

Voluntary Employee Offboarding Checklist

This checklist outlines the necessary steps for employees voluntarily separating from UMB. Some actions are optional, as indicated in the offboarding journey.

Voluntary Employee Offboarding Actions

(Some actions are optional and indicated on the actual journey.)

- ☐ Submit Resignation Letter.
- ☐ COBRA Information.
- ☐ Supplemental Retirement (SRA).
- ☐ Update Contact Information.
- ☐ Financial Disclosure Notice.
- ☐ Return Parking Pass.
- ☐ Return Hard Keys.
- ☐ Return Technology.
- ☐ Return UMB One Card ID.
- ☐ Return USM/MTA State ID.
- ☐ Outstanding UMB Assets.
- ☐ Retirement Notification.
- ☐ Transfer of Knowledge.
- ☐ Conduct Employee Leave Payout.
- ☐ Submit timesheet.
- ☐ USM/State Agency Transfer Documentation.
- ☐ Transition Plan.
- ☐ Clear Outstanding Procurement Transactions.

Involuntary Employee Offboarding Checklist

This checklist outlines the necessary steps for employees separating from UMB involuntarily.

Involuntary Employee Offboarding Actions

- ☐ Update Contact Information.
- ☐ Return Parking Pass.
- ☐ Return Hard Keys.
- ☐ Return Technology.
- ☐ Return UMB One Card ID.
- ☐ Return USM/MTA State ID.
- ☐ Outstanding UMB Assets.
- ☐ Conduct Employee Leave Payout.
- ☐ Submit timesheet.
- ☐ Clear Outstanding Procurement Transactions.