University General Division (Campus)

Employment Separation/Department Transfer Checklist for Supervisors

(Use this checklist for faculty, staff and administrative employee separations and department transfers. Retain the checklist in the department for your records.)

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.

_____ Employee Separation DocRoute Form completed within 24-hours of receiving notification of the separation or transfer. (For assistance, please contact Human Resources.)
_____ Ensure the removal of all personal/non-essential software from computers.
_____ 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: _____