



SEPARATION PROCESSING CHECKLIST Faculty and Staff

The following checklist has two purposes:

- To outline the required and recommended tasks that may need to be addressed when someone separates from employment or otherwise separates from a department (by transfer, layoff, extended leave of absence, etc).
- To serve as documentation that required tasks have been completed. All items may not apply to a given individual, and department-specific actions may need to be taken in addition to the actions noted on this checklist.

Section I: Separating employee information

Employee Name: _____
 Department Name: _____
 Position Title: _____
 Supervisor Name: _____

Employee ID: _____
 Dept. Number: _____
 Separation Date: _____

Section II: To be completed by the supervisor in conjunction with the separating employee before the last day of work.

SEPARATION PROCESSING	
Done	N/A
<input type="checkbox"/>	<input type="checkbox"/>
	Resignation/Retirement: Receive and acknowledge notice of intent to separate and forward the document to your HR partner for processing. If notice is given orally, document notice using the Notice of Resignation or Retirement template.
<input type="checkbox"/>	<input type="checkbox"/>
	Ensure that the separating employee 1) has been contacted by OHR with offboarding information and 2) has a copy and understands the Employee Checklist for Separating from Employment .
<input type="checkbox"/>	<input type="checkbox"/>
	Remind employee to update forwarding address in the CUBS system.
<input type="checkbox"/>	<input type="checkbox"/>
	Remind employee to contact OHR if moving to a job within CU or another S.C. state agency without a break in service to ensure benefits and deductions are handled correctly.
<input type="checkbox"/>	<input type="checkbox"/>
	Obtain all information needed to access computing or other information systems accounts and/or equipment – passwords for example.
<input type="checkbox"/>	<input type="checkbox"/>
	Finalize timesheet and leave records; notify HR partner if not correct.
<input type="checkbox"/>	<input type="checkbox"/>
	Cancel enrollments in training classes and conferences to avoid “no-show” fees.
<input type="checkbox"/>	<input type="checkbox"/>
	Obtain voice mail access code. Change voicemail. Submit request to ithelp@clermson.edu to reset password prior to new hire arriving.
<input type="checkbox"/>	<input type="checkbox"/>
	Download and save (on appropriate University resources) all University-owned data from personally owned computers/devices (laptop, tablet, smartphone) or computing accounts and obtain access.

CLEMSON

HUMAN RESOURCES

<input type="checkbox"/>	<input type="checkbox"/>	Ensure University-owned software is uninstalled from personally owned computers and devices.
<input type="checkbox"/>	<input type="checkbox"/>	<p>Collect or verify return of University property: (check applicable items)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Access cards / ID cards <input type="checkbox"/> Keys (building, office, desk, files, vehicles, lockers, etc.) <input type="checkbox"/> University credit/procurement cards <input type="checkbox"/> Computers/laptops, cameras, iPads, chargers, etc. <input type="checkbox"/> Cell phones / pagers and chargers <input type="checkbox"/> Uniforms/tools/instruments, etc. <input type="checkbox"/> Library books, audio/video materials, periodicals <input type="checkbox"/> Parking decal <input type="checkbox"/> Official parking placard <input type="checkbox"/> Other <input type="checkbox"/> Other <input type="checkbox"/> Other <p>Please list any University property not returned, and explain why:</p>

*Employee Signature: _____ Date: _____

Supervisor Signature: _____ Date: _____

*The employee's signature certifies that all applicable activities as denoted on this Separation Processing Checklist have been completed and discussed as appropriate.

Section III: To be completed by the supervisor.

Done	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	Verify transfer of any University records (e.g., paper, electronic, email) held in employee's work area or home office/computer to his/her supervisor. In particular, prevent the employee from retaining, copying, or removing in any way confidential or sensitive records.
<input type="checkbox"/>	<input type="checkbox"/>	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.
<input type="checkbox"/>	<input type="checkbox"/>	Delete the employee's access to department data systems, email servers, voice mail systems, email lists, etc. or ensure employee's access to data systems will be terminated on last day of work. Contact IT Help Desk (ithelp@clemsun.edu) for assistance.
<input type="checkbox"/>	<input type="checkbox"/>	Notify your HR partner about the employee's departure, so that the separation can be entered into CUBS.
<input type="checkbox"/>	<input type="checkbox"/>	Deactivate building/area access.
<input type="checkbox"/>	<input type="checkbox"/>	Change building directories, Campus Directory, and update list servs.
<input type="checkbox"/>	<input type="checkbox"/>	Change names on subscriptions, institutional memberships, etc.
<input type="checkbox"/>	<input type="checkbox"/>	Create appropriate reply-back messages and forwarding rules for the individual's email account.
<input type="checkbox"/>	<input type="checkbox"/>	Create appropriate reply-back messages and forwarding rules for the individual's voicemail.
<input type="checkbox"/>	<input type="checkbox"/>	Notify colleagues and co-workers of the employee's departure.
<input type="checkbox"/>	<input type="checkbox"/>	If the employee was engaged in research as a part of the job, contact the Research Division to review research agreements, patents, intellectual property agreements, etc.

I certify that the employee has completed all applicable activities as denoted on this Separation Processing Checklist and that all administrative procedures as outlined above have been completed.

Supervisor Signature: _____ Date: _____

SECTION IV -- DISTRIBUTION

- Give the separating employee a completed and signed copy of Sections I and II.
- Submit the original to the HR partner to be retained in the departmental file.