Checklist for Separating from Employment

This checklist serves as a resource for individuals separating from employment with Clemson University. If you are the manager/supervisor of a separating faculty or staff member, please refer to the Separation Processing Checklist.

Tasks and activities associated with separating from employment are listed below. Some actions are required by the University while others are recommended by the Office of Human Resources (OHR). Required actions are marked with an asterisk.

Section I: Complete the following information:

Name: Employee ID:

Department Name: Dept. Number:

Position Title: Separation Date:

Done	N/A	SEPARATION: RETIREMENT	Responsibility
		Three months before retirement, contact PEBA for an individualized counseling session. Schedule your appointment with PEBA. • Retirement benefit estimates • Service purchase options • The ability to continue insurance into retirement	Faculty/Staff Member
		Two to three months before retirement, meet with supervisor to discuss departure.	Faculty/Staff Member
		*Submit a notice of retirement to supervisor. This can be a memorandum; include the effective date.	Faculty/Staff Member
		Forward the documented notice of retirement to the college's HR service representative or solutions generalist.	Supervisor/Department Administrator
		Contact HR service representative or solutions generalist if there are any changes in supervision that is the result of the faculty or staff member leaving.	Supervisor
		Review eligibility and benefits of obtaining emeritus status: http://www.clemson.edu/emerituscollege/membership.html	Faculty Member
Done	N/A	SEPARATION: RESIGNATION	Responsibility
		*Submit a notice of resignation. Notice should be in writing and include the effective date.	Faculty/Staff Member
		Supervisor will respond in writing to the resignation (accept, deny, or modify). Email is acceptable.	Supervisor
		Forward the documented notice of resignation to the college's HR service representative or solutions generalist.	Supervisor/Department Administrator
		Contact HR service representative or solutions generalist if there are any changes in supervision that may result from the faculty or staff member leaving.	Supervisor
		If taking another job at Clemson University or with another SC state agency without a break in service, email empins@clemson.edu prior to your separation to ensure that benefits and payroll deductions are handled correctly.	Faculty/staff member
		Review eligibility and benefits of obtaining emeritus status (http://www.clemson.edu/emerituscollege/membership.html).	Faculty Member

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The length of time that constitutes a break in service varies by separation type. Please contact the Office of Human Resources Workforce Benefits and Well-being unit for guidance on your separation.

Done	N/A	AFTER NOTICE OF SEPARATION	Responsibility
		Enter separation date into CUBS.	HR Data Center
		Ensure that the separating faculty member has a copy and understands this checklist for separating faculty/staff members.	HR Service Representative or Solutions Generalist
		Remind faculty/staff member to update forwarding address in the CUBS system.	HR Service Representative or Solutions Generalist
		Within two days of the separation being entered into CUBS, the separating faculty/staff member will receive an off-boarding email from the Office of Human Resources with guidance and links to information related to separating from employment with Clemson University. If you have not received this email, please contact OHR (864-656-2000/Ask HR).	Office of Human Resources
		*Engage in transition planning (course preparation, research, students, department commitments, etc.).	Faculty/Staff Member and Supervisor
		Complete the online exit survey	Faculty/Staff Member
		Contact the University's HR Service Center (Ask HR) with any questions regarding the following: • Continuation of health coverage under COBRA • Conversion or continuation of life insurance • Retirement account balances and/or distribution of retirement contributions • Paid time remaining • Employment verification process for future reference	Faculty/Staff Member
		Cancel enrollments in conferences or upcoming training.	Supervisor/Department Administrator
Done	N/A	TWO WEEKS PRIOR TO SEPARATION DATE	Responsibility
		Cancel payroll deductions (e.g., parking, TigerStripe, etc.). Note: Wait until the last day to return the parking decal.	Faculty/Staff Member
		Settle all University accounts, pending reimbursements, and any outstanding parking or library fines.	Faculty/Staff Member
		If a supervisor, ensure that budgetary records, HR reviews (evaluations, correspondence, etc.), letters or emails containing resource commitments and unit strategic plans are labeled and organized in hardcopy files for the supervisory successor.	Faculty/Staff Member
		Use the following guidelines for retention and/or disposition of email, business and personal files, websites, and other electronic materials. If more information is needed consult with a supervisor, CCIT college consultant, or the CCIT Customer Support center.	Faculty/Staff Member

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		Hard Copy/Paper Files • Shred documents with no value. • Send business documents that need to be retained to the supervisor. **Email** • Delete messages with no value. • Forward messages with value to a supervisor. • Print or forward personal messages as needed. • Update external online accounts (e.g., bank accounts) that may have been established with a University email address. Update the email/login information as needed. **Cloud Storage** • Review files stored in Box, Google Drive, or Microsoft OneDrive. • Delete files with no value. • Transfer ownership of files with value to a supervisor. • Copy personal files to a storage location established outside of the University. **Web Sites** • Request department webmaster remove references to employee from web pages.	
		If a supervisor, address any leave requests submitted by employees you supervise.	Faculty/Staff Member
		Finalize leave records—notify HR service representative with questions.	Faculty/Staff Member
		If not done already, [complete the online exit interview]().	Faculty/Staff Member
Done	**N/A**	**WITHIN LAST FEW DAYS OF SEPARATION DATE**	**Responsibility**
		At the request of supervisor, review and sign this checklist, which, among other things, documents that all University property has been returned.	Faculty/Staff Member
		Establish an out-of-office Outlook message. Discuss with department admin if a standard message is preferred.	Faculty/Staff Member
		Ensure forwarding mailing address is correct in the Clemson University Business System (CUBS).	Faculty/Staff Member
		*Return all applicable University property to the department administrator and/or appropriate department: University keys Date Returned: ID badges Date Returned: University credit cards Date Returned: Official parking placard Date Returned: Parking permit Date Returned: Laptop Date Returned: Cell phone Date Returned: iPad Date Returned: Library books/materials Date Returned: DUO Two-Factor Token Date Returned:	Faculty/Staff Member
		Submit ithelp@clemson.edu request to deactivate employee's phone line. If number should be forwarded, include that information in the request. The Telecommunications organization can offer options for Voicemail. They will need to receive special requests before an employee departs and if the employee was on the new Unity voicemail or the old system.	Supervisor/Department Administrator

		Requests can be submitted to: Telecomservices-l@clemson.edu.	
		Obtain passwords to any administrative database, software application, information system, etc., for which the employee possesses the sole access rights, and that is necessary for program or unit administration or operations. If an employee is using their personal User ID, instead of an administrative account, request a new account be created with the appropriate permissions instead of obtaining a personal password.	Supervisor/Department Administrator
		Confirm with employee the computing systems in which they have been granted access. Submit an ithelp@clemson.edu request to deactivate employee's access in Central groups and the University systems identified by the employee. Ensure profiles or access to other University systems is transferred or removed (i.e. **Adaptive**, etc.). Note: Upon termination in the HR system, network and email access will automatically be disabled. Other systems require a specific request to disable accounts.	Supervisor/Department Administrator
		Deactivate building/area access.	Supervisor/Department Administrator
		Retrieve University ID	Supervisor/Department Administrator
		Change building directories, campus directory and update listservs.	Supervisor/Department Administrator
		If the employee was engaged in research as a part of their job, contact the Research Division to review research agreements, patents, intellectual property agreements, etc.	Supervisor/Department Administrator

Faculty/Staff Member Signature: _____   Date: _____

Supervisor Signature: _____   Date: _____

The faculty/staff member's signature certifies that all applicable activities communicated on this Separation Checklist have been completed. The supervisor's signature denotes that all administrative procedures outlines above have been completed.