

Staff Separation Checklist for Supervisors

This checklist assists the department in processing a separation for a staff employee. This checklist should be used for both staff who are terminating employment, as well as those transferring to another University Department.

This form will not alter or stop the terminating employee's paycheck. If a correction is needed for the employee's final paycheck, please include the information on the Employee Record (ER).

If the termination is involuntary (position elimination, discharge, etc.), please contact the Employee Relations Department before proceeding with processing the termination.

Return copies of the resignation, related documents, and the completed ER to the Office of Human Resources, 100 Craig Hall. *Please note: The ER can be submitted prior to this checklist being completed.*

Employee Name:

Department:

Projected Last Day:

Actual Last Day Worked:

Actions required when an employee notifies supervisor of resignation.

| Item | Complete | N/A | Notes: |
|--|--------------------------|--------------------------|--------|
| General | | | |
| Employee submitted resignation letter. | <input type="checkbox"/> | <input type="checkbox"/> | |
| Employee has been provided with a Separation Guide and Checklist for Staff Employees. | <input type="checkbox"/> | <input type="checkbox"/> | |
| Employee Record has been completed and submitted through approval process. (Applies to separations only, not staff-to-staff transfers.) Payroll deadlines must be considered when completing the termination Employee Record. | <input type="checkbox"/> | <input type="checkbox"/> | |
| If separation date changes, submit a revised Employee Record documenting the date changes, and contact the Office of Human Resources. | <input type="checkbox"/> | <input type="checkbox"/> | |
| A plan has been set up to communicate the separation to the department and other internal/external contacts. | <input type="checkbox"/> | <input type="checkbox"/> | |
| A plan has been set up to redistribute the employee's duties. | <input type="checkbox"/> | <input type="checkbox"/> | |
| Will the position be replaced? If yes, obtain the appropriate approvals, and process the request through PittSource. | <input type="checkbox"/> | <input type="checkbox"/> | |
| All travel disbursements and expense reports have been processed. | <input type="checkbox"/> | <input type="checkbox"/> | |

| Item | Complete | N/A | Notes: |
|---|--------------------------|--------------------------|--------|
| Technology/Systems | | | |
| <p>All University business related documents, including emails, have been provided to the department supervisor, or other appropriate person assuming such responsibilities. Supervisors will not have access to a subordinate's email account after the separation date.</p> <p>Employee must return all hard and soft copies of University files saved on any personal drives prior to final day of employment.</p> | <input type="checkbox"/> | <input type="checkbox"/> | |
| <p>All relevant Cloud storage files (such as Box) have been transferred to a Department network drive or Department supervisor prior to last day of employment.</p> | <input type="checkbox"/> | <input type="checkbox"/> | |
| <p>If the employee has sole access or administrative rights to files, databases, shared drives, applications, or servers, access should be disabled. New administrative rights should be created for any individual taking over the responsibilities for such files, databases, shared drives, applications, or servers.</p> | <input type="checkbox"/> | <input type="checkbox"/> | |
| <p>Remove any University business related documents, files, etc. from personal devices.</p> | <input type="checkbox"/> | <input type="checkbox"/> | |
| <p>Confirm whether employee is currently subject to a litigation hold from the Office of General Counsel. If yes, send email notification to OGC Attorneys with employee's full name, email address, and expected last day.</p> | <input type="checkbox"/> | <input type="checkbox"/> | |
| <p>If employee is subject to a current litigation hold, confirm that all relevant documents requested have been forwarded to OGC, including any relevant text messages or photographs that might be maintained on a personal mobile device.</p> | <input type="checkbox"/> | <input type="checkbox"/> | |

Actions required on or around the last day of employment.

| Item | Complete | N/A | Notes: |
|--|--------------------------|--------------------------|--------|
| General | | | |
| Collect/deactivate department keys and/or security passes (both Pitt and UPMC). | <input type="checkbox"/> | <input type="checkbox"/> | |
| Change security codes in building. | <input type="checkbox"/> | <input type="checkbox"/> | |
| Parking Permit returned to Department of Parking and Transportation. | <input type="checkbox"/> | <input type="checkbox"/> | |
| Department equipment, computers, laptops, software, flash drive, books, research notebook, and manuals returned to the appropriate office. | <input type="checkbox"/> | <input type="checkbox"/> | |
| University ID cards/badges returned to department, Pitt ID cut in half and discarded. UPMC ID (if applicable) returned to UPMC HR office. Applies to separations only. | <input type="checkbox"/> | <input type="checkbox"/> | |
| University-issued credit card, travel card, and/or telephone card cancelled and returned to department. | <input type="checkbox"/> | <input type="checkbox"/> | |
| Forwarding address, telephone number and email address verified (update on Employee Record if necessary). | <input type="checkbox"/> | <input type="checkbox"/> | |
| Request for HR to terminate PittSource account (if applicable). | <input type="checkbox"/> | <input type="checkbox"/> | |
| Disable employee's access to department servers. | <input type="checkbox"/> | <input type="checkbox"/> | |
| All timecards have been submitted and approved by the last working day. | <input type="checkbox"/> | <input type="checkbox"/> | |
| If the employee has supervisory approval, PRISM TRKS approval responsibility has been assigned to someone else. | <input type="checkbox"/> | <input type="checkbox"/> | |
| Cancel/transfer paid subscriptions and memberships in professional organizations. | <input type="checkbox"/> | <input type="checkbox"/> | |
| Arrange for the employee to take their personal items. | <input type="checkbox"/> | <input type="checkbox"/> | |
| Update department phone list/org chart. | <input type="checkbox"/> | <input type="checkbox"/> | |
| Notify outside vendors/suppliers of separation. | <input type="checkbox"/> | <input type="checkbox"/> | |
| Update external security access rosters. | <input type="checkbox"/> | <input type="checkbox"/> | |
| The Current Employee Record Form and Personnel File should be forwarded to the new department administer for staff transferring to another University department. | <input type="checkbox"/> | <input type="checkbox"/> | |

| Item | Complete | N/A | Notes: |
|---|--------------------------|--------------------------|--------|
| Technology/Systems | | | |
| Notify the Technology Help Desk to disable voicemail to email and "send2mobile" features, if used by employee. | <input type="checkbox"/> | <input type="checkbox"/> | |
| If employee has a University-owned mobile device with service agreement, determine what will happen to the phone and the current phone number. The supervisor should contact Telecom to transfer the phone number to the employee, deactivate the phone number and/or suspend the phone number until it is reassigned. | <input type="checkbox"/> | <input type="checkbox"/> | |
| Other user accounts have been terminated or transferred (PeopleSoft, external vendors, etc.). Transferring employees must consult with their new department administrator to ensure appropriate systems access has been changed. | <input type="checkbox"/> | <input type="checkbox"/> | |
| If the employee is eligible to retire from the University, and they would like to retain their University email account, they must make this request at the time they submit their resignation. If the department approves the request, please send the following information to the Benefits Office at hr-benque@pitt.edu: <ul style="list-style-type: none"> ● Employee Full Name ● Employee Department ● Employee Retirement Date ● Employee Primary Email Address | <input type="checkbox"/> | <input type="checkbox"/> | |
| Out of office messages placed on both office phone and University email account directing correspondents to department supervisor or replacement. Please individually establish unique out of office messages so that University business is not disrupted. | <input type="checkbox"/> | <input type="checkbox"/> | |
| For involuntary terminations, notify the Technology Help Desk to disable the University Computing Account at xxx (time of termination) on the employee's last day of employment as employee will not have access to University email or services after that time. | <input type="checkbox"/> | <input type="checkbox"/> | |
| All personal information (i.e. pictures, emails, documents, etc.) has been removed from any University-owned device. | <input type="checkbox"/> | <input type="checkbox"/> | |