Employee Departure Checklist
Guide for Managers and Administrators

> The process we undertake when an employee is departing from McMaster University through any reason, is a critical component of managing positive employee relations and experiences.
>
> The intent of this checklist is to help guide Managers and Administrators through the process of **voluntary resignations/retirements/departures and standard end of contract situations.** *(Please contact your Employee and Labour Relations Advisor for other situations).*
>
> The steps and timelines outlined below will enable you to ensure that all key elements of the process are executed in an efficient, compliant, and respectful manner.
>
> Should you require assistance at any point throughout the process, please connect with your HR Advisor or FHS HR anytime.

STEP 1:	CONFIRM EMPLOYEE INFORMATION AND DEPARTURE DETAILS *(ASAP upon employee notification of resignation, retirement or at least 1 month prior to contract end)*

This checklist is being completed for:

Name	
ID	
Position Title	
Manager	
Exit Date	

Hold meeting with the employee to:

☐	• Confirm plans to end employment based on current contractual arrangement **OR** • Confirm date of resignation and ensure employee submits a formal resignation letter **OR** • Confirm date of retirement and submit Intent to Retire notice to HR at hr.mcmaster@mcmaster.ca and your HR Strategic Partner (if applicable)
☐	Address any related questions, confirm preferences for announcements, going away-parties, etc. and set expectations regarding required transition plans
☐	Refer employee to available career transition support *(as appropriate)* i.e.: • Homewood Health McMaster's Employee and Family Assistance Program. • McMaster's Employee Career Services

Consider Staffing Needs

☐	Review Recruitment and Selection Process Checklist • Identify your staffing needs • Post for replacement

STEP 2:	NOTIFY KEY INTERNAL PARTNERS TO CONFIRM REQUIRED CHANGES *(1-2 weeks prior to employee departure)*

☐	**Notify HR:** Submit either a Termination Request eForm or Retirement Request eForm (whichever is applicable) through the Employee Change Request eForm process in Mosaic. Please attach a copy of the resignation or Intent to Retire letter (if applicable).
	   • *Confirm final payments such as overtime, vacation, SPP to be processed.*
	   • *HR will ensure pay, pension/GRRSP, benefits are terminated, as applicable.*
	Notifications from departments pre-termination are critical so that RoEs can be issued on time to meet CRA compliance requirements.
	An Exit Interview may also take place upon employee and/or department request. Please contact your E/LR Advisor for assistance.

☐	**Notify Financial Affairs** who will:
	   ✓ Cancel any corporate credit cards; Diners, BMO Procurement Card, etc. Contact aphelp@mcmaster.ca
	Notifications pre-termination are critical so that cards may be cancelled in alignment with an employee's departure in order to mitigate risk and meet audit requirements.
	   ✓ Mosaic Finance Modules (travel and expense, etc.) – role access will be removed when employee terminates in system.
	Employees should complete final expense reports in advance of their departure from McMaster.
	   ✓ End MPDA/PDA allocations (if applicable) (Chris Sylvester – sylvest@mcmaster.ca).

☐	**Notify Department/Team members:** Hold meeting(s)/ send announcement(s) to share information and plans with the Department/Team. ***A farewell event may be planned based on the situation and employee preferences in alignment with University expense policy.***
☐	**Notify University Partners/ Business Contacts**: of any related changes based on the nature of the role via call/e-mail as appropriate.

STEP 3:	COLLECT MCMASTER PROPERTY AND FINALIZE DEPARTURE DETAILS *(Last day of work)*
☐	Ensure employee has all personal belongings and any work-related items have been transitioned.
☐	Collect Electronics (Laptop, Cellular Telephone and any Peripherals.
☐	Collect Employee ID Cards and Office Keys.
☐	Collect All Access Cards (Axiom). Disable Office/Lab/Building access by emailing axiomrep@mcmaster.ca with the employee name, employee ID#, card # located above the bar code, and location(s) of access to be disabled. For FHS employees in a hospital building with swipe access: Disable Office/Lab/Building access by calling HHS Security at extension 76444 with employee name and ID. If you work within a St. Joseph's Healthcare Hamilton location, please contact SJHH security within your building.

☐	Terminate Systems Access:
	  ✓ MACID - is not terminated it will be automatically maintained for life.
	  ✓ Mosaic HR Modules – role access will be removed when employee terminates in system, however, Self Service will still be available for 18 months for collection of pay and T4/T4A information.
	  ✓ McMaster email will be automatically terminated within 30 days (unless otherwise noted in retirement meeting).
	  ✓ MacDrive, JIRA, Confluence, Office 365 Microsoft TEAMS Chat access (may depend on termination status).

STEP 4:	COMPLETE POST DEPARTURE LOGISTICS *(within 1-2 Days of employee departure date)*
☐	Ensure Office Servers Access is Disabled: Network Shared Drives Access - UTS (mcmaster.ca)
☐	Ensure MacID is removed from all MacDrive folders.
☐	Remove employee name from EDL and Email lists - https://edl.mcmaster.ca
☐	Remove employee name from Department Website Contact List.
☐	Remove employee name from University Directory Listing - https://directories.mcmaster.ca/faculty-staff/ (Update Your Listing).
☐	Reset Telephone Name Display and Voicemail - https://telecom.mcmaster.ca/voicemail.cfm
☐	Forward Telephone Calls to _____.
☐	Verify that Email and Email ID Suspended ✓ CSU revokes from termination report 30 days after termination date.
☐	Confirm termination or retirement of pay by referring to your area's payroll reports on the HR Reporting Hub or labour distribution reports.

OTHER DEPARTMENT SPECIFIC ITEMS *(TO BE ADDED BY DEPARTMENT AS REQUIRED)*	
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