

Staff Separation Checklist

This checklist is a tool to assist supervisors in completing the final steps of an employee's offboarding & separation from the department.

Prior to separation, the following checklist should be completed by the supervisor & signed by the employee.

Employee's Name:		Campus ID#:	
Supervisor's Name:		Date:	

Supervisor Preparation	
<input type="checkbox"/>	Separation Transaction - as soon as supervisors are made aware of the employee separating, please complete a personnel transaction and attach a copy of the letter of resignation to the separation transaction. <i>(If employee is transferring within CMU – e-mail letter to emplsvcs@cmich.edu and do not complete a personnel transaction).</i>
<input type="checkbox"/>	Desk Manual/Pending Projects - identify if the employee has a Desk/Procedure Manual and any pending/outstanding projects that require attention.
<input type="checkbox"/>	CMU Equipment Inventory - verify what equipment/property the employee has been issued and insure it is returned prior to separation <i>(i.e. computer, cell phone, uniforms, etc.)</i> .
<input type="checkbox"/>	Systems Security - verify what systems the employee has security access to including HIPAA sensitive systems access. This will be beneficial for requesting security access for new/replacement staff & ensuring security access is cancelled for separating employee. Social media account administrators should transfer security access prior to separating and wherever possible, supervisors should change passwords for all social media accounts. Initiate a Helpdesk Ticket for OIT Offboarding <i>(terminate security access, remove personal files, etc.)</i>
<input type="checkbox"/>	Performance Review – supervisors should complete employee performance review for current fiscal year. <i>(You can simply indicate “Employee Separated” and submit).</i>
<input type="checkbox"/>	Department Personnel File – supervisors who have maintained a personnel file in their department for employees, please shred the contents upon employee separation. Do not return this file to Employment Services.
<input type="checkbox"/>	Offboarding – supervisor meets with the employee prior to separation to go over the following checklist items & return property.

Payroll & Payables	
<input type="checkbox"/>	Final Paycheck – employee's final paycheck will be issued on the scheduled pay date that includes the date of separation. It will include payoff of all eligible personal/vacation/comp hours. <i>Note: employee may see a paycheck deduction if they used more personal time than they were eligible for at time of separation.</i> For paycheck questions, contact Payroll at 774-3481.
<input type="checkbox"/>	Credit Cards - employee should turn in CMU Business credit card and all outstanding credit card documentation to supervisor. Supervisor is responsible for completing reconciliation form. CMU Business Credit card will automatically be cancelled on employee's last day. If card needs to be cancelled sooner e-mail travel@cmich.edu . If employee has a gas card, contact purch@cmich.edu . <i>Note: Supervisor may cut up card & destroy.</i>
<input type="checkbox"/>	Outstanding CMU Accounts - employee should verify if they have any outstanding CMU accounts such as tuition reimbursement, bookstore charges, parking tickets, etc. <i>Note: If there are outstanding accounts, Supervisor should notify appropriate department of employee's separation.</i>
<input type="checkbox"/>	W2 & 1095C - print W2/1095-C and/or update forwarding address (important to receive W2 next year) .
<input type="checkbox"/>	Parking Permit – employees separating between September and January, should contact Parking Services at 774-3083 to see if they are eligible for any parking permit reimbursement.

Benefit Information	
<input type="checkbox"/>	Benefit Coverage - employee benefits coverage will end at midnight on their last day. Any claims paid after their last day will be their responsibility. Employees will receive a COBRA letter via US mail from Benefits & Wellness regarding benefit continuation. https://www.cmich.edu/about/human-resources/benefits-wellness/cobra .
<input type="checkbox"/>	Flexible Spending Account - Health Care and Dependent Care FSA claims must be received by our FSA administrator within 90 calendar days following the separation of employment. Claims must be incurred prior to the termination or retirement date.

- Life Insurance** - Options to port or convert life Insurance coverage will be mailed from The Hartford within 30 days after your termination date.
- Retirement Accounts** - TIAA will be notified of separations the pay period following the official last day. Employees do not need to take any action, however if they wish to withdraw or rollover monies they may contact TIAA directly at 1-800-842-2776 following their final pay date.
- Retiree & Emeritus Status** – employee eligibility for CMU Retiree or CMU Emeritus Retiree status will be automatically reviewed and, if eligible, submitted for processing.
- Wellness Rewards Program** - employee wellness rewards account will end on their last day of employment. They must redeem their earned cash rewards before their separation date.

Technology, Security & Property

- E-mail Account** - employee should place an “Out of Office” message indicating they are no longer with CMU and indicate who individuals should contact for assistance. *Note: Email will remain active up to one (1) year unless employee is terminated by the University. Employees with active student or alumni status should notify the OIT Help Desk at 774-3662 to change their email status.*
- Voicemail** - employee should deactivate their voicemail and/or forward their telephone to a designated contact person or department switchboard.
- Microsoft Teams** – employees should remove themselves from any applicable Microsoft Office team that they belong too. Also, if employees are the owner/manager of a team they should either assign a new owner or remove the team.
- Central ID Card or Mobile ID** – employees whose CMU “Staff” identification is a physical card should return the card to their supervisor. They may keep any “student” Central ID Cards. For employees who utilize Central Mobile ID for their CMU identification, the mobile app will become inactive when no longer meeting eligibility requirements. *Note: Supervisor may cut up “Staff” ID card & destroy. HR notifies the Campus ID office to deactivate the employee’s identification card.*
- Keys** - employee should return any keys/key cards they have been issued (building, office, vehicle, etc.). *Note: Supervisor should notify appropriate security administrator to cancel electronic building access.*
- CentralLink** – employees will retain limited access to Central Link for up to one (1) year to update/maintain your address, print W2’s, tax forms, etc.
- Mailing Address** – employees should ensure their mailing address is current in CentralLink so they receive important benefit and tax information.
- Central Alert** - employees may wish to unsubscribe personal contact information from Central Alert.
- Personal Cellphone Account** – employees with a personal cellphone through Connect CMU, will need to make arrangements for final billing. *(Students, alumni and emeriti are still eligible for service through Connect CMU).*
- Restricted/Protected Data** – employee should provide supervisor with any restricted/protected data from personal accounts such as e-mail, OneDrive, etc. Employee should also permanently delete any restricted/protected data from personal accounts.
- Personal Items** – employee should remove any personal items/documents prior to separation.

Signatures

I acknowledge that all CMU Property has been returned & restricted/protected data has been deleted from personal accounts.	Employee Signature:	
I verify that all University property has been returned and the appropriate departments have been notified.	Supervisor Signature:	

Questions? Feel free to contact:
 Employment Services - 989-774-2010 emplsvcs@cmich.edu
 Benefits & Wellness - 989-774-3661 benefits@cmich.edu

Return completed checklist to Employment Services, Rowe 109 or emplsvcs@cmich.edu Revised 12/22