

# Separation Checklist

*This checklist is designed to assist the supervisor and the employee during the period of separation from the University or the department. The checklist must be completed in the event of a resignation, involuntary termination, retirement, leave of absence, or when an employee transfers to a different department. Department.*

Employee Name \_\_\_\_\_ Separation Date \_\_\_\_\_

*Please complete the items below, marking completion and noting the date for each.*

**Done    Date**

## Upon Notice

- \_\_\_\_\_ 1. Obtain resignation letter or email. Send email to employee accepting the registration.
- \_\_\_\_\_ 2. Complete a Personal Action Form, route to [records@oakland.edu](mailto:records@oakland.edu) immediately to avoid overpayment.
- \_\_\_\_\_ 3. Employee will receive an email with instructions for their Exit Interview.
- \_\_\_\_\_ 4. Inform employee to reconcile vacation balances with UHR Personnel Records (x3482).
- \_\_\_\_\_ 5. Inform employee that UHR Staff Benefits will contact him/her regarding continuation of benefits.
- \_\_\_\_\_ 6. Begin hiring process by preparing online requisition. If position is no longer active or will not be posted within 30 days, notify UHR Employment Services (x3480).
- \_\_\_\_\_ 7. Reconcile outstanding department expenses (travel, mileage, etc.) and inform employee to reconcile other debts to the University (library fines, tuition reimbursement, etc.).

## Last Day

- \_\_\_\_\_ 1. Inform employee to provide forwarding address to UHR Employment Services (x3489), if applicable.
- \_\_\_\_\_ 2. Ensure that OU property/ equipment has been returned:
  - Keys (building, filing, desk);  Access Cards (Laboratory/ Facility);  Photo ID/ Badges;
  - Uniforms;  Computers/ Laptops;  Cell Phones/ Pagers;  Purchasing Card;
  - Reference/Training/ Project Manuals;
  - Other Proprietary Materials: \_\_\_\_\_
- \_\_\_\_\_ 3. Change voicemail directory, vm box, and phone display; ask employee for vm access code.
- \_\_\_\_\_ 4. Unsubscribe employee from mailing lists; make provisions for access to work-related email addresses
- \_\_\_\_\_ 5. Update department organization chart/website. Notify UHR Personnel Records (x3482) of changes in reporting authority.
- \_\_\_\_\_ 6. Change secure access codes.
- \_\_\_\_\_ 7. Notify departments to remove employee's signature authority (i.e. Payroll, Accounts Payable, etc.).
- \_\_\_\_\_ 8. Collect completed leave report from employee.
- \_\_\_\_\_ 9. Ensure that employee has cleaned computer files, removing personal items and transferring University files to a location that is accessible to others.
- \_\_\_\_\_ 10. Notify the Registrar to remove Advising Access (if applicable) in Banner.
- \_\_\_\_\_ 11. Ensure that the employee has removed personal items.
- \_\_\_\_\_ 12. If employee is on H-1B visa status, notify UHR Employment Services (x3480) to ensure compliance with special requirements.
- \_\_\_\_\_ 13. Ensure that employee's access to Banner has been removed.

**Comments:** \_\_\_\_\_