

RETIRING EMPLOYEE SEPARATION CHECKLIST

Name: _____ Supervisor: _____

Department: _____ Last day with department: _____

This checklist is to be completed by the employee and returned to his/her supervisor prior to the last day with the department.

YOUR OFFICE

Yes N/A

- Completed required job responsibilities prior to my departure or I have arranged to have them completed on my behalf.
- Prepared and delivered a summary of ongoing projects and tasks to my supervisor.
- Placed work-related print documents in a secure area.
- Notified committees, project teams, etc. of intent to leave.
- Returned building, office, desk, vehicle, and other keys to my supervisor.
- Returned miscellaneous office equipment, tools, uniforms, supplies, etc. to my supervisor.
- Returned other University property to Library or any other area.
- Removed personal items from office or work area.

YOUR IT ACCOUNTS AND TECHNOLOGY

Yes N/A

- Exchanged current DePauw ID at HelpDesk for a new retiree ID.
- DePauw Google Account will remain active during retirement. Optional:
 - Set up an automatic email response (<http://goo.gl/n2qMGT>) with relevant information. (Example: XXXXXX has retired from the University. Questions or requests may be directed to XXXXXX@depauw.edu or 765-658-####.)
 - Set up email forwarding (<http://goo.gl/Y6JrIY>) or create email filters (<http://goo.gl/gsx94S>) as directed by supervisor.
- Transferred ownership of Google Apps materials:
 - Recurring** events or meetings (<http://goo.gl/5RjvcZ>) scheduled after my departure date.
 - Individually created calendars (<http://goo.gl/U26dS4>) shared with others.
 - Files and folders (<http://goo.gl/FR0aVy>) in Google Drive.
- Transferred work-related electronic materials from personal network (P:) drive, smart phone, cloud storage, or other
- I: drive folders I currently have access to (*Supervisor communicates access changes to HelpDesk@depauw.edu):

TASKS TO COMPLETE FOR BUSINESS OFFICE

Yes N/A

- Budget account(s) I currently have access to (*Access will end upon separation): _____
- Reconciled or paid any outstanding invoices, expense reimbursements, and DePauw Commercial Card(s).
- Returned DePauw Commercial Card(s).
- Settled outstanding University fines, such as parking, library, or other unsettled accounts (e.g., rent, etc.)
- Consulted with Auxiliary Services regarding move-out process for rental property.

TASKS TO COMPLETE FOR YOUR SUPERVISORY RESPONSIBILITIES

Yes N/A

- Organized staff files for supervisory successor.
- Arranged interim reporting structure for staff members including time card approval
- Verified appropriate notifications have been completed.

TASKS TO COMPLETE FOR HUMAN RESOURCES

Yes N/A

- Provided a signed letter of Intent to Retire through the Resignation Process in Workday.
- Completed the online Employee Exit Survey (<http://goo.gl/tA1TDj>) OR met with Human Resources to do an Exit Interview.
- Verified home address is up-to-date for tax reporting purposes in Workday.
- Saved Workday login information (e.g., web address, username, and password) in a secure place.
- Completed Retirement Benefit Checklist (<https://www.depauw.edu/offices/human-resources/retirees/>).

EMPLOYEE FORWARDING INFORMATION

Personal address: _____

Personal email: _____ Personal Phone: _____

SIGNATURES

Employee Signature Date

Supervisor Signature Date

A copy of this completed form along with the employee ID and parking permit should be uploaded in Workday as part of the Resignation/Termination Process.