



TRANSFER/SEPARATION CHECKLIST

(To be facilitated by managers)

Instructions:

This form is to be completed by the Manager prior to the employee's last day of work. This form should be used to certify that all WSU property has been returned, rights to access WSU property or services have been discontinued and forms and files are processed correctly. Index document into Application Xtender with other relevant termination documents.

Employee Name: _____ Banner ID: _____

School/College/Division: _____ Position Title: _____

Reason for Separation: _____ Separation Date: _____

 = **Task Completed** **N/A = Not Applicable**

MISCELLANEOUS DEPARTMENTAL ISSUES TO ADDRESS

- ___ Obtain employee's letter of resignation
- ___ Meet with employee to discuss status of work projects/reassignments
- ___ Obtain any confidential and all work-related materials/information
- ___ Offer an exit interview with HR (for voluntary terminations)
- ___ Remove employee from Web Time Entry Approval queue (NTRRQUE), assign new approver to avoid deactivation of timesheets
- ___ Cancel signature authority
- ___ Remove mail box/slot
- ___ Update departmental phone list
- ___ Update website
- ___ Request removal from Faculty and Staff directory
- ___ Cancel memberships/subscriptions employee has through WSU
- ___ Notify employee's customers and/or contacts of employee's departure
- ___ Request the employee to remove all personal property from office/laboratory or other workspace prior to departure
- ___ In the event of death, the supervisor is responsible for making contact with employee's family to retrieve personal belongings and university property
- ___ Change/disable passwords for any department or University subscriptions
- ___ Change/disable department suite access
- ___ Have employee print Pipeline groups

EMPLOYMENT SERVICE CENTER (ESC)**7-2010**

- ___ If employee accepts to have an exit interview, contact ESC to schedule the interview (for voluntary separations)
- ___ Create and submit an EPAF transaction (Term-E or Term-J) along with a scanned supporting documentation (if leaving WSU).
- ___ Removal of OHS access

TOTAL COMPENSATION & WELLNESS**7-3717**

- ___ Advise employee to contact TCW for benefit coverage information
- ___ Advise employee to contact TCW for information regarding retirement (if applicable)

PURCHASING**7-3734**

- ___ Obtain procurement card and return to purchasing department
- ___ Terminate access to on-line ordering systems (Office Max OSDOS, UPS Campus Ship, etc.)

FISCAL OPERATIONS – PAYROLL**7-2138**

- ___ Obtain petty cash fund and provide notification of new custodian to the Cashier's Office
- ___ Complete procedures for final paycheck (including unused/accrued vacation and/or overtime payout or dockings)
- ___ Submit "Last day of work/Pay Notice" form (if leaving WSU)
- ___ Confirm address is correct in Banner. The most recent Banner address will be used for W-2 purposes

BUSINESS OPERATIONS**7-2313**

- ___ Obtain One Card from employee and send it to the One Card/Parking Office. If employee needs a refund he/she should contact the One Card/Parking Office
- ___ Obtain Parking Permit (hang tag) from employee and send it to the One Card/Parking Office
- ___ Collect any credit cards issued to employee (Travel card, Visa, MasterCard, etc.)
- ___ Send email to Business Services to terminate travel profile.

COMPUTING & INFORMATION TECHNOLOGY (C&IT)**7-4778****Computer Access:**

- ___ Terminate Access ID and access to all administrative systems and other computing applications
- ___ Advise employee to retrieve or delete any personal files/information on office/department server, lab server, etc.
- ___ Transfer all computer files to appropriate location
- ___ Revoke passwords: workflow routing, shared pass codes
- ___ Obtain password rights to any administrative database, software application, information system, etc., for which employee has sole access rights
- ___ Clean or have employee clean computer Hard drive(s)
- ___ Ensure that Network information is accessible to supervisor
- ___ Unsubscribe from e-mail distribution and list servers
- ___ Change password for shared online subscriptions and departmental shared files

Phone:

___ Advise employee to clear voice mail greeting(s) and obtain password

___ Purge messages

UNIVERSITY PROPERTY

___ Obtain Computers/Laptop/PDA or other peripheral equipment (e.g., printer, cameras).

___ Obtain Cellular phones/ Pagers

___ Obtain all administrative systems instructions and computer manuals

___ Collect uniforms/gear/tools/instruments/job accessories

___ Obtain Keys: *office building, classrooms, storeroom, desk, file cabinets, storage, cabinets, lockers, vehicles*

___ Obtain Research equipment, data/databases, etc.

PUBLIC SAFETY

7-6057

___ Contact Public Safety to deactivate access to building

Other (Please list): _____

Comments:

Supervisor/departmental representative name: _____ (Please print)

Supervisor/departmental representative signature

Date