

# COLLEGE OF DESIGN GUIDELINES FOR EMPLOYEE OFFBOARDING

## 1. Voluntary Separation

### A. As Soon as Employee Notifies Manager of Separation

#### Manager Responsibilities

- Request the employee submit a resignation letter specifying the last working day to the manager and UHR representative.
- Ensure HR enters the resignation details in Workday to initiate separation tasks.
- Advise the employee to contact the Benefits Office regarding benefits continuation, retirement, or payouts.
- Instruct the employee to review the [University Records Retention Schedule](#) and [Policy](#) to evaluate analog and digital records.
- Determine if the faculty member will continue serving on Program of Study Committees. Designate another advisor for oversight and emergencies, and appoint the departing faculty member as an affiliate, if applicable.
- Department chairs should complete [Faculty Offboarding Letter](#) and a copy of this letter should be saved in the Academic Personnel Folder.

#### Employee Responsibilities

- Submit a resignation letter specifying the last working day to the manager and UHR representative. Academic year (nine-month) faculty should notify their department chair no later than April 15. Resignations should typically align with the end of the academic year (May 15). The separation date is the last day worked or the effective date of the resignation. Refer to the [ISU Resignation Policy](#) for more details.
- Evaluate analog (office/cubicle) and digital (computer, shared drives, cloud storage, etc.) records:
  - Transfer active records to a shared location or to the manager (e.g. CyBox, Canvas, computer files).
  - Destroy or transfer inactive records according to University policies.
- Compile and submit a list of non-standard software and accounts to the manager and IT.
- If applicable, notify relevant research offices:
  - Institute for Design Research and Outreach
  - Office of Intellectual Property and Technology Transfer
  - Office of Sponsored Programs Administration
  - Office of Research Ethics
- Verify expenditures and close out projects with Finance and OSPA, for sponsored projects. Address discretionary funds and finalize reporting.

---

### B. Before the Last Working Day

#### Manager Responsibilities

- Develop a communication plan to inform key stakeholders of the employee's departure, including graduate students, faculty and staff, clients or other external stakeholders, the ISU community as relevant, and include:
  - Employee's last working day.
  - Plans for reassigning tasks.
  - New workplace details, if permissible.
- Contact the Building Manager to schedule the deactivation of card access.
- Collaborate with the employee to:
  - Assess ongoing projects and document relevant details.

- Reassign tasks and responsibilities.
- Transition digital assets (e.g., CyBox folders) to the successor or to the manager.
- Plan for training sessions, if time allows.
- Verify all records have been transferred, shared, or destroyed.

#### Employee Responsibilities

- Work with the manager to:
  - Complete assigned projects.
  - Transfer ownership of digital content and train successors as needed.
- Emails are turned off soon after employees depart from their positions. Set up an auto-reply in Outlook redirecting emails to the department's general address, and communicate with others and share the new email address they can use.
- Return all Iowa State–owned equipment from remote workspaces.
- Deactivate licenses as instructed by IT.
- Finalize all outstanding expenses, advances, and travel.
- Ensure time and leave reporting is up to date in Workday.

#### IT Responsibilities

- Provide the manager with a list of equipment, software, and licenses assigned to the employee.

### **C. On the Last Working Day**

#### Manager Responsibilities

- Confirm the successful transfer of accounts and software.
- Verify all Iowa State–owned items have been accounted for, including keys, ID cards, computers, phones, lab equipment, and p-cards.

#### Employee Responsibilities

- Clean out workspace, removing personal belongings and leaving University-owned equipment.
- Return all checked-out materials (e.g., library books, equipment).

#### IT Responsibilities

- Remove the employee from email lists and groups.

### **D. After the Last Working Day**

#### Manager Responsibilities

- Request the college web developer to remove the employee from directories.
- Update passwords for departmental shared accounts, if applicable.
- Remove the employee from shared inboxes, software, and CyBox folders.
- Notify relevant staff of changes in project contacts.
- Continue training successors as needed.

#### IT Responsibilities

- Disconnect the phone line, if necessary.
- Retrieve equipment and assets.

---

## **2. Involuntary Separation**

### **A. As Soon as the Decision is Made**

#### Manager Responsibilities

- Compile a list of Iowa State–owned equipment used by the employee.
- Notify the Building Manager to deactivate card access.
- Submit a ticket to the Solutions Center to disable Net-ID access.
- Inform College IT about the separation date for software access termination.

#### IT Responsibilities

- Provide the manager with a list of assigned equipment, software, and licenses.

---

### **B. On the Last Working Day**

#### Manager Responsibilities

- Follow UHR instructions for separation procedures.
- Confirm that all University-owned equipment remains in the workspace.
- Remove the employee’s accounts from shared software and systems.
- Update passwords for shared accounts.
- Verify that the employee left the university keys in their office/workplace.

#### IT Responsibilities

- Remove the employee from email lists and groups.

---

### **C. After the Last Working Day**

#### Manager Responsibilities

- Reassign tasks and notify staff of contact changes.
- Request the web developer to update directories and departmental pages.
- Verify that accounts and software have been transitioned appropriately.
- Evaluate and manage the employee’s analog and digital records:
  - Transfer active records to a shared location.
  - Destroy or archive inactive records as per University policy.

#### IT Responsibilities

- Disconnect the phone line, if necessary.
- Retrieve equipment and assets.

---

## **3. Appendix**

### **A. Workday “To-Dos” for Separating Employees**

- Remove Workday community access.
- Reminder to return parking tag.
- Cancellation of P-Card.
- Return University Property.
- Electronic Files.
- ISU Email account deactivation.
- Return University Keys.
- Send in final expense reports.
- Update home address.
- Complete Final Leave report.
- Staff Exit Survey.
- Option for supplemental retirement plan.
- Review documents.

- Additional To-Dos occur for retirees, faculty, and emeritus related to those specific statuses.

**B. Workday “To-Dos” for Managers**

- Oversee the return of University property.
- Manage computer access.
- Review employee separation tasks.
- Complete the faculty separation checklist, if applicable.

**C. Automated Workday Tasks**

- Remove user-based security groups.
- Process separation payouts.
- Update retiree status, if applicable.