

SOUTHWESTERN UNIVERSITY

RETIRING FACULTY DEPARTURE CHECKLIST

This checklist is designed to assist faculty retirees with the departure process and also ensures that all pedagogical and financial obligations to Southwestern University are met. 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](tel:512/863-1567) or jeanb@southwestern.edu. This form must be completed and returned to the Human Resources Office prior to the last day of employment.

Individuals approving the faculty member's clearance must sign and date the form. A "No" answer requires action by the faculty member or department.

Thank you for your service and best of luck!

The department chair should sign off on STEP 1 before the retiree proceeds to STEP 2. The FINAL STEP is going to the Human Resources department where this completed form and current Pirate Card(s) will be collected. A "retiree" Pirate Card may then be issued for identification and continued use of facilities.

RETIREE INFORMATION:

Last Name: _____ First: _____ Middle: _____

Department: _____ Office Phone: _____ Last day of work: _____

STEP 1 – DEPARTMENT RESPONSIBILITIES			YES	NO	N/A
Has the retiree 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)?					<input checked="" type="checkbox"/>
If applicable, has the retiree preserved computer files and changed ownership of <i>shared</i> computer files pertinent to their position?					<input checked="" type="checkbox"/>
<div style="border-bottom: 1px solid black; width: 100%;"></div> Printed Name of Department Chair and Signature	<div style="border-bottom: 1px solid black; width: 100%;"></div> Date				

STEP 2 – RETIREE RESPONSIBILITIES			YES	NO	N/A
Are you aware that you, as a retired faculty member, will retain your SU Gmail account, which includes your Google Drive?					
Upon retiring, your network drive will be permanently deleted. Have you moved any files you wish to retain from your H:/ drive to a local drive on your personal computer, or to your Google Drive?					
Have you returned regalia rented on your behalf for use during official ceremonies?					
<div style="border-bottom: 1px solid black; width: 100%;"></div> Signature	<div style="border-bottom: 1px solid black; width: 100%;"></div> Date				

STEP 3 – RETIREE RESPONSIBILITIES (CHECK-OUT PROCESS)					
INFORMATION SERVICES (LIBRARY INFO DESK)			YES	NO	N/A
Has the retiree returned all books, checked-out equipment, and paid all fines?					
Has the retiree returned all University-owned equipment and materials? This includes laptops, tablets, software, audio visual, or any equipment purchased by the University?					
Notes:					
<div style="border-bottom: 1px solid black; width: 100%;"></div> Signature: _____	<div style="border-bottom: 1px solid black; width: 100%;"></div> Title: _____	<div style="border-bottom: 1px solid black; width: 100%;"></div> Date: _____			

CAMPUS POLICE (FIELD HOUSE)		YES	NO	N/A
Does the retiree have any outstanding violations?				
If yes, has the Business Office been notified?				
Notes:				
Signature: _____		Title: _____		Date: _____
PHYSICAL PLANT (MUNDY BUILDING)		YES	NO	N/A
Has the retiree returned all keys to University buildings?				
Notes:				
Signature: _____		Title: _____		Date: _____
BUSINESS OFFICE (FIRST FLOOR CULLEN BUILDING)		YES	NO	N/A
Has the retiree returned the University Mastercard?				
Has the retiree paid all outstanding tickets?				
Has the retiree paid all outstanding travel advances and completed expense reports for all travel?				
Is the retiree a custodian of any fixed assets? (e.g. lab tools, equipment, and appliances) If yes, change custodian to: _____				
Does retiree have a balance on the current Pirate card that needs to be refunded or rolled to the "retiree" Pirate Card (the latter is automatic with the issuance of a retiree Pirate Card)?				
Does retiree have any outstanding Accounts Payable or Payroll checks?				
Has the retiree paid in full all employee loans (computer equipment or summer loans) through payroll?				
Notes:				
Signature: _____		Title: _____		Date: _____
FINAL STEP – HUMAN RESOURCES (FIRST FLOOR CULLEN BUILDING)		YES	NO	N/A
Has the retiree returned all personal and dependents' University Pirate Card(s)?				
If your departure date is before the 25th of the month, your paycheck or regular direct deposit notice will be mailed to your home address.				
Forwarding address for end-of-year IRS Form W-2:				
Notes:				
Signature: _____		Title: _____		Date: _____