

EMPLOYMENT SEPARATION CHECKLIST

Name: _____ Separation Date: _____ Last Day Worked*: _____

EIN: _____ Job Title: _____

Department: _____ Supervisor: _____

TYPE OF SEPARATION	Voluntary Separation	Involuntary Separation	Retirement
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EMPLOYEE TASKS:

Provide resignation letter to supervisor and HR
Complete final PTO leave bank updated in myFIT
Complete final timesheet, if applicable
Update personal contact information (home address, email, phone) Banner Self-Service
Clear workspace/desk/lock of personal effects
Return all FIT IT property (laptops, cell phone, tablet, etc.)
Discuss voicemail/email out of office message with supervisor
Return all FIT work resources (files, manuals, records, library books, etc.)
Final Paycheck: Mail or Pickup?
Employee completes online exit survey
Employee completes face to face exit interview with HR, if desired
Return FIT ID, keys, other security/access cards to Supervisor

SUPERVISOR TASKS:

Accept and send employee’s written resignation to HR
Complete final PTO leave bank approvals in myFIT
Complete final timesheet approvals, if applicable
Voicemail transfer/proxy to who? Instruct employee on out of office message
Contact HR if department access is needed for email, voicemail or employee drives
Collect college property, laptop, cell phone, credit card, mobile devise, files
Collect ID badge, keys, security card, from employee
Review with employee any outstanding work
If separating employee is a supervisor, who will their direct reports report to?
Email transfer/proxy to who? Instruct employee on out of office message

HUMAN RESOURCES:

PTO Payout
Check Leave Report status
Calculate PTO Payout/Payback for overuse of PTO
Create Action Form for PTO Separation Payout/Repayment
Send PTO Separation Payout Form to Budget, Payroll, HR
Benefits
Send written brochure with all separation information: medical, dental, vision, Flex
Meet with employee, if applicable
Aetna Team
FSA
LTD
Retirement
Coverage Notice – Life & LTD
Coverage Notice: COBRA
Records
Verify if employee has enrolled in any classes and notify Bursar if invoice needs to be sent to separating employee
File resignation letter in personnel file
Close personnel file
BANNER
Verify Open/Active Job Position
Final Termination Action Form
NBAJOBS
PDABCOV
PDADEN: If yes, complete Employee Benefits Form for Welfare Fund Payback/Recoup
PHICHEK: If yes, complete Employee Benefits Form for Welfare Fund Payback/Recoup