

EMPLOYEE TERMINATION CHECKLIST

NAME _____

EMPL. ID. # _____

DEPARTMENT _____

TERMINATION DATE _____

Terminating staff and faculty must return all CWRU property and equipment to the issuing department on or prior to their last working day. Terminating employee’s final pay will typically be direct deposited to the bank account listed HCM on the regular pay date unless otherwise requested prior to the payroll run date.

Transferring employees - Supervisors must remove access to internal department systems and collect department items. Transferring employees should also return keys to access services. PAF Form is not required for transferring employees.

SUPERVISOR’S RESPONSIBILITY

- Complete the [Personnel Action \(PAF\) Form](#) and return to HRRecords@case.edu.
- Email [Access Services](#) at access@case.edu to verify deactivation of ID card (i.e. building and office access).
- Submit a telephone services request at <https://case.edu/utech/help/telephone-service-request> to have the employee's telephone number put in the name of the department. Additionally, request that a department voicemail is set up and provide the name and Case ID of a current employee who will receive the messages.
- If email should be delegated or forwarded to another employee, a bounce response requested for incoming emails, or network access should shut down before normal [U]Tech procedure, email help@case.edu with those requests. Include who the email should be delegated or forwarded to and/or the requested bounce language; and/or the date when network access should be shut down. When the request is received, approvals to make the changes will be obtained from HR. It is important to send your request in advance of the employee’s final day so there is enough time to get the approvals and plan for the changes prior to their last day.
- Remove access to any and all internal department systems (i.e. local systems, networks, servers that are controlled by the department) that are not under the control of central [U]Tech.
- If the terminating employee holds email records which are subject to Document Retention per the [Email Retention Policy](#), the supervisor must collect any pertinent email from the terminating employee **before** they depart.
- Collect any Department items (non-exhaustive list below).

<input type="checkbox"/> Desk Keys	<input type="checkbox"/> Purchasing Procurement Card (P-Card) / Travel & Expense Card (T&E Card)	<input type="checkbox"/> Lab equipment, research, books, and work-related materials
<input type="checkbox"/> Cell Phone	<input type="checkbox"/> Parking Stamp and Log Book	<input type="checkbox"/> Computing devices, accessories, peripherals (e.g. iPads, backup drives)
<input type="checkbox"/> Uniforms	<input type="checkbox"/> Card No.	<input type="checkbox"/> University data removed from personally owned equipment (e.g. smart phones and personal laptops)

<p>IF TERMINATING EMPLOYEE IS A CWRU ALUM</p> <input type="checkbox"/> Confirm if they receive any work-related correspondence after leaving, their professional responsibility is to protect the information from disclosure, and to email the CWRU Information Security Office (security@case.edu) to correct the situation. Alumni do not retain their CWRU email.	<p>IF TERMINATING EMPLOYEE IS SUPERVISOR</p> <input type="checkbox"/> Contact the HR Records Office at HRRecords@case.edu to remove the terminating employee as a supervisor of record and update HCM with the new or interim supervisor.
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EMPLOYEE’S RESPONSIBILITY

- Return university ID card to Access Services (*Crawford Hall, Ground Floor*).
- Failure to return university ID card will result in a fine of \$25.**
- Return parking permit/hangtag to Access Services (*Crawford Hall, Ground Floor*), if applicable. Employee will receive a parking voucher to exit the parking facility the last day.
- Return university-issued keys to Access Services (*Crawford Hall, Ground Floor*).
- Failure to return all university-issued keys will result in a fine of \$50 for the first key and \$25 each additional key.**

Access Services signature confirms receipt in case of later disputed ID, key, or parking charges.

_____ Access Services Signature

_____ Date

- Update contact information, including forwarding address, by emailing HRRecords@case.edu if it is not accurate in HCM.
- Contact the HR Records Office (HRRecords@case.edu) to request final pay to be a paper check or mailed, if desired.
- Complete the [Exit Interview](#) or contact the HR Service Center at AskHR@case.edu for an in person Exit Interview, if desired.

Any personal information on Employee’s university-owned computer or laptop will be wiped and deleted.