

EMPLOYEE SEPARATION CHECKLIST
 SAM HOUSTON STATE UNIVERSITY
 DIVISION OF STUDENT SERVICES

This checklist is designed to guide supervisors through the process of employee separation/termination at SHSU. When possible, it should be reviewed with staff members prior to their separation. Once completed, this form should remain in the employee's department file.

Employee's Name (print):	Employee's Sam ID #:
Employee's Title:	Employee's Department:
Last Date of Employment:	Supervisor's Name (print):

Please check off applicable items:

1. The items in this section should be completed within three (3) business days of receipt of a written notice of resignation:

- a. Advise employee of action item timelines to avoid delays in the separation process.
- b. Prepare and process Payroll Action Form documenting the last day of employment. A copy of the written notice of resignation should be attached to the PAF, and the original shall be stored in the employee's department file.
- c. If the employee has any questions about the separation process, benefits or vacation leave balance payout procedures, he/she should contact the Human Resources Department at 936-294-1070. The Human Resources Department will send the separating employee a separation packet once notification is received regarding the separation. This packet includes benefit related documents and a voluntary Exit Interview Questionnaire.
- d. Advise employee to contact Human Resources at 936-294-1070 if he/she is transferring to another Texas state agency or university within 30 days of the separation date.
- e. Request employee to provide a written summary of projects/programs to be transferred to other staff members and begin notification to relevant parties of the pending re-assignment of programs to ensure a smooth transition. For example, post the following on e-mail auto reply: "Due to a change in department staffing, effective (date), please contact John Smith regarding the ABC Program."
- f. Complete Travel Voucher for pending travel report.

2. SECURITY – On the effective date of separation, these items are to be completed:

- a. Collect department-issued building, office, and vehicle keys from employee, as applicable. Verify employee has returned all university-issued keys to Physical Plant Work Control by obtaining from the employee a copy of his/her Key Card reflecting all keys have been returned.
- b. Collect P-Card from employee, if applicable.
- c. Review and reset P-Card login credentials and verify documentation of P-Card purchases within the current billing cycle.
- d. Submit notification of termination of signature authority to Procurement and Business Services with effective date.
- e. Submit notification of termination of signature authority to Controller's Office with effective date.

f. Submit notification of termination of signature authority to Accounts Payable Department with effective date.

3. **PROPERTY – On the effective date of separation, these items are to be completed:**

a. Collect university-owned equipment and software issued to employee (laptop, cell phone, handheld radio, etc.) and/or items assigned for off-campus use as per Property Department Form RA-22. Acquire all passwords to protected electronic equipment and verify access to operating systems.

b. Submit to Property an updated RA-22 for each item returned to campus or assigned to another employee.

c. All personal and non-essential software and files should be removed from university-owned property.

d. Reset passwords on all office equipment as needed to ensure data protection.

e. Reconcile any Petty Cash accounts under the purview of the employee.

4. **COMPUTER USE – On the effective date of separation, these items are to be completed:**

a. Notify Computer Services via online Work Order of employee's separation, username and effective date.

b. Notify Telephone Services via online Work Order of employee's separation, telephone extension and effective date.

5. **OTHER – At earliest time after effective date of separation, these items are to be completed:**

a. Update university websites referencing separated employee's name.

b. Cancel any pending Travel Applications, travel arrangements, and event registrations.

c. Remove or change name of institutional memberships and subscriptions established in the employee's name.

d. Submit employee's final approved timesheet or leave report to Payroll.

e. Employee mail to be forwarded as applicable to:

f. Notes on additional separation procedures:

6. Checklist complete Date: _____ Supervisor Signature: _____