



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.

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
- _____ 2. Notify UHR Personnel Records (x3482) of employee termination
- _____ 3. Complete Termination/ Leave of Absence & Return/ Layoff & Return form and send to UHR immediately, to avoid overpayment.
- _____ 4. Inform employee to contact UHR Employment Services (x3480) to schedule an exit interview
- _____ 5. Inform employee to reconcile vacation balances with UHR Personnel Records (x3482)
- _____ 6. Inform employee that UHR Staff Benefits will contact him/her regarding continuation of benefits
- _____ 7. 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 If position is no longer active or will not be posted within 30 days, notify UHR Employment Services (x3480)
- _____ 8. 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 Personnel Records (x3482), 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; work-related email addresses; guest or shared accounts
- _____ 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. Ensure that employee has completed web-time entry and submitted report.
- _____ 9. Ensure that employee has cleaned computer files, removing personal items and transferring University files to a location that is accessible to others
- _____ 10. Ensure that the employee has removed personal items
- _____ 11. If employee is on H-1B visa status, notify UHR Employment Services (x-3480) to ensure compliance with special requirements.
- _____ 12. Ensure that employee's access to Banner has been removed.

Comments: _____

I acknowledge that the above list is accurate and all University property/equipment has been returned to the University.

Supervisor Signature _____

Date _____

Employee Signature _____

Date _____

Retain this checklist in your department.