



This checklist outlines employment exit guidance for immediate supervisors regarding Bluefield State University employees who end their employment with BSU, such as through resignation, retirement, or termination.

EMPLOYEE INFORMATION:

Employee Name: _____ Position Title: _____

Employee Last Date of Employment: _____

Forwarding Address (Street, City, State, Zip): _____

Phone: _____ Forwarding Email: _____

Supervisor Name: _____ Supervisor's Phone/Email: _____

EMPLOYEE RESPONSIBILITIES:

- Submit resignation letter to the President's Office; please also provide copy to immediate supervisor and to Human Resources office.
- Contact Payroll to set up appointment if you have questions regarding pay/benefits, such as:
 - Continuation of health insurance coverage (such as under COBRA)
 - Conversion or continuation of life insurance
 - Distribution/other available options regarding retirement contributions
 - Leave Balances (such as annual, sick, and/or compensatory leave)
- Make sure work records, files, letters, emails, etc. are updated and readily available for your immediate supervisor, as well as your successor.
- Return all University property prior to or on last day physically worked to appropriate office(s). Items may include: Keys (Building access, work area, offices, desk, file cabinets, storage, vehicle), uniforms, Name badges and pins, ID Card, P-Card, Travel Card, Parking hang tag, Personal computer, laptop, iPad, tablet or other University issued electronics, Cell phone, pager, PDA, floppy disks, zip drives, CD's, memory sticks, tools, safety equipment, etc. If you have a P-Card, notify (in writing) your supervisor, Department Head, and the P-Card Coordinator/Purchasing Director in Procurement of your departure and turn in the P-Card and P-card paperwork to the P-Card Coordinator/Purchasing Director prior to your last day worked. *Employees transferring within the University should retain their ID cards. The departments which employees transfer out of/ into are responsible for removing/ assigning ID card building access as applicable for their locations.*
- Return all University Library material, reconcile outstanding fines and fees, if any, and close your account.
- Settle any cash advances, petty cash accounts, pending reimbursements, or any other unsettled accounts.
- Please note: Employees who separate from BSU employment lose access to their BSU work-related accounts (such as myBSU and Email). However, BSU retirees may keep their email account. Some faculty maintain email accounts beyond their termination date and should contact the Provost Office if questions.
- Remove all personal items from offices or lockers prior to or on last day physically worked.
- Notify the BSU Payroll office of any change of address during the year so that a W-2 tax Statement can be sent in January.

IMMEDIATE SUPERVISOR'S RESPONSIBILITIES:

Upon initial notice of departure:

- Provide employee with a copy of the Employee Separation Checklist and obtain copy of employee's resignation letter. Inform Human Resources, Cabinet-level Administrator, and Payroll of the resignation.
- Recommend the employee meet with BSU Payroll office regarding benefits, retirement, and leave information (such as annual, sick, compensatory leave, if applicable).



- Arrange for “knowledge transfer” regarding employee’s job duties, responsibilities and work records.
- Process any non-reimbursed pre-authorized travel expenses through the department prior to employee’s termination date.
- Confirm that the employee does not owe reimbursements, such as a moving and relocation reimbursement, or professional development/education expenditures.
- Audit annual leave, compensatory time, and sick leave balances. If there is an error with the balance(s) listed, resolve as appropriate with the employee and the Payroll office.
- Verify repayment of salary over payments, if any, by contacting the Payroll office.

Within days prior to, or on employee’s last day worked:

- Obtain from employee all University property, coordinating with appropriate issuing office(s) as necessary. Items may include: Keys (Building access, work area, offices, desk, file cabinets, storage, vehicle), uniforms, Name badges and pins, ID Card, P-Card, Travel Card, Parking hang tag, Personal computer, laptop, iPad, tablet or other University issued electronics, Cell phone, pager, PDA, floppy disks, zip drives, CD’s, memory sticks, tools, safety equipment, etc. Example: P-Card and P-card paperwork must be returned by the employee to the P-Card Coordinator/Purchasing Director directly.
- Confirm with employee that all University-related electronic records and paper documents containing University work product/data have been returned to you as the immediate supervisor.
- Confirm as supervisor that you have obtained from the employee access and passwords for any electronic files, voicemails, vendor logins, etc. that have been used in the course of performing the employee job responsibilities on behalf of BSU.
- Contact university webmaster/IT department to ensure references to employee are removed from web content and that any IT systems and building accesses are to be terminated at the close of business on the employee’s last day of employment. Faculty supervisors via their respective Deans offices are responsible to notify the Provost Office, the Human Resources office and the IT department of faculty accounts that are to be disabled at termination, providing written notification to those offices regarding the faculty account to disable and the effective date it is to be disabled.
- Confirm the employee has removed personal items from offices or lockers.

The day following the employee's last day:

- Verify all locally provisioned user access has been cancelled, including access to shared drives.
- Clear/change all passwords, including Voicemail, personal computer station, vendor logins, etc.
- Remove former employee from recurring meetings in Outlook as an attendee.
- Remove or coordinate removal of former employee from listserves.
- Return University property(ies) to appropriate BSU offices, if applicable.
- Contact Payroll office to reassign any direct reports to a new supervisor in the wvOASIS system, if necessary.
- Verify building access and security cards have been deactivated.
- Verify cancellation of signature authority over university accounts (if applicable).
- Cancel photocopy access number (if applicable).
- Change signature authority for approving time cards with Payroll office (*applicable when a Supervisor is leaving*).
- Other (identified by Supervisor): _____

Supervisor Signature: _____ Date: _____

Supervisor may retain this completed form in departmental files, if desired. (Do not send to HR)