

Employee Separation or Transfer Checklist

Employee Name: _____

Supervisor: _____

At First Notice of Departure:

| Done | Date | N/A | |
|--------------------------|-------|--------------------------|--|
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | Obtain a resignation letter or email from the employee. |
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | Check the employee's notice period required (e.g. 2 or 4 weeks). |
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | Provide the employee a written acceptance of the resignation. |

On Employee's Final Day:

| Done | Date | N/A | |
|--------------------------|-------|--------------------------|---|
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | Supervisor is encouraged to conduct a brief, informal exit interview. |
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | Collect all University Property, including UID card, keys, computers, laptops, tablets, mobile devices, pagers, tools, or equipment. |
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | Confirm with employee that all University licensed software on personally owned devices has been uninstalled. |
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | Confirm with employee that all electronic files containing University data from personally owned computers, mobile devices, cloud storage, and storage media (flash drives, etc.) have been migrated and deleted. |
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | If the employee has a Purchasing Card, the employee or supervisor completes the "Pcard Update Form – Account Closure" and submits to the Purchasing Department. |
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | Ensure the employee returns his/her parking pass to Commuter Services. |
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | Ask the employee to make sure his/her mailing address is correct in CIS. |

After Employee's Last Day:

| Done | Date | N/A | |
|--------------------------|-------|--------------------------|---|
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | Deactivate access to University buildings. |
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | Deactivate access to any departmental software programs which allow remote access and/or shared drives. |
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | Contact department webmaster to ensure references to employee are removed from web content. |
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | Send request to HR to grant access to employee's email, if necessary. |

- | | | | |
|--------------------------|-------|--------------------------|--|
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | Once employee's voicemails have been responded to, contact the Campus Help Desk at 1-4000 option 2 to reset the voicemail's PIN. |
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | Initiate appropriate termination ePAF which will end access to Kronos, PeopleAdmin, and to anything in CIS but the Self-Service tools. The employee is also removed from the online directory. |
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | If an hourly employee has Comp Time that is owed, enter that time (CTP) onto the Kronos timecard. |
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | If the employee managed others, update all direct reports' "supervisor" field in PeopleSoft to the new or interim supervisor by submitting an "Edit ePAF." |
| <input type="checkbox"/> | _____ | <input type="checkbox"/> | Health Sciences Only: Notify the Credentialing Department of any providers exiting the University. |