

Department Check-list for Departing Employees

This check-list is not exhaustive nor required, but is intended to help departments to consider what information is needed from an employee and what actions to take when an employee leaves a department or the university.

Complete

Employee's Name _____
Employee ID Number _____
Employee's Forwarding Address _____
Employee's Home Telephone Number _____
Last Day of Work _____
Separation Date _____
Supervisor's Name _____

Provide to Employee

- Resignation acceptance memo or Layoff notice(1) or Separation notice (1)
- Parking Permit Cancellation Form
- Benefits (COBRA) information (Refer to Human Resources (HR)- Benefits)
- Cancellation form for other payroll deductions
- Copy of IDOC from PPS system for employee's own record
- Opportunity to dispose of personal email
- Exit Interview Opportunity (Either by department or third party vendor - see HR)

Obtain from Employee

Date Received

- Resignation Letter (if employee is resigning)
- Time Accrual Approval/signature (vacation/sick/OT/comp/furlough)
- Passwords or consent to access all electronically stored information
- Password to voicemail system
- Keys, key cards, key fobs, etc.
- Laptop, Computer, Cell phone, PDA, Pager, other devices
- University records that may have left the campus
- Location of records being held under a preservation hold instruction
- Identification card, including Emergency ID.
- Parking permit (employee to return permit to Parking)
- Flex card
- Corporate card
- Payment for any outstanding debt (such as a phone bill, advance, travel)

Notes: (1) For layoffs and separations, departing employees may be referred to the EDD Web Site for information regarding unemployment insurance.

Check list for Departing Employees (continued)

Department Actions

- PPS separation bundle
- Payroll separation form to Accounting/Payroll (72 hour rule) (includes time reporting information)
- Print IDOC and send to Accounting/Payroll
- Complete Unemployment Insurance Termination Report Form and send to Human Resources
- Cancel signature authorizations
- Cancel access/close accounts-electronically stored files/info systems
Such as Complete, Gold, Data Warehouse, Email, Calendar, Kronos,
PPS, Leave Reporting, DFS (servers), APEX, Espresso, OACIS, TOF
- Cancel (where electronic) access to buildings, rooms, copiers, etc.
- Change **shared** security codes (doors, copiers, storage areas, et al)
- Change voice mail recording or cancel account
- Set auto email response message (do not redirect mail to another address)
- Determine disposition of business records & transfer to new custodian, archive, or destroy (2)
- Close employee's personnel file, tag with destruction date, file with secured
inactive personnel files until retention period ends, then destroy (2)

Department Updates

- Web site information
- Directory information
- Organization charts
- Name plates
- Emergency "trees" and plans (reassign responsibility as needed)
- Department and external listservs
- Contact lists
- Delegations of Authority
- Signature Authorizations
- Role Changes (PPS preparer/reviewer, DSA, etc.)
- Staffing List
- Department directory boards and mailboxes
- Office Routing Slips

Notes: (2) Prior to any destruction of records verify the retention schedule permits it
and that there is no preservation order for the records.
See instructions for How to Handle Records.