**Supervisor Offboarding Checklist for WVU Internal Transfers/Promotions**

Use this checklist when a direct report is transferring/promoting to another WVU position to ensure a smooth transition and a positive employee experience. Supervisors should add additional department-specific tasks or modify the existing list for their use.

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| **Employee Name:** |
| **Employee Title:** |
| **Transfer Date:** |

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| **Category** | **Task** | **Completed?** |
| Documentation | Obtain “Intent to Transfer” letter from employee. Transferring employees should outline the fact that they are transferring (not resigning) and the effective date of the transfer. |  |
| Review and complete the tasks on this checklist. Retain this for your records as needed. |  |
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| Transition activities | Notify other employees within the unit of the employee’s departure. Collaborate with the employee to determine best way to do this. |  |
| Update website directories, listservs, etc. |  |
| If the employee supervises other WVU employees, graduate students or student workers, submit a request to Shared Services to [change their supervisor](https://wvusharedservices.wvu.edu/s/article/Finance-Change-of-Supervisor) as of the transfer date. |  |
| Determine how the employee’s duties and responsibilities will be handled after their departure and communicate who/what duties will be assumed. |  |
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| University assets and financial steps | Identify the systems that the employee has access to and arrange for their access to be removed or transferred. This should be completed on or before their transfer date. |  |
| Remove building access for employee, if applicable. This should be completed on the last day before their transfer. |  |
| Obtain department/University property (laptop, monitors, webcams, chair, office equipment and other equipment, including equipment and office items hybrid employees have at home. This should be completed on or before their transfer date. |  |
| Return employee keys to appropriate office/person. |  |
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| Items to remind employee to do | Review all outstanding assignments with supervisor. |  |
| Complete a [Knowledge Transfer Plan](https://talentandculture.wvu.edu/files/d/cc49814e-b773-4dc8-986a-a61e8202107f/knowledge-transfer-plan-template.docx) (if applicable). |  |
| Move any work-related files on computer to a shared drive, Teams site or other appropriate place. |  |
| If the employee has sole access rights to any systems, accounts or applications (i.e., administrative databases, social media accounts, departmental memberships to professional organizations, etc.), de-activate or transfer the passwords or other access rights as determined by supervisor. |  |
| Transfer ownership of any cloud-based platforms/services to supervisor/designee. |  |
| Change ownership of calendar events. |  |
| Transfer ownership of work-related email groups/Teams groups to supervisor/designee and remove self from ownership. |  |
| If standard operating procedures exist for the role, update and provide to supervisor/designee. |  |
| Update voicemail and email with an automatic reply, and indicate a contact person (unless employee is keeping their number for the transfer position). |  |
| If employee is responsible for supervision of WVU employees, ensure that personnel information (hiring notes, performance reviews, accolades, professional certifications and disciplinary documentation) are organized for and available to the next supervisor. |  |
| Contact the Parking Management Office if a different permit is required for your new job. |  |
| Notify any external or client relationships/contacts as well as any WVU relationships/contacts of your transfer and their new contact person. |  |
| Notify any committees/working groups in which the employee participates as needed. |  |
| Reconcile any PCard transactions, if applicable. |  |
| Return any department/university assets including laptop, monitors, webcams, chair, office equipment and other equipment, including equipment and office items hybrid employees have at home. |  |
| Remove all personal items from office/desk/locker, and clean and organize office/desk/locker. |  |
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| Department-specific tasks (to customize) |  |  |
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