SOUTHWESTERN UNIVERSITY
Separation Procedures and Check-out Process Form
(Staff)

The primary purpose of the Separation Procedures and Check-out Process form (SPCP) is to assist separating employees and their supervisors with an orderly and thorough separation process. This form includes details by departmental area that must be reviewed and completed prior to separation.

Supervisors are responsible for initiaing this process. **Supervisors should initiate this process as early as administratively possible prior to the separating employee's last working day.** *(Note: employees who hold split appointments (faculty and staff) will receive both a check-out form for staff from their supervisor and a check-out form for faculty from the Provost's office.)*

The supervisor must sign off on STEP 1 before the employee can proceed to STEP 2.

The employee (in coordination with the supervisor) must complete STEP 2 by hand-carrying the SPCP form to the specified departments for clearance. Departmental Reviewers (appointed by the Department Head) will review, approve and date their department's section of the SPCP form.

The FINAL STEP is the Human Resources department where the SPCP form and Pirate Card (along with any dependent cards) will be collected.

Separating Employee Information:

Last Name:_____First: _____Middle:_____

Department:_____Office Phone:_____Last day of work:_____

STEP 1 **SUPERVISOR/DEPARTMENT RESPONSIBILITIES**

	YES	NO
Has a Personnel Action form (PAR) been initiated notifying Human Resources of the employee's termination date?	☐	☐
Has the employee preserved files, emails, and changed ownership of ***shared*** files * pertinent to their position?	☐	☐
Has the employee returned all department-issued uniforms, safety equipment, or any other University owned equipment?	☐	☐
Has the employee returned all University-owned data storage devices such as thumb drives and similar devices?	☐	☐
Has the employee set a vacation or forwarding notice that states they will be leaving SU and instructed correspondence to go to their Supervisor on any outstanding email?	☐	☐
Has the employee moved their H:\helios\home drive files to their department S:\shared drive? (Location on shared drive to be determined by Supervisor)	☐	☐
Is the employee aware their SU email account, shared drives, and all data will be terminated on their departure date?	☐	☐
Does employee use Google Drive? If so, has the employee changed ownership for all shared Google Documents, Calendars, Groups, Sites, etc…? ***All shared files will be permanently deleted and are non-recoverable.***	☐	☐

_____ _____

Print Name of Supervisor and Signature Date

* Note to Supervisor: Any Google file that is *owned* by the departing employee and *shared* with others will be **permanently deleted** from all locations when the employee's account is terminated. It is critical that the supervisor and the employee have identified any of these files and either copied/archived any pertinent files, or changed the ownership to you or another appropriate employee prior to the last day of work.

STEP 2 **EXITING EMPLOYEE RESPONSIBILITIES**
(CHECK-OUT PROCESS)

INFORMATION SERVICES (LIBRARY INFO DESK)	YES	NO
Has the employee returned all books, check out equipment, and paid all fines?	☐	☐
Has the employee returned all University-owned equipment and materials? This includes laptops, tablets, mobile phones, software, audio visual or any equipment purchased by the University?	☐	☐

Notes: _____

_____

Signature:_____Title:_____Date:_____

CAMPUS POLICE	N/A	YES	NO
Does the employee have any outstanding violations?		☐	☐
If yes, has the Business Office been notified?	☐	☐	☐

Notes: _____

_____

Signature:_____Title:_____Date:_____

PHYSICAL PLANT	YES	NO
Has the employee returned all keys to University buildings?	☐	☐

Notes: _____

_____

Signature:_____Title:_____Date:_____

BUSINESS OFFICE	N/A	YES	NO
Has the employee returned the University Mastercard?	☐	☐	☐
Has the employee paid all outstanding tickets?	☐	☐	☐
Has the employee paid all outstanding travel advances & completed expense reports for all travel?	☐	☐	☐
Is the employee a custodian of any fixed assets? If yes, change custodian to: _____	☐	☐	☐
Does employee have a Pirate card balance that needs to be refunded?	☐	☐	☐
Does employee have any outstanding Accounts Payable or Payroll checks?	☐	☐	☐
Has the employee paid in full all employee loans (computer equipment or summer loans) through payroll?	☐	☐	☐
For monthly paid employees, have all leave reports been turned in to payroll?	☐	☐	☐
For employees who are a PI/Budget Officer for grants/research projects, are all time & effort reports completed and all financial reports turned in? Change PI/Budget Officer to: _____	☐	☐	☐

Notes: _____

_____

Signature:_____Title:_____Date:_____

FINAL STEP - HUMAN RESOURCES	N/A	YES	NO
Has the employee returned all personal and dependents' University Pirate Card(s)?	☐	☐	☐
Has employee completed, (including supervisor's signature) and returned final time sheet?	☐	☐	☐
Do you authorize time sheets for staff or students?	☐	☐	☐

Instructions for final paycheck: _____Mail Check _____**Direct Deposit _____Other (employee must make special arrangements with the Payroll Office).

Forwarding address for end of year IRS Form W-2:

**(if canceling Direct Deposit, employee must complete the "Discontinue Direct Deposit" form).

_____

_____

Notes: _____

_____

Human Resources Representative:_____Title:_____Date:_____