Virginia Tech

Offboarding Program Guide
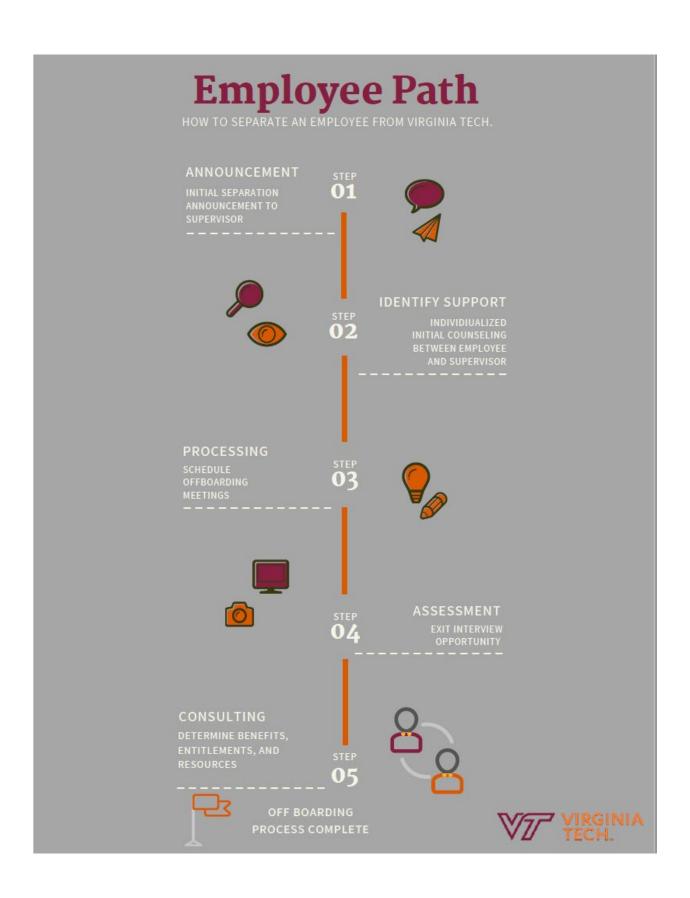
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Offboarding Overview

Offboarding is the process used to help prepare the employee, supervisor, team, and other representatives for the employee's separation from the department or Virginia Tech. Offboarding includes returning Virginia Tech property and other job-related items and transactional processing items, including payroll and benefit actions. The offboarding program is designed to ensure a smooth transition of duties and assets before the employee's departure and invite them to provide valuable feedback from their experience at Virginia Tech.

From opportunities such as retirement or career advancement to more unfortunate circumstances such as the work assignment ending or a reduction in workforce, there are various reasons why employees leave Virginia Tech or transfer to another position within the university.

All managers, supervisors, and separating employees should follow the interactive offboarding process steps to ensure a smooth transition of assignments and employment closure. Employees who have questions or concerns about the terms of their separation or wish to discuss their rights to file a grievance should contact their Human Resources representative or Employee Relations.

Employee Path

HOW TO SEPARATE AN EMPLOYEE FROM VIRGINIA TECH.

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STEP 01

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ANNOUNCEMENT TO
SUPERVISOR

IDENTIFY SUPPORT
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DETERMINE BENEFITS,
ENTITLEMENTS, AND
RESOURCES

OFF BOARDING
PROCESS COMPLETE

VIRGINIA TECH.

STEP 1: Announcement

The initial separation announcement is given to the supervisor by the employee. The supervisor should ask if the employee is leaving the university or transferring to another department. The supervisor should then notify the department's Banner enterer (the person who enters the Personnel Action Form-PAF in the HR Banner System) of the separation so they can use the appropriate job change reason code. The supervisor should share the Offboarding Website with the employee and ask them to download and complete the proper offboarding checklist.

STEP 2: Identify Support

The supervisor and employee should download their respective checklist. These can either be the Separation Checklist if the employee leaves Virginia Tech, or the Internal Transfer Checklist if the employee is moving to another role within the university. Both the employee and supervisor should begin working on their checklist before the employee's last day in the office.

There is also the opportunity for additional employee and supervisor support during this process. If the employee is retiring, they should visit the Retirement Resources page for more information. We encourage all employees to stay connected to the university even after their final day of employment. Employees should look over Staying Connected to Virginia Tech for more details.

Supervisors should review the Supervisor Resources for information and videos on handling employee separations. They should also visit Separation Best Practices for guidance in managing separating employees. For employees transferring within the university, it is encouraged that supervisors have a conversation with the transferring department if there will be a transitioning time where the employee is working between departments.

Employees leaving should be recognized for their time at Virginia Tech. Supervisors should visit the Recognizing Separating Employees page for more information on appropriate ways to recognize employees when they leave.

STEP 3: Processing

An offboarding meeting should be scheduled between the employee and supervisor to discuss current projects, outstanding work, and vendor contacts. It is recommended that the employee complete the Knowledge Transfer Form before that meeting to share with their supervisor.

The supervisor needs to complete additional offboarding tasks from their checklists, including removing the employee's system access and working with the benefits and payroll to ensure things are ready for the employee's last day in the office.

For additional guidance on these steps, visit Employee Transactions. It is also imperative that the Supervisor let the department Banner enterer know why the employee is leaving so they can enter the correct reason code in Banner.

STEP 4: Assessment

The Exit Questionnaire serves as a way to gather information about the Virginia Tech work experience from the employee that is separating or transferring and allows Human Resources to analyze trends, identify common themes, and appropriately address concerns.

Human Resources' goal in collecting this information is to increase the likelihood of retaining top talent and continue making Virginia Tech an employer of choice. Human Resources will analyze survey information monthly with an internal committee. The committee will provide the information to HR directors and managers, who will ideally meet with leaders and department heads to share available data quarterly.

It is highly recommended that departing employees complete the Exit Questionnaire to help the university understand the reason(s) for employees' departures and their experiences – both positive and negative - while employed with us.

Exit Questionnaire Procedure

When an employee tenders their resignation or retires from the university, the supervisor notifies the employee regarding the importance of completing the Exit Questionnaire. When possible, the employee should complete the survey before their last day of service. Employees should be informed that the Exit Questionnaire is entirely confidential; the questionnaire is not connected to an employee in any way. An optional section in the questionnaire is provided for employees that wish to identify themselves, but is not required for survey completion.

To initiate the exit questionnaire process, the departing employee or their supervisor will submit a request to receive an exit questionnaire. The employee will receive an email from Employee Relations within one business day of receipt of the form with a questionnaire link. An additional option is for the employee to meet with an Employee Relations Consultant, their supervisor, or HR representative. Completed questionnaires may be kept on file but not in employees' personnel records.

Internal Transfer Procedure

For employees transferring to another position within Virginia Tech, the supervisor will provide the employee with their department/division's Internal Transfer Questionnaire or schedule a one-on-one separation consultation. The employee may contact the Employee Relations team if they prefer.

The Internal Transfer Questionnaire is managed internally by the department; however, data may be shared with the Vice President for Human Resources and the internal committee.

Supervisors should partner with their HR practitioner to ensure that all appropriate forms are completed and submitted to the Division of Human Resources for processing.

Paperwork Processing

Supervisors need to be sure that the appropriate Supervisor Checklist has been completed and that the appropriate completed Employee Checklist has been turned in before the employee's last day. The completed Employee Checklist should be filed in the employee's personnel file. Supervisors should reach out to their HR practitioner, Employee Administration, or Employee Relations with any additional questions.

STEP 5: Consulting

For the employee, additional support may be needed before their last day in the office with regard to their benefits, entitlements, and other resources.

Employees should use their Employee Checklist as a guide for reminders on each area they need to complete before their last day of work. Employees should be directed to contact the HR Service Center if they need to talk to the leave team or benefits team for additional questions on leave payout and benefit duration. For retiring employees, a consultation should be made with the retirement team for the next steps.

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