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 Pay 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 & 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. For athletic staff with a Contract appointment, refer to policy above.

  Faculty: For faculty leaving at the end of the Fall semester, the separation date should be December 31. If leaving at the end of the Spring semester, the separation date should be June 1. If the faculty member has a summer appointment or is leaving other than at the end of a semester, contact Shristy Bashyal for assistance in determining the effective date.

☐ Emeritus Status (if applicable): If the faculty or staff member is interested in Emeritus status, direct them to view Policy 4.21 to determine eligibility. If they are eligible and interested in applying, the employee must complete the online Emeritus Request form.

☐ 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.

☐ UNI Google Account: By default, the employee’s UNI Google account will be deprovisioned the day after their last day at UNI (for staff) or 90 days after their last day (for faculty). These time frames can be extended in some situations through the PAF process. Contact paf-support@uni.edu with these requests. The employee should set up an out of office message directing those sending them emails to a new contact. Any personal data associated with their UNI Google account (email, calendar, docs, etc.) should be removed from the account or transferred to a personal account by their last day of work. The employee must transfer ownership of Google Drive content they have created to other faculty and/or staff as appropriate or the content will be lost. Contact the IT Service Desk at 3-5555 with questions or assistance with these items.

☐ Departmental Email Account: If the employee is an owner of a departmental email account (this includes faculty advisors for student groups), they will need to transfer ownership of the account from themselves to someone in their department. To do this, follow these instructions.

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

☐ Phone Service: A forwarding message should be placed on the faculty or staff member’s voicemail or calls should be forwarded to another faculty or staff member. To prevent callers from leaving voice mails on this extension for a period of time, before the employee leaves, the employee must submit a request to transfer the phone to your department and remove the exiting employee’s information. Contact the ITS Service Desk at 3-5555 with questions about phone service.
☐ **Cancel Network Access, e-Business Suite, SIS and Other Systems Responsibilities:** These will automatically end when the Termination Personnel Action Form (PAF) is fully approved and processed. If the PAF will not be fully approved and processed by the termination effective date, log into the ITS Security Request System (SRS) 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 faulty or staff member’s need to have these responsibilities. If the employee has access to systems not managed by SRS, please submit a Service Hub request.

☐ **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; unless they are retiring. For retirees, if they would like a new ID card then they will need to exchange their current card for a retiree card at the Department of Residence located at 010 Redeker Center. 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 all cell phones, laptops, research supplies and instrumentation, manuals, handbooks, documents, desk/filing cabinet keys, uniforms, and all other UNI property from employee.

☐ **Procurement Card and Expense Report:** Ensure faculty or staff member submits final expense report and procurement card bill, if applicable. Collect procurement card from faculty or staff member and contact Office of Business Operations at 3-2162 to cancel card.

☐ **Vacation/Sick Leave Payout:** 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 a Termination PAF. 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 is the last day worked. 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 the Spring semester, the separation date should be June 1. For those with summer appointments or who are leaving other than the end of a semester, contact HRS for assistance in determining the effective date. For adjunct faculty who work every other semester, on the Termination PAF, the default setting for ending Google Account access may be extended from the default 90 days to 270 days.

☐ **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 with HRS for more information.