

# SOUTHWESTERN UNIVERSITY FACULTY DEPARTURE CHECKLIST

This checklist is designed to assist separating faculty (faculty member) and their department chair with the departure process and also ensures that all pedagogical and financial obligations to Southwestern University are met and that all equipment belonging to Southwestern is returned before a faculty member leaves the University. The Office of Academic Affairs is charged with initiating this process. The checklist should be hand-carried by the faculty member to the required offices for review. Should you have a physical limitation that requires assistance in taking this form to the various offices, please contact Barbara Jean at 512/863-1567 or jeanb@southwestern.edu. This form must be completed and returned to the Human Resources Office by the date indicated on the transmittal email.

Individuals approving the faculty member's clearance must sign and date the form. A "No" answer requires action by the faculty member or department. A departing faculty member is not in good standing until this form is completed and submitted to the Human Resources department. This form includes details by other University departmental areas that must be reviewed and completed prior to separation.

Thank you for your service and best of luck!

**The department chair should sign off on STEP 1 before the faculty member proceeds to STEP 2. The FINAL STEP is going to the Human Resources department where this completed form and Pirate Card(s) will be collected.**

**DEPARTING FACULTY MEMBER INFORMATION:**

Last Name: \_\_\_\_\_ First: \_\_\_\_\_ Middle: \_\_\_\_\_  
 Department: \_\_\_\_\_ Office Phone: \_\_\_\_\_ Last day of work: \_\_\_\_\_

<b>STEP 1 – DEPARTMENT RESPONSIBILITIES</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
Has the faculty member given the department chair: their completed grade records (originals or copies) for the final semester's courses, including grades for individual assignments, and any graded work not returned to students (in case of grade appeals or discrepancies)?			
Has the faculty member removed items not owned by the University from the building? (Offices and labs should be left in good order for the next occupant.)			
If applicable, has the faculty member preserved files, emails, and changed ownership of <i>shared</i> files * pertinent to their position?			
Has the faculty member returned all University owned equipment?			
Has the faculty member returned all University-owned data storage devices such as thumb drives and similar devices?			
Has the faculty member moved their H:\helios\home drive files to their department S:\shared drive? (Location on shared drive to be determined by the department chair)			
Is the faculty member aware their SU email account, shared drives, and all data will be terminated on their departure date?			
Does faculty member use Google Drive? If so, has the faculty member changed ownership for all shared Google Documents, Calendars, Groups, Sites, etc...? <b><i>All shared files will be permanently deleted and are non-recoverable.</i></b>			
Has the faculty member returned regalia rented on their behalf for use during official ceremonies?			
<div style="display: flex; justify-content: space-between;"> <div style="width: 70%; border-top: 1px solid black; border-bottom: 1px solid black;"> <b>Printed Name of Department Chair and Signature</b> </div> <div style="width: 25%; border-top: 1px solid black; border-bottom: 1px solid black;"> <b>Date</b> </div> </div>			
<p><b>* Note to Department Chair:</b> Any Google file that is <i>owned</i> by the departing faculty member and <i>shared</i> with others will be permanently deleted from all locations when the faculty member's account is terminated. It is critical that the department chair and the faculty member have identified any of these files and either copied/archived any pertinent files, or changed the ownership to you or another appropriate faculty member prior to the last day of work.</p>			

<b>STEP 2 – EXITING FACULTY MEMBER RESPONSIBILITIES (CHECK-OUT PROCESS)</b>					
<b>INFORMATION SERVICES (LIBRARY INFO DESK)</b>			<b>YES</b>	<b>NO</b>	<b>N/A</b>
Has the faculty member returned all books, checked-out equipment, and paid all fines?					
Has the faculty member 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: _____	
<b>CAMPUS POLICE (FIELD HOUSE)</b>			<b>YES</b>	<b>NO</b>	<b>N/A</b>
Does the faculty member have any outstanding violations?					
If yes, has the Business Office been notified?					
Notes:					
Signature: _____ Title: _____				Date: _____	
<b>PHYSICAL PLANT (MUNDY BUILDING)</b>			<b>YES</b>	<b>NO</b>	<b>N/A</b>
Has the faculty member returned all keys to University buildings?					
Notes:					
Signature: _____ Title: _____				Date: _____	
<b>BUSINESS OFFICE (FIRST FLOOR CULLEN BUILDING)</b>			<b>YES</b>	<b>NO</b>	<b>N/A</b>
Has the faculty member paid all outstanding tickets?					
Has the faculty member paid all outstanding travel advances and completed expense reports for all travel?					
Does faculty member have a Pirate Card balance that needs to be refunded?					
Does faculty member have any outstanding Accounts Payable or Payroll checks?					
Notes:					
Signature: _____ Title: _____				Date: _____	
<b>FINAL STEP – HUMAN RESOURCES (FIRST FLOOR CULLEN BUILDING)</b>			<b>YES</b>	<b>NO</b>	<b>N/A</b>
Has the faculty member returned all personal and dependents' University Pirate Card(s)?					
<b>**If your departure date is before the 25<sup>th</sup> of the month, your paycheck will be mailed to your home address.**</b>					
Forwarding address for end of year IRS Form W-2:					
Notes:					
Signature: _____ Title: _____				Date: _____	