

Purpose

The purpose of this checklist is to help ensure a smooth transition from employment for staff members voluntarily resigning from CMU. This checklist provides the information you need to complete your offboarding tasks (i.e., the tasks — required and recommended — associated with separating from employment).

Checklist

Resigning staff members are asked to complete the tasks listed below, as applicable and in a timely manner, to ensure a smooth transition, for both the university and the separating employee. If you have questions about any of the tasks below, please contact your supervisor or [HR generalist](#) for assistance.

*If retiring, follow this additional step

☐ **Three to six months prior to retiring:** Consult the [Retirement Guidelines and Process Steps Page](#) to obtain guidance on the pre-separation process steps you need to take prior to submitting your resignation notice.

Initiating the Resignation Process

☐ **Submit a letter of resignation:** Extend written notice to your supervisor declaring your intention to resign/retire. Your notice should include your resignation effective date (i.e., the date of your last day of work) and the reason for your resignation. Nonexempt staff members are asked to give no less than *two weeks'* notice, while exempt staff members are asked to give at least *four weeks'* notice.

NOTE: Notice can be in the form of a signed letter or an email. A [Letter of Resignation template \[docx\]](#) is available.

☐ **Enter your resignation into Workday via self-service:** Within 24 hours of notifying your supervisor of your intent to resign, use Workday's self-service function to submit your resignation. Be sure to attach your letter of resignation to the transaction to ensure accurate and timely processing. See the [Submit Resignation System Guide \[pdf\]](#) for detailed instructions.

Before your last day of work

☐ **Participate in the exit interview process** (Recommended): The exit interview process consists of an online exit survey and an in-person exit interview, which together are designed to obtain feedback on your employment experience and address questions or concerns you may have regarding your separation from employment with CMU. You will receive an email with a link to the exit survey and instructions for scheduling an exit interview. CMU values your feedback and the positive change it can bring to the university, and we encourage you to participate. Feedback that is collected will be reported in total by a member of the Office of Human Resources.

☐ **Work with your supervisor to ensure the transition of your duties:** Unless you are informed otherwise by your supervisor, it is expected that you will participate in the transition in the following ways:

- Work to ensure the successful transfer of operational knowledge/responsibility, systems access and ownership (if applicable) and intellectual property of the university.
- Re-assign shared boxes and/or re-assign ownership of shared boxes. Access to Box ends thirty days following your last day of work, unless you have a subsequent active appointment with CMU (e.g., emeritus status, adjunct/affiliate).

- Report to work and be actively involved with transition planning and implementation, which includes honoring any existing commitments and effectively transferring the knowledge and responsibility associated with your position.
- Assist in training a replacement, if a replacement is hired before your final day.
- Work until your last day.

☐ **Move your cloud storage files.** Use the following guidance to **begin transferring your data to a shared location.**

- Box – Move files or folders to a [Box Org folder](#).
- Google Workspace – Move files or folders to a [Google Shared Drive](#).
- M365 – Move files or folders to a [Teams Drive](#).

This will ensure that others retain access even after your account has been deleted.

☐ **Download and move your Zoom Recordings.** Visit [My Recordings](#) to [download any recorded Zoom meetings](#) you saved to the Zoom cloud. Then, upload the files to a location identified by your manager.

☐ **Download or remove any personal files from your laptop computer.**

☐ **Update your contact information:** Make sure your current contact information (especially home address and personal email address) is up to date in Workday. To make changes, please follow the instructions below:

- Log in to Workday and click on the Personal Information worklet.
- In the Change column, click on Contact Information.
- Click on Edit in the upper left corner of the My Contact Information screen.
- Click on the edit icon (pencil) in the field you wish to update.
- Enter correct home contact information.
- Click "Submit" and then "Done" when finished.

☐ **Confirm PTO balance is up-to-date and accurate:** Confirm all paid time off (PTO) requests have been submitted and approved via Workday (exempt employees at the SEI, confirm that the remaining PTO balance is correct, and all utilized PTO has been deducted per internal SEI procedures).

Please note:

- You cannot use PTO on your last day of work, per the Staff Handbook.
- We recommend that you use your floating holidays before using PTO, as unused floating holidays are not paid out upon separation.
- Please refer to the [Paid Time off \(PTO\)](#) page for more information on the university's PTO Policy.

☐ **(If you are a supervisor or a delegate) Take the following additional steps:**

- Reassign all supervisory responsibilities (operationally and electronically). This includes reassigning all roles you have in university systems.
- Provide any personnel or performance management documentation for your direct reports including files, reviews, etc. to your supervisor.
- Approve any outstanding PTO requests.
- Approve time entries.
- Provide your supervisor a list of any outstanding projects, key contacts, files and any other pertinent information.
- Assist in any other activities related to transitioning your tasks to the appropriate employee.

☐ **Cancel parking lease:** To cancel your parking lease and return your parking hang tag/gate pass, please contact the Parking and Transportation Services office:

- parking@andrew.cmu.edu
- 412-268-2052
- East Campus Garage, first floor, Monday-Friday, 8 a.m. – 4:30 p.m.
- Upon separation, your payroll deductions for parking will be removed and you will no longer have access to parking.

☐ **Benefits questions:**

- Consider the implications of your resignation on your benefits.
- Contact [HR Services](#) with any benefits-related questions.

☐ **Intellectual property:** Review and discuss intellectual property with your supervisor; address any concerns/issues prior to your last day.

☐ **Email access:** CMU email access typically ends 30 days after your last day of work, unless you have a subsequent active appointment (e.g., transfer to another CMU position) or your supervisor requests that it end earlier. If you do not have a subsequent active appointment, you will need to manage retrieval of personal information (including contacts and emails) prior to your last day of work.

- You should set a [vacation reply](#) that directs senders to a [shared mailbox](#) for business correspondence to limit continuity concerns. Vacation reply messages can display for up to 30 days and can be replaced by a “bounce” message at your supervisor’s discretion.
- Alumni who wish to have an alumni account, should contact the Alumni Relations Office at alumni-house@andrew.cmu.edu or 412-268-8089 for assistance.
- Once account access expires, you will no longer have access to password reset or other operations related to your Andrew email. Make certain to change all personal accounts that use your Andrew email as a recovery email.

☐ **Cancel university-funded activities, services and fees:** Cancel any travel, subscriptions, memberships, RSVP’s, enrollments, etc., paid for by CMU. If you are unsure about cancelling something, please ask your supervisor for guidance.

☐ **Submit outstanding travel expenses:** Submit any non-reimbursed travel expenses for processing.

☐ **Settle CMU accounts:** Settle any cash advances, petty cash accounts, pending reimbursements, parking or library fines, and any other unsettled accounts.

☐ **Post-separation access to Workday:** You will not be able to access Workday after your last day of work. To gain temporary, limited access to Workday (to view pay stubs and tax forms) after separation, send an email to hr-help@andrew.cmu.edu.

- In the subject line include: “LAST NAME, FIRST NAME – EXITING EMPLOYEE WORKDAY ACCESS REQUEST”
- In the body of the email include:
 - Your personal email address
 - Last day worked or anticipated last day of work

- Request to allow you access to Workday after you depart CMU in order to view your W-2's and any prior paystubs.

☐ (Transitioning to student status) Request new student ID and account access:

- You will need to request a new student ID from the HUB Services. Contact 412-268-8186 or thehub@andrew.cmu.edu for assistance.
- Please work with the [HR generalist](#) for your department to alert them to your student status and to request that your Andrew ID account not be disabled.

Final Day of Work at the University

☐ (Hourly employees only) Confirm time entries: To ensure accurate and timely processing of your final paycheck, please ensure that you have submitted all time worked in Workday by the end of business on your last day of work.

☐ Personal items: Remove all personal items from your workspace (including communal areas, if applicable) as well as from university/department owned computers and laptops. Be sure to leave your workspace clean and tidy and dispose of garbage properly.

☐ Return university and department property: Work with your supervisor to determine the preferred method to return all items that belong to the university and department on or before your last day. Items that typically need to be returned include:

- Laptops
- iPads/tablets
- Purchasing cards
 - For how to close a card, please visit:
<https://www.cmu.edu/finance/procurementservices/faq/card-program.html>
 - **Note:** All outstanding charges must be verified before a card can be closed.
- ID's
- Extra building and/or parking access swipe cards
- Keys – filing cabinet keys, door keys, electronic keys
- Physical authentication tokens
- University data
 - Return paper documents containing university data to your department.
 - Migrate and delete all electronic files containing university data from your personal computers, mobile devices, and cloud storage media.
 - Remove your CMU email account from your personal devices, including computers, mobile phones and tablets

After Separating from the University

☐ Maintain confidentiality: After resignation, maintain confidentiality of all confidential information related to your position.

☐ Retiree ID card: If you retired and would like to obtain a Retiree ID Card, visit [ID Card Services](#). In general the process entails:

- **Retirees:** Emeriti faculty and retired faculty or staff members are eligible for an ID card that must be renewed each year. At the time of the request, you may be asked to furnish written confirmation of your retiree status ID Card Services.

- Verification of your status may be requested from HR Services by phone at 412-268-4600 and email at hr-help@andrew.cmu.edu.
- Once you receive verification via email, you may forward this information to idplus@andrew.cmu.edu to confirm your retiree status.
- Spouses, Domestic Partners, and Dependent Children of Retirees: Benefits-eligible faculty and staff, including emeriti faculty and retiree staff, may obtain Sponsored ID Cards for spouses, domestic partners or dependent children (ages 12-21) who meet certain eligibility criteria. More information related to obtaining this type of Sponsored ID Cards can be found on the [Sponsored ID Cards](#) page.

☐ **Keep your contact information up to date:** In the event that you move and still need a W-2, HR Services can update your address for W-2 purposes.

- Send an email to hr-help@andrew.cmu.edu.
 - In the subject line include: "LAST NAME, FIRST NAME – CONTACT INFORMATION CHANGE FOR SEPARATED EMPLOYEE"
 - In the body of the email include:
 - Your personal email address
 - Last day worked
 - New address
 - Request to update your address for W-2 purposes

Additional Resources

Health Insurance

If health insurance is provided to you through CMU, the employee-paid portion of a full month of health insurance coverage will be withheld from your pay. Active coverage ends on the last day of the month in which eligibility ends. (Eligibility ends on the last day of employment.)

You will have the option of electing COBRA. COBRA is effective the first of the month following your separation date, so there is no gap in coverage. For more information on COBRA, please visit:

<https://www.cmu.edu/hr/work-life/life-experiences/leaving.html>

Retirement Benefits

CMU's contributions to TIAA are typically vested after three years of employment. Vested employees are asked to contact TIAA directly for information related to employer contributions and retirement funds: 1-800-732-8353. Additional information on rolling over assets can be found at:

<https://www.cmu.edu/hr/benefits/retirement-savings/investment-options.html>

Credit Union

To make arrangements for the settlement of remaining account/loan balances, contact the CMU Credit Union at 412-268-2905.

Employee Assistance Program (EAP): CMU's Employee Assistance Program (EAP), provided by Guidance Resources, continues to be a great resource following your resignation. The EAP is available to employees for 30 days after your separation date. For more information about EAP, visit <https://www.cmu.edu/hr/work-life/support/eap/index.html> or call 844-744-1370.

Employment Verification: For employment and income verification, third parties and former employees should direct all inquiries to The Work Number®. The Work Number® is the name of the service that

provides Carnegie Mellon University's employment and income verifications.

- Website: www.theworknumber.com
- Telephone: 877-442-9963 M-F 8 a.m. to 8 p.m. (ET)
- Email: verifiersolutionssupport@equifax.com
- Employer Code: 18385

In parting, thank you for your services to Carnegie Mellon University. We wish you the best in your future endeavors. If, at any time during your offboarding, you have questions or concerns not adequately addressed in this checklist, please contact your [HR generalist](#).