



Employee Separation Checklist SOHS Internal Use Only

Manager: Please use this checklist when an employee leaves employment for any reason (i.e., resignation, termination, department transfer, retirement, etc.). Completing this checklist promptly will help ensure that the employee is properly removed from employment systems, knowledge is transferred, and University property is collected.

I. EMPLOYEE INFORMATION			
Employee Name:		Banner ID:	
Last Date Worked:		Division/Dept:	
II. ACTIONS TO COMPLETE PRIOR TO THE LAST DAY			
<input type="checkbox"/> Completed		Verify no outstanding travel advance and/or credit card balances and no outstanding reimbursements.	
<input type="checkbox"/> Completed	<input type="checkbox"/> N/A (temp/contractor)	Confirm with HR benefits that the employee has scheduled a Benefit Exit Interview to discuss benefits information and applicable leave payouts.	
<input type="checkbox"/> Completed		Complete performance appraisal and summary performance rating for the current work plan	
<input type="checkbox"/> Completed		Confirm work products/deliverables received, and information is transferred from the departing employee on any outstanding projects or deliverables to the supervisor.	
<input type="checkbox"/> Completed	<input type="checkbox"/> N/A (access not needed)	Notify IT if access to the employee's email or any of the employee's system files are needed.	
<input type="checkbox"/> Completed	<input type="checkbox"/> N/A (temp/contractor)	Employee asked to complete the exit interview found on the Human Resources webpage .	
<input type="checkbox"/> Completed		Notify the department of the employee's pending departure.	
III. ACTIONS TO COMPLETE ON THE LAST DAY			
<input type="checkbox"/> Completed		Employee's final timesheet/leave report completed and approved in Banner Self-Service .	
<input type="checkbox"/> Completed		Request Employee Separation via Ram Support Service Portal is submitted by supervisor. Employee Separation Process - Request Employee Separation	
<input type="checkbox"/> Completed	<input type="checkbox"/> N/A (no equipment to return)	The laptop and any other University-provided IT equipment were collected and returned to the Supervisor, who is responsible for returning them to OIT.	
<input type="checkbox"/> Completed		Ram card collected and returned to Supervisor. The supervisor is responsible for returning the card to OIT.	
<input type="checkbox"/> Completed	<input type="checkbox"/> N/A (no parking card issued)	The parking access card was collected and returned to the supervisor, who is responsible for returning to the Parking & Transportation Office.	
<input type="checkbox"/> Completed	<input type="checkbox"/> N/A	P-card, T-card, and supporting documents collected and returned to the supervisor. The supervisor is responsible for returning items to Purchasing.	
<input type="checkbox"/> Completed	<input type="checkbox"/> N/A	Desk/office keys collected. The supervisor is responsible for returning to the building coordinator.	
<input type="checkbox"/> Completed		All personal items removed from the office. University property, course, and student records were returned to the supervisor, who will maintain the records according to the UNC System Records Retention and Disposition Schedule .	
IV. SUPERVISOR SIGNATURE			
Supervisor Name & Signature:		Date:	