

**Employment Checklist & Instructions**

(To be completed by supervisor and retained in employee file and updated during hire, transfer, termination or extended leave.)

Employee Name _____ **Department** _____

Hire Date _____ **Termination Date** _____

	HIRE		TRANSFER		SEPARATION	
	Date	Initials	Date	Initials	Date	Initials
Payroll Documents Completed						
Onboarding/Training Schedule Reviewed						
Share Employee Separation Checklist/Exit Interview schedule (if applicable)						
Benefits Orientation/Notify Benefits of Separation						
ID Card –Visit Card Office						
Collect ID Card from Employee at Separation						
Building Access Codes (Assigned/Removed)						
Photocopier Codes (Assigned/Removed)						
UO Equipment						
Employee signed usage of equipment statement						
Employee returned all loaned equipment						
Building Access						
Building (Assigned/Removed)						
Key(s) (Assigned/Removed)						
Locker (Assigned/Removed)						
Telecommunications and Mail Services						
Telephone Work Order/Long Distance Auth/Termination						
Mobile Technology Allowance (Accts. Payable notified of termination)						
UO Alert http://emc.uoregon.edu/content/sign-uo-alert						
Mailing lists updated with Mail Services						
Purchasing and Contracting Services						
Procurement Card (VISA) (Assigned/Removed)						
Signature Authorization) (Assigned/Removed)						
Computing Accounts						
Access forms (Banner, FIS/HRIS User Profile, Singularity, Appworx)						
E-mail account (DuckID)						
Computer files managed						



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	Date	Initials	Date	Initials	Date	Initials
Other (Dept. Specific or Addition)						

Separation Instructions

The Employment Checklist and Instructions serves as a guide to assist supervisors and employees with addressing key areas as the employee separates from the university. Consider the department's policies and procedures while working the checklist. Use listed items as applicable and add as necessary.

1. **Complete Final Payroll Documents:**
 - [Standard Separation](#)
 - [Transfer to Other UO Dept.](#)
 - [Death](#)
 - [Graduate Teaching Fellow Separation](#)
 - [Student Employee Separation](#)
 - [Retirement](#)
2. **Provide Employee with Employee Separation Checklist**
3. **Notify the Benefits Office:** Contact the Benefits Office by emailing hrbenefits@uoregon.edu with your employee's name, UO ID number, and termination date. Benefits will send out important information regarding benefit termination to your employee.
4. **Collect ID Card:** If possible the UO ID card should be collected from the employee if they are fully separating from the university. The ID card should be confidentially destroyed.
5. **Collect Keys and Terminate Building Access:** Collect keys to all buildings/office/desk and if the employee has a building access code or card swipe/prox access you'll need visit the UO Police Department's webpage and select Online Forms to remove access.
 - [Locknetic/Omni Code](#)
 - [Card Access Request](#).
6. **Collect UO property:** Including tangible items, i.e. laptop, other personal computer devices, cell phone, pager, locker number or other items specific to your department and intangible items including [intellectual property](#). Request that personal files are deleted before equipment is returned. If the employee is unable to remove personal files prior to separation, they can identify these files to be returned and we will consider their request.
7. **Cancel Telecommunications:** If you need to cancel a phone line, cell phone or terminate a long distance code you will need to complete the forms on the [Telecommunications Services](#) website. Forms 1(a), 2(a), 2(b) and 12(a) are the most common forms needed when removing access from a separating employee. If you need assistance please call 6-6387.
8. **Terminate Reimbursements:** Please remember to terminate automatic account reimbursements for mobile technology by emailing apbao@uoregon.edu

9. **Remove Name from Mail Services:** Email Campus Mail at uomailing@uoregon.edu to notify them of a separation.
10. **Remove Procurement Card Authorization and Delete Card Custodian or Budget Authority Authorization:** Notify Purchasing and Contracting Services of the removal of authorization for the use of a Procurement Card by emailing pcard@uoregon.edu within 24 hours of the change to employee status. If the employee separating from the university is the card custodian/budget authority for your unit, the unit must email pcard@uoregon.edu within 24 hours after such a separation. All Procurement card activity must stop within the unit until a new [PCard Authorization Form](#) is submitted, required training is complete and a new pcard is issued. [PCS Forms](#) can be found on the Purchasing and Contracting Website.
11. **Terminate Computing Accounts:** When the job and employment record are ended in Banner, access to computing accounts will be terminated based on the classification of the employee. The [Identity Management](#) webpage outlines when access will be terminated for different technology. If you have a separation requiring immediate termination please email account@ithelp.uoregon.edu with the separation information of the employee along with their Duck ID.
12. **Request Employee Update Personal Information:** Remind the employee to update their personal information by logging on to [Duckweb](#) or by completing an [Employee Information Form](#) and submitting to the Payroll Office. It's important for the university to have correct contact information for future correspondence (for W-2, COBRA, etc.).
13. **Arrange for Transition of Outstanding Assignments:** Meet with the employee to determine outstanding assignments and work that will need to be delegated to another team member.
14. **Employee Voicemail/Email:**
 - a. Ask the employee to update their voicemail and email message to include a new contact within your department
 - b. If you are unable to have the employee update the voice message contact your telephone coordinator assigned to your department for further instructions.
15. **Remove Employee Email from University Listservs:** Remove employee from university listservs by emailing listmaster@uoregon.edu with the employee's email and last day of employment.
16. **Remove Employee Contact Information from Departmental Resources:** Remove employee contact information from your website, emergency contact lists and other internal resources.
17. **Check UO Online Directory Listing:** If you find that the employee's name has not been removed from the UO Online Directory after the employee's job has been terminated, please contact Telecommunications by emailing nts@ithelp.uoregon.edu