

# 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 initiating 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?	<input type="checkbox"/>	<input type="checkbox"/>
Has the employee preserved files, emails, and changed ownership of <i>shared</i> files * pertinent to their position?	<input type="checkbox"/>	<input type="checkbox"/>
Has the employee returned all department-issued uniforms, safety equipment, or any other University owned equipment?	<input type="checkbox"/>	<input type="checkbox"/>
Has the employee returned all University-owned data storage devices such as thumb drives and similar devices?	<input type="checkbox"/>	<input type="checkbox"/>
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?	<input type="checkbox"/>	<input type="checkbox"/>
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)	<input type="checkbox"/>	<input type="checkbox"/>
Is the employee aware their SU email account, shared drives, and all data will be terminated on their departure date?	<input type="checkbox"/>	<input type="checkbox"/>
Does employee use Google Drive? If so, has the employee changed ownership for all shared Google Documents, Calendars, Groups, Sites, etc...? <i>All shared files will be permanently deleted and are non-recoverable.</i>	<input type="checkbox"/>	<input type="checkbox"/>

\_\_\_\_\_

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?	<input type="checkbox"/>	<input type="checkbox"/>
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?	<input type="checkbox"/>	<input type="checkbox"/>

Notes: \_\_\_\_\_

Signature: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

<b>CAMPUS POLICE</b>	<b>N/A</b>	<b>YES</b>	<b>NO</b>
Does the employee have any outstanding violations?		<input type="checkbox"/>	<input type="checkbox"/>
If yes, has the Business Office been notified?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Notes: \_\_\_\_\_  
\_\_\_\_\_

Signature: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

<b>PHYSICAL PLANT</b>		<b>YES</b>	<b>NO</b>
Has the employee returned all keys to University buildings?		<input type="checkbox"/>	<input type="checkbox"/>

Notes: \_\_\_\_\_  
\_\_\_\_\_

Signature: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

<b>BUSINESS OFFICE</b>	<b>N/A</b>	<b>YES</b>	<b>NO</b>
Has the employee returned the University Mastercard?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Has the employee paid all outstanding tickets?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Has the employee paid all outstanding travel advances & completed expense reports for all travel?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is the employee a custodian of any fixed assets? If yes, change custodian to: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does employee have a Pirate card balance that needs to be refunded?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does employee have any outstanding Accounts Payable or Payroll checks?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Has the employee paid in full all employee loans (computer equipment or summer loans) through payroll?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
For monthly paid employees, have all leave reports been turned in to payroll?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Notes: \_\_\_\_\_  
\_\_\_\_\_

Signature: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

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

Personal email address: \_\_\_\_\_  
If you are a retiree (having worked for Southwestern for 10 consecutive years), do you wish to be on the retiree list-serv? \_\_\_\_\_

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

Notes: \_\_\_\_\_  
\_\_\_\_\_

Human Resources Representative: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_