University General Division (Campus)
Employment Separation/Department Transfer Checklist for Supervisors
(Faculty, staff and administrative employees’ voluntary resignations, retirements, terminations and department transfers)

Note to Supervisor: Check (√) each item once completed, or write “N/A,” as applicable.

Notifications
For voluntary separation or retirement:

   ______ Verbal notice given by employee
   ______ Written notice given by employee
   ______ Written acceptance delivered to employee

For other separation:

   ______ Written notification of separation given to employee

Required Departmental Notifications:

   ______ Notice given to appropriate members of management

Employee Benefits Referral

   ______ Employee referred to Human Resources for important information about discontinuance and continuance of benefits/coverages to include healthcare, insurance, and retirement.

Security

   ______ University-issued entry access cards obtained. (building and office keys are obtained by Key Mgmt)
   ______ Keys or cards for desk/files/cabinets/equipment obtained.
   ______ Keys and paperwork for University owned vehicles, including fuel pump key obtained, if applicable.
   ______ If necessary, contact Human Resources, Campus Police or the Health System Division Security Department for assistance in escorting employee from building.

USA Computer Software/Hardware Security and Access and Telephones

Note: Under no circumstances should University business-related files be deleted from University computers or servers.

   ______ Notify/e-mail applicable Computer Services/Information Systems of the employee’s departure.
   ______ Employee Separation DocRoute Form completed within 24-hours of receiving notification of the separation or transfer. (For assistance, please contact Human Resources.)
   ______ Disable access to Banner, networks, servers, and other computer systems and email, as applicable.
   ______ Ensure the removal of all personal/non-essential software from computers.
   ______ Obtain access to usernames/passwords on computers and other systems, as applicable.
   ______ Identify location and access to all computerized information/saved files.
   ______ Change passwords on applicable systems/computers to which the employee has had general access.
   ______ Ensure that employees remove any USA-licensed software from personal home computers.
   ______ Change telephone voice mail message to direct callers to contact a designated co-worker or forward calls to a departmental contact number, and change telephone display name.
USA Property – Check or write “N/A” for return of the following items:

- Computers, laptops, accessories.
- University issued uniforms.
- University issued equipment, tools, supplies and materials.
- Books, journals, literature, CDs, DVDs, etc.
- Library materials.
- Any other USA-owned items in possession of employee.

HR/Financial/Payroll Issues

- Direct employee to contact Human Resources Office.
- Prepare and process final separation Personnel Action Form.
- Reconcile any outstanding payroll issues with the employee to include final timesheet and leave balances, as applicable.
- As applicable, ensure all financial accounts, including travel expense and petty cash transactions, are reconciled.

Work Status Update

- Meet with the employee to discuss the status and transition of job duties and current and/or pending projects.

University Research

As applicable, ensure the employee has been cleared by and executed all applicable agreements with the Office of the Vice President for Research and Economic Development regarding:

- Grants and contracts
- Patents
- Inventions
- Special government security clearances
- Human and animal protocol projects and approvals, when applicable for transferring equipment and for release of laboratory notebooks

Safety and Environmental Services

- As applicable, ensure handling of any controlled materials such as chemicals, lasers, radiation, and biohazards are transitioned in accordance with University guidelines.

Supervisor Printed Name: ________________________________

Supervisor Signature: ________________________________

Date: ________________________________

Employee Name: ________________________________

Employee J-Number: ________________________________

03/03/2021