

The following checklist should be completed when someone terminates (by resignation, involuntary termination, retirement, reaching appointment end-date, or graduating) his/her MSU employment or otherwise separates from a department (by transfer, layoff, extended leave of absence). Not all items may apply to a given individual. For example, in cases where a person terminates one type of appointment but begins another, some checklist items will not apply. Supervisors should complete the form with the employee who will be terminating or separating from MSU Extension. Once completed, send the checklist to MSUE Human Resources.

MSUE Human Resources

Justin S. Morrill Hall of Agriculture

446 W Circle Drive, Room 182

East Lansing, MI 48824-1039

517-353-9108; msuehr@anr.msu.edu

EMPLOYEE ACTIONS BY LAST WORKING DAY

PERSONAL

Done N/A

- ☐ ☐ 1. Remove personal items from work areas.
- ☐ ☐ 2. HR Benefits will send you a letter (after your benefits terminate) about termination/continuation of applicable benefit programs. This letter will come after you are no longer employed with MSU. Call 800-353-4434 if you have questions about the letter.
- ☐ ☐ 3. Make sure your information (address, etc.) is updated in EBS for future mailings such as W2s.

RETURN ALL UNIVERSITY PROPERTY

Note: Failure to return all MSUE purchased property may result in a delay of your last paycheck and/or any applicable payout.

- ☐ ☐ 1. Keys (building, office, desk, files, vehicles, lockers, etc.)
- ☐ ☐ 2. Parking decal/gate card (forward to DPPS so parking deduction is stopped).
 - a. Official retirees who will need continued parking privileges should contact DPPS for a retiree parking decal.
- ☐ ☐ 3. Computers/laptops/palm pilots or other electronic equipment (e.g., printers, cameras)
- ☐ ☐ 4. Cellular phones/pagers
- ☐ ☐ 5. Records (documents, files, correspondence, etc.)
- ☐ ☐ 6. Research/data notebooks (you may retain a copy)
- ☐ ☐ 7. Program files (e.g., includes all files with or without client information)
- ☐ ☐ 8. Credit/procurement/travel, and related receipts
- ☐ ☐ 9. Library books, CD texts, periodicals
- ☐ ☐ 10. Access cards (e.g., County and/or campus building access)

FINANCIAL

Settle outstanding accounts, including:

- ☐ ☐ 1. Charges owed to your department (e.g. p-card invoices are completed in EBS)
- ☐ ☐ 2. Charges owed to other departments (e.g., Library, Parking, Student Accounts)

- ___ 3. Reimbursements owed to you (e.g., travel expenses)
 - a. Your final Travel Expense Report (TER) submission, if applicable, may be processed after your Termination.
 - b. Confirm address to send final TER payment(s) to below (only used for TER processing; will not update your address through University systems).

Forwarding address:

- ___ 4. Access cards (e.g., County and/or campus building access)

ELECTRONIC RECORDS

Done N/A

- ___ 1. Retrieve or delete any personal files/information on your office/home PC, office/department server, lab server, central file space (AFS), etc.
- ___ 2. Retrieve any University email files, or files on other University email servers and systems, that you wish to retain. Note:
 - a. Files are purged when your email account is closed.
 - b. You must have the permission of the appropriate unit administrator to copy any University files or records.
 - c. MSU retirees are eligible to continue their MSU email accounts indefinitely; students may continue using their accounts for two years after graduation. If you will have a new email address, make arrangements for your email to be forwarded.
- ___ 3. Return (transfer, copy, etc.) to the appropriate unit and/or University administrator(s) any unit or University data files, electronic documents and records, etc. that are stored on your personal work PC or in your personal server file spaces.
- ___ 4. If you possess sole access rights to an administrative database, software application, information system, social media accounts, IChat permissions - including agency code, 4-H online access, etc., that is necessary for program or unit administration or operations, transfer the passwords to the appropriate unit administrator, or arrange for a unit administrator to be given the access needed to assure continued operations.

MISCELLANEOUS

- ___ 1. If you were responsible for clients, make arrangements with your supervisor for others to assume program/service coverage.
- ___ 2. Foreign National employees should contact the Office of International Students and Scholars to determine if there are other requirements related to their status.

SUPERVISOR ACTIONS

EQUIPMENT/PROPERTY

Done N/A

- ___ 1. Arrange for the return of University property (see examples listed in employee section).
- ___ 2. Determine applicable equipment reassignment (e.g., computers, vehicles, etc.).

DATA SYSTEMS/RECORDS/MISCELLANEOUS

- ___ 1. Ask the employee to return any University records (e.g., paper, electronic, email) held in his/her work area or home office/computer to his/her supervisor.

* In particular, prevent the employee from retaining, copying, or removing in any way protected health information, as defined under HIPAA. This includes, but is not limited to, any and all medical records, and client files.
- ___ 2. Obtain a list of all internal and external grant funding and account details, if applicable.
- ___ 3. Review these records for possible transfer to other staff member or archiving (e.g., paper or email communications related to federal grants).
- ___ 4. Work with appropriate facilities entity (county or campus) to ensure that codes on door entry systems; deactivate building/area access; notify DPS to deactivate identification card access are deactivated or changed.
- ___ 5. Change building directories and phone number listings.
- ___ 6. Change names on subscriptions, institutional memberships, etc.
- ___ 7. In cases of involuntary termination, access to the above items should be discontinued as of the time notice of termination is given. Particular attention should be given to data systems, personal health information/medical records, offices, phone systems, and restricted areas.
- ___ 8. Run a voicemail message for at least two weeks sharing that the employee no longer works there and provide options of who the caller can contact instead.
- ___ 9. Help the employee prepare an out of office email message containing the same information as above; there will be a few days before their anr.msu.edu and/or msu.edu accounts are disabled.
- ___ 10. Ensure the employee understands that MSU is the employer and the MSU Unemployment Compensation Office is the proper recipient of any and all Michigan Employment Security Commission (MESC) inquiries. If a county or District Extension office receives any MESC correspondence, the document should be forwarded immediately to:

MSU Unemployment Compensation Office

240 Nisbet Building
Michigan State University
East Lansing, MI 48824
Telephone: (517) 884-0104

For additional information, refer the employee to the MSU Unemployment Compensation Policy:
<http://www.hr.msu.edu/termsep/UnempComp.htm>

Employee Name (please PRINT): _____ **Institute/Department:** _____
Supervisors Signature: _____
Date form was completed: _____

Send completed form to MSUE HR at:

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