

## Manager/Supervisor Checklist for Separation Processing

<b>Employee Name</b>	
<b>PID</b>	
<b>ID Number</b>	
<b>Title</b>	
<b>Supervisor</b>	
<b>Department/Group</b>	
<b>Separation Date</b>	

*NOTE: If this is an involuntary termination, contact [Employee Relations](#) for assistance with immediate suspension of employee access and accounts.*

<b>Type of separation</b>	
<b>Regrettable termination</b> (Employee left the organization but whom the organization had planned to retain.)	
<b>Non-regrettable termination.</b> (Employee left the organization but whose departure did not hurt the department)	
<b>Controllable separation.</b> (Employee left for reason that, if known, the organization might have been able to address – e.g., dissatisfaction with career opportunities).	
<b>Uncontrollable separation.</b> (Employee who left for a reason that, even if known, the organization could not have prevented – e.g. spousal relocation).	
<b>New-hire separation.</b> (Employee who left the organization within two years after their hire date.)	
<b>High-performer separation.</b> (Employee designated as a high performer, as determined by organizational performance evaluation ratings.)	

<b>Category</b>	<b>Description</b>	<b>Date Completed</b>
<b>University Assets and Financial Steps</b>	Obtain employee's Hokie Passport and return to Hokie Passport Office.	
	Collect fuel card for applicable employees and return to fleet services.	
	Contact <a href="mailto:purchasecard@vt.edu">purchasecard@vt.edu</a> to notify the employee's P-card needs to be cancelled in the system; destroy card once confirmation has been received that card has been cancelled.	
	Remove any cash-related responsibilities and close out fund.	

	Return employee keys to appropriate office/person.	
	Obtain university property (cell phone, laptop, tablet, books, Duo hardware token, etc.).	
Category	Description	Date Completed
<b>Shared Files/ Systems Access</b>	If you have an emergency request to delete access for a terminated employee, contact the HR Service Center* and/or <a href="#">university IT</a> .	
	Notify unit/department IT of employees last day in office ASAP and ensure that IT has performed a backup on that machine recently.	
	Determine ongoing system entitlements depending on separation status (alumni, retiree, or terminated).	
	Ensure ownership is transferred for collaborative electronic files.	
	Complete removal procedure(s) for all university system access (HokieMart, Banner, PageUp, MicroStrategy, Hokies/Outlook 365, etc.).	
	Remove third party vendor access.	
	Remove access to unit shared drives and databases.	
	Ensure security camera operator access privileges are withdrawn within 24 hours of separation of employment.	
	Remove from department email groups/staff directory/phone list.	
	Remove access to any business social media accounts.	
	Submit a service request to have the employee's performance cycle archived (If staff).	
	Was this employee a supervisor? If so, will the next employee be hired into the same position number? <ul style="list-style-type: none"> <li>• If yes, then the Banner system will make the supervisor record updates for you! (Effective the first day of the next pay cycle.)</li> <li>• If no, then enter supervisor e-paf updates for each individual reporting to the supervisor. (Note that there is a bulk process for &gt;10!)</li> </ul>	
<b>Payroll/ Benefits</b>	Make sure all leave periods have been approved through the termination date. Confirm with the Bursar's Office if there is an outstanding tuition advance/reimbursement/waiver.	
	Notify Payroll at <a href="mailto:payroll@vt.edu">payroll@vt.edu</a> of potential overpayments if there is a retroactive termination.	

Category	Description	Date Completed
	Ensure that all travel and personal reimbursements for the employee has been submitted with proper documentation and approved before last day in office.	
	Inform employee of the date of their last check and when they should expect to see their vacation/PTO accruals paid out. Inform them that standard practice in Virginia is to pay leave payout on pay day following the last regular pay day. If out of state contact <a href="mailto:payroll@vt.edu">payroll@vt.edu</a> .	
<b>Transition Activities</b>	Inform employee of retirement eligibility if within 3- 6 months of termination. Tell them to contact the HR Service Center* for eligibility rules and retirement benefits (life insurance and health credit).	
	Provide HR Service Center contact* for questions regarding benefits particularly health insurance (health insurance is active through the last day of the month that the employee resigns, and COBRA paperwork will be forthcoming).	
	Verify if employee has multiple appointments and that you are ending the correct appointment. Verify if standard hours need to be adjusted on another appointment for benefit eligibility.	
	For instructions on death processing, contact the HR Service Center* as they have a process for deceased pay, and special instructions may apply.	
	Approve all outstanding timesheets so they can be processed by Payroll.	
	Confirm that the last leave report has been completed, submitted, and approved.	
	Conduct exit interview or send exit interview link to employee.	
	Contact HR Service Center* for any exiting employees on workers comp or disability for additional instructions.	
	Request Exit Interview from the <a href="#">offboarding site</a> .	

Category	Description	Date Completed
<b>Items to remember for supervisor and employee</b>	Submit all outstanding timesheets for approval. Set up meeting with employee if applicable.	
	Update mailing address for W-2s in Hokie Spa.	
	Review all outstanding assignments with supervisor.	
	Send any business-related emails to appropriate person.	
	Remove any personal information from university property (i.e. email, laptop, cell phone)	
	Remove any business-related information from personal property (i.e. home computer, personal cell phone)	
	Remove all personal items from office/desk/locker, and clean and organize office/desk/locker.	
<b>Items to remind employee to do</b>	Update voicemail/email with an "out of office" reply and indicate a contact person.	
	Have employee return parking permit or full amount will be charged on the last payment if applicable.	
	Update voicemail/email with an "out of office" reply and indicate a contact person.	
	Remind employee to return parking permit or full amount will be charged on the last payment if applicable	
	Reconcile final university-issued purchasing card statement if applicable.	
	Ensure that all travel and personal reimbursements have been submitted with proper documentation and approved before last day in office.	
	Return any university assets including laptop, monitor, chair, office equipment, and other equipment.	
	If applicable, direct the employee to clean out any laboratory or chemical storage areas and contact Environmental Health and Safety Services for removal of any hazardous waste or excess chemicals.	
	Remind employee the importance of completing the <a href="#">exit interview questionnaire</a> .	

Category	Description	Date Completed
<b>Departmental/ Status Specific Transactions</b>	<b>Does the employee have principal investigator status?</b> If so, please consult with the Office of Sponsored Programs, Scholarly Integrity and Research Compliance, and Export and Secured Research Compliance regarding coordination of pending, awarded and funded sponsored projects.	