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 process correctly. Index document into Application Xtender with other relavent 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