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**Supervisor’s Separation Checklist**

*\*Complete this checklist for each departing employee and retain in your files for reference.*

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| --- | --- |
| **Name of employee:** |  |
| **Last day worked:** |  |
| **Department:** |  |
| **Date of checklist:** |  |

* **Voluntary Separation:** A written letter of resignation from employee must be provided to HR. (Scroll to the bottom of the document if this was an involuntary termination)
* **Position Change Authorization:** Complete and forward a [Payroll Assignment Form](https://financeadmin.lehigh.edu/content/payroll-forms) *(PAF)* to Payroll and Budget removing the employee from the position and terminating benefits and pay.
* **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.
* **Checklist for Employee:** HR will email a Separation Checklist to the employee informing them of their responsibilities before leaving Lehigh and information regarding their benefits.

# Logistical Issues:

* **Desk/Work Space:** Provide direction to the departing employee regarding cleaning out his or her desk and organizing the workspace. Request that pertinent files from their computer and network space be assigned to the shared network space.

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, one card, mobile phone, parking hangtag, equipment, library books and any other items. Property may vary based on requirements of position. Supervisor must complete the [*OneCard Maintenance Form*](https://businessservices.lehigh.edu/onecard/forms)and forward it to Brenda Bachman in Purchasing Services.
* **Computer Security Issues:** Contact your Library and Technology Services (LTS) support person immediately with name of employee, department, and date of separation. LTS will manage email and portal access appropriately and terminate access to departmental networks. HR recommends placing an auto response announcement on email including a designated contact name and email address for continued business communication.

# Payroll Issues:

* **Time Clock Plus:** The departing employee needs to enter their time through their last day in the Time Clock Plus system. Any time off (vacation, sick leave, and/or excused absences) should be included as applicable.

# 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.
* **Contact Human Resources if you need temporary help:** We are contracted with two temporary agencies (Allied Personnel Services and Integrity Personnel).
* **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

# Involuntary Termination

* **Termination:** Consult with Human Resources (HR) prior to termination
* **References:** If the employee asks for a written reference from you please contact HR before providing.
* **Notify Other Staff:** The following is a recommended announcement:
* *“Employee name] is no longer working at Lehigh University. Employee’s responsibilities will be handled by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ on an interim basis until we have hired another person for the position. “*
* 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?”*