

Managers at UNC are responsible for ensuring that all off-boarding steps are completed when an employee transfers to another department or voluntarily* leaves UNC-Chapel Hill. Use the checklist below to ensure a smooth and thorough transition.

Checklist with Typical Timeline

Day 1

- Employee notifies supervisor of transfer or separation in writing (email is acceptable). Date of notification: _____
- Forward employee notification and manager's written acceptance to SCE HR at sceseparations@unc.edu.

Days 2-3

- Submit applicable systems access forms to request system access removal for employee. [See all system access forms](#).
- For Temporary Employees:*
 - o Agency Hire: Notify temp agency and ensure final payment with SCE Finance.
 - o Direct Hire: Provide written notice to SCE HR.
 - o Affiliates: Submit affiliate request ticket, providing date of termination to SCE HR. Go to fo.unc.edu/sce/hr/ > Request Service.

Days 4-9

- Create checklists with employee to identify:
 - o University property that needs to be returned. See the [Leaving the University Packet](#) for reference.
 - o Status of all work in progress.
 - o Outstanding client issues.
 - o Document clean-up needs.
- Hold exit interview and conduct knowledge transfer to receive employment feedback and discuss final steps. Encourage employee to complete exit interview questionnaire in the Leaving the University Packet.

Last Day

- Last Scheduled Work Day: _____
- Collect from employee:
 - o SCE parking permit and OneCard. Return to SCE Operations.
 - o Computer hardware and other equipment. Return to IT.
 - o Building and desk keys.
 - Check to be sure employee cleans out desk and filing cabinets and takes home all personal items.

Day After Departure

Check with SCE HR, SCE IT, and temp agency (if applicable) to ensure that all steps were completed properly.

Tips for a Smooth Transition

Meet with employee to discuss current projects and to complete a plan for knowledge transfer. Use the <Knowledge Transfer Form> to aid discussion.

Communicate the change to your team while maintaining confidentiality and professional courtesy.

Develop a strategy for coverage within your team and discuss with affected employees.

Have a coworker shadow the employee who is leaving.

Reduce employee workload to allow him or her ample time to complete current projects and provide appropriate knowledge transfer.

Notify customers of the upcoming change in staffing.

Check in frequently and provide support as needed to ensure employee can complete projects, clean-up and archive documents, transfer knowledge and tie up all loose ends.

Useful Links:

[UNC SHRA Separation Policies](#)

* See the back of sheet for special steps required in the case of involuntary separations and links to off-boarding policies.



Involuntary Separations

Involuntary Separations follow disciplinary actions issued to the employee. Refer to the [SHRA Disciplinary Action and Related Separations Policy](#) on the UNC HR website for more information or contact a SCE HR staff member. After the employee dismissal is confirmed with SCE HR, but not yet delivered, the supervisor, SCE IT, SCE HR should work together to schedule access termination and acquire university property. Submit a ticket to SCE Finance and attach the ConnectCarolina All Systems Access Form to remove employee access.

<http://go.unc.edu/shra-terminations>

Leaving the University Packet

Upon leaving the university the employee will receive a packet of information from HR detailing information on benefits, employee steps prior to leaving the university, and retirement plans. The packet also contains an exit interview questionnaire. It is recommended that managers become familiar with the Leaving the University Packet and offer the opportunity to review the packet with the employee prior to their last scheduled work day. Managers may conduct an exit interview using the questions found in the packet.

[Leaving the University Packet](#)

Policies and other links

[UNC SHRA Separation Policies](#)

[All Systems Forms](#)