



LAST NAME: _____ **FIRST NAME:** _____ **EMPLOYEE #:** _____

Transfer Retirement Lay-off Contract End Resignation Dismissal

An individual’s employment status within the University can change for a variety of reasons. This checklist lists the actions that the direct manager is required to take/consider upon notification of a change in employee status in order to limit any potential liability for the University. Not all actions listed apply to all changes in employment status. For those please select N/A.

In addition to the actions listed in this document, the direct manager should contact the Department of Human Resources to commence the position replacement or position closure process.

Section 1 - EMPLOYEE DOCUMENTATION

It is the direct manager’s responsibility to complete and forward all applicable documentation to the Department of Human Resources to ensure the accurate and timely processing of any final payment due to the employee as per Collective Agreements, Employment Standards and HRSDC requirements. The items for consideration are listed below:

Manager’s Responsibility	X	N/A	Who to Contact / Forward documentation	Contact Department Will...
Forward a copy of the letter of resignation or intention to retire upon notice of change in employee status.			Human Resources - Employee Relations	Place documentation in the employee’s file and commence the exit process.
Two weeks prior to the employment end date, forward vacation time taken by the employee in the current year, carryover vacation from previous years and any lieu time owing.			Human Resources - Benefits	Notify the Finance Department of any monies owing.
Forward the “Department Report of Approved Overtime” form two (2) weeks prior to the employment end date.			Finance Department - Payroll	Check outstanding debt and/or any other outstanding financial issue that may need to be settled. Issue the Record of Employment once all monies are paid to the employee.

Section 2 – SECURITY

Access to various information systems and accounts is dependent on the individual’s position. It is the direct manager’s responsibility to arrange the cancellation of all access accounts including access to job related enterprise systems. This should take place no later than the last day of employment. The items for consideration are noted below:

Manager’s Responsibility	X	N/A	Who to Contact	Contact Department Will...
Request termination of access to all enterprise systems such as FIS, SIS, VIP and CLEW.			Appropriate department - systems administrator	Terminate access to the appropriate enterprise system.
Request the cancellation of the UWin Card (non-retirees).			UWin Office	Cancel UWin account. Note: retiree UWin accounts remain active.
Request termination of access to directories and arrange for distribution of computer files as appropriate.			ITS – Help Desk	Terminate access to directories/share drive and distribute computer files as instructed.
Request the termination of Novell and other access accounts. Request the termination of the UWin ID & Lotus Notes (non-retirees).			ITS – Help Desk	Terminate UWin ID, Lotus Notes, Novell. Note: retiree UWin ID & Lotus Notes e-mail account remain active.

Section 3 – FINANCIAL

Access to cash or to make/authorize purchases is dependent on the individual's position. It is the direct manager's responsibility to consider items that have a financial implication. The items for consideration are listed below:

Manager's Responsibility	X	N/A	Who to Contact	Contact Department Will...
Cancel purchasing and travel credit cards.			Finance - Procurement	Cancel the credit cards.
Remove employee from signing authority on accounts such as purchase orders, cheque requisition and invoices.			Finance - Procurement	Terminate signing authority.
Identify any outstanding expense claims due to the employee and forward a completed Expense Reimbursement form to Accounts Payable.			Finance - Accounts Payable	Settle outstanding Expense Reimbursement Claims.
Balance the Petty cash before the last day of employment.			Department	Balance the petty cash and submit the Petty Cash Reimbursement Form to Accounts Payable.
Notify the Provost's office, if the employee is a faculty member, upon notice of change in employee status.			Provost's Office	Provost's office will notify Research Finance and the Office of Research Services.

Section 4 - COMMUNICATION

Upon notice of change in employee status, the direct manager will need to consider general communication items. These are listed below:

Manager's Responsibility	X	N/A	Who to Contact	Contact Department Will...
Notify Telecommunications.			Telecommunications	Update phone name display, deactivate or reset voice mail, update long distance code information, update the UWindor online telephone Directory.
Update Departmental/Faculty organizational chart, contact information and contact lists on the departmental web pages.			Department	Update all public records

Section 5 – UNIVERSITY PROPERTY

It is the responsibility of the direct manager to ensure that all University property in the possession of the employee is collected on or before the employee's last day of work. Items for consideration are listed below. The employee and the direct manager should jointly acknowledge and sign below noting that all University property has been returned.

Manager's Responsibility	Received		Return to
	Yes	N/A	
Retrieve building and departmental office keys			Facility Services – Key Control
Retrieve desk/cabinet/locker Keys and badges			Keep in the department
Retrieve access card/swipe card			Facility Services – Key Control
Retrieve UWin card			UWin Card Office
Retrieve Parking Pass and swipe card			Campus Parking Services
Retrieve Visa Purchasing card, Travel card			Destroy cards
Retrieve laptop, tablets and/or other computing equipment, including computers purchased by the University for home use			Keep in the department

Manager's Responsibility	Received		Return to
	Yes	N/A	
Obtain access/security passwords for University devices			Keep with the devices
Retrieve other equipment, tools, and textbooks			Keep in the department
Retrieve any University issued PDA (i.e. Blackberry), pager and/or cell phone			Keep in the department
Retrieve business cards with the employee's name & position			Destroy cards
Other items not listed (teaching assets, lab equipment, etc.) - please specify			

We hereby acknowledge that the above list is accurate and all noted property has been returned to the University.

Employee Signature: _____ Date: _____

Manager Signature: _____ Date: _____

**Please forward the completed checklist (all three pages) following the employee's last day of work to:
 Department of Human Resources – Employee Relations
 CHT Room 207**

Please provide a signed copy of page 3 of this document to the employee for their records