Supervisor’s Checklist for Faculty and Staff Leaving UNI

The following items are to be completed prior to the faculty or staff member’s last day of work.

☐ Terminations & Terminal Vacation Policy: Review the [Terminations & Terminal Vacation Pay](#) policy.

☐ Resignation/Retirement Letter (if applicable): Collect a signed resignation or retirement letter from the exiting faculty or staff member that includes the date of the last day of work, and forward a copy to Human Resource Services (HRS). Verify that the termination effective date adheres to the following:

  **Staff:** The effective date should be the employee’s actual last day of work. Pursuant to the [Terminations and Terminal Vacation Pay](#) policy, any unused vacation or personal holiday accruals will be paid out, but cannot be used to extend the employee’s termination effective date.

  **Faculty:** For faculty leaving at the end of the Fall semester, the separation date should be December 31. If leaving at the end of an academic year, the separation date should be June 30. If the faculty member has a summer appointment or is leaving other than at the end of a semester, contact HRS for assistance with determining the correct effective date.

☐ Emeritus Status (if applicable): If the faculty or staff member is eligible for Emeritus status and chooses to apply, direct them to view [Policy 4.21](#) to determine eligibility. If they are eligible and interested in applying, the [Emeritus Request Form](#) must be completed and routed.

☐ Exit Survey & Exit Interview: The employee will receive an exit survey and benefits information by email, with an invitation to meet one-on-one with an HRS team member. Direct the employee to 3-2422 with any questions.

☐ Email and Other Google Apps: Faculty / staff should set up an out of office message directing senders to the correct contact person. Personal data associated with their Google account (email, calendar, docs, etc.) should be removed from the account or transferred to a personal account by their last day of work. Google Drive content they created must be transferred to other employees as appropriate to ensure that data is not lost. Direct faculty / staff to the IT Service Desk at 3-5555 for assistance.

☐ Learning Management (Faculty): Access to the Learning Management system will end 120 days after the faculty member’s departure. For faculty with Emeritus status, this access will be retained.

☐ Phone Service: Coordinate with the employee to place a forwarding voicemail message or have calls forwarded to another faculty / staff member. To prevent callers from leaving voicemails on the extension, direct the faculty / staff member click [here](#) for instructions. Contact the ITS Service Desk at 3-5555 with questions or for assistance.

☐ Cancel Network Access: Contact your Division’s IT personnel to cancel.

☐ Cancel e-Business Suite, SIS and Other System Responsibilities: Log into the ITS [Security Request System](#) and select “View Subordinate Roles” to see a list of various system responsibilities and to request access be ended. Please note that because access ends upon receipt of the request, time the request with the end of the employee’s need to have these responsibilities.
Keys: The faculty / staff member is responsible to return office and building keys to Facilities Access staff in the Physical Plant.

UNI ID Card: Collect the faculty / staff ID card and destroy. Electronic access will end once the termination PAF is fully processed or after the last day of work, whichever is later. If electronic access needs to be revoked immediately, please contact the Facilities Access/Maintenance Coordinator, Tricia Pugh at tricia.pugh@uni.edu or 3-6109.

Parking Permit: Employee should contact Ann Kjeld at ann.kjeld@uni.edu or 3-2710 to turn in parking permit or to inquire about a refund.

UNI Property: Collect cell phones, laptops, research supplies and instrumentation, desk and filing cabinet keys, manuals, handbooks, documents, uniforms, and all other UNI property from employee.

Procurement Card and Expense Report: Verify that faculty / staff member submits final expense report and procurement card bill, if applicable. Collect procurement card from faculty or staff member and contact Amy Kliegl at amy.kliegl@uni.edu or 3-3034 to cancel card.

Vacation/Sick Leave Payout (if applicable): Review and approve employee’s final time card to assist Payroll in reconciling final sick leave and/or vacation payouts.

Employee’s Departure: Communicate to departmental faculty and staff as appropriate.

Prepare Personnel Action Form (PAF): Direct your departmental PAF preparer to create an “End Appointment” PAF. For staff, the effective date is the actual last day worked. For faculty resignations and retirements at the end of the fall semester, the separation date an academic year, the termination date should be June 30. For those with summer appointments or who are leaving at other than the end of the academic year, contact HRS for assistance in determining the effective date. This PAF should be created as soon as the last day of work is known; do not wait until the last day of work. HRS will prepare PAFs for those who are completing Phased Retirement.

Staff: The effective date should be the employee’s actual last day of work. Pursuant to the Terminations and Terminal Vacation Pay policy, any unused vacation or personal holiday accruals will be paid out, but cannot be used to extend the employee’s termination effective date.

Faculty: For faculty leaving at the end of the Fall semester, the separation date should be December 31. If leaving at the end of an academic year, the separation date should be June 30. If the faculty member has a summer appointment or is leaving other than at the end of a semester, contact HRS for assistance with determining the correct effective date.

Rehire Eligibility: Occasionally when someone resigns or retires, departments may have a need to rehire the employee on a temporary basis to complete some training of other staff or to complete a specific project. If this occurs, note that employees cannot be rehired until the beginning of the next pay period following their termination date. Consult HRS for more information.