

COLLEGE OF ARTS + ARCHITECTURE EMPLOYEE SEPARATION CHECKLIST

Please use this form as a guide to complete the 'separation' process for an employee that is permanently leaving your department. Edit as you need to, based on the specific responsibilities, business systems, and facility access that the employee has in your department. Complete the checklist and sign/date; please submit the original to CoAA Business Manager on the final day of the employee's service to your unit. THANK YOU!

KEYS and LENEL SWIPE CARD ACCESS

Employee Initials/Keys returned:

List key numbers/room access below, for keys that need to be returned to your unit. Are there file cabinet keys?

Has the employee been removed from LENEL swipe card access for your unit or other buildings? List/describe below.

COMPUTER and EMAIL FILE BACK-UP

Contact the IT Director/CoAA to schedule the process for backing up computer documents and email files. These materials are the property of UNC-Charlotte. List the date the back-up of files was confirmed as completed:

VOICEMAIL

Contact the UNCC IT Helpdesk and clear the voicemail from the phone assigned to the employee. Confirm w/ Director, Chair, and business services coordinator whether the phone line should stay active. List date completed, below:

BUSINESS SYSTEMS

Contact the system administrator/complete appropriate 'Change/Termination' form (if required) for any/all that applies to the functional responsibilities of the employee. Please attach copies of all system-separation forms submitted list below, as a quick-glance summary, of the date each system change was requested/completed, or write 'NA.'

XYTHOS (COAA Shared admin system):
PURCHASE CARD HOLDER:
DECLINING BALANCE CARD HOLDER (49er card for unit):
ARCHIBUS (PAM or FAM?) Building Projects, Work Order Requests, Motor Fleet:
49-er MART / e-procurement:
BANNER FINANCE:
BANNER HR:
BANNER STUDENT:
MAXIMUS Effort Reporting System:
OTHER? List/describe, as needed:

PETTY CASH or CHANGE FUND

Employee Initials/Fund Closed or Transferred:

Contact the Controller's Office to ensure Petty Cash or Change Fund custodianship is closed out properly or transferred. Be sure no outstanding checks are waiting for the employee to cash and replenish the fund. Date of completion:

EQUIPMENT or MATERIALS/MEDIA LOAN

Employee Initials/Equipment or Materials Returned:

If the employee had use of UNCC-purchased equipment or software, has it been returned? This applies to any/all equipment, tools, software, or IT/media that was purchased through State, grant or contract funds. List and describe:

UPDATED FILES and RECORDS

Employee Initials/Files or Records Updated & Transistioned:

The employee should coordinate the completion of projects/tasks and close-out of their files/records with a supervisor to ensure business continuity. Briefly describe key areas that require completion and/or transfer of records and responsibilities:

SEE PAGE TWO/REVERSE SIDE

SECURING PERSONAL ITEMS

Employee Initials/Personal Items Collected:

The employee will need to collect personal items from their office space. This should be supervised with the contents of moving materials reviewed in the presence of the employee prior to their leaving.

Date completed:

Comments:

ADDITIONAL COMMENTS

Describe any additional considerations or actions taken or actions still needed to assist in a smooth separation.

SIGNATURES / DATES

On the final day of the employee's service please review all checklist areas, above, for one last time. Then, sign/date this form -- you, as the supervisor or office administrator, plus the employee leaving the unit. Return original form to CoAA.

Signature/title of Direct Supervisor or Office Administrator

Date reviewed/completed.

Signature/title of Separating Employee

Date reviewed/completed.