

# OFF-BOARDING GUIDE

*A resource for those resigning from the university*

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# OFF-BOARDING GUIDE

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# TABLE OF CONTENTS

## Off-Boarding Guide

*A resource for those resigning from the university*

<b><u>Timeline</u></b>	<b>2</b>
<b><u>Alumni Association</u></b>	<b>3</b>
<b><u>Benefits</u></b>	<b>4</b>
CalPERS Retirement	
COBRA	
Employee Assistance Program (EAP)	<b>5</b>
Fee Waiver Program	<b>6</b>
HCRA/DCRA	
Life Insurance	
Savings Plus	<b>7</b>
<b><u>Change of Address</u></b>	<b>8</b>
<b><u>Coyote Cash</u></b>	<b>9</b>
<b><u>Electronic Files</u></b>	<b>10</b>
<b><u>Employment Verification</u></b>	<b>11</b>
<b><u>Final Pay</u></b>	<b>14</b>
<b><u>Knowledge Transfer</u></b>	<b>16</b>
<b><u>Out of Office Message</u></b>	<b>17</b>
<b><u>Professional Development</u></b>	<b>18</b>
<b><u>Workspace</u></b>	<b>19</b>
<b><u>References</u></b>	<b>23</b>
<b><u>About the Contributors</u></b>	<b>24</b>

# TIMELINE

Whether you've been at the University for 2 years or 20, below is a recommended timeline of things to consider as you begin the off-boarding process. Although a 2-week notice is industry standard, most employees know well beyond 2-weeks when they are ready to move on from their employer. Below are tips to consider during the final 30 days of your employment:

30  
Days

- **Tell your boss first:** Once you've decided to resign, the first person you should tell is your manager. You don't want your boss to hear the news from anyone else, so now is a good time to consider submitting your formal notice.

21  
Days

- **Make a transition plan & identify a "handover" period:** Work with your supervisor on the best way to spend the remainder of your time and consider making a list of all the projects under your purview. Identifying a "handover" period of when your duties will transition to a colleague will help prevent any "surprises" upon your departure. (See [Knowledge Transfer](#) for additional tips)

14  
Days

- **Inform your colleagues:** Discuss with your supervisor when and how you would like to inform your colleagues of your departure. Providing appropriate notice to the team informs them of any potential additional projects or assignments they may acquire as a result of your departure.

7  
Days

- **Confirm your personal info is accurate:** Human Resources will send you important information on how to ensure your personal information is accurately recorded in the University's system as well as what to do with your CalPERS contributions (if you are a CalPERS member). This may include an explanation of vacation, sick and personal time remaining. You will want to do this as soon as possible to avoid any potential delays to receiving your final pay. (See [Change of Address](#), [Benefits](#), & [Final Pay](#) for additional tips)

Final  
Day

- **Clear out your workspace of personal items & personal paper/electronic files:** Now is a good time to start clearing out your workspace over the course of your final weeks including the transfer of electronic files. Perhaps schedule yourself to remove a few personal items at a time so that you do not have to worry about removing your items on your final day. (See [Workspace](#) & [Electronic Files](#) for tips)
- **Express gratitude:** Take the time to give those colleagues who've made a difference in your career experience an appreciative note. This can be a handwritten card or email that leaves a lasting impression. You may never know when you'll cross paths with that team member again.

# ALUMNI ASSOCIATION

(FOR EMPLOYEES WHO GRADUATED FROM CSUSB)

Stay connected to CSUSB and continue to leave your paw print in our community by visiting [alumni.csusb.edu](http://alumni.csusb.edu) and engaging with alumni news, programs, and events. Show the world you are a proud **#Coyote4Life!**

Tag us and be featured by using hashtags **#Coyote4Life**, **#CSUSBAumni**, and **#CoyoteStrong**. Wherever you choose to Define the Future, share your stories with us and we will continue to highlight your success.



## STAY CONNECTED:



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[alumni.csusb.edu](http://alumni.csusb.edu)



[alumni@csusb.edu](mailto:alumni@csusb.edu)



(909) 537-3700

# BENEFITS

## CalPERS Retirement

- The California Public Employees Retirement System (CalPERS) offers a defined benefit retirement plan. It provides benefits based on the member's years of service, age, and final compensation. By statute, the California State University (CSU) participates in the CalPERS program and membership is mandatory for those CSU employees who are eligible.
- If you leave CalPERS-covered employment, you can either leave or take a refund of your contributions. To learn more please visit <https://www.calpers.ca.gov/page/active-members/retirement-benefits/refunds-reciprocity>
- For the most current and detailed information, employees can visit the CalPERS website: [www.calpers.ca.gov](http://www.calpers.ca.gov) or call CalPERS at (888) 225-7377. In addition, members may log into [MyCalPERS](#) to manage their account online.

## COBRA

- Employees will receive a Consolidated Omnibus Budget Reconciliation Act (COBRA) Continuation Coverage Election Notice that explains when health, dental and vision plans will end. This notice will be addressed to the employee and dependents covered on each plan and explain the plans employees are eligible to continue, the duration of COBRA, and the monthly cost for each plan.
- COBRA is completely optional and employees can elect to cover themselves and/or their dependent(s) in any of the plans.

# BENEFITS

## Employee Assistance Program (EAP)

Employees can access resources from LifeMatters by Empathia for up to six (6) months from the date of separation. Services provided include:

- **Short-term counseling** - receive up to 6 sessions for each issue.
- **Work/life resources** for child and elder care information to assist with care options, financial concerns, and legal issues.
- **Financial consultation** referral with a certified financial counselor for budgeting, credit report review or correction, mortgage and loan information, debt management and consolidation, college or retirement planning.
- **Legal consultation** with an attorney for consumer law, traffic citations, family law, estate planning and other personal law issues.
- **Professional development** information.
- **Convenience resources** for volunteer opportunities and pet care.
- **Critical incident** stress management.
- **Skills coaching** for adjusting to change, stress reduction, resiliency, time management, assertiveness, conflict management, goal strategies, creativity, tact and responsiveness, communication and more.
- **Healthy living services** promoting health and wellness through a six (6) week telephonic Tobacco Cessation Program or a Baby Welcome Program for expectant mothers to receive a voucher for a free diaper bag and sample newborn products.
- **Online self-assessments** for adaptation to change, alcohol and drug abuse, anxiety, depression, eating disorders, gambling, nicotine addiction, obsessive-compulsive behavior, post traumatic stress disorder, relationships and stress.

### EAP ACCESS INFORMATION



<https://members2.mylifematters.com/portal/welcome/sso>



Contact Life Matters 24/7 at 1-800-367-7474



Password: csusb (not case sensitive)

# BENEFITS

## Fee Waiver Program

The Fee Waiver Program provides a waiver or reduction of certain fees for employees and eligible dependents who enroll in courses at one of the 23 CSU campuses. Depending on the employee's separation date, the Fee Waiver benefit for the current/future term may be impacted. For more information, please email [hrd-fw@csusb.edu](mailto:hrd-fw@csusb.edu).

## HCRA/DCRA

- The employee's participation in the Health Care Reimbursement Account (HCRA) and/or Dependent Care Reimbursement Account (DCRA) will terminate at the end of the month in which the employee last contributed. For example, if the employee separates in May, their last contribution to HCRA/DCRA is taken from their May salary, and their participation ends on June 30. Note that your benefits are paid a month in advance. If you work enough days to cover your benefit's monthly premiums, they will be deducted from your last paycheck. This deduction will result in an extension of your benefits until the end of the month following your month of separation.
- This benefit may also be continued through COBRA however, it will no longer be a pretax benefit through the plan year.
- For more information, please review the brochures on the [Benefits website](#).

## Life Insurance

Employees may be eligible to continue coverage (portability) at the same group rates. Please contact The Standard directly at 1-800-378-5745 for more information.



# BENEFITS

## Savings Plus

Employees who have savings plans such as 403(b) Supplemental Retirement Plan (SRP) account with Fidelity Investments, 401(k) and/or 457(b) Supplemental Retirement Plan(s) (SRPs) with Savings Plus or ScholarShare 529 will need to contact the plans directly to learn more about managing their account after separating from CSUSB. The phone numbers for each plan are listed below:

- Fidelity Investments: 1-800-343-0860
- Savings Plus: 1-855-616-4776
- ScholarShare: 1-800-544-5248

## BENEFITS



(909) 537-5143



[benefits@csusb.edu](mailto:benefits@csusb.edu)




[csusb.edu/human-resources/current-employees/benefits](https://www.csusb.edu/human-resources/current-employees/benefits)

# CHANGE OF ADDRESS


If you are moving or relocating, please be sure to update your mailing address before your last day worked. Below are instructions for how to update your address:

1. Log in to the myCoyote portal.
2. Click on the My Personal Information tile.
3. Select Home and Mailing Address.
  - Home address is your permanent address, typically a street address.
  - Mailing address is the address where you would like to receive all mail sent to you from the university, and where the State Controller's Office will mail your W-2
  - **Note:** *The address listed in "Home" and "Mailing" can be the same.*
4. Click on the Edit box for Mailing and key in your changes. The effective date defaults to the current date. Edit your home address, mailing address, or add an address.

## HUMAN RESOURCES

 (909) 537-5138

 [hrdept@csusb.edu](mailto:hrdept@csusb.edu)

 [csusb.edu/human-resources](http://csusb.edu/human-resources)


# COYOTE CASH

Coyote Cash is a cash-equivalent credit deposited to an employee's CoyoteOne Card and can be applied to purchases made at CSUSB designated retailers and eateries.


Although Coyote Cash does not expire, employees who will no longer be on campus are encouraged to spend the remaining amount before their last day worked. The CoyoteOne Card will be deactivated upon separation from employment.


To check the balance on your CoyoteOne Card, contact the Technology Support Center (TSC). Please be prepared to provide the TSC Representative with your full name and employee ID number. Please note that this does not apply to individuals who remain on campus as CSUSB students.

## TECHNOLOGY SUPPORT CENTER

 (909) 537-3700

 [support@csusb.edu](mailto:support@csusb.edu)

 **Pfau Library, Room 1108**  
(located on the first floor  
of the new addition, the "Wedge")

 [/csusb.edu/its](http://csusb.edu/its)

# ELECTRONIC FILES

From time to time, we are aware employees keep personal files on their university-issued computer/laptop. If you'd like assistance with transitioning your non-university related files, please submit a ticket to the Technology Support Center (TSC).

They may be able to assist you with moving those files to another [Google] account or your personally-supplied flash drive. Please be prepared to provide the TSC Representative with your full name, employee ID number, and specific location of electronic files.

## TECHNOLOGY SUPPORT CENTER



(909) 537-3700



[support@csusb.edu](mailto:support@csusb.edu)



**Pfau Library, Room 1108**

(located on the first floor  
of the new addition, the "Wedge")



[/csusb.edu/its](http://www.csusb.edu/its)

# EMPLOYMENT VERIFICATION

Whether renting an apartment, buying a house, purchasing a car, or doing anything else that requires employment and/or salary verification, TWN is available 24 hours a day, 7 days a week via internet or phone. TWN offers quicker loan approvals, speedier employment verifications, and up-to-date information for verifiers (organizations that need credit or employment reference data).

The Work Number (TWN) is an automated system used for employment and salary verifications of "state" employees. The Work Number® database offers credentialed verifiers with permissible purpose access to income and employment data for more than 111 million records.

## For questions on using the system:



Call TWN customer services (800) 367-2884



Visit the TWN website

## For more information on TWN:



Visit the SCO TWN Employment and Income Verification website

# EMPLOYMENT VERIFICATION

## How to use The Work Number

**Note:** Your Employee ID for The Work Number is the last six digits of your social security number + two-digit month/two digit date of your birthdate.

### For Proof of Employment Only:

Give the person (the verifier) needing proof of your employment the following information:

- **Your Employee ID:** last six digits of your social security number + two-digit month/two-digit date of your birthdate (example: 1234560714)
- **State of California Employer Code:** 10396
- **The Work Number Access Options** for Verifiers
- [The Work Number website](#) or 1-800-367-5690

### For Proof of Employment and Income:

**Step 1.** Create a Salary Key. A Salary Key is a six-digit number that allows one-time access to your salary information.

- Access The Work Number either via the web or by telephone
  - The Work Number web site or
  - 1-800-367-2884
- Select the Employee option and log-in. Provide the following information:
  - State of California Employer Code: 10396
  - Your Employee ID: last 6 digits of your social security number + 2-digit month/2-digit date of your birthdate (example: 1234560714)
  - Your PIN - Two-digit month/two-digit date of your birthdate (example: 0714)
  - Security questions - upon the initial log-in, employees will need to set up a personal security image, security questions, and work phone number.
- Select "Create a Salary Key" and prepare to write down the 6-digit number.

**Note:** You may have a maximum of three salary keys active at one time. Salary keys can be used only once. After it is used or not used within six months, the salary key is automatically removed from the system.

# EMPLOYMENT VERIFICATION

## How to use The Work Number

**Step 2.** Give the person (the verifier) needing proof of your employment and income the following information:

- Your Employee ID: last six digits of your social security number + two-digit month/two-digit date of your birthdate (Example: 1234560714)
- State of California Employer Code: 10396
- Your Salary Key (from Step 1)
- The Work Number Access Options for Verifiers
  - The Work Number web site or
  - The work number phone number: 1-800-367-5690

**TWN worksheet is also available to quickly provide the required information to a verifier.**

- [The Work Number Worksheet](#)
- [How to Use the Work Number](#)
- [Sample Employee Data Request Form](#)

**Note:** If your third party vendor does not utilize the work number, please have them contact the Human Resources Department.

## HUMAN RESOURCES



(909) 537-5138



[hrdept@csusb.edu](mailto:hrdept@csusb.edu)



[csusb.edu/human-resources](http://csusb.edu/human-resources)

# FINAL PAY

## **Notification of Separation**

Payroll Services will need adequate notification of separation to process an accurate, and timely final payout. A minimum of (10 business days) notice is requested when possible. In most cases, employees will have any applicable direct deposit cancelled, and final pay will be issued via live warrant.

## **Absence Management Entries**

Please work with your timekeeper to ensure that all absence entries taken/projected have been entered in to PeopleSoft. This includes time for sick, vacation, personal holiday, CTO, holiday CTO, holiday credit, or alternate day(s) off (ADO).

If you have not taken, or do not plan to use any available leave banks, please input “No Leave Taken”. All entries will need to be approved by the appropriate administrator. Timely completion of this process is imperative for calculations of lump-sum pay.



# FINAL PAY

## Effective Date of Separation vs Last Day Worked

**Effective date of separation** is relative to the last day on payroll status.

- Example: Employee will stop physically working on 2/1/21, but plans to use vacation time up to (and including) 2/12/21. The effective date of separation would be 2/12/21.

**Last Day Worked** is the actual day the employee stops working.

- Example: Employee will stop physically working on 2/1/21, but plans to use vacation time up to and including 2/12/21. The last day worked would be 2/1/21.

## Payroll Services



(909) 537-5159



[csusb.edu/payroll](http://csusb.edu/payroll)



[payroll@csusb.edu](mailto:payroll@csusb.edu)

# KNOWLEDGE TRANSFER

According to the Corporate Culture and Boomerang Employee Study conducted by Workplace Trends, 40% of employees say they would consider boomeranging back (return) to a former employer. This includes 46% of millennials, 33% of Gen Xers, and 29% of baby boomers. Because of this, it is important to leave on a positive and professional note. Two ways to do that is to “wrap things up” and offer to train your replacement.

## Wrap Things Up

**Project/Assignment Completion:** Between “now” and your last day of work, complete major assignments and projects. If finishing what is currently on your plate requires more hours than you would like to spend, discuss prioritizing the critical work with your manager. If the major project or assignment cannot be wrapped up in two weeks, document details, status, decision points, and instructions. Wrapping things up with a project/assignment not only for the sake of department goals, but also for the other project members or the person replacing you. It is also important for your professional reputation to leave on a trail of completed projects.

**Business Process Guide/Desk Manual:** If you leave the University due to another position, you’ll find that the first few weeks in your new job is learning how to do something. Pay it forward and consider helping your replacement maintain the process you’ve put in place to help reduce their learning curve. A desk manual or business process guide is a collection of documents that include information and step-by-step processes a staff member uses to complete a specific job/task. Develop a Business Process Guide or Desk Manual that highlights the name of an assignment and the steps, resources, and timeline of the assignment.

**Offer to Train your Replacement:** Your boss doesn’t know your position as well as you do. So, if your circumstances allow you to train your replacement, offer to do so. If you aren’t able to train your replacement, consider letting your boss know you are available to answer questions via phone or email.

**Source:** Adapted from Amanda Chatel, <https://www.themuse.com/advice/peace-out-how-to-leave-a-job-on-great-terms>, accessed on 11/30/2020

# OUT OF OFFICE MESSAGE

No doubt you are familiar with the "out of office" message.

It is a message that alerts senders that the addressee is not available for a temporary period. However, when leaving CSUSB, we encourage you to set an automated notification and confirm with your supervisor when the message should expire. A helpful "out of office" message contains the following elements:

- A statement that you left the university
- One or more statements on who is handling your responsibilities
- Your department's website, main phone line, and business hours
- State that your message is automatic
- Optional: Your personal contact information

Consider the following examples to help spark your permanent "out of office" message.

## **Example 1:**

As of (insert month day, year), I am no longer working at the University. For questions regarding employee benefits, call (insert name of a colleague) at (909) 537-XXXX or email (insert colleague's email address). For questions regarding recruitment, contact (insert name of a colleague) at (909) 537-XXXX or email (insert colleague's email address).

Let's stay in touch! Feel free to reach me at (personal number) or by email at (email address).

Best, Your Name

# OUT OF OFFICE MESSAGE

Out of office message examples continued:

## **Example 2:**

Thank you for your email. I no longer work at the University. (Insert the name of a colleague) is assuming my responsibilities. If you have any questions, please contact (insert name) at (insert email address and phone number).  
Take care!

Regards, Your Name

## **Example 3:**

Hello!

Thank you for reaching out. As of (last day worked), I have left the University. Please contact the (insert name of department) for assistance with your inquiry.

Your name

# PROFESSIONAL DEVELOPMENT

We wish you success wherever your path takes you.

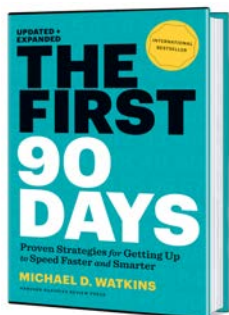
Below are a few tips and resources to assist you in navigating professional development.

**Download a copy of your training transcripts** from CSULearn and LinkedIn Learning. For assistance, contact the Staff Development Center at [staffdevelopmentcenter@csusb.edu](mailto:staffdevelopmentcenter@csusb.edu) or call (909) 537-3125.

**Access the e-book titled "The First 90 Days"** and download it to your device. This is a great book to help you assimilate to your next job, role, and organization.

**Visit the Staff Development Center's website** at

<https://www.csusb.edu/staff-development-center/career>



# WORKSPACE

Cleaning your workspace (e.g., desk, cubicle, workstation) is probably a bigger task than you realize. Are you tempted to leave everything behind? This thought can be tempting, but it's best to dig in and handle the job yourself. It can be kind of fun, and you can learn a lot along the way.

Yes, you can learn a lot about your work habits when you dig into your desk and pull out all sorts of notes and things you saved with good intentions in mind but then forgot about once they were out of sight.

Another reason to do your desk cleaning is that most people tend to have personal items in their desks that they'd prefer not to share. And it's not just your desk. Have you considered what's on your computer that you should remove before turning that over to HR or IT?

Finally, the real reason you should tidy up your desk yourself – you made the mess, the least you can do is clean it up. Few people can manage to keep their desktop clean during their employment, and then even those people are bound to have a few odds and ends tucked into their drawers.

Below is a strategy to help you tackle your desk-cleaning-mission in an organized manner without skipping any of the significant steps.

# WORKSPACE

## WHERE TO START CLEANING WHEN YOU QUIT

If you have an office, you have more work ahead of you than just a desk, but the desk is still the best place to start. Use this handy guide to help you check off items as you go.

- **Computer.** There are bound to be things you want to remove from your work computer (vacation pictures, anyone?) Make sure you get rid of all of your non-work-related data before you hand over the computer.
- **Email.** Clean out your email, deal with open tasks as much as possible, remove personal emails, and leave it as empty as possible.
- **Software.** Have you downloaded software that's not a part of your job or that is, but it's not something the company asked you to download? If so – clean it up and move it out.
- **Browser.** Delete your browsing history, cookies, saved passwords, and other items sitting in the browser.
- **Drawers.** Whether it's file cabinets or desk drawers, they all deserve attention. Your drawers will be full of stuff, and most of it will be useless to everyone but you, so go through it all carefully. You'll want to leave everything clean and organized for the next person. Typically, CSUSB collects name badge(s), so please be prepared to surrender it.
- **Office storage.** If you have office storage or a cubby, those areas need your attention too. These spots often house long-lost coats, sweaters, shoes, umbrellas, and more.
- **Common areas.** Do you have coffee cups lying around, storage containers, a gym outfit, tennis shoes? Many offices have common areas that act as dumping grounds for your items, and you sometimes totally forget what's there or forget to look in those areas.

# WORKSPACE

## THINGS YOU'LL FIND WHEN YOU CLEAN YOUR OFFICE

So, what should you expect to find when you do the deep purge?

- Office supplies are an obvious find in and on your desk; if you can, return unused items to a supply closet.
- Get ready to turn on the waterworks because you're going to find memories in every drawer. Even if you're leaving because you couldn't stand your job anymore, you'll realize you still had some good times with your co-workers. It's okay to feel emotional about a career transition, [an article in the New York Times](#) suggests you take time to grieve when you change careers.

## LEAVE ON A POSITIVE NOTE

You've heard people warn about burning bridges when quitting a job; the reason that's such a common saying is that it's so true. [You simply never know when you'll run into these people again](#) and how they may crop up in your life. All that's certain is you want to be in a good position when you see them again, and this means you have to take the high road and leave professionally and positively. You also have to leave a clutter-free workspace behind.

**Source:** Adapted from Chris Kolmar, <https://www.zippia.com/advice/clean-up-your-desk/>, accessed 11/23/2020.



# REFERENCES

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<https://www.zippia.com/advice/clean-up-your-desk/>

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*Administration & Finance*

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**STAFF DEVELOPMENT**

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**CENTER**

*Information Technology Services*

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*University Advancement*

**EMPLOYEE &**

**LABOR RELATIONS**

*Administration & Finance*

**OFFICE OF THE CHANCELLOR**

*The California State University*

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*University Advancement*

Thanks to our project team, contributors and external reviewers!





CALIFORNIA STATE UNIVERSITY  
**SAN BERNARDINO**

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