

## Employee Departure Procedures

### OVERVIEW

When an employee resigns, retires, dies, or is otherwise separated from employment at the University, the employing department is responsible for ensuring that all applicable personnel, payroll, computing, financial, facility, property, and safety-related procedures are completed.

In order to facilitate this process, departments are to document the completion of required items, either by using the Departure Checklist included with this section or a departmental checkout document. The Departure Checklist includes items that are to be completed prior to or immediately after the departure of an individual from department or University employment.

This list is not all-inclusive and a department may have additional requirements. The department attaches notation of the completion of any additional departure requirement to the Departure Checklist or includes the information on a departmental checkout document.

### Responsibility

The employee's supervisor is responsible for completing and/or reviewing each of the applicable departure items. In some departments, the department's personnel officer is responsible for completing the personnel/payroll departure items, e.g., personnel actions, Time or Leave Reports. (See 60.74.2.)

### Form Completion and Approval

To ensure that all departure procedures are completed, the supervisor enters the date each item is completed on the Departure Checklist. Obtain copies of the checklist by printing the PDF master on 60.74.7-8.

The supervisor, and the departing employee, when applicable, sign the completed Departure Checklist.

### Retention

The department retains the completed checklist in the department's employee file. See 90.01 for retention requirements.

### CHECKLIST ITEMS

Items to be completed by the department or the employee at the employee's departure are listed below by category. NOTE: Depending on the employee's responsibilities, only some of these items may be applicable.

#### Leaving the Department

If the employee is leaving the department, but remaining a University employee, the department completes *only* the items indicated in **Part A**. See 60.74.2-4.

#### Leaving the University

If the employee is leaving the University, the department completes the items indicated in **Part A** and *also* completes the items indicated in **Part B**. See 60.74.4-5.

#### Principal Investigator Leaving

If the employee leaving the University is a principal investigator (PI), the department completes the items indicated in **Part A**, and **Part B** (see 60.74.4-5), and **Part C** (see 60.74.5-6). A principal investigator is defined as the senior member of a research team, i.e., the individual with primary responsibility for the design and conduct of a research study.

## **Employee Departure Procedures**

### **Part A**

The department completes the items in *Part A* if the employee is leaving the department, but remaining a University employee.

#### Personnel/Payroll

- Complete and route a personnel action through the Personnel/Position/Payroll Electronic Routing Management System (PERMS). See 60.25. NOTE: If the employee is transferring to another department within the University, the receiving department processes the personnel action.
- Send the employee's Time or Leave Reports to the new department or HRS as indicated in the applicable instructions in 60.60, 60.62, or 60.63.
- Notify HRS if the departing employee verifies I-9s, PERMS, and/or OPDRS transactions for the department. HRS must establish a new departmental contact to receive e-mail notifications regarding document deadlines. See 60.04, 60.25, and/or 60.02.

#### Financial

- Remove the employee's name from University department bank accounts. See 30.65.
- Cancel the employee's departmental purchasing card. See 70.08.
- Obtain and reconcile any cash advances issued to the employee. See 40.21.
- Remove the employee's name from any till or petty cash fund. See 30.50 and 30.51.
- Remove the employee's toll call authorization and obtain any calling cards. See 85.41.

#### Approval Authority

- Remove the employee's expenditure authority. See 70.02.
- Remove the employee's appointing authority. See 60.10.
- Remove the employee's authorization to approve travel. See 95.01 and 95.05.
- Remove the employee's authorization to approve contracts. See 10.10.

#### Information Services

- Remove the employee's access to departmental personal computer accounts, including those which allow remote access to departmental resources.

For Windows personal computers, notify department Information Technology Services (ITS) staff to remove the employee's Network ID from authorization groups that grant access to departmental resources.

For Macintosh personal computers, update personal computer passwords to discontinue the employee's access.

## Employee Departure Procedures

- Information Services (cont.)
- Update accounts and passwords for departmental network and systems access.
  - Update any associated websites.
  - Remove the employee's authorization to access student and/or financial data warehouse, PERMS, OPDRS, and/or other enterprise systems (e.g., myWSU). Contact CougTech for assistance; telephone 509-335-4357.
  - Update the active telephone listings in Information Technology Services (ITS), the department, and in Employee Workplace (WRKPLACE) within the mainframe DEPPS AIS application. See 85.33 for more information about accessing DEPPS and AIS.

NOTE: If the employee is leaving the University, remove the employee's name from active telephone listings in ITS and the department.

### *AIS Applications*

If the employee is transferring to another department within the University, the department must submit AIS Access Requests to remove authorizations for the employee to use AIS applications associated with the department's accounts. The department indicates in *Comments* on the request form that the employee is transferring to another department. See 85.33.

NOTE: Within 24 hours of the employee's separation from the University and upon verification from HRS, ITS automatically removes authorizations to all AIS mainframe computer applications to which the employee has access.

### *RONet Applications*

An employee leaving the University should close his or her Registrar's Office Network (RONet) account by:

- Logging into RONet,
- Selecting Your Account,
- Selecting Close.

If the employee is transferring to another department where RONet is needed, the employee should access his or her RONet account and deselect any applications that are no longer needed.

Alternatively, the department may provide notification to the Registrar's Office of the employee's separation from the department or University by sending an e-mail to:

[eit.helpdesk@wsu.edu](mailto:eit.helpdesk@wsu.edu)

## Employee Departure Procedures

### *Registrar's Office Actions*

Upon notification from the employee or department of the employee's separation from the University, the Registrar's Office:

- Removes the employee's ROnet account authorizations,
- Disables the employee's ROnet account, and
- Removes the employee's administrative access to registration and academic planning and records applications through the myWSU portal.

### Records Management

- Transfer all University records to the employee's successor or the department records coordinator. See 90.01.
- Locate and secure all records which are subject to litigation holds. See 90.12.

### Facilities/Property

- Obtain all keys and key cards to offices and buildings that were issued to the employee.
- Obtain all University equipment, e.g., tools, computer equipment, portable electronic devices, reference materials, software, which were issued to the employee.
- Ensure that office, laboratory, and locker spaces are left clean and all of the employee's personal items are removed.
- Obtain all research data, including research log books.

### Safety

- Complete and route a Departure Notice if employee worked with radiation machines, radioactive materials, hazardous chemicals, Drug Enforcement Administration (DEA) controlled substances, and/or biohazardous materials. See 60.38.
- Receive a termination bioassay if the employee used radioactive materials or radiation machines. See *SPPM* 9.50.
- Obtain the radiation monitoring badge if the employee used radioactive materials or radiation machines. See *SPPM* 9.30.
- Receive final surveillance documentation if the employee worked with chemical carcinogens.

### Part B

If the employee is leaving the University, the department completes the items indicated in **Part B** below, as well as the items in **Part A**. (If the employee is a principal investigator, the department also completes **Part C**. See 60.74.5-6.)

## Employee Departure Procedures

- |                      |   |
|----------------------|---|
| Personnel/Payroll    | <ul style="list-style-type: none"> <li>• Have employee contact vendor agencies, e.g., credit union, Parking Services, to stop any automatic payroll deductions. Deductions that are not stopped prior to termination are withheld from the employee's remaining paycheck. See 55.49.</li> <li>• Have the employee notify applicable committees and boards of his or her departure from the University.</li> <li>• Refer the employee to the Washington Employment Security Department website for unemployment benefits information:<br/><br/> <a href="https://esd.wa.gov/">https://esd.wa.gov/</a><br/><br/>           (RCW 50.20.140)</li> </ul> |
| Financial            | <ul style="list-style-type: none"> <li>• Obtain the employee's University travel charge card. See 95.03.</li> </ul>   |
| Information Services | <ul style="list-style-type: none"> <li>• Cancel the employee's UNIX accounts. See 85.37.</li> <li>• Cancel the employee's e-mail and calendar accounts.</li> <li>• Update the employee's status for CougarCard. See 10.08.</li> </ul>   |
| Facilities/Property  | <ul style="list-style-type: none"> <li>• Obtain the employee's parking permit and garage access card, if applicable.</li> </ul>   |
| Contact Information  | <ul style="list-style-type: none"> <li>• Have employee update mailing address file by selecting the Main Menu--&gt;My Profile link on the myWSU website at:<br/><br/> <a href="http://my.wsu.edu">http://my.wsu.edu</a><br/><br/>           See also 90.70.</li> <li>• Obtain a forwarding address and personal e-mail address for the employee.</li> </ul>   |
| <b>Part C</b>        | <p>If the employee leaving the University is a principal investigator (PI), the department completes the items indicated in <b>Part C</b> below, as well as the items in <b>Part A</b> and <b>Part B</b>.</p>   |
| Sponsored Projects   | <ul style="list-style-type: none"> <li>• Transfer responsibility for the employee's grants to his or her new employer or complete a change of principal investigator for the grants. See OROS Guideline #3 and the IACUC Resources website.</li> <li>• Complete disposition of the employee's contracts and subcontracts. See the OROS Guidelines and the IACUC Resources websites.</li> <li>• Review all outstanding invoices with Sponsored Programs Services for charges applicable to the employee's grants and contracts.</li> </ul>   |

## **Employee Departure Procedures**

- |                       |  |
|-----------------------|--|
| Facilities/Property   | <ul style="list-style-type: none"><li>• Clear and close laboratory areas. See 60.38, and <i>SPPM</i> 4.24, 4.25, and 4.26.</li><li>• Complete disposition of research equipment. See 20.76, 20.78, 40.16, the OROS Guidelines website, and the IACUC Resources website.</li><li>• Complete disposition of research animals. See IACUC Policy #5.</li></ul>   |
| Safety                | <ul style="list-style-type: none"><li>• Complete disposition of biological materials. See <i>SPPM</i> 4.24 and 5.40, and the Office of Research Assurances Biosafety website.</li><li>• Complete the transfer or disposal of radioactive materials. See <i>SPPM</i> 9.50, 9.60, and 9.70.</li><li>• Complete disposal of chemical wastes. See <i>SPPM</i> 5.66.</li><li>• Complete disposition of other hazardous materials. See 20.77, and <i>SPPM</i> 5.40 and 5.66.</li></ul> |
| Intellectual Property | <ul style="list-style-type: none"><li>• Complete transfer of technology and intellectual property. See Executive Policy #27 and <i>Faculty Manual</i> Section IV. If software was developed, see also Executive Policy #8.</li></ul>   |
| Research              | <ul style="list-style-type: none"><li>• Transfer permission to conduct research with human subjects group to the employee's successor. See the Institutional Review Board website.</li></ul>   |

*Complete and/or print the form on 60.74.7-8 as needed.*