

Staff Off-boarding Checklist

(Full Time Continuing and Term Temporary Full Time Employees)

Staff Name: _____

Item	Action	Responsibility
Employee Documentation	After Employee submits Letter of Resignation or Letter of Intent to Retire, a Termination Notice is completed and submitted to HR-Payroll for keying on system. If employee is transferring to another Unit on campus, that Unit will have completed the SAN to set-up the employee in their Unit.	Jan Millette / Sarah Williams
Exit Interview	Sent up Exit Interview with Employee and the Dean prior to their departure (if appropriate).	Sarah Williams
Email Distribution Lists	On employee's last day, access is removed on the required email distribution lists.	Sarah Williams
PeopleSoft Access	On last day, Supervisor to contact the Computer Accounts Office (SSB 3300, 519 661-3800, Fax 519 661-3486) to remove access to PeopleSoft HR, HE and/or Financials, ROAMs, etc. Christina MacDonald to remove any HR access online as applicable. For those staff who have signing authority for specific department/units, a "Signing Authority Human Resource Data and Transactions" form must be filled out to delete this authority by Christina MacDonald.	Supervisor / Employee Christina MacDonald
Vacation	Employees are to submit and outstanding monthly vacation/time sheets to their supervisor for approval and submission to Jan Millette for tracking in our Timetracker system. For Employees transferring to another unit, they will be able to transfer up to 10 days to their new unit – this will be communicated to the new unit by Christina MacDonald/Sarah Williams. Any vacation days over and above these 10 days transferred, will be paid out to Employee. Jan Millette will ensure this vacation pay-out is completed and submitted to Payroll for processing. Employees can access Timetracker to review their vacation balance at: https://servlet.uwo.ca/timetracker/welcome.jsp	Supervisor / Employee to complete Christina MacDonald/Sarah Williams/Jan Millette
Employee ID# and Email Address	Once employee termination is keyed by Payroll, this de-activates UWO ID# and email address. If employee is transferring to another unit, employee information is transferred to that unit.	Payroll / ITS
Announcement	Announcement is sent out to faculty and staff prior to the individual's last day by the Dean's Office.	Sarah Williams
UWO ID Card	Supervisor to collect UWO ID Card prior to last day (if leaving UWO).	Supervisor
MyHR	If employee is leaving UWO, they must ensure that their address is up to date on MyHR. HR prepares a Record of Employment for Employee which is mailed to most current address listed on MyHR. T4's will also be sent to this address. MyHR Sign in: http://www.uwo.ca/humanresources/peoplesoft/admin_index.htm	Supervisor to remind Employee
Keys and Building Access	On last day, Supervisor to collect Keys and return to the Parking Office located in the Support Services Building, Rm. 4150. They should also send updated Building Access form to remove employee from Building Access list. Keys: http://www.uwo.ca/ppd/documentation/western_keys_guidelines.pdf Building Access: http://www.uwo.ca/police/documentation/CopyofCardAccessRequest.xls For inside doors, the below list outlines who is responsible for removing employees. Department Administrator/Supervisor/Dean's Office should contact the required	Supervisor

	<p>individuals as needed.</p> <ul style="list-style-type: none"> • SEB/TEB/CMLP Perimeter doors and SEB U/G computer labs – Campus Police (cardacc@uwo.ca) • CMLP Roof Access – Campus Police (cardacc@uwo.ca) • SEB 2097 (U/G services) – Campus police (cardacc@uwo.ca) • SEB 3016, 3092, 3108 – Electronics Shop (Ron Struke) • TEB 6, 28, 40, 50(UMS), 206, 240, 244, 252, 336, 338, 344, 346, 352, 420, 424, 454 – Mike Gaylard or Sue Chapman 	
Engineering Computer Account / Network Access / Intranet Access / Remote Access	Supervisor to contact ITG to remove employee's Engineering computer account/login, network access, intranet access, remote access, etc.	Supervisor to contact Lyle McLean / Jim Dobravec
Telephone Extension, UWO online Directory	<p>Department Administrator/Supervisor/Dean's Office to remove access to telephone extension by contacting ITS. ITS Computer Accounts Office ext. 83800; helpdesk@uwo.ca.</p> <p>Department Administrator/Dean's Office to remove name from UWO online directory. Western Directory: http://www.uwo.ca/westerndir/</p>	<p>Department Administrator to complete for employee in Department.</p> <p>Sue Chapman to complete for employees in Dean's Office.</p>
P-card cancelation	Supervisor is responsible for collecting the credit card and returning it to the Central Program Administrator. The Central Program Administrator will cancel the card. Steve Caldeira, Purchasing Department 661-2111 ext. 88117 scaldeir@uwo.ca	Supervisor
Collect Department/ Faculty Property	Supervisor to obtain departmental/faculty property (e.g. mobile devices, computers/printers, software licences, etc.).	Supervisor
Reimbursements	Employee to ensure that they submit paperwork for reimbursement of expenses, petty cash, work boots, education and courses, etc.	Supervisor to remind employee
Parking	If employee is leaving UWO, they must return their parking transponder to Parking Services to receive their deposit back. http://www.uwo.ca/parking/	Employee
Pension & Benefits	For employees who are retiring, they will want to make an appointment to discuss their retirement plan/pension with HR. For employees leaving UWO, we have a pension account, they will want to make an appointment regarding transferring pension (as appropriate). Contact: HR at 519-661-2194	HR / Employee

Other Sources:

<http://www.uwo.ca/humanresources/index.htm>