

YMA Offboarding Guide: Perm Staff and Temp/Casuals

ROLE	STEPS TO BE TAKEN <u>PRIOR</u> TO EMPLOYEE'S LAST DAY
Manager	☐ Manager must acknowledge employee's resignation or retirement in writing (via email) ☐ <i>Direct employee to Employee Services at employee.services@yale.edu or 203-432-5552 for additional information regarding benefits, etc.</i> ☐ Notify HR Business Partner and Staff Operations Important: Managers must notify the HR Business Partner of all terminations as soon as they become aware. HR Business Partner will initiate the termination process in Workday, which will trigger various exiting actions. For voluntary terminations, please submit a copy of the resignation or retirement notice. For involuntary terminations, please coordinate with HR Business Partner on handling actions on employee's last day. - For terminations of <u>temporary workers</u>, Manager must notify Staff Operations (jaclyn.angelino@yale.edu/maryam.rahmani@yale.edu) as soon as they become aware. ☐ If the position will be backfilled (permanently or temporarily), review and complete the steps outlined in the YMA Job Requisition Request Process Guide & Forms. ☐ Discuss "Knowledge Transfer" steps with Employee to take care of before their departure. Employee should provide Manager with the following: - List of important contacts - Useful resources - Location of records and files - Status report of ongoing projects - List of outstanding tasks - Process guides for specific tasks handled by the employee
Manager	☐ Send email to ITS Help Desk helpdesk@yale.edu (with employee on copy and with Subject line: "This is for DSPs at 2SP") notifying them of the upcoming termination, <u>and to arrange for drop-off at 2 Science Park of computer equipment and/or cell phone/tablet equipment, that must be returned upon employee's departure.</u> - Manager should either meet with employee prior to departure, or send them an email, outlining Section E (below) of Yale Policy 5002. PR.01 Return of University Property Section E. All equipment and supplies purchased with University funds are owned by the University. Staff members must return all University-supplied equipment and other University property, including, but not limited to, intellectual property or other confidential information, upon the conclusion of their Remote Work arrangement or employment. <u>This includes:</u> - Computing device (laptop or desktop) - Two external monitors - One keyboard

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	▪ One mouse ▪ One headset ▪ One universal docking station ▪ One video camera ▪ Computer cables, power cords, etc. ▪ Cell phone and charger ☐ Using Workday Time & Absence, Timecard Approver (manager) should: • For C&T staff, sign off on final timecard prior to payroll run date, to ensure that full amount is included in final paycheck. • For M&P staff, review timecard/time-off requests for accuracy to ensure correct PTO payout upon termination. No final timecard approval needed.
ROLE	STEPS TO BE TAKEN <u>ON</u> EMPLOYEE'S LAST DAY
Manager	☐ Collect relevant University items from employee: ☐ Uniform / Name Badge / Tools ☐ Keys ☐ Loaner Office Chair ☐ Parking Permit and Passes • Employee should contact Parking office to cancel: ▪ Med School - 203-785-6456 ▪ Central campus - 203-432-9790 ▪ Email - parking@yale.edu ☐ Yale ID Card (<i>NOTE: Retirees and staff entering the IEP retain their ID card</i>) • ID cards are the property of Yale University and must be returned to the ID Center upon termination. • Manager should promptly contact Access Control (432.open@yale.edu) to request deactivation of the building access associated with ID card. The card should then be returned to the Central or Medical School ID Center for processing and disposal. ▪ NOTE: For Retirees, managers should email Access Control (432.open@yale.edu) to inform them of retiring staff member – they will remove their building access to their primary work location but retain general access to Yale locations • Options for staff: a) Drop off ID card at the ID center b) Return to manager who can send the ID card via campus mail to the ID center c) Put the ID card in an envelope and place in HR's mailbox at 2SP on the third floor in mail/copy room 316 ☐ Yale Purchasing Card (<i>if applicable</i>) • Collect & Cancel Purchasing Card – notify YM Finance 1. Manager to complete P-Card cancellation form and submit to YM Finance (nicholas.nemergut@yale.edu) 2. Manager to collect p-card from cardholders and shred. Staff can also leave their p-card in an envelope in HR's mailbox at 2SP on the third floor in mail/copy room 316 ☐ Request termination to Desk phone and Cell phone (<i>if applicable</i>): • Reset desk line to remove employee's name • Reset voicemail • Terminate cell plan, change owner, or transfer to a personal account
Manager	

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Manager - OR - Manager's Designated Senior Administrative Assistant	☐ For Voluntary terminations, request access termination for applicable systems through the IT Service Portal , for example: ☐ Email, Calendaring, and YaleConnect ☐ Express Shipping Website Access (E-Ship) and SciQuest Legacy ☐ For Involuntary terminations, request access termination by calling the IT Help Desk directly at (203) 432-9000 and include details (employee name, termination date) for: ☐ Email and Calendaring ☐ Shared Drives ☐ <u>Miscellaneous/Additional tasks:</u> ☐ Remove shared drives / meeting & conference room booking access (<i>email helpdesk@yale.edu</i>) ☐ Terminate other applicable systems access: • To remove Epic access, managers must send a completed Request Form (select “delete access” on page 2 – Section V) to helpdesk@YNHH.org. ☐ Update any departmental directories not automatically updated by Workday
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Scope

This document is applicable to all Managers of Staff reporting to Yale Medicine Administration (YMA)

Contact Information

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Version History

- 02/19/2025 – No changes to the content of this document.
- 02/12/2026 – Removed inactive email address for building access.
- 06/1/2026 – Added P-Card Cancellation Form link
- 07/09/2026 – Updates to broken links and Finance contact email

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