

## 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. The link to the exit questionnaire is at <http://www.usu.edu/hr/htm/employee-exit-process>

| <u>ITEM</u>                     | <u>Date Returned</u> | <u>Department Representative Signature</u> |
|---------------------------------|----------------------|--|
| Complete JC_TRM EAPF            | _____                | 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/uploads/Forms/Banner-Training-and-Access-Request-12-06-07.pdf>

Email: Institutional email addresses (@usu.edu) automatically end 90 days after a person no longer has an active position in Banner. Aggiemail services will be decommissioned on May 30, 2022 for all USU students, faculty, staff, emeriti, alumni, summer citizens, and club accounts. For questions related to aggiemail please contact IT Service Desk 435-797-4357. If you have been granted the Emeritus status through the Provost Office, they may also set up a new @emeriti.usu.edu email alias address that will be forwarded to a personal email address of their choice.

*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

1. 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 30 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.