

Faculty Exit and Offboarding Checklist

College of Health and Human Development

- Verbally discuss resignation or retirement plans with your department head. Faculty on a 36-week appointment should review the [Academic Year Start/End and Key 36-Week Contract Dates](#) guideline. Faculty on a 36-week appointment must separate from the University on June 30 or December 31 in order to ensure a balance between pay and effort.
- Provide a written notice of resignation to the Department Head and Human Resources. A resignation template can be found [here](#).
- Review the following information and associated checklists:
 - o [HRG20 Separation and Transfer Protocol](#)
 - o [Checklist for Departing Researchers: Offboarding Departing Faculty](#) is important that you reach out to [Niki Page](#), Director of Grants and Contracts, to discuss grant transfer and other research related items as you prepare for your departure.
- Review [Information to Know When Leaving University Employment](#). This resource provides information on the end of benefits coverage. Benefits coverage will conclude at the end of the pay period during which the resignation is effective. Once your separation from the University is processed, COBRA information will come to you directly from our vendor, Lifetime Benefit Solutions. COBRA information is also available at: <https://hr.psu.edu/benefits/insurance/cobra>
- Review the University [email policy](#). The policy provides information on how long you will have access to your account as well as email forwarding.
- Contact the ISS Help Desk at iss-helpdesk@psu.edu to coordinate the return of any HHD/PSU owned IT equipment. ISS will also assist with wiping hard drives or the transfer of files as appropriate. If you wish to purchase IT equipment that is no longer under warranty, also contact the [Help Desk](#) to begin this process. This process requires that the equipment be wiped to factory defaults before being purchased. Installed software is the property of PSU and is non-transferrable, therefore it won't be included in the purchase. Equipment not authorized for purchase must be returned on or prior to your departure date.
- Please notify any part-time employee(s) who will terminate, or be transferred to another supervisor, at the time of your departure of your plans and the impact to their employment. Please notify your unit administrative support coordinator of the associated employment actions so they can request the appropriate transfer or separation action in Workday.
- Full-time employees who currently report to you will no longer be able to report to you as a separated employee. Please consult with [Erica Lutz](#), HR Consultant, on any full-time postdoctoral or academic employees or [Sara Lobb](#), HR Consultant, on any full-time staff employees, who report to you who's employment will be affected by your departure. Erica and/or Sara will assist with appropriate communications, timing of notice, and available resources for the displaced or transferring employee.

- Discuss with your department head plans for supervision of your current graduate assistants.

- We encourage you to participate in an exit survey and/or interview. Please be on the lookout for an email from Dean Newschaffer (tenured/tenure-track faculty) or Erica Lutz, HR Consultant (non-tenure track faculty) with more information on this and to schedule.

IMPORTANT ITEMS TO NOTE:

- If your new employer requires a verification of benefit coverage termination from the Penn State Benefits team, this can be requested once your separation has been processed Workday. Please reach out to HR Services at (814) 865-1473 to request the needed verification document.
- If you have a change of address after your separation, please contact HR Services (814-865-1473) to update your address on file. Correct home addresses will be necessary in order to obtain your year-end tax documents.

POLICIES AND GUIDELINES TO REVIEW AS APPLICABLE:

- AC25 [Emeritus Status](#): This policy provides the criteria for eligibility and privileges of Emeritus Status. Please review the [HHD-specific guideline for requesting emeritus status](#).
- [Academic Affiliate](#) Appointment Process: Affiliate appointments apply to those who will continue to be engaged within the department in a manner which contributes to the mission of teaching, research, and/or service. To obtain approval for an academic affiliate appointment please refer to HHD's [Guidelines for Unpaid, Joint, and Adjunct Appointments](#).
- HR45 Post-Retirement Appointment [Policy](#): This policy establishes University procedures to be followed in the event a post-retirement appointment of an annuitant is necessary. Such appointments are only considered in emergency situations.
- RAG03 Retired Faculty Participation [Guideline](#): This guideline provides the procedure for retired faculty who will continue to contribute as investigators on sponsored projects.