



# EXIT PROCEDURES FOR ON-CAMPUS, HYBRID, OR REMOTE STAFF

This guide is designed to assist colleges/units in the voluntary separation process for on-campus, hybrid, or remote employees. Use the template to create your checklist by adding items appropriate for your college/unit. While some of the items listed will not be applicable to all situations, the checklist will be helpful in suggesting areas to consider when any employee voluntarily leaves the university. The guide also includes a list of recommended questions for the exit interview. Following this guide will assist with setting a respectful tone during the separation process.

## SUPPORTING A ON-CAMPUS, HYBRID, OR REMOTE EMPLOYEE EXIT PROCESS AT-A-GLANCE

Completed by:	Tasks:	Summary of Activities
Supervisor/Dept. Manager or designee	<input type="checkbox"/> Exit Checklist	<b>(Mandatory)</b> List of tasks to complete when exiting an employee.
HR Representative	<input type="checkbox"/> Workday Transactions <input type="checkbox"/> Exit Interview	<b>(Mandatory)</b> University Workday transaction indicating voluntary separation and actions to be taken.  <b>(Voluntary)</b> Interview of exiting employee to gain insight beyond the university survey.
Exiting Employee	<input type="checkbox"/> Exit Checklist <input type="checkbox"/> Exit Survey <input type="checkbox"/> Exit Interview	<b>(Mandatory)</b> Return of equipment, resources to the university  <b>(Voluntary)</b> University on-line survey.  <b>(Voluntary)</b> Exit interview with local or central HR office.

### CORNELL UNIVERSITY

### EXIT CHECKLIST

Use this as a template to customize a checklist that is appropriate for your college/unit.

Employee: \_\_\_\_\_

Date: \_\_\_\_\_

Employee Net ID: \_\_\_\_\_

Department: \_\_\_\_\_

Supervisor: \_\_\_\_\_

### SUPERVISOR RESPONSIBILITIES

*If you have any questions about the following tasks, please contact your local HR representative.*

**At least 2 weeks BEFORE the employee's last day:**

- Request a letter of resignation if separating voluntarily. It should indicate the last day of active work and specify the last day on the payroll. Forward letter to HR Rep. immediately.
- Provide the employee, in writing, details of any special circumstances regarding continued access to departmental or university resources (e.g.: space, Net ID, software, etc.)
- Schedule a virtual or in-person meeting with the exiting employee to complete the exit checklist and arrange for return of university property (see checklist below.)

- Advise the exiting employee to contact the various offices (e.g. Benefits Office, Transportation, etc.) to prepare for their exit.
- Encourage the exiting employee to complete the University Exit Survey.
- Make sure all time off requests are submitted and approved for exempt employees before the payroll cut-off date in the final pay period.
- Authorize reimbursement for any approved out-of-pocket expenses to the employee.
- Direct the employee to their Workday profile to update their post-Cornell contact information.
- Share important information about Net IDs:
  - Net IDs are de-provisioned approximately 30-60 days after separation (unless the employee is an alumnus or retiree of Cornell) and the employee will be automatically removed from university directories.
  - If there is a security issue and certain access must be cancelled immediately, the supervisor should communicate this to their HR Rep. The College/Unit HR office can request more timely cancellation of various access via the Net ID under unusual circumstances.
  - Workday allows the former employee access to their personal data only (e.g. contact information, tax documents [W-2s], and paycheck data) for 20 months from their last day of work.

**Obtain the following from all employee:**

***NOTE: Remote employees may need to ship these items to a designated Cornell location. Provide appropriate pre-paid, pre-addressed shipping materials. If the employee is going to drop them off, a drop-off appointment for items will need to be arranged. All campus visitors are expected to follow current safety protocols.***

- Department Equipment (*department retains; ex: laptop, docking stations, batteries, monitors, keyboards, cell phone, PDA, research equipment, etc.*)
- Keys and/or ID Card Access (*department retains*)
  - Building
  - Lab
  - Office
  - Departmental Parking Permit/Tag
  - Other \_\_\_\_\_
- Reimbursed yet not fully used prepaid calling cards for international business calls.
- University credit cards (*Follow your college/unit protocol. Notify the [Office of Credit Card Programs](#)*)
- Procurement cards (*Follow your college/unit protocol.*)
- Travel Advance Accounts - Notify the [Division of Financial Affairs - Travel](#) to close account and clear individual's balance before departure.
- Reference manuals, relevant professional books, or publications (*department retains*).
- Any electronic or hard copy work located at home or elsewhere.
- Uniforms (*does not include departmental gifts*).
- Library materials (*return to appropriate library utilizing no contact drop off option*).

**As soon as possible on or after the employee's last day, as appropriate:**

- Request the university ID card from the employee. Return it to the Registrar at B07 Day Hall with a note that this is the ID of a former employee. The Registrar's office will properly dispose of the ID card.

- Cancel call-forwarding and telephone authorization codes through your telecom coordinator. Ask them to submit a [Request for Service](#) form to the [IT Service Desk](#).
- Cancel signature authorization (*send memo directly to the Division of Financial Affairs*).
- Cancel subscriptions (*at departmental discretion*).
- Cancel departmental computer passwords and computer accounts (*at departmental discretion*).
- Remove employee from local telephone directories, listings on the department website(s), mailbox, and nametags on hoteling spaces, desks, or doors.
- Remove access to University Systems (*HR, Payroll, Student Employment, PeopleSoft, Cornell BOX, etc.*).
- Change computer passwords.
- Cancel remote access to the computer or network.
- Inform individuals with relevant responsibilities (*IT, facilities, research center staff, etc.*) that the employee is leaving.
- Notify stakeholders of the employee's exit and provide an alternate contact.
- Forward the completed Exit Checklist to HR Representative to be retained in the employee's HR file.
- Change safe or door combinations, building or room access codes, and/or community type passwords (*at departmental discretion*).

## ON-CAMPUS, HYBRID, OR REMOTE EMPLOYEE RESPONSIBILITIES

- Provide supervisor with resignation letter. It should indicate the last day of active work and specify the last day on the payroll.
- Make sure that all time off requests are submitted for exempt employees before the payroll cut-off date in the final pay period.
- Submit any approved out-of-pocket expenses for reimbursement.
- Set up an email "Time Away Responder" on last day.
 

**Example:** *This is a message from (name). I am no longer with (department) at Cornell University. Please direct your message to (contact name) at (netid)@cornell.edu or phone (phone number).*
- Set up the appropriate Audix/RingCentral message and reset the password to the phone number.
- Settle reimbursements for any business calls made on personal cell phone or via prepaid cards for international calls.
- Contact [HR Services & Transitions Center](#) at 255-3936 regarding continuation/conversion of benefits as appropriate.
- If applicable, contact [Transportation and Campus Services](#) at 255-7275 to arrange return of personal parking permit and possible refund, if applicable. There are no refunds on pre-paid permits after March 31.
- Add forwarding address in Workday to receive your W-2 forms and final paycheck. (Contact [payroll@cornell.edu](mailto:payroll@cornell.edu) with any questions after your exit.)
- Contact Cornell Retail Services at [cbsbo@cornell.edu](mailto:cbsbo@cornell.edu) to arrange payment completion on contract of purchased electronics via the payroll deduction plan. Unpaid contracts will result in collection efforts and may potentially impact the exiting employee's credit score.
- Transfer ownership of listservs, Cornell BOX, Qualtrics surveys, etc.,. Review steps to take with specific [IT Services](#) when you exit the university.
- Employees on a visa should contact the International Students and Scholars Office to make sure the HR representative has all pertinent information.

- Check the [Awardco Employee Recognition portal](#) to redeem any points you may have accumulated during their employment. Points expire once you leave the university.
- Arrange for the safe return of all department equipment (*laptop, docking station, batteries, cases, monitors, keyboards, cell phone, PDA, desktop computer, desk phone, research equipment, departmental parking permits, etc.,...*)

***NOTE: Remote employees may need to ship these items to a designated Cornell location. Contact your manager for more information. If the employee is going to drop them off, a drop-off appointment for tangible items will need to be arranged. All campus visitors are expected to follow current safety protocols.***

## **HR REPRESENTATIVE RESPONSIBILITIES**

- Process the Workday transaction terminating the employee’s appointment. Review the [Terminations, Permanent Layoffs, and Retirements Job Aid](#) for more details.
- While in Workday, input the reason for the voluntary separation. The employee will automatically receive the university exit survey when identified as a voluntary separation for one of the following subcategories: (1) Family reasons; (2) No Reason Given; (3) Other Position; (4) Relocation; (5) Return to School.
- For exiting employees who are fully remote and out-of-state, contact the [Remote Talent Consultant](#) to review the laws of the employee’s home state. (Final paycheck, final pay date, PTO payout, and separation information requirements will differ).
- Confirm or request a forwarding address for W-2 forms and final paycheck. The employee may change their address via Workday up to the date of their departure.
- If there is a security issue, contact CIT to cancel the Net ID immediately.
- If the employee is on a visa and leaving before their expected end date, notify ISSO so their records can be amended.
- Discuss and encourage staff leaving the university to complete Exit Survey.
- Offer a virtual or safe in-person exit interview to be completed by local HR Representative or central HR Representative. Appointments for a central exit interview with Cassie Pierre Joseph can be made at the following link - [Schedule an Exit Interview](#) or by email at [exit\\_interview@cornell.edu](mailto:exit_interview@cornell.edu).

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Employee Signature

Date

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Exit checklist completed with

Date

## CORNELL UNIVERSITY EXIT SURVEY VIA QUALTRICS

The Cornell Staff Exit Survey is sent via a Workday notification to all staff who exit the university voluntarily for reasons other than retirement (a separate survey is sent to retirees). The Staff Exit Survey is designed to help the university understand trends in reasons staff leave Cornell. This information will be used to make changes to overall policies and practices to reduce regrettable staff turnover. The survey is completely confidential – only HR Analytics can access individual-level information; colleges and units will receive their aggregate results. This guarantee of confidentiality provides a better means of obtaining honest feedback from exiting employees.

We realize some employees exit Cornell for reasons beyond our control – such as leaving the area when a spouse/partner obtains employment elsewhere. The Staff Exit Survey is designed to determine the extent to which employees leave because they are dissatisfied with various aspects of employment at Cornell; unhappy with various aspects of the Ithaca area; and/or have received more attractive employment offers elsewhere. In addition to areas of potential concern, the Staff Exit Survey is designed to measure exiting employees' experience with their supervisor and their overall sense of belonging at Cornell. Because we recognize today's employees tend to change employment more frequently, the survey also asks whether an employee stayed at Cornell for a longer or shorter duration than they originally anticipated.

Many employees will not complete multiple surveys. To maximize the impact of the Staff Exit Survey and support Cornell's efforts to understand and take actions to reduce regrettable turnover, we encourage HR representatives to conduct exit interviews and focus on obtaining college/unit-specific information, **rather than conducting their own exit surveys.**

For more information about the Cornell Staff Exit Survey, please contact Ruth Katz, [rk563@cornell.edu](mailto:rk563@cornell.edu), HR Analytics.

# CORNELL UNIVERSITY COLLEGE/UNIT EXIT INTERVIEW

We recommend that some or all of the following questions be asked during the exit interview. Please let the employee know that they will be receiving (or may have already received) a short Qualtrics survey that will ask them about their *overall experience* at Cornell that address more universal topics. **Let the employee know that the purpose of your in person or virtual interview will be to learn more about their specific experience in this college/unit.** Feel free to ask follow up questions if there are specific details related to the employee's experience at the college/unit level you would like to understand better.

Employee: \_\_\_\_\_

Date: \_\_\_\_\_

Employee Net ID: \_\_\_\_\_

Department: \_\_\_\_\_

Supervisor: \_\_\_\_\_

## INTRODUCTION

- Thank you for taking the time to meet with me today.
- Cornell University is committed to excellence, inclusion, and to providing a positive work environment for our employees.
- The data collected from this virtual interview will be one measure used in assessing the quality of the work environment within our college/unit.
  - Your honest and candid responses are important to us and will be kept in the \_\_\_\_\_ Human Resource Center.
  - When appropriate, information in aggregated form may be shared with managers or supervisors.
  - However, if you disclose something that may be harmful to you or others; Cornell may take action to stop, remedy and prevent further conduct of this type.
  - I will take notes to help keep record of our conversation today.
  - Do you have any questions before we begin?

## EXIT INTERVIEW QUESTIONS FROM BEST PRACTICES

1. What made you decide to leave your current position?
2. Is there anything that could have been done to encourage you to stay?
3. What was the most satisfying (and/or what did you like most) about your job?
4. What was least satisfying (and/or what did you like least) about your job?
5. (IF APPLICABLE) What was least satisfying (and/or what did you like least) about working remotely?

6. (IF APPLICABLE) What was the most satisfying (and/or what did you like most) about working remotely?
7. What did your current supervisor do well, and what could they have done differently?
8. Was your supervisor clear on defining goals and setting expectations? (If no, please elaborate.)
9. How do you feel about the level of training you received, and what opportunities did you have to develop your skills?
10. Tell me about your specific workgroup environment – for example, do people typically work well together and do they typically respect one another?
11. What – if any – changes would you make to your workgroup/functional area?
12. (IF APPLICABLE) What – if any – changes would you make to your remote work arrangement?
13. What advice would you offer someone coming into the workgroup you are leaving?
14. What do you think is your legacy at Cornell? (*Ask this question only if you feel it is appropriate to do so in the given situation; make sure to follow up with thanks for what they have accomplished/achieved.*)
15. Is there anything else you would like to add?

## **EXIT CHECKLIST/INTERVIEW STORAGE**

The department should hold the completed checklist and exit interview notes (if applicable) for at least one year after the employee's voluntary exit. Several colleges and units have developed an exit checklist/interview file folder in the Cornell BOX that only approved HR team members can access.

## **MESSAGE FROM WORKFORCE POLICY AND LABOR RELATIONS**

Cornell University is committed to providing a safe, inclusive, and respectful learning, living, and working environment for its students, faculty, and staff members. To this end, through [Policy 6.4](#), the university provides means to address bias, discrimination, harassment, and sexual and related misconduct. If an individual reports conduct that may be prohibited by Policy 6.4, either submit a bias incident report summarizing the report [Link to [Bias Report System](#)] or contact WPLR or the Title IX office with the information. You may also refer the individual directly to those offices or the bias incident reporting tool.

## **HR CONTACTS FOR COLLEGES AND UNITS**

If you have any questions, please contact your local HR representative. The contact for your college/unit can be found in the following directory - <https://hr.cornell.edu/about-hr/contacts-college-unit>.