process to disable card key access and place the employee on a watch list to prevent future access.

6. **BUDGET IS RESPONSIBLE FOR** cancelling credit cards, travel cards or purchasing cards.
7. **PAYROLL IS RESPONSIBLE FOR** working with the Central Payroll Office to remove the employee from payroll in a timely manner. Prompt notification by manager/supervisor of staff departure is critical to facilitate the accurate calculation and processing of an employee's last paycheck, as well as any potential annual leave payouts.

**STEP II. THE DEPARTMENT WILL MEET WITH EMPLOYEE TO OBTAIN CRUCIAL DELIVERABLES INCLUDING PROJECT STATUS REPORTS.**

A project status report might include:

1. **Current and Ongoing Tasks** e.g., a list of all current, outstanding, and important upcoming projects, deadlines, and tasks; lists of ongoing regular tasks, and any pending tasks [Work in Progress] that the employee is currently working on.
2. **Key Contacts** e.g., contact information of those with whom an employee has been collaborating with on tasks, projects; committees, etc.; a list of key people/groups (internal and external) the position works closely with that are necessary to daily functions.
3. **Documents** e.g., specific files/records/emails related to current or past projects.

**STEP III. THE EMPLOYEE INITIATES AN EXIT INTERVIEW WITH THE BENEFITS OFFICE**

1. In the event of a retirement, the employee will schedule an exit interview with the Benefits officer at least 30 days prior to retirement.
2. In the event of a resignation or termination, an employee has the option of reaching out to the Benefits Officer in order to discuss their benefits upon separation.

**PAYROLL AND LAST PAYCHECK**

Prompt notification by manager/supervisor of staff departure is critical to facilitate the timely and accurate calculation and processing of an employee's last paycheck, as well as any potential annual leave payouts.

### RETIREES

Faculty and Staff, who have finalized their bona fide retirement, must meet with the benefits team in advance at the Office of Human Resources to arrange and discuss the retirement transition. At the June 2015 CUNY Board of Trustees meeting, an amendment to the CUNY Policy on Acceptable Use of Computer Resources was approved that allows teaching faculty and librarians the option to retain their current CUNY e-mail address upon retirement. Faculty counselors also have the option to retain their current CUNY e-mail address upon retirement. The Retiree email form must be completed and returned to the Office of Human Resources prior to the employee's retirement.

Employees in the Executive Compensation Plan and non-teaching instructional staff titles such as Higher Education Officer series, College Laboratory Technician series, Research Associates and Research Assistants will be given a one-time option at the time of retirement (during the off-boarding/exit interview process), to request a "retiree" e-mail. (Teaching faculty, librarians and faculty counselors may also opt for a "retiree email" in lieu of retaining their current email address). The retiree email form can be obtained at: [Retiree Email form](#).

### INTERNAL TRANSFERS (WITHIN THE COLLEGE)

When employees transfer between departments at the college, both managers and employees should follow the procedures below:

1. Notify, in writing, the Office of Human Resources (or the Manager/Supervisor of an employee in related entities) of the transfer.
2. Complete and submit the Personnel Action Form (PAF)
3. Return to manager/supervisor all college property, keys, tools, computers, mobile devices or other equipment associated with current department.
4. Submit IT and CUNYfirst forms to cancel system access associated with current unit.

### INVOLUNTARY OR EMERGENCY SEPARATIONS

All involuntary separations will be discussed with the Legal Counsel/Labor Designee in the Office of the Executive Legal Counsel or Labor Relations Director in HR, as applicable, before the termination transpires.

Appropriate documentation and evidence of unsatisfactory performance should be prepared prior to termination.

Written notification should also prepared and provided to the terminated employee.

All Hunter College Property will be returned to the manager prior to the employee leaving the premises.

Benefits will cease effective on the last day of employment and COBRA applications will be immediately sent to the employee's residence.

Further, the following offices should be contacted to immediately cancel access to College data and systems:

- ✓ Office of Human Resources
- ✓ Public Safety Director
- ✓ ICIT

#### DEATH OF AN EMPLOYEE

A termination due to the death of an employee will be made effective as of the date of death.

#### *Procedures*

1. Upon receiving notification of the death of an employee, the employee's manager should immediately notify HR and send a Personnel Action Form.
2. The benefits officer will contact the employee's next of kin to discuss appropriate next steps.
3. The employee's manager should ensure that the payroll office receives the deceased employee's final timesheet.

## APPENDICES

- Appendix 1: Manager Off-Boarding Checklist
- Appendix 2: Employee Off-Boarding Checklist
- Appendix 3: Summary of Procedures Chart

APPENDIX 1

MANAGER OFF-BOARDING CHECKLIST

Employee: \_\_\_\_\_ Signature: \_\_\_\_\_

Last Day of Work: \_\_\_\_\_ Date form completed: \_\_\_\_\_

Manager's/Supervisor's Name and Title: \_\_\_\_\_

Manager's/Supervisor's Signature: \_\_\_\_\_

*This is Hunter College's template for the Off-Boarding process. The Manager/HR Liaisons and/or designees should use this document as a guide when off-boarding an employee.*

**TO BE COMPLETED BY DIRECT SUPERVISOR/MANAGER/HR LIAISON**

- Secure resignation letter from employee or notice of separation (e.g., non-reappointment letter)
- Notify Human Resources via email of the separation ~~via PAF~~ and submit a PAF
- Notify Dean, Vice President or Department Head in writing of employee's departure
- Separate the employee from internal shadow systems such as AEMS or PR Assist, as applicable

**CANCELLATION OF MEMBERSHIPS, LICENSES AND CONTRACTS**

- Alert Budget to cancel Travel/purchasing card/credit card
- Mobile Devices will be returned to ICIT.
- Other

**ACTION ITEMS UPON EMPLOYEE'S DEPARTURE**

- Retrieve Hunter College cell phone, laptop, ipad, and any other Hunter College property
- Retrieve ID card and keys. Remove card access to buildings and classrooms.
- Remove employee mailbox
- Remove employee name from Hunter College website and directory
- Remove nameplate
- Remove employee from department organizational charts

APPENDIX 2  
EMPLOYEE OFF-BOARDING CHECKLIST

Employee Name: \_\_\_\_\_ Resignation Effective Date: \_\_\_\_\_

Department: \_\_\_\_\_ Manager's/Supervisor's Name and Title: \_\_\_\_\_

Last Day of Work on Campus: \_\_\_\_\_

*The following items must be submitted to the department designee prior to the employee's last day on campus:*

- Letter of Resignation
- Employee Hunter College ID/Badges
- Keys (i.e., office, labs, etc.)
- Travel, credit, and/or purchasing card(s)
- Outstanding expense reimbursements
- College property/equipment (e.g., cell phone, iPad, laptop)
  - o \_\_\_\_\_
  - o \_\_\_\_\_
  - o \_\_\_\_\_

*Additionally, the following actions must be completed by the employee prior to the last day on campus:*

- Return files and/or documents to the department designee
- For full-time employees, schedule Exit Interview with a Human Resources representative, if feasible.
- If needed, consult with College Benefits Officer for benefits inquiries (e.g., retirement, health insurance, COBRA etc.)
- Submit final timesheets to timekeeper in order to confirm balance of remaining vacation days
- Clear voicemail and telephone access
- Update and/or confirm current contact information
- Request Retiree email
- Other \_\_\_\_\_
- Other \_\_\_\_\_
- Other \_\_\_\_\_

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Manager/Supervisor Department Head

\_\_\_\_\_  
Date

*\*The employee, as well as the Department Head, must sign this document to verify that all property has been turned in. Return the checklist to your department HR coordinator.*

**APPENDIX 3**

SUMMARY OF PROCEDURES

The chart below outlines roles and responsibilities of departments when an employee leaves the college.

Responsible Unit	Responsibilities
<p><b>Department</b></p> <p><b>Department Head, Manager, or Supervisor of employees of related entities</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Inform HR via Personnel Action Form (PAF)</li> <li><input type="checkbox"/> Initiate staff exit process using Manager Off-Boarding Checklist (Appendix 1).</li> <li><input type="checkbox"/> Provide letter of resignation to HR</li> <li><input type="checkbox"/> Ensure required assignments are completed prior to employee departure.</li> <li><input type="checkbox"/> Contact HR to determine if timesheets are up-to-date and approve final timesheets.</li> <li><input type="checkbox"/> Cancel access to any electronic systems maintained within the Dept./Unit (i.e.AEMS, PR Assist &amp; CUNYFirst)</li> <li><input type="checkbox"/> Collect ID card, college properties, and keys and sign-off on Employee Separation Sign-Off Form</li> <li><input type="checkbox"/> Collect College credit, purchase, and travel card(s) and notify the Budget Office to cancel.</li> <li><input type="checkbox"/> Remove employee from organizational chart, website, and directory.</li> </ul>
<p><b>Human Resources</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Initiate exit process by providing employee and manager (or supervisor of employees in related entities) with appropriate documents and/or links for electronic access to them.</li> <li><input type="checkbox"/> If requested, conduct face-to-face exit interview for full-time employee, if feasible.</li> <li><input type="checkbox"/> COBRA packets will be sent to the employee’s residence</li> <li><input type="checkbox"/> Inform employee of benefit continuation rights and responsibilities.</li> <li><input type="checkbox"/> Secure final timesheet, calculate outstanding balances, and payout annual leave,</li> </ul>
<p><b>Labor Designee/ Office Of General Counsel</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Must be contacted if employee separation is involuntary, problematic, or possibly litigious.</li> </ul>
<p><b>ICIT</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Disable network access, Identification Cards, email, CUNYFirst roles, and other system access upon notification from Human Resources or manager (or supervisor of employees in related entities).</li> <li><input type="checkbox"/> Update Email/Active Directory</li> </ul>



<b>Budget</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> Cancel travel, credit cards, and/or purchasing cards upon notification from department or HR.</li><li><input type="checkbox"/> Submit the CUNYFirst User Access Form to ICIT to turn off CUNYFirst financial modules, as applicable.</li></ul>
<b>Property Management</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> Ensure that the college property assigned to the staff member is collected.</li></ul>