TRANSFER/SEPARATION CHECKLIST

(To be facilitated by managers)

Instructions:
This form is to be completed by the Manager prior to the employee’s last day of work. This form should be used to certify that all WSU property has been returned, rights to access WSU property or services have been discontinued and forms and files are process correctly. Return to the Employment Service Center when completed (5700 Cass Ave., A/AB, Suite 1900).

Employee Name: ____________________________  Banner ID: ____________________________

School/College/Division: _____________________  Position Title: __________________________

Reason for Separation: ________________________  Separation Date: ______________________

☑️ = Task Completed      N/A = Not Applicable

MISCELLANEOUS DEPARTMENTAL ISSUES TO ADDRESS

☑️ Obtain employee’s letter of resignation
☑️ Meet with employee to discuss status of work projects/reassignments
☑️ Obtain any confidential and all work-related materials/information
☑️ Offer an exit interview with HR (for voluntary terminations)
☑️ Remove employee from Web Time Entry Approval queue (NTRRQUE), assign new approver to avoid deactivation of timesheets
☑️ Cancel signature authority
☑️ Remove mail box/slot
☑️ Update departmental phone list
☑️ Update website
☑️ Request removal from Faculty and Staff directory
☑️ Cancel memberships/subscriptions employee has through WSU
☑️ Notify employee’s customers and/or contacts of employee’s departure
☑️ Request the employee to remove all personal property from office/laboratory or other workspace prior to departure
☑️ In the event of death, the supervisor is responsible for making contact with employee’s family to retrieve personal belongings and university property

EMPLOYMENT SERVICE CENTER (ESC)  7-2010

☐ If employee accepts to have an exit interview, contact ESC to schedule the interview (for voluntary separations)
☐ Create and submit an EPAF transaction (Term-E or Term-J) along with a scanned supporting documentation (if leaving WSU).
TOTAL COMPENSATION & WELLNESS 7-3717

___ Advise employee to contact TCW for benefit coverage information

PURCHASING 7-3734

___ Obtain procurement card and return to purchasing department
___ Terminate access to on-line ordering systems (Office Max, UPS, etc.)

FISCAL OPERATIONS – PAYROLL 7-2138

___ Obtain petty cash fund and provide notification of new custodian to the Cashier’s Office
___ Complete procedures for final paycheck (including unused/accrued vacation and/or overtime payout or dockings
___ Submit “Last day of work/Pay Notice” form (if leaving WSU)
___ Confirm address is correct in Banner. The most recent Banner address will be used for W-2 purpose

BUSINESS OPERATIONS 7-2313

___ Obtain One Card from employee and send it to the One Card/Parking Office. If employee needs a refund he/she should contact the One Card/Parking Office
___ Obtain Parking Permit (hang tag) from employee and send it to the One Card/Parking Office
___ Collect any credit cards issued to employee (Travel card, Visa, MasterCard, etc.)

COMPUTING & INFORMATION TECHNOLOGY (C&IT) 7-4778

Computer Access:
___ Terminate Access ID and access to all administrative systems and other computing applications
___ Advise employee to retrieve or delete any personal files/information on office/department server, lab server, etc.
___ Transfer all computer files to appropriate location
___ Revoke passwords: workflow routing, shared pass codes
___ Obtain password rights to any administrative database, software application, information system, etc., for which employee has sole access rights
___ Clean or have employee clean computer Hard drive(s)
___ Ensure that Network information is accessible to supervisor
___ Unsubscribe from e-mail distribution and list servers
___ Terminate access to on-line ordering systems (Office Max, UPS, etc.)

Phone:
___ Advise employee to clear voice mail greeting(s) and obtain password
___ Purge messages
UNIVERSITY PROPERTY

- Obtain Computers/Laptop/PDA or other peripheral equipment (e.g., printer, cameras).
- Obtain Cellular phones/ Pagers
- Obtain all administrative systems instructions and computer manuals
- Collect uniforms/gear/tools/instruments/job accessories
- Obtain Keys: office building, classrooms, storeroom, desk, file cabinets, storage, cabinets, lockers, vehicles
- Obtain Research equipment, data/databases, etc.

PUBLIC SAFETY 7-6057

- Contact Public Safety to deactivate access to building

Other (Please list):
________________________________________________________________________________________
________________________________________________________________________________________________________

Comments:

________________________

Supervisor/departmental representative name: ____________________________________________ (Please print)

________________________

Supervisor/departmental representative signature Date