

EMPLOYEE SEPARATION CHECKLIST

Once a supervisor is informed of the employee's separation date, a transition process should be started to prevent disruption in the work area and ensure continuation of services.

If the supervisor is involuntarily terminating an employee, they should seek guidance from Employee and Labor Relations on the steps that should be followed. The following steps should be followed as needed, in no particular order:

- ☐ Forward resignation letter with the last day of work and/or termination notice with the effective date of separation to the Department of Human Resources.
- ☐ Start the process to post the position, if needed.
- ☐ Determine what responsibilities will be distributed to other employees.
- ☐ Request from IT through a ticket:
 - ☐ A copy or access to the employee's One Drive and/or computer files;
 - ☐ Transfer of the employee phone extension to another employee or supervisor;
 - ☐ Access to the employee's email;
 - ☐ Access (i.e., student, adjunct) that the separating employee needs to maintain
- ☐ Have the employee place a general out of the office message with instructions about who to contact. If not done by the employee, request this from IT through a ticket.
- ☐ Contact Purchasing to review P-Card transactions and other purchases in process. The employee will need to provide all outstanding receipts, P-Card, and exempt cards prior to departure.
- ☐ Contact other department heads for work that may be affected and plan for the transition.
- ☐ Request all WNMU items to be returned at the latest on their last day. Examples may include:
 - ☐ Fob, card, and/or keys for area access;
 - ☐ P-Card and non-exempt cards;
 - ☐ Laptop and/or any other electronic equipment; and/or other WNMU items.
- ☐ Return key to Facilities, P-Card to Purchasing, laptop to IT, etc.
- ☐ Ask the employee to complete the exit interview survey. They may also request an in-person exit interview with Employee and Labor Relations.

REQUEST FOR ACCESS FROM SEPARATED EMPLOYEES

If a separated employee requests access to any WNMU system, information, areas, or other after their last day, please refer to the below processes:

- ☐ System Access: Access to systems such as Mustang Express, email, Canvas, Panopto, and/or any other WNMU systems will not be granted to any separated employee. The employee can request specific information or documents to be provided by emailing employment@wnmu.edu requesting the information. The Department of Human Resources will review requests and discuss with the appropriate departments to determine if the information can be provided.
- ☐ Employee File Documents: Separated employees who request copies of documents in their files will need to follow the "Review of Employment File – Inspection and Reproduction" process:
 - ☐ Copies of documents in the employ's personnel file will be provided upon request within a reasonable time and cost. Photo ID verification prior to disclosure will be required.
 - ☐ Request for multiple documents in the employee file, the complete employment file, or internal documentation/communications outside of the employee file will need to be requested through a [Public Records Request](#).
- ☐ Any other request: For any other request from separated employees, please notify the Vice President of Communications and Compliance for review and consideration.