## Human Resources

## Employee Separation/Transfer Checklist

**Instructions:**

Supervisors should read these instructions completely before filling out the checklist**.** The completed checklist should be kept within the department's records. The checklist is a tool to help guide the supervisor and the terminating or transferring employee through the separation process.

Supervisor or assigned personnel should complete the following **Employee Separation/Transfer Checklist** for terminating or transferring employees. The purpose of the checklist is to document procedures to revoke or change secured access privileges and secure all equipment. If an employee is ending his/her employment with Northern Arizona University for any reason, or transferring to another NAU department, the supervisor needs to follow the checklist to ensure a smooth transition and to provide for the continuation of any benefits/services the employee may need. The supervisor should initiate this form and start completing it as soon as the departure notice is received from the employee.

Employee's secured access refers to access/accounts (in addition to standard email, NAU domain, and PeopleSoft self-service) that require specific security access authorization requests and may include but not be limited to:

- PeopleSoft/LOUIE (secured access)
- Business Objects/Data Warehouse access,
- PeopleSoft Financials System,
- Disable access to domain resources by removing employee from any NAU domain (active directory) accounts they should not longer access.
- Transfer ownership on any:
  - o department or project accounts that were owned by employee, including "shared" email/calendar accounts, resource accounts and other project accounts
  - o web server accounts, including Sharepoint
  - o Listserv mailing list ownerships
- Directory Services Department Maintenance Applications
- Any other secured system access

If the department is concerned about a departing employee's access to NAU records, property, or personnel, please work through your HR representative to coordinate with ITS in revoking various computing security in a timely manner, and issues related to property or personnel.

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Employee Name: _____

NAU ID: _____

Department Name: _____

Position Title: _____

Supervisor: _____

Separation Date: _____

Transfer to another University Department:  ☐ Yes    ☐ No

Department Name: _____

Transfer Date: _____

### Supervisor is Responsible for Completing:

☐ Supervisor must submit on-line request at https://nau.service-now.com/sp/ to have employee's <u>secured access</u> disabled. (If Email and NAU domain access need to be immediately disabled, please specify this on the request. If not specified, these accounts will purge automatically within 2 weeks of termination of employment for staff, or 6 months for faculty).

☐ Cancel specific departmental software/server/shared files access (accounting software, scheduling software, list serves, websites, etc).

☐ Employee should be reminded to remove NAU licensed software if they have it installed on a personally owned system. Licensing is only valid during employment. (Employee would have been required to acknowledge this at time of specific software download or media purchase. Return media to ITS Solution Center, Box 5100).

☐ Be sure you have access to employee's files stored on desktop system PC only. Files saved on desktop system should be backed up and/or moved to a share or server where they will be accessible as needed.

☐ Transfer of ownership of all active and archived files or libraries.

☐ Signature of a non-disclosure agreement if appropriate to protect sensitive research or other important University data.

☐ Voice mail account deleted (Submit a service-now request to Telecomm—go to https://nau.service-now.com/sp/

☐ Main departmental voice mail account password reset (Submit a service-now request to Telecomm – go to https://nau.service-now.com/sp/

☐ Removal from on-line access to phone bills (Submit service-now request to Telecomm – go to https://nau.service-now.com/sp/

☐ Remove security for the on-line Time Application. The form to give or remove security is located at: http://nau.edu/ITS/Learn/ePASS/.

☐ Remove security for the Leave Application. The form (Louie Security Access Request) to give or remove security is located at: http://nau.edu/ITS/Learn/ePASS/.

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**Employee Separation Information:**

☐ Outstanding fees (parking tickets, travel advances, library fees, etc.). Outstanding balance may be deducted from last paycheck.
You will need to pay any outstanding fees at the Student and Departmental Account Services Office located in the Gammage Building #1, North Campus, First Floor Main Lobby.  Information number (928) 523-6153 or you pay directly on the web at http://nau.edu/sdas/.

☐ Parking Decal (To stop payroll deduction, peel sticker from vehicle and return to parking services.  Otherwise the full amount will be taken out of employee's last check.)

☐ Cancel any meetings or seminars that are scheduled for a time following your transfer or separation date.  Work with your supervisor to achieve a smooth transfer of duties.

☐ Update your address on LOUIE self service so you can receive future correspondence.  Sign up for Electronic W-2 Delivery through the following pathway: LOUIE – Self Service – Payroll and Compensation.  You can get information on Electronic W-2s and access the log-in to create an account for electronic W-2 delivery at https://in.nau.edu/human-resources/w-2--1095c-information/.

☐ Your final paycheck will be paid on the next regular payday according to the payroll schedule located at https://in.nau.edu/Human-Resources/Payroll/).  If you are entitled to vacation pay out, it will be included on your final check.  You will be able to view and print your paycheck for 6 months after separation from Northern Arizona University.  You can do this by navigating to https://peoplesoft.nau.edu and proceeding through the following pathway:  LOUIE – Self Service – Payroll and Compensation – View Paycheck.  Questions about your final check can be directed the Payroll team at https://in.nau.edu/human-resources/contact-us/.

☐ Benefits:  Your coverage of benefits will terminate unless you are a benefit eligible retiree.  All benefits will terminate the 1st of the pay period following your last day of employment. You may be eligible to continue to purchase certain benefits after you leave.  Upon loss of coverage for you and/or your eligible dependent(s) will be mailed a COBRA notification packet within 14 days of the date the Benefits Services receives official confirmation of an employee's separation from employment or change in eligibility status. The law requires that this packet be sent by mail to the last known address of the employee and/or the employee's eligible dependent(s). An eligible individual has 60 days from the date of the notice to elect COBRA coverage, which is effective retroactive to the last day of coverage under the NAU/State of Arizona group plan. The individual then has an additional 45 days from the date of COBRA election to make the first premium payment.  For additional COBRA information: https://in.nau.edu/human-resources/cobra/.

☐ If you are leaving NAU but not retiring, you may have questions about your retirement account.  You can access information on available distribution, rollover and other options at:  https://in.nau.edu/human-resources/when-your-benefit-coverage-ends/.

☐ Exit Interview:  We would like to learn about why you are leaving NAU, and about your experience as an employee here.  Please help us by completing the exit interview survey at: https://in.nau.edu/human-resources/exiting-employees-2/ or access a printable version at:  http://nau.edu/Human-Resources/Forms-Index/#e.