

### Offboarding Checklist for Managers

When it is known that an employee will be leaving the university, managers are responsible for completing the following actions promptly. (Note: Employees who are being transferred or promoted are not part of the online termination request process, but processes under the 'terminate access to DePaul resources' section below should still be observed if the transferred or promoted employee no longer requires access to some of the systems or data they needed for their previous role.)

### Submitting a Termination Request in BlueSky

Managers are responsible for submitting a termination request through BlueSky **before the employee's last day**; BlueSky will allow managers to process a termination with a future date. Managers should not submit a termination request that is more than three months prior to the actual termination date.

All voluntary termination requests must be processed prior to the employee's departure to ensure that all access is removed at the end of the employee's last day and to avoid any overpayment of wages.

1. Log in to [mybluesky.depaul.edu](https://mybluesky.depaul.edu).
2. Navigate to **Terminate Employment** (Home > My Team > Quick Actions > Terminate Employment).
3. Locate the employee and assignment you want to terminate, then click the employee's name.
4. On the first page, Info to include, choose whether you would like to enable **Comments and attachments** for the termination request. If enabled, you will be able to add comments and attachments on a fourth page of the request, Comments and attachments, that will appear. If left disabled, there will be no option to add comments and attachments. Please note that you will not be able to go back to enable this feature once you move on to the second page.
5. On the second page, When and why, select the **Termination Notification Date** and **Termination Date** (employee's last day of work). *Note: The Termination Notification Date is when the employee notified their manager (or when the employee was notified of the termination).*
6. As a manager, under the "What are you terminating?" section, you will be given the option to terminate either a specific assignment, multiple assignments, or the entire work relationship. Please note that to terminate the entire work relationship, you must be the manager of all assignments. If the employee has multiple assignments, you can only terminate the assignment(s) for which you are the direct manager.
7. Select a **Termination Action** from the dropdown menu.
  - End Assignment is the termination action for ending an assignment.
  - Voluntary is the more commonly used termination action for ending a work relationship.
  - Retirement should only be used when terminating full-time staff and faculty who are retiring.
8. Select a **Termination Reason** from the dropdown menu. The list of reasons available will depend on the Termination Action selected.
  - Only the Benefits team should submit Death terminations. Please reach out to the Benefits team to notify them of an employee or retiree death.

9. The next page, Work relationship termination info, is intentionally left blank. Please use this page to confirm that you are terminating the correct employee and assignment/work relationship before proceeding any further. If you are not terminating the correct employee or assignment/work relationship, please click Cancel and restart the termination process.
10. If enabled, on the Comments and attachments page:
  - Enter comments in the **Comments** section. Please note that you must click **Save Comment** to add your comments to the termination.
  - Click in the **Drag and Drop** field to attach termination documentation.
11. Click **Submit** to submit the termination for approval.

Requestors can check their worklist in BlueSky to confirm submission. They will not receive an email of termination submission.

The termination will not take effect until HR Central has approved the request. The requestor will be notified via email once the transaction has been completed.

If an employee's termination date changes prior to their departure, notification of a status change must be made to HR Central by contacting them at [hrhelp.depaul.edu](mailto:hrhelp.depaul.edu) or (312) 362-7505.

### **Exit Interviews**

DePaul University's exit interview program is administered by The Work Institute. Upon your employee's departure, they will receive an invitation from The Work Institute (via email and phone call) to conduct a confidential, open-ended, third-party phone interview. **Please advise your employee to make sure their contact information is up to date in BlueSky.**

### **After Submitting a Termination Request in BlueSky**

Managers will need to complete the following tasks before an employee's last day. It is recommended to start preparing as soon as the employee's last day has been confirmed and the termination request has been initiated in BlueSky.

- Provide a notification to remaining staff that the employee is leaving the university. Communicating early can avoid gossip or insecurity about the transition. Additionally, review how work may be redistributed temporarily.
- Reconcile any PTO recorded and approved in BlueSky against PTO used prior to termination date.
- Collect all university-issued property. In-person/hybrid/remote (local) employees should return all university-issued property to their manager. Remote (not local) employees should return all university-issued property to their manager via FedEx. Managers are responsible for arranging and charging a FedEx return to their department. *If an employee wishes to purchase or keep any equipment for any reason, [Procurement Services](#) must be notified.*
  - Keys for office, desk, cabinets, file room, etc.
  - Cellular phone, PDA (cancel service) and/or pager/two-way radio.
  - Laptop/tablet/accessories (open a ticket at [IS HelpDesk](#) to determine if the laptop should be salvaged or reimaged).
  - Building/DePaul identification card(s) - Forward DePaul ID to [Blue Demon Card Services](#). (Note: For retirees, a new retiree ID can be obtained from Blue Demon Card Services once their status has changed to retiree. Retiree ID cards can be mailed or the retiree can visit one of the offices

- in person.)
- Department materials, files, records and other proprietary items. (Note: Some materials/files may be covered by the [Records Retention Schedule](#) or should be transferred to [University Archives](#).)
- Ensure financial tasks are completed and financial responsibilities are transferred. For any assistance with financial-related questions, [contact Financial Affairs online](#).
  - Collect ProCard and contact [Procurement Services](#) to close the account; submit any outstanding receipts.
  - Ensure that all transaction approvals that the employee is responsible for have been completed in BlueSky.
  - For employees who are Cost Center Owners, ensure that a [delegation has been set up in BlueSky](#).
- Terminate access to DePaul resources and transfer data/resources.
  - Complete the [Employee Phone Request form](#) to make the appropriate changes to phone access.
  - Email [netadmin@depaul.edu](mailto:netadmin@depaul.edu) and request they transfer any departmental IT resources the employee may manage (e.g., departmental email accounts or lists, W: drive folders, meeting rooms, etc.) to another person in the department. NetAdmin can also set up an autoreply to alert internal and external customers that the employee has left the university and who should be contacted going forward. Employees should work with their manager and/or relevant members of their team(s) to move any DePaul-related content on their DePaul computer, U: drive and DePaul OneDrive to other locations (e.g., department/group W: drive folders, another user's OneDrive, a team SharePoint site, etc.).
  - Disable Administrator privileges from department social media sites and external systems.
  - *Note: Information Services provides an overview of the [removal of online access](#) for an employee leaving DePaul.*
- Resolve scheduled trainings, workshops, and travel issues/reimbursements.
- Schedule a time for pickup of personal items. A property removal form will be required for Loop Campus employees; contact Loop Public Safety at (312) 362-8400.
- Disable Administrator authorization for external vendors, consultants and service providers.

**For benefits-related questions, contact the Benefits Team [online](#) or by calling (312) 362-8232. For other questions related to leaving DePaul, contact Employee Relations [online](#) or by calling (312) 362-7182.**