

## CHECKLIST FOR THE RESIGNATION/TERMINATION PROCESS

Please return the following items to the appropriate department *prior* to leaving the current department, Utah State University's employ, or at the death of a current employee. The link to the exit questionnaire is at [usu.edu/hr/termination](http://usu.edu/hr/termination) .

Resign    Retire    Transfer    Admin. Leave    Death    Other

Name of Employee: \_\_\_\_\_ A# \_\_\_\_\_

Last Day of Work: \_\_\_\_\_ Department Name: \_\_\_\_\_

<u>ITEM</u>	<u>Date Returned</u>	<u>Department Representative Signature</u>
Tools/Equipment/ Manuals	_____	Home Department _____
Key(s)	_____	Facilities _____
Parking Pass*	_____	Parking _____
CERT Equipment	_____	Police _____
P-Card	_____	Purchasing _____
Credit Card PIN #	_____	Motor Pool _____
Diner's Club/Other Credit Cards	_____	Controllers _____
Library books*	_____	Library _____
Other	_____	Appropriate Department _____
ID Card*	_____	TSC Card Office _____
Lab chemicals	_____	Environmental Health & Safety _____
Equipment	_____	Equipment Mngmt Office _____

Does this person have any Contracts or Grants? If yes, please send to Sponsored Programs.

SPO \_\_\_\_\_ SPA \_\_\_\_\_

\*Not necessary if remaining in employment at Utah State University.

Banner permissions: Finance  Financial Aid  HR  Student  Other

HR will contact IT to discontinue assigned services (i.e., email account, etc.).  
Please return this completed form(s) to Human Resources (UMC 8800).

- There has been a Memorandum of Understanding (MOU) created in association with this termination. Please send a copy to the Office of Human Resources (UMC 8800) for the employee's file.

*If USU property is not returned in a timely manner, an unfavorable reference or other consequences could result. Each terminating employee should download and delete any personal email messages. All other messages must be left available for the supervisor(s) as part of Utah State University business.*

## **RESIGNATION/TERMINATION CHECKLIST INSTRUCTIONS**

1. When it is known that a benefit-eligible employee is going to terminate from the University (including retirees), or at the death of a current employee, the individual who submits JC\_TRM EPAFs for the employee's home department/unit will either invite the employee to meet with him/her to get/provide the following information, or otherwise complete the Termination Checklist. The following information is needed for the JC\_TRM EPAF or the JC\_ADJ EPAF or PHATIME:
  - a. termination date (if different from the last working day), and
  - b. final annual leave status.
2. The terminating employee should remove all personal messages on his/her email account and contact private correspondents to use another email address. If the employee wants an "aggiemail" account, please contact IT.
3. A template for a letter of resignation is available at the Human Resources (HR) website.
4. The checklist items, and the departments who will signify that the items are returned, are listed on the form entitled "Checklist for the Resignation/Termination Process." The form should be returned to the HR Office (UMC 8800) as soon as possible.

## **TRANSFER CHECKLIST INSTRUCTIONS**

1. When it is known that a benefit-eligible employee is going to transfer from one USU department to another or take an administrative leave, the individual who submits JC\_TRM EPAFs for the employee's home department/unit will invite the employee to meet with him/her to get the following information, or otherwise complete the Resignation/Termination Checklist. The following information is needed:
  - a. the transferring employee's new title, office address, and phone number. Ask the employee to change the UMC/MC address on Self Serve Banner. The new department will send through a JB\_SAL EPAF;
  - b. transfer date (if different from the last working day);
  - c. new Banner security, new P-card, and ownership of new assigned services (if needed) should be set up by the new department;
  - d. the home department should ask if the new department will accept the financial obligation of unpaid annual leave, or if other arrangements will be made (split the obligation, etc.).
2. The checklist items, and the departments who will signify that the items are returned, are listed on the form entitled "Checklist for the Resignation/Termination Process." The form should be returned to the Human Resources Office (UMC 8800) as soon as possible.
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