

TEXAS WOMAN'S UNIVERSITY

Management Checklist for Faculty/Staff Separation

This checklist is a tool to assist supervisors in completing the final steps of an employee's separation from the University. Prior to the employee's last day at work, the following items should be reviewed by the supervisor. This form, in addition to the Personnel Transaction Form (PTF), is to be submitted to Office of Human Resources (HR) in order to finalize the separation process.

EMPLOYEE INFORMATION						
Name:	Last Day Worked:					
Position:	Remove From Payroll Date:					
TYPE OF TERMINATION						
<table style="width: 100%; border: none;"> <tr> <td style="width: 50%; vertical-align: top;"> <input type="checkbox"/> Voluntary Termination <input type="checkbox"/> Obtain resignation in writing from employee. <input type="checkbox"/> Accept employee's resignation. <input type="checkbox"/> Instruct employee to complete exit packet from HR website.* </td> <td style="width: 50%; vertical-align: top;"> <input type="checkbox"/> Retirement <input type="checkbox"/> Obtain letter of intent to retire from employee. <input type="checkbox"/> Access exit packet from HR website. <input type="checkbox"/> Instruct employee to complete exit packet from HR website.* <input type="checkbox"/> Refer employee to HR to assure that the retirement processing procedures have been followed. </td> </tr> <tr> <td style="vertical-align: top;"> <input type="checkbox"/> Involuntary Termination <input type="checkbox"/> Progressive discipline policies followed. <input type="checkbox"/> Termination approved by head of department <input type="checkbox"/> Request for termination submitted to HR <input type="checkbox"/> HR's approval obtained. <input type="checkbox"/> Instruct employee to complete exit packet from HR website.* </td> <td style="vertical-align: top;"> <input type="checkbox"/> Other (death, military service, etc.) <input type="checkbox"/> Receive supporting documentation regarding event <input type="checkbox"/> Direct employee to complete exit packet from HR website.* </td> </tr> </table> <p style="text-align: right;">*For Exiting forms please go to HR Forms.</p> <p>Note: The separation process must meet the following goals: diminish the legal risks for the University, maintain the employee's dignity and confidentiality, protect the University's reputation and minimize disruptions of the work place.</p>			<input type="checkbox"/> Voluntary Termination <input type="checkbox"/> Obtain resignation in writing from employee. <input type="checkbox"/> Accept employee's resignation. <input type="checkbox"/> Instruct employee to complete exit packet from HR website.*	<input type="checkbox"/> Retirement <input type="checkbox"/> Obtain letter of intent to retire from employee. <input type="checkbox"/> Access exit packet from HR website. <input type="checkbox"/> Instruct employee to complete exit packet from HR website.* <input type="checkbox"/> Refer employee to HR to assure that the retirement processing procedures have been followed.	<input type="checkbox"/> Involuntary Termination <input type="checkbox"/> Progressive discipline policies followed. <input type="checkbox"/> Termination approved by head of department <input type="checkbox"/> Request for termination submitted to HR <input type="checkbox"/> HR's approval obtained. <input type="checkbox"/> Instruct employee to complete exit packet from HR website.*	<input type="checkbox"/> Other (death, military service, etc.) <input type="checkbox"/> Receive supporting documentation regarding event <input type="checkbox"/> Direct employee to complete exit packet from HR website.*
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REVIEW APPLICABLE ISSUES						
<input type="checkbox"/> Personnel Transaction Form completed. <input type="checkbox"/> If voluntary resignation, letter of resignation submitted to HR. <input type="checkbox"/> Final timesheet submitted and approved.	<input type="checkbox"/> Determine status of current projects. <input type="checkbox"/> Pending reimbursements processed (ie. travel expenses). <input type="checkbox"/> Arrangements made for removing personal items.	<input type="checkbox"/> Cancel applicable signature authority. <input type="checkbox"/> Arrange for email access by supervisor. <input type="checkbox"/> Submit Personnel Vacancy Form to initiate recruitment of replacement. <input type="checkbox"/> Remind employee to complete and submit the Exit Packet to HR.				
RETURN UNIVERSITY PROPERTY CHECKLIST						
<input type="checkbox"/> All Keys/Access Cards to building(s), locker, desk, cabinets <input type="checkbox"/> Keys to vehicle(s)/Golf carts <input type="checkbox"/> Communication devices (Cell phone/pager/PDA, 2-way radio, etc.)	<input type="checkbox"/> Laptop, computer equipment <input type="checkbox"/> Procurement and credit card(s) <input type="checkbox"/> Manuals and books (reference, training) <input type="checkbox"/> Tools, equipment <input type="checkbox"/> Library Materials/resources	<input type="checkbox"/> Office/project files <input type="checkbox"/> Uniforms <input type="checkbox"/> ID Card/Badge <input type="checkbox"/> University Cards (Travel, Purchasing) <input type="checkbox"/> Ask for Departmental Social Media Passwords <input type="checkbox"/> Any other University property: _____				
ELIGIBILITY FOR REHIRE (final approval verified by HR)						
<input type="checkbox"/> Eligible for rehire <input type="checkbox"/> Ineligible for rehire						
Comments: _____						
COMPUTER, VOICEMAIL, LONG DISTANCE ACCESS AND SECURITY CODES						
<table style="width: 100%; border: none;"> <tr> <td style="width: 50%; vertical-align: top;"> <input type="checkbox"/> Contact Public Safety to cancel employee's security access code to department. <input type="checkbox"/> Send an email to servicedesk@twu.edu to deactivate voicemail and long distance code and to Remove from Telecom databases. </td> <td style="width: 50%; vertical-align: top;"> <p>Note: Contact the Help Desk at x3971 to deactivated immediately.</p> <input type="checkbox"/> Change passwords for any additional systems/networks accessed by employee. <input type="checkbox"/> Other: _____ </td> </tr> </table>			<input type="checkbox"/> Contact Public Safety to cancel employee's security access code to department. <input type="checkbox"/> Send an email to servicedesk@twu.edu to deactivate voicemail and long distance code and to Remove from Telecom databases.	<p>Note: Contact the Help Desk at x3971 to deactivated immediately.</p> <input type="checkbox"/> Change passwords for any additional systems/networks accessed by employee. <input type="checkbox"/> Other: _____		
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Authorized Signature _____ Date _____