

Separation Checklist

Complete the Checklist at the time of separation of employment. Submit the form along with the individual's personnel file to HRIM.

Employee Name:	Employee Campus ID:
Home Department:	Supervisor's Name:

****Note:** Individuals working for more than one department at time of separation should complete one checklist for each department.

EMPLOYEE AND DEPARTMENT REPRESENTATIVE

	Description	Completed (Dept Rep Initials)
1	Update Asset Tracking Form to provide proof of return of equipment, etc.	
2	Obtain all information needed to access computing or other information system accounts and/or equipment (e.g. encryption codes, passwords, etc.).	
3	Obtain voice mail access code. Change voicemail.	
4	Direct employee to return parking permit to Transportation (fees will be deducted from last check if not returned timely).	
5	Finalize timesheet & leave records (f applicable).	
6	Finalize travel expense receipts & reports.	
7	Cancel future training or travel.	
8	Obtain proxy access to email and calendar (GoogleApps) (unless employee is a current or former NC State student).	
9	Update the MyPack Portal "Employee Self Service" with forwarding address or provide it to HR Payroll for future correspondence.	
10	If engaged in research as part of job, contact Research Administration to review research agreements, patents, intellectual property agreements, etc.	
11	Repurpose Compass membership to another employee.	
12	Contact Benefits at 919-515-2151 to discuss benefits continuation and to ensure benefit vendors have correct forwarding address.	
13	Complete the online exit survey (password: wolfpack) and/or schedule in person exit interview. <ul style="list-style-type: none"> • SHRA, EHRA Non-faculty, & Post Docs: HR 919-515-6575 • Faculty: OIED 919-513-2099 	
14	Let employee know that they may donate excess annual leave (beyond the max 240 hours payout) to a specific person currently in the Shared Leave program is desired. Review the Shared Leave program information for more details or call 919-515-2151.	
16	Download and save on appropriate university resources all university data from personally-owned computers/devices (ex: laptop, tablet, smartphone) or computing accounts and obtain access.	
17	Remove university-owned software from personally-owned computers or devices.	
18	If employee is retiring and want to retain email account, contact department HR representative to submit a no-pay personnel action to continue access	

Departing Employee Signature: _____ Date: _____

Dept. Representative Signature: _____ Date: _____

DEPARTMENT REPRESENTATIVE

	Description	Completed
1	<p>Submit appropriate separation action(s) through HR System prior to payroll cutoff deadline for the final pay date. The following paperwork should be submitted to HRIM to finalize payment. Follow your internal process for workflow and approval.</p> <ul style="list-style-type: none"> • Resignation/Separation Letter • Annual Leave & Bonus Payment Authorization Form (EHRA & SHRA) • Signed final leave balance report <p>**Leave pay-out penalty applies to EHRA employees who have been employed an aggregate of 24 months or less (See PRR 05.15.01 section 8.2.4.2-Payout of Accrued Annual Leave) **Post Docs are not paid out for annual leave</p>	
2	Review System Access Checklist and determine appropriate action.	
3	Notify/involve appropriate IT staff to review the individual's current access to systems (e.g., MySoft, Proteus, Facilities, HR, Financials, SIS, etc.) and submit a revoke/termination access request (Security Access Request-SAR) as needed.	
4	Terminate the individual's signature authority on bank accounts (such as Foundation accounts).	
5	Deactivate Purchase Card and cellular plans.	
6	Knowledge transfer: Update or create SOPs for position duties. Work with the people who will be taking over responsibilities until the position is filled to train and update them on the status of projects and tasks.	
7	Notify colleagues and co-workers of the employee's departure.	
8	Contact Security Applications Technology (919-513-3111) to terminate security access for doors.	
9	Process comp time payouts for non-exempt employees.	
10	Account for non-salary compensation adjustments.	
11	Contact Office of General Counsel (919-515-3071) if separating employee is involved in a Litigation Hold to arrange a successor custodian of records.	
12	Update organizational chart and other references to employee (department directory, staff listing, website).	
13	Put "tickler" on calendar for 1 month after the termination date to verify all payroll transactions have cleared, and to terminate individual from Leave System. Post leave transactions to reduce leave balances to zero.	
14	Suspend/remove access to department-owned systems or any shared accounts and change passwords accordingly.	
15	Retain the individual's student access (student email account, Moodle, etc.) if applicable.	
16	Create appropriate reply-back messages and forwarding rules for the individual's email account.	
17	Create appropriate reply-back messages and forwarding rules for the individual's voicemail .	
18	Ensure any files on local or network drives that the individual administers or can access are also accessible to other department personnel. Verify appropriate public record copies of the files exist.	
19	<p>Document, re-assign, and terminate, if appropriate:</p> <ul style="list-style-type: none"> • External accounts used for university business by the individual • Individual's administration of departmental email lists, groups, generic accounts, items in web registry or use of individual email aliases or departmental aliases • Any resources (e.g., conference rooms, projectors, etc.) • . 	
20	Send departmental Personnel File to HRIM.	

Department Representative Signature _____ Date _____