

– LEAVING LEHIGH –
SUPERVISOR’S SEPARATION PLAN CHECKLIST

This checklist is for the supervisor’s use and reference. Complete this checklist for each departing employee and retain in your files for one year to ensure consistency across campus.

Name of Employee: _____

Last Day of Work: _____

Completed by: _____

Date Completed: _____

- Voluntary Separation:** Obtain written letter of resignation from employee.
- Involuntary Separation:** Consult with Human Resources (HR) prior to termination. HR will assist supervisors with preparing a letter of termination. It is also in the best interests of the University to have an HR representative present during the termination and to meet immediately after with the terminated employee.
- Notification of Pending Separation:** Forward copies of the resignation (voluntary) or termination (involuntary) letter to Human Resources.

For wage employees leaving the department, the supervisor should notify the Payroll of the effective separation date.
- Position Change Authorization:** Complete and forward an *Assignment/Appointment Form (AAF)* to Budget, Payroll, and Human Resources to remove the employee from the position and to terminate benefits and pay. This form can be downloaded from the Payroll website [http://www.lehigh.edu/~inctr/forms_payroll.shtml] or you should have a copy of the current *AAF* in your department. Human Resources and Payroll cannot make any changes without proper authorization.
- Exit Interview:** Upon receipt of resignation letter or other notification, HR will contact the departing employee to schedule an exit interview. The purpose of the interview is to address any questions, comments, or concerns regarding the individual’s employment at Lehigh University.
- Provide Separation Information to Employee:** A *Separation Information Sheet* is available on the HR website at: <https://hr.lehigh.edu/hr-forms#Leaving Lehigh Forms>. Review this information with the departing employee. Questions about benefits may be referred to HR (extension 83900).
- Future References:** If the departing employee wants the University to provide references to other possible employers, obtain the employee’s authorization for release of information for future reference checks. A *Request for Reference and Release* form is on the HR website at: <https://hr.lehigh.edu/hr-forms#Leaving Lehigh Forms>. Forward the signed form to HR for retention in the employee’s personnel file.

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If the employee asks for a personal reference from you, you may offer to provide it in writing. We suggest you have HR review the written reference.

- Eligibility for Re-employment:** This will be noted on the *Separation Report* which Human Resources will send to you shortly after the employee's last day of work.

Logistical Issues:

- Desk/Work Space:** Provide direction to the departing employee regarding cleaning out his or her desk and organizing the workspace. Request and secure copies of pertinent files from his or her computer and network space supplied to individuals you designate. Personal items and information should be removed from the physical space, email and desktop computer.
- University Property:** Collect all University property from departing employee. This includes keys, ID card, Credit card, phone card, parking hangtag, equipment, library books and any other items. Property may vary based on requirements of position. University property to collect may include:
 - ___ University keys and/or access cards
[building, office, file cabinets, or other keys]
 - ___ Communications equipment
[cell phone, pager, telephone calling card, PDA, radio, answering machine, etc.]
 - ___ Computer equipment (hardware and licensed software)
[PCs including disks, external hard drives, flash drives, printers, other peripherals]
 - ___ Other University property
[books, calculator, files, furniture, manuals, records, tools, uniforms, etc.]
 - ___ Lehigh ID Card, Parking Hangtag, Wells Fargo university-liability credit card (OneCard program). HR will destroy the credit card but the Supervisor must complete the *OneCard Maintenance Form* and forward it to Brenda Bachman in Purchasing Services [see http://www.lehigh.edu/~inctr/forms_onecard.shtml to find the OneCard Maintenance form]
 - ___ Secured and returned proprietary documentation/ intellectual property. (Collaborate with HR to plan in advance of exit process)
 - ___ Other: _____
- Computer Security Issues:** Contact data security in Library and Technology Services (LTS) immediately with name of employee, department, and date of separation. LTS will manage email and portal access appropriately and terminate access to, departmental networks, and other computer systems. HR recommends placing an auto response announcement on email including a designated contact name and email address for continued business communication.

Payroll Issues:

- Expense Reports and Reimbursements:** Expedite expense reimbursements for items such as mileage, lodging, board, or other business expenses or allowances that have not yet been paid through the OneCard system.
- Final Time Sheet:** The departing employee needs to turn in a final time sheet showing hours worked up to and including the separation date. Any time off (vacation, sick leave, and/or excused absences) should be included as applicable.
- Final Paycheck:** After receiving the *Assignment/Appointment Form* (available from the payroll website at: http://www.lehigh.edu/~inctr/forms_payroll.shtml or your department) and verifying the time sheet, Payroll will prepare the final paycheck and mail it to the departing employee's home address of record.
- Payment for Accrued Unused Vacation:** Departing employees will be paid for any unused vacation time that accrued during the twelve-month period preceding the separation date. This payment is issued as a paper check (no direct deposit) on the next regular payroll cycle following the final paycheck and will be mailed to the departing employee's home address of record.

Departmental Issues:

- Work Transition:** Meet with the employee in advance of separation to review work plan. Review, revise and update plans and transfer duties where appropriate. Verify transfer of access to any computer files and software applications.
- Notify Other Staff:** Work with the departing employee to find the appropriate time and manner in which to announce the departure. The following is a recommended announcement:

"(Name) will be leaving Lehigh effective (date). (Name) has been at Lehigh for more than ___ years. Please join me in thanking (name) and in wishing him/her well as he/she pursues new professional challenges. _____ will be handling the responsibilities of the position during the time it takes to fill the vacancy."

Advise departmental staff members on how to handle inquiries about the employee who is leaving Lehigh. For example:

"(Name) is no longer working at Lehigh (or in this department). _____ is handling his/her workload (and/or calls, meeting, projects, etc.). May I connect you with _____?"
- Contact Human Resources if you need temporary help:** We are contracted with two temporary agencies (Integrity Personnel and HTSS). HR also maintains a list of Lehigh retirees interested in temporary work assignments.
- Building/Office Access:** If alarm codes are required to access the building or office, these will need to be changed following the employee's departure.

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- Update Departmental Communications:** Update voice mail messages to ensure current information. Forward the telephone of departing employee to appropriate person. Update web pages and/or departmental listings to reflect staffing changes.
- Scheduled Meetings:** Ensure cancellation of meetings or seminars employee may have been scheduled to attend.
- Notify Key Contacts:** Communicate staffing change to key contact people on campus with whom the employee worked regularly. (Consider the employee's participation in cross-campus responsibilities, such as Informal Network, Critical Staffing, etc.)
- Other:** _____
- Other:** _____