

Exiting Employee Checklist

Instructions: For review by the supervisor of the terminating employee. The supervisor should work with the employee (and, as needed, other department resources) prior to the employee's termination date to fulfill the tasks on this checklist. The completed checklist should be stored by the department. Please note this list is not exhaustive; departments may have their own exiting procedures that should be incorporated into the offboarding process.

Employee Name

BU ID Number

Department

Position Number

Position Title

Last Day of Work

Important

- BU policy requires an employee be in the office on their last day of work. An employee cannot end their employment with vacation time.
- For an employee who recently resigned to move into a temporary position, there must be a break in service of *at least* 30 days. If there will be a break in service less than 30 days, the employee should be [transferred](#) to an [overlap position](#) and will retain benefits eligibility to the extent their percent time allows.
- Do not terminate an employee who is [transferring to another BU position](#) or [reducing hours](#).
- If the outgoing employee will overlap with the incoming employee for a period of time, the outgoing employee will need to be [moved](#) into an [overlap position](#). To ensure the smoothest process, this must be completed *prior* to the Termination or Retirement form being processed.

Type of Termination

Voluntary:

Employee provides written resignation letter (email is acceptable)

If an employee provides a verbal resignation, the supervisor must send a written communication to the employee accepting the resignation. This document will be used as the employee's notification on record.

A copy of the resignation letter is provided to whomever will be processing the relevant forms in SAP.

Exiting Employee Checklist

Involuntary:

Discuss with [HR Business Partner](#) prior to any action being taken. Follow any instructions provided by your HRBP. This includes layoffs, performance issues, violation of policy, egregious misconduct.

Process in SAP

NOTE: *The termination of any employee who is age 55 or over **and** has at least 10 years of continuous service will be processed as a retirement in SAP, regardless of whether the employee is remaining in the job market.*

Determine employee's last working day

Notify [IS&T](#) of the employee's departure *at least one week* prior to their last day. This will ensure they have time to complete any manual deprovisioning activities on the last day.

Any unused accrued vacation will be paid out in the employee's last paycheck. Ensure all Time Off Requests (monthly paid employees) and Timesheets (hourly paid employees) have been entered and approved prior to the termination form submission, so the vacation balance is accurate upon payout.

Complete the [Termination](#) or [Retirement](#) form in SAP. A copy of the resignation letter or supervisor's written confirmation of verbal resignation must be attached to this action. Please note departments may have their own internal policies for this process.

If the employee is on an H-1 Visa, notify ISSO: [End of Employment or Activity » International Students & Scholars Office | Boston University \(bu.edu\)](#)

Optional: If the position is being revised prior to posting, the department HR liaison or hiring manager needs to work with Compensation for a [position evaluation](#). Please note departments may have their own internal policies for this process.

Optional: If the position needs to be posted for recruitment, the Payroll Coordinator or Manager needs to submit the [Maintain Position](#) form. Please note departments may have their own internal policies for this process.

Exiting Employee Checklist

Assigned Access

Email account will be disabled automatically after termination processes *unless* the employee is a retiree, alumni, or current student. Employees who have a retiree, alumni, or current student affiliation will be automatically migrated from O365 to a BU Google inbox – existing mail will not be moved into the new mailbox. Additional information about deprovisioning and entitlements based on affiliation can be found here: <https://www.bu.edu/tech/services/cccs/email/office-365-outlook/account-expiration/>

NOTE: *Any concerns about continued access should be addressed with your HR Business Partner and/or IS&T.*

Determine if the department needs access to any data the departing employee possesses. For planned off-boardings, this data transfer/access needs to be done by the departing employee and their supervisor or other department staff member BEFORE the person's last day of work.

Contact [IS&T](#) to remove department specific computer/networking access.

If the employee has swipe access to your building, remove the access by contacting for CRC: ithelp@bu.edu 617-353- 4357 or on MED: ID Office 617-638-6879. Access provided automatically by CCure is removed automatically upon termination.

If the employee has a BU credit card, close out the account (see [Policy](#))

Communications

Remove employee's name from departmental/internal:

Email group lists

Distribution lists

Office phone list

Website

Building directory

Workspace/Office

Ensure that the employee completes the applicable tasks before their last day of work:

Change/transfer phone ([Instructions](#))

Change voicemail

Change office mailbox

Clean work area and remove personal belongings

Exiting Employee Checklist

Physical Items

Collect the following items by/on the last day of work:

Keys (office, building, desk, filing cabinets, etc.)

BU Terrier Card (to be destroyed)

Business cards

Nameplate

Name badge

PCard

BU owned cell phone (return to IS&T)

BU owned laptop (return to IS&T)

Uniforms

Tools

Other