

BOKU University

Offboarding Checklist

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The importance of the separation process

Professional 'offboarding' is an important and unfortunately often neglected management task in everyday work. Depending on the reason for leaving and the length of service, the emotional state of employees in the exit phase can be characterized by melancholy or uncertainty. This may make accompaniment in the exit phase a task that requires tact.

Universities, in particular, employ a large number of people on fixed-term contracts, such as research project staff, doctoral candidates, and teaching staff. The concluded employment relationship ends automatically. This does not necessarily make a separation process easier. Some colleagues would have liked to continue working at the university.

But the transition to retirement and thus the beginning of a new phase of life can also be emotionally stressful. An early termination of the cooperation by the employer or employee is

usually unpleasant for one side or the other anyway due to the occasion. By mutual agreement, the employment relationship may be terminated by mutual consent¹.

Whatever the reason for leaving, offboarding is an indispensable process that affects all employees at some point. The more prudent the exit phase is, the better the farewell can be designed and 'digested' by the departing person and in the organization. It is also important to think about remaining team colleagues, who sometimes must take on work.

In any case, it is in everyone's best interest to ensure a fair farewell on equal terms. Especially in the academic field, opportunities for fruitful collaboration frequently arise within professional (interuniversity and intersectoral) networks. It can therefore be quite beneficial to leave a positive impression and maintain occasional contact. A professional farewell calls for acknowledging achievements, valuing collegial efforts, and honoring the time spent at the institution.

What is professional 'offboarding' supposed to do?

- Clarity: information as early as possible regarding the impending termination of employment² and a schedule for the handover
- Knowledge Management: careful handover of ongoing tasks, projects, and relevant knowledge
- Order: regulated return of all equipment and keys provided as well as timely reporting of billing-relevant data
- Socio-emotional support: appreciation of work performance, joint look into the future and appropriate farewell

Systematic offboarding is an important task

Managerial responsibility for personnel also goes hand in hand with the obligation to ensure a professional "offboarding" process for employees. It is not only the manager who is called

¹ You can find a request form for a consensual termination on the [Homepage of the HR Management](#) (after logging in).

² e.g., if a contract extension is not possible or retirement is imminent

upon, but also the person leaving the company and colleagues in the direct working environment who must act responsibly in order to proceed in a targeted manner.

In one's own sphere of influence, it is important to consider measures that allow further orderly service operations and a respectful farewell to each other. This includes a final discussion between manager and employee (exit interview) as well as tidying up the work documents and a considerate transfer of knowledge and tasks (obligations to provide and receive information).

It can therefore sometimes be helpful to consider together to determine who can take on which tasks or responsibilities. A [handover plan](#) can be useful in this regard.

In practice, the following measures are recommended:

- Planning for the time afterwards and preparation of a handover plan
- Exit interview in the last working weeks or days
- Contact person for return of work equipment and completion
- Personal farewell

Planning for the time after and handover plan

Whether planning for the period afterward or a detailed handover plan is necessary depends, of course, heavily on the position and function. For project staff whose employment contracts end at the conclusion of a research project, the situation is certainly quite different from that of key positions involving central or strategic tasks.

If a replacement is needed, a request must be submitted as early as possible through the head of the organizational unit and HR Management, and the standard [procedures](#) for advertising the open position must be initiated promptly. It is advisable to review the job specifications and requirement profile again before each new job posting. Has the field of tasks evolved? Are the same skills still required? There may be a gap in coverage during the transition period. How can the team cover the most urgent tasks?

In principle, a proper handover is part of an employee's duty of loyalty. Not only must (partial) results of projects, tasks, and competences be handed over, but also relevant work documents and data stored on the server or in folders. Make sure that the documents are handed over in an orderly manner and in a way that is comprehensible to other people. For projects, interim

invoices and all original invoices are particularly important for the later final invoice. For lecturers, there may be files in BOKUlearn (Moodle) that you would like to share.

For effective internal knowledge management, it is recommended to systematically list tasks and competences for the handover. A [handover plan](#) template can be found in the appendix. Which tasks and projects were last worked on and what is the current status? What knowledge and skills were needed for this? Where can relevant information be found? Who can take on which tasks and projects, and what might the timeline look like for the handover and transfer of knowledge?

Be careful not to overwhelm anyone with the handover. Even experienced colleagues first need instruction and support when taking on new tasks. Some things only become fully understandable once they are put into practice.

Exit Interview

The direct supervisor should not only say goodbye in person, but also consciously take time for a final conversation with his or her employee in the last working weeks or days. The following points should be discussed:

- If necessary, discuss the reason for the employee's departure
- Recognizing special skills and good performance
- If desired, provide differentiated feedback on work performance
- As an employer, also obtain feedback on the employment relationship: What was a good fit? What was less good?
- Ake a look into the future together: What's next? Are there contacts from the network who can be useful?³ Are there ways to stay in touch?
- Discuss consumption of remaining vacation and time credits
- Determine the timetable for the handover
- Clarify the contact person and appointment for the return of work equipment, keys, equipment and finalize the process

³ Students and alumni of BOKU have access to the Alumni Career Center with the [Job portal](#) and the [service for applicants](#) such as CV check and job compass.

Also discuss whether your departing employee needs a certificate of employment. If this is the case, it may be useful to list the work content together again. Especially in cases of long-term employment, responsibilities may have changed or supervisors may have changed. All information on the certificate of employment can be found on the [Homepage of the HR Management](#).

The exit interview serves not least to emotionally accompany a separation process. For a 'good' conclusion, a last structured conversation can be very helpful. If necessary, address existing differences openly and without rancor and in any case appreciate what has been successful in the course of the working relationship. Also give space to the impressions and assessments of your departing employees. Sometimes blind spots come to light and the exit interview can provide clues for potential for improvement.⁴

Make sure you have a "good" farewell for all sides!

Return of work equipment and completion

In practice, it has proven very useful to nominate a person for the return of work equipment and the conclusion on the last working day and to schedule an appointment for this well in advance. This way, even if the secretary is temporarily absent, for example, returned laptops or keys won't go missing because no one knows where they were turned in.

The contact person is primarily responsible for ensuring that returns are processed and documented properly. Please clarify the following in advance:

- What equipment and work equipment (notebook, mobile phone, personal protective equipment...) were issued?
- What keys were issued?
- Has an access and copy card (BOKUCard) been issued?
- Are all work documents, project results, original invoices on site?

⁴ In the case of termination by the employee, the reason may be mistakes made by the employer that can be avoided in the future. These include, for example: making wrong selection decisions, offering too few offers for assistance or inadequate framework conditions.

The return of tools, equipment, and keys must be confirmed with a signature. Ideally, the department should maintain a list that is kept up to date.

The following tasks cannot be transferred to the contact person for the return of work equipment and the conclusion:

- Conducting an exit interview
- Creation of a handover plan
- Issuing a certificate of employment
- Personal farewell

Managerial responsibility and authority to issue instructions always remain with the direct supervisor.

Personal farewell

The farewell should be designed in accordance with the position and length of service. In order to take into account the emotional level of all those involved, a farewell is not something that takes place 'on the side', but a conscious social act. This can range from a heartfelt handshake and good wishes for the future to a get-together in the team.

Depending on the position and function, it is appropriate to say goodbye not only to teammates but also to internal and external cooperation partners.

End of service FAQs

Frequently asked questions at the end of service are:

Extension of compulsory insurance: Insurance coverage remains in effect for 6 weeks after the end of employment. [Information from BVAEB](#)

Payment in lieu of untaken leave: Unused vacation time will be paid out with the final paycheck at the end of the employment relationship. Compulsory insurance coverage is extended for the duration of the payment in lieu of leave. Information. [Information on vacation policies](#).

Unemployment benefit: You are eligible if you have been employed in a position subject to social insurance contributions for 52 weeks over the past two years. [Information from AMS](#)

Occupational provision fund: For all employees who joined from 2003 onwards, the university pays the so-called 'new severance pay' into the APK provision fund. The payment of the entitlement can be applied for if at least 36 months of contributions have been paid for you and the employment relationship was limited in time or was terminated by the employee or by mutual agreement. [Information APK](#)

Pension fund: For employment relationships with an uninterrupted duration of at least 24 months, the university pays contributions to the [Valida pension fund](#) for old-age, occupational disability and survivors' pensions.⁵ After leaving the company, it is possible to transfer it to another pension fund.

E-Mail address and BOKU account: At the end of the employment relationship, the BOKU account automatically becomes inactive. An external forwarding can be set up for the e-mail address. [Information Account Termination Process](#)

⁵ The agreement with the [Federal Pension Fund](#) applies to civil servants and contract employees

Offboarding Checklist

The following checklist is designed to assist you when employees leave the University. It covers three areas:

- **Before the last day of work**, all employment contract formalities relating to the termination of the employment relationship must be completed.⁶ Colleagues and key partners should be informed in a timely manner, and the handover of work responsibilities should be organized. A systematic [handover plan](#) supports internal knowledge management. Work documents and server data are organized for handover. The supervisor should conduct a final interview (exit interview) and nominate a contact person for the return of work equipment and the conclusion on the last day of work. If necessary, the replacement of the position must be initiated.
- **On the last day of work**, the keys, access and copy cards as well as provided work equipment and equipment such as notebooks, mobile phones and protective equipment must be returned, and the return must be documented. The workplace must be cleared of personal belongings and work documents taken to the home office must be returned. The working days spent in [home office](#) in accordance with the individual contractual agreement must finally be reported via BOKUonline. Ideally, a personal farewell takes place on the last day of work.
- **After the last day of work**, the IT authorizations must be reset and the linking of person and telephone numbers must be deactivated. Door signs must be changed and, if necessary, mailing lists, employee posters or organizational charts must be updated.

Maintain contact occasionally if it is convenient for you. Perhaps it is appropriate to invite former employees to a network event or to inform former colleagues at BOKU about a new job.

⁶ A request for consensual termination or a resignation by an employee must be forwarded to HR Management without delay.

Template checklist for offboarding

Employee: Exit date: Supervisor:	
Task completed	☒
Before the last day of work	
Completing employment contract formalities ☐ If necessary, sign a request for consensual termination Plan consumption of remaining vacation and time credits ☐ Accounting for business trips in full ☐ Request a certificate of employment	☐
If applicable: Initiating job succession (application , job posting)	☐
Inform colleagues and cooperation partners	☐
Draft a handover plan	☐
Conduct an exit interview	☐
Contact person for returning work equipment and scheduling an appointment	☐
Print the BOKU Training Pass	☐
Organize work documents and server data for the handover	☐
Complete ArgeData Project Time Tracking and Approve Work Time Reports	☐
Transfer various online access credentials (e.g., FFG eCall)	☐
Other:	☐

Last Day of Work	
Complete the report on work-from-home days ⁷	☐
In ArgeData, set all approvals, print them out, AND submit them signed	☐
Return of work devices and equipment ☐ PC Laptop, rental notebook ☐ Telephone Mobile phone ☐ Access and copy card (BOKUcard) ☐ Key (office, laboratory, etc.) ⁸ ☐ Personal protective equipment (laboratory, field, etc.) ⁹ ☐ Other ¹⁰ :	☐
Confirmation of takeover: Date , Signature	☐
Clear personal items from your workspace	☐
Saying goodbye to colleagues and cooperation partners	☐
Leave contact details (phone number, email address)	☐
Other ¹¹ :	☐
After the last day of work	
Deactivate the link between person and phone number ¹²	☐
Reset authorizations for IT systems and BOKUcard ¹³	☐
Changing door plates	☐
Mailing lists, phone lists, employee poster, update organizational chart	☐
Other ¹⁴ :	☐

⁷ if there is an individual contractual agreement on [working from home](#)

⁸ For lost keys, a loss report must be made via the [FM-Helpdesk](#)

⁹ e.g. work coat, safety goggles, earmuffs, safety helmet

¹⁰ e.g. books from the institute's library

¹¹ e.g. activate the absence rule in the mail program with 'Out of office – Message'

¹² Via e-mail to the hotline (boku-it@boku.ac.at) (boku-it@boku.ac.at) stating name, exit date, telephone extension, mobile phone number, deactivation MEX ([Mobile-Extension-Service](#))

¹³ Does the IT manager in BOKU Account Manager (AccMan)

¹⁴ e.g. hand over project management (FIS, newsletter) or change SAP substitution access

Template handover plan

Task	Know how	Takeover by	Completed by
<i>Which tasks and projects have been worked on and what is the current status?</i>	<i>What knowledge was required for this? Where can I find this information?</i>	<i>Who can take on the task / project?</i>	<i>When can the handover take place?</i>
For a regulated handover, please arrange the required work documents and server data in a comprehensible manner in good time or secure access for colleagues. For teachers, there may be files in BOKUlearn (Moodle) that you would like to pass on. For employees in projects, it is important to hand over partial results and interim statements. Remember that all original invoices are needed for the final settlement of projects and ensure a conscientious handover!			