

SUPERVISOR EXIT CHECKLIST



Supervisors preparing to replace an employee due to voluntary resignation or retirement please use this checklist.

YOUR EMPLOYEE GIVES NOTICE

- ☐ **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.
- ☐ A copy of the letter of resignation should be sent to HR for processing.

SETTING UP A SUCCESSFUL TRANSITION

- ☐ Set up a transfer of knowledge meeting with the exiting employee to review the following information:
 - ☐ 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
 - ☐ Department specific passwords/usernames

POSTING YOUR OPEN POSITION

- ☐ Review/update the job description for the open position and/or consider restructuring opportunities within the department.
- ☐ Complete a Staff Adjustment Request, routing it to your VP/Dean and CFO for approval before submitting to HR.
- ☐ Send an electronic copy of the updated job description to HR for the job posting.

COMPLETING THE EXIT PROCESS

- ☐ Contact IT to set up a redirection of calls and emails to the supervising team member within the department.
- ☐ Make sure all department specific loaned equipment/keys are returned (file cabinets, desk drawers, storage rooms, etc.). Office/building keys will be collected by HR during the exit meeting.
- ☐ Complete the Supervisor Exit Recommendation form sent from HR with information about rehire eligibility and possibility of continuation of employment.
- ☐ **Optional** - Depending on the length of employment with NU, and reason for departure, you may want to host a small get together with other Staff/Faculty to say thank you and wish the employee good luck in future endeavors.