

**CHECKLIST FOR THE RESIGNATION/TERMINATION PROCESS**

Resign     Retire     Transfer     Admin. Leave     Death     Other

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

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

Please return to the appropriate department and perform the following items *prior* to leaving the current department, Utah State University's employ, or at the death of a current employee.

<u>ITEM</u>	<u>Date Returned</u>	<u>Department Representative Signature</u>
Complete JC_TRM EPAF	_____	Home Department
Annual Leave Taken/Payout	_____	Home Department
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.

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.

Other Information  
 INB Banner Security: INB Banner access automatically ends when a person leaves USU or transfers to a new position at USU. If you are transferring positions and still need INB Banner access, please fill out a new security form based on your new responsibilities. <https://www.usu.edu/hr/files/resources/banner/banner-training-and-access-request.pdf>

Email: Institutional email addresses (@usu.edu) automatically end 90 days after a person no longer has an active position in Banner. If granted Emeritus status through the Provost Office, you will keep your @usu.edu email address and can forward that to a personal email address if desired.

*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 person is no longer going to be employed at the University (including retirees), or at the death of a current employee, the individual who submits the 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 Resignation/Termination Checklist. The following information is needed for the JC\_TRM EPAF or PHATIME:
  - a. termination date (if different from the last working day), and
  - b. final annual leave status (if benefit eligible).
2. Write a letter of resignation and submit to department.
3. 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.

## @USU.EDU E-MAIL ACCOUNT TERMINATION

90 days after leaving USU, the exiting employee will no longer have use of or access to the @usu.edu e-mail address they were assigned to. The exiting employee is encouraged to notify colleagues or private contacts of any new e-mail address they intend to use for correspondence post-employment at USU. **Any e-mail sent to or stored at their @usu.edu e-mail address will no longer be accessible to the exiting employee 90 days after termination.\***

\*Administrative/USU access to the exiting employee's @usu.edu account and address may be extended temporarily on a case by case basis beyond the 90 days by contacting the IT Service Desk. (@usu.edu e-mails are subject to GRAMA requests and are considered records of USU.)

## TRANSFER CHECKLIST INSTRUCTIONS

1. When it is known that a benefit-eligible employee is going to transfer from one USU department to another, 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. ask the employee to change the directory 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.