

Staff Exit Process

Supervisor Training - 2023



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Receiving a Notice of Resignation

When a supervisor receives written notice that an employee is retiring or resigning, please **forward a copy of the resignation letter to HR as soon as possible.**

- **Staff without supervisory responsibilities and below the level of director** who wish to resign should provide written notice to their immediate supervisor no later than two weeks (10 working days) prior to the last day of employment, excluding Holidays and Personal Leave.
- **Administrators and Staff at or above the level of director or having supervisory responsibilities** who wish to resign should provide written notice to their immediate supervisor no later than one month (20 working days) prior to the last day of employment, excluding Holidays and Personal Leave.

Transition of Knowledge

It is important to try and retain as much positional knowledge as possible. Supervisors will want to work with their exiting employee to create a plan to either transition positional knowledge to others within the department and/or set up a training plan for whomever will be moving into the open position.

Information to consider:

- Useful resources for the position (job manual)
- List of outstanding tasks
- Locations of records and files
- List of important contacts
- Status report of ongoing projects



Update Communications



Supervisors may want their exiting employees to set up an auto-reply email message to let others know the employee has separated and who the next best contact will be.



Exiting employees should also update their voicemail message to advise callers of their last day and provide an alternate contact to call for assistance.

Supervisors can contact IT to set up a redirect of calls and emails to someone else within the department, if necessary, until a replacement for the position is found.

Supervisor Exit Recommendation



HR will send the supervisor an Exit Recommendation Form. This form provides a record of the following information for the employee's file:

- **Employee's eligibility for rehire**
- **Determination of future status** (continuing in a part-time staff position or adjunct role.)

If the employee will be continuing in another position or in a part time capacity, please submit a Status Change form.

Staffing Updates

JOB DESCRIPTION

Title: Insert Full Title Here
Department: Insert Department
Reports to: Insert Supervisor's Position Title
Supervises: Insert Yes or No, # Employees
Classification: Insert Grade, indicate whether Exempt or Nonexempt
Last Updated: Insert Date

The following statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified.

POSITION SUMMARY (Write a summary of the job. State whether the position is part-time or full-time and indicate FTE.)
Type in position summary here...

ESSENTIAL FUNCTIONS (This section is for functions that are essential to the successful completion of this position. If these functions aren't done, then the job isn't being done. Please be as specific as possible about the task and the manner in which it is to be done. Don't rush through this part of the process. Take time to consider exactly what this position requires.)

1. Essential Job Function Number One [Percentage of time spent doing this function]
2. Essential Job Function Number Two [Percentage of time spent doing this function]
3. Performs other work-related duties as assigned. [5%]

QUALIFICATIONS (Describe the education, experience, certifications, knowledge, skills, and abilities an employee will need in order to fulfill the position's essential functions. These should include those mandatory as well as preferred.)

1. Qualification number one.
2. Qualification number two, etc.
3. Demonstrate commitment to maintaining a safe work environment free of harassment, violence, and unlawful discrimination.
4. Ability to communicate effectively, get along well with co-workers, and deal effectively and professionally with colleagues.

WORKING ENVIRONMENT (The working conditions described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.)

1. Work is generally performed indoors in a typical office setting.
2. Some weekend/evening work required.
3. Travel, including overnight travel, may be required.
4. Position works with strictly confidential information.
5. Requires work in outdoor weather conditions, including wet, extreme cold, and extreme heat.
6. Frequently required to be in front of a computer screen for long periods of time.
7. Work requires occasional exposure to fumes or airborne particles, toxic chemicals, and bloodborne pathogens.

- Having a vacancy within the department is an excellent time for supervisors to consider restructuring opportunities or changes to the job description.
- Before posting an open position, supervisors should review the current job description to ensure the job summary and essential functions are still accurate.
- Major changes to the job description or department staffing levels will need VP/HR approval.



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Posting an Open Position

Even if you have a qualified candidate in mind, it is our policy to post all staff positions for a **minimum of 7 days**.

To post your position, complete a **Staff Adjustment Request**, routing it to your VP/Dean and the CFO for approval before submitting it to HR along with an updated job description.

This allows all potential candidates an equal opportunity to apply for the position, both internally and externally.

By doing this, you also avoid perceived discrimination or favoritism by offering the job to someone without reviewing all eligible applicants.



Staff Adjustment Request

Job # _____

Prior to advertising and/or hiring, please complete and approve this form with your personalized digital stamp (click here for instructions). Then email it to your Dean or Vice President for their approval. They will forward it to the CFO (for budget authorization) who will forward it to HR for final approval.

Important: Please email a copy of the job description for this position to Human Resources.
Note: Supervisor must finalize any job description changes with HR before this position is posted or filled.

Requesting Department _____

Title of Position _____ Request Date _____

Supervisor _____

Budgeted ☐ Yes ☐ No Budget # (required) _____ (format: 11-XXXX-XXXX)

Classification: ☐ Exempt ☐ Non-Exempt ☐ Temporary (ending date _____)

Full time ☐ Part time ☐ Estimated Hours per Week _____ FTE Amount _____

Working hours for this position are from _____ (indicate am/pm) to _____ (indicate am/pm)

Check working days for this position: ☐ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

Must be complete for all openings: Please describe the circumstances that created this opening.
(Replacement reasons might be employee resignation, promotion, transfer, etc.)

☐ Staff Increase (New Position) ☐ Staff replacement for _____

Replacement reason _____

☐ Temporary replacement – Approximate Dates _____

☐ Other _____

Approvals:

1. Recommending Supervisor/Dean _____ 2. Applicable Vice President _____

3. CFO (Budget Authorization) _____ 4. Human Resources _____

Human Resources Only:

Compensation Pay Range starts at \$ _____ to a median of \$ _____.

Northwest University Human Resources Forms (revised 2/2023)

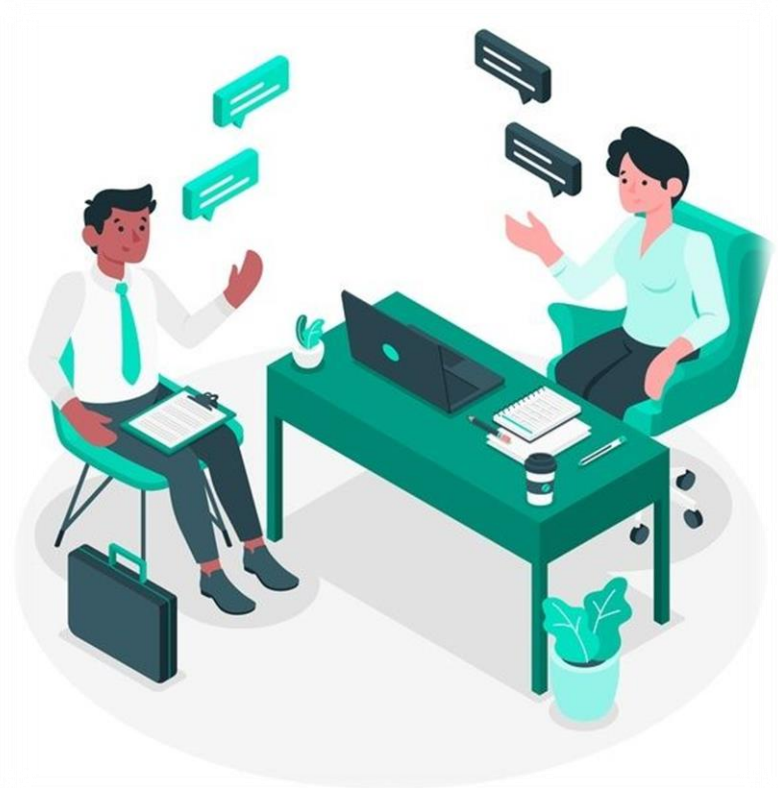


HR Exit Interview

HR will send an email to the exiting employee to coordinate an exit interview. An exit survey will also be sent for the employee to complete ahead of time.

During the exit interview meeting HR will:

- Collect any loaned equipment/materials that need to be returned to NU. This includes the employees NU ID badge, keys, credit card(s) and computer equipment.
- Give the employee instructions on how to access ADP for up to three years after their departure from NU.
- Review dates of the employee's final paycheck and any additional payouts for person leave.
- Review benefit information and termination dates.



Personal Leave Payouts

- If the employee leaves the University for any reason after having worked a **total of six months or more** during his or her latest term of employment, the employee should be paid for any Personal Leave hours accrued but not used.
- **Personal Leave cannot be used as an extension of employment.** One's termination date should be the last day of actively performing work for the University. Termination cannot occur on a weekend or holiday.
- Failure to provide timely written notice of resignation may result in the loss of accrued Personal Leave.



Benefit Eligible Employees



Benefit Eligible Employees

Benefit provider and contact information for exiting employees

☐ **Health Benefits (Medical/Dental/Vision):**

All health benefits will end on the last day of the month of employment. Employees who leave during the first week of the month and are enrolled in a benefit plan will have the full month's premium deducted from their final paycheck (first pay period of the exiting month). This applies to medical, dental, vision, supplemental plan coverage, HSA and 403b contributions, as applicable.

☐ **COBRA:** Employees that lose health coverage through our group plan will be given the option of continuing coverage through COBRA. A letter from COBRA Management Services will be mailed to you explaining your benefit options and the costs of coverage. With COBRA coverage you can remain on your existing health plan for up to 18 months but are responsible for paying the full monthly premium. Once enrolled through COBRA all benefits will be retroactive to the day after your NU coverage ends.

☐ **HSA Accounts:** Employees can continue to use all funds accrued in their HSA account to pay for medical expenses. If employees are transitioning to another high deductible health plan and want to roll over their HSA account or for other questions about how to use HSA funds, please contact our HSA provider FURTHER.

☐ **FSA Accounts:** Employees can continue to use FSA contributions for eligible health or dependent care expenses throughout the calendar year. For questions about your account, please contact our FSA provider below.

☐ **403b Retirement Plans:**

Retirement plans with AG Financial can be rolled over into a future employer's plan, an individual retirement account (IRA) or kept with AG Financial. NU will notify AG Financial that the employee is no longer employed at NU and will no longer be receiving contributions from NU. For questions about retirement accounts or help with the roll-over process, please contact AG Financial.

☐ **MetLife – Group Life/AD&D and Supplemental Life Insurance:** NU Group Life/AD&D coverage through MetLife may be converted to an individual whole life policy within the first 31 days following the date your NU Life Insurance ends (last day of the month of employment). Supplemental Life Insurance may be converted or ported (continued). Please contact MetLife directly for assistance or questions.

☐ **Colonial Life – Voluntary Insurance:**

HR will notify Colonial Life that you are no longer employed with NU. Please reach out to Colonial Life directly if you wish to continue any currently elected supplemental insurance policies.

FURTHER by HealthEquity

Website: www.hellofurther.com
Customer Service: 1.800.859.2144
Group Name: Northwest University
Group Number: 009124

HealthEquity

Website: www.healthequity.com/fsa
Customer Service: 1.877.924.3967

AG Financial Solutions

Website: www.agfinancial.org
Phone: 1.800.831.7526
Email: retirement@agfinancial.org

NU Consultant: Tim McDowell
Phone: 1.417.379.4274
Email: timcdowell@agfinancial.org

MetLife

Group Policy # 5398625
Customer Service: 1.800.638.5433

Colonial Life

Webpage: www.coloniallife.com
Account Coordinator: Megan Casto
Email: megan.casto@ColonialLifeSales.com

Benefit eligible employees will receive the following information from HR regarding the termination of their elected benefits:

- The date when each benefit will terminate.
- Contact information for each provider.
- Instructions about optional ways to continue or transition their elected benefits.



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Staff Emeritus/a

If your exiting employee is retiring and meets the criteria for staff emeritus/a, please consider making a recommendation to your VP for the employee to be honored with the staff emeritus/a status.

Criteria:

- A minimum benefit eligible service of ten years;
- A recognized quality of life and service to the institution and its constituency; and
- Service to the University up to (or almost to) retirement.

Privileges:

- Standing invitation to participate in university social functions;
- Standing invitation to participate in academic functions such as commencement or other occasions;
- Employee privileges in the dining hall, the library, passes to athletic events, etc.;
- Retention of their job title with the added word “emeritus/a” and NU email address.

Celebrating a Job Well Done

Depending on the employee's length of service with NU, and the reason for their departure, you may want to host a small get together with other employees to say thank you and wish them good luck in their future endeavors.



Questions? Contact Human Resources



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Additional exit information and employee/supervisor checklists can be found on our Eagle webpage.



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