

**Employment Separation Checklist & Instructions**

*(To be completed by supervisor and retained in employee file. Use at the point of transfer, termination or extended leave.)*

**Employee Name Department
Hire Date Last Day of Employment**

|  |  |  |
| --- | --- | --- |
| **Employee Separation: Supervisor Tasks** | **TRANSFER** | **SEPARATION** |
| **Date** | **Initials** | **Date** | **Initials** |
|  Obtain letter of resignation if voluntary separation |  |  |  |  |
| Complete the [Employee Separation Request Form](https://duckdocs.uoregon.edu/) in DuckDocs and obtain necessary approvals. Training is available in [MyTrack](https://uomytrack.pageuppeople.com/learning/3802). |  |  |  |  |
| Verify final timesheet or leave report. Verify vacation leave balance hours for final check |  |  |  |  |
| Share this checklist and exit interview schedule (if applicable) |  NA |  NA |  |  |
| Collect the employee’s UO ID card/Flock card and return it to the Card Office.If the card is used for building access, notify the building manager of final date of employment. |  NA |  NA |  |  |
| Counsel employee to update their address and final check delivery method if needed |  |  |  |  |
| **International Employees** |  |  |  |  |
|  If employee is on a UO sponsored work authorization (E-3, H-1B,  J-1, TN, etc.) contact International Student and Scholar Servicesto confirm immigration paperwork is updated. |  |  |  |  |
| **UO Equipment & Property** |  |  |  |  |
| Manage return of **all** university property and equipment. |  |  |  |  |
| **Record Retention Preservation of Electronic Files** |  |  |  |  |
| All paper and electronic records, including email, for whicha) the UO’s retention schedule requires preservation b) where the information is subject to a legal hold or c) where the information is subject to a pending public records request. Make sure to get any OneDrive files that the department might need from the employee’s account **before** the employee’s last day of work. Access to OneDrive is terminated when employment ends (including for retirees). |  |  |  |  |
| **Building Access** |  |  |  |  |
| Remove building access codes and Prox card access. |  |  |  |  |
| Collect keys: building, office, file cabinet etc. |  |  |  |  |
| Remove all other access codes: copier, locker (if applicable) |  |  |  |  |
| **Telecommunications –**[**UO Service Portal**](https://service.uoregon.edu/TDClient/2030/Portal/Home/) |  |  |  |  |
| Teams calling extension removed or change outgoing message |  |  |  |  |
| End any UO-managed mobile device accesses and accounts. |  |  |  |  |

***Employment Checklist & Instructions-Pg. 2***

*(To be completed by supervisor and retained in employee file. Update at the point of transfer, termination or extended leave.)*

**Employee Name**

|  |  |  |
| --- | --- | --- |
| **Employee Separation: Supervisor Tasks** | **TRANSFER** | **SEPARATION** |
| **Date** | **Initials** | **Date** | **Initials** |
| **Transitional Tasks** |  |  |  |  |
| Confirm status of projects and assignments. Work to arrange transition of projects. |  |  |  |  |
| Ensure you know where shared files are stored before employee departs. Have employee share any OneDrive files the unit may need. Access to OneDrive ends on termination. |  |  |  |  |
|  |  |  |  |  |
| [**Purchasing and Contracting Services**](https://pcs.uoregon.edu/) |  |  |  |  |
| Terminate procurement card (VISA) access |  |  |  |  |
| [Terminate Custodian Authorization of Petty Cash](https://ba.uoregon.edu/content/petty-cash#custodian-responsibilities)  (balance fund and remove access) |  |  |  |  |
| Remove signature authority from all accounts |  |  |  |  |
| **Parking Permit**  |  |  |  |  |
| Counsel employee to return parking permit for possible refund. |  |  |  |  |
| Computing Accounts: When the job and employment record are ended in Banner, access to computing accounts will be terminated.  |  |  |  |  |
| If you have a separation requiring immediate termination or to avoid overpayment as necessary, please email payroll@uoregon.edu with the employee’s Duck ID, and separation date and reason. |  |  |  |  |
|  |  |  |  |  |
| **Other (Dept. specific or addition)** |  |  |  |  |

**Separation Instructions**

**The Employment Checklist and Instructions serves as a guide to assist supervisors and employees with addressing key areas as the employee separates from the university.  Consider the department’s policies and procedures while working the checklist.  Use listed items as applicable and add as necessary.**

**Complete Final Payroll Documents:**

* [General Separation](https://hr.uoregon.edu/content/general-separation)
* [Transfer to Other UO Dept.](https://hr.uoregon.edu/transfer-other-uo-department)
* [Death](https://hr.uoregon.edu/death-employee)
* [Graduate Employee Separation](https://hr.uoregon.edu/graduate-employee-separation)
* [Student Employee Separation](https://hr.uoregon.edu/student-employee-separation)
* [Retirement](https://hr.uoregon.edu/employee-retirement)

**Notify the Benefits Office:** Contact the Benefits Office by emailing hrbenefits@uoregon.edu with your employee’s name, UO ID number, and termination date. Benefits will send out important information regarding benefit termination to your employee.

**Collect ID Card:** If possible, the UO ID card/Flock Card should be collected from the employee if they are fully separating from the university. The ID card should be confidentially destroyed.

**Collect Keys and Terminate Building Access:**Collect keys to all buildings/offices/labs, etc. as well as desks and file cabinets. If the employee has a building access code or card swipe/prox access you’ll need to visit the UO Police Department’s webpage and select Online Forms to remove access.

* [Locknetic/Omni Code](https://emu.uoregon.edu/key-and-access-office/lockneticomni-code-requests)
* [Card Access Request](https://emu.uoregon.edu/key-and-access-office/card-access-requests)

**Collect UO property:** Including tangible items, i.e. laptop, other personal computer devices, cell phone, pager, locker number or other items specific to your department and intangible items including [intellectual property](https://research.uoregon.edu/manage/innovation-impact/uo-intellectual-property-policies-guidelines). Request that personal files are deleted before equipment is returned. If the employee is unable to remove personal files prior to separation, they can identify these files to be returned and we will consider their request.

**Record Retention/Preservation:** Contact Information Services and your unit IT administrator no later than 2 weeks before the employee’s last day to enable preservation of university-related electronic communications, electronically stored files, and hard copy files. All paper and electronically stored records, including email where a) our retention schedule requires preservation b)where the information is subject to a legal hold or c) where the information is subject to a pending public records request. We cannot delete departing employee accounts and inboxes until all UO work-related records are retained and preserved pursuant to applicable retention schedules and or active legal holds.
 **Remove Procurement Card Authorization and Delete Card Custodian or Budget Authority Authorization**: Notify Purchasing and Contracting Services of the removal of authorization for the use of a Procurement Card by emailing pcard@uoregon.edu within 24 hours of the change to employee status. If the employee separating from the university is the card custodian/budget authority for your unit, the unit must email pcard@uoregon.edu within 24 hours after such a separation. All Procurement card activity must stop within the unit until a new [PCard Intake Form](https://pcs.uoregon.edu/content/procurement-card-program)  is submitted, required training is complete and a new pcard is issued. [PCS Forms](https://pcs.uoregon.edu/content/forms#RELATED_FORMS_AND_DOCUMENTS) can be found on the Purchasing and Contracting Website.

**Cancel Telecommunications:** If you need to cancel a phone line, cell phone or terminate a long distance code you will need to complete the forms on the [UO Service Portal](https://service.uoregon.edu/TDClient/2030/Portal/Home/) website. Forms 1(a), 2(a), 2(b) and 12(a) are the most common forms needed when removing access from a separating employee.

**Terminate Access to Computing Accounts**: When the job and employment record are ended in Banner, access to computing accounts will be terminated based on the classification of the employee. The Identity Management website outlines when access will be terminated for different technology. If you have a separation requiring immediate termination, please email payroll@uoregon.edu with the separation information of the employee along with their Duck ID.

**Request Employee Update Personal Information**: Remind the employee to update their personal information by logging on to [Duckweb](https://duckweb.uoregon.edu/pls/prod/twbkwbis.P_WWWLogin) or by completing an [Employee Information Form](https://pages.uoregon.edu/baoforms/bao_drupal_6/sites/ba.uoregon.edu/files/forms/eif.pdf) and submitting to the Payroll Office. It’s important for the university to have correct contact information for future correspondence (for W-2, COBRA, etc.).

**Arrange for Transition of Outstanding Assignments**: Meet with the employee to determine outstanding assignments and work that will need to be delegated to another team member.

**Employee Voicemail/Email:**

Ask the employee to update their voicemail and email message to include a new contact within your department. If you are unable to have the employee update the voice message contact your telephone coordinator assigned to your department for further instructions.

**Remove Employee Email from University Listservs**: Remove employee from university listservs by emailing listmaster@uoregon.edu with the employee’s email and last day of employment.

**Remove Employee Contact Information from Departmental Resources**: Remove employee contact information from your website, emergency contact lists, and other internal resources.

**Check UO Online Directory Listing:** If you find that the employee’s name has not been removed from the UO Online Directory after the employee’s job has been terminated, please [create a ticket](https://service.uoregon.edu/TDClient/2030/Portal/Requests/ServiceDet?ID=20175) for a UO Directory Request.