

## UNC SCHOOL OF MEDICINE EMPLOYEE EXIT CHECKLIST

*Please review guidelines on the second page prior to completing the checklist. This form is to be completed jointly by the terminating employee and the HR facilitator upon the receipt of a letter of resignation from the employee. This form is to be retained in the employee's personnel file. All items belonging to the department must be accounted for before the employee's last day of work.*

|   |  |   |       |     |
|---|--|---|-------|-----|
| <input type="checkbox"/> Faculty <input type="checkbox"/> EPA Non-Faculty <input type="checkbox"/> SPA (Staff) <input type="checkbox"/> Temp/Student/Visitor <input type="checkbox"/> Post-Doc/Fellow |  |   |       |     |
| Employee's Name and Title: _____  |  |   |       |     |
| PID Number _____  |  |   |       |     |
| Department _____  |  | Division _____                                  |       |     |
| Date of Employment _____  |  | Separation Date _____                           |       |     |
| Forwarding Contact Information: _____   |  |   |       |     |
| Street / PO Box   |  | City  | State | Zip |
| (Note: Payroll must be advised if home address will change in order to receive W2 at the appropriate time)  |  |   |       |     |
| HRIS Notification of Termination Date: _____  |  | Performance Review Summary Transfer Form: _____ |       |     |
| SPA (Staff)   |  | SPA (Staff)                                     |       |     |

The following checklist is provided to assist the employee and the department with the exit process.

**If applicable, items must be returned to the HR Facilitator or Department Administrator prior to last day of work. If required, also deactivate the item.**

= Task Completed                      N/A = Not Applicable

**Accounting Services Deactivated**

- CABS
- FRS
- IN-Depth

**Security (Returned & Deactivated)**

- Building Access Card (return/deactivate)
- Copier Card/Code (return/deactivate)
- Purchasing Card (return/deactivate)
- Diners Club Card (return/deactivate)
- Identification Badge (return/deactivate)
- Keys Returned (return)
- PIN # (deactivate)
- UNC One Card
- Phone (change password & out-going message)

**Computer Access - Deactivated**

- E-Mail
- Listserv
- SOM System (OIS)
- Health Care System (ISD)
- University System (ITS)
- Departmental System
- Sanitize Hard Drive

**Equipment Returned**

- Cellular Phone
- Laptop Computer       Sanitize
- Pager
- PDA

**Human Resources**

- Campus Directory (remove listing)
- Dept. Phone List (remove listing)
- Desk/Locker (cleared)
- Final Timesheet (submitted to HR)
- Final Paycheck (mail or pick-up)
- Leave (pay out or transfer)
- Letter of Resignation
- Tax Forms (W-2)  
(send forwarding address to payroll)
- Travel Advance Payback
- Mailbox
- Parking Permit (returned)
- Parking, Library Fines (remind employee to clear)
- Medical Information Management

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Supervisor's Signature

\_\_\_\_\_  
Date Signed

## GUIDELINES FOR OPERATING UNIT HR FACILITATOR WHEN TERMINATING EMPLOYEE

### 1. Accounting Services

Notify the FACS coordinator for your department.

### 2. Security

**Building Access Card** – collect and return to SOM Facilities and Planning, 425 MacNider, Phone 966-2441. They will deactivate the card.

**Copier Card** – collect and deactivate

**Purchasing Card** – collect, cut in half

**Diners Club Card** – collect, cut in half and return to Phil Easler, CB #1230, Travel Services.

<http://www.unc.edu/mds/ts/diners.htm#16>

**Identification Badges** – SOM badge must be collected, cut in half and returned to Facilities and Planning in 425 MacNider. Phone 966-2441.

Hospital badge must be returned to the Parking Office, 3<sup>rd</sup> floor Neurosciences Hospital. Phone 966-6421.

**Keys** – collect and store in a secure location.

**Pin Number** – deactivate

**UNC One Card** – notify UNC One Card. Phone 962-8024, Fax 962-8217, CB # 1530

<http://www.onecard.unc.edu/>

**Phone** – have employee remove their voice mail password and create a new one. Be sure to obtain the new password. Telecom voice mail is reset by telecom <http://www.telecom.unc.edu/> Phone 962-8353

### 3. Computer Access

**Email/Listserv** – send an email message to [request@med.unc.edu](mailto:request@med.unc.edu) to cancel access to system.

**Health Care System** – send an email message to [isaadmin@unch.unc.edu](mailto:isaadmin@unch.unc.edu) to cancel access to system.

**University System** –

**Departmental System** – notify department's systems support personnel

**Sanitize Hard Drive** – Obtain password, remove any data needed and sanitize

### 4. Equipment Returned

**Cellular Phone** – collect and send to Telecom

<http://www.telecom.unc.edu/> phone 962-8353

**Laptop Computer** – collect, remove any data needed, sanitize and store in a secure location

**Pager** – collect and send to Telecom

<http://www.telecom.unc.edu/> phone 962-8353

**PDA** – collect, remove any data needed, sanitize and store in a secure location

### 5. Human Resources

**Campus Directory** – contact the Campus Directory Coordinator Phone 962-1608

**Departmental phone list** – contact appropriate person within the department responsible for updating phone list

**Desk/Locker** – cleared, collect any keys

**Final Timesheet** – signed and delivered to HR in 247 MacNider

**Final Paycheck** – final paycheck is delivered to the department, not direct deposited. Employee is to make arrangements to pick up the check or request that check be mailed to an appropriate address.

**Leave** – signed and delivered to HR in 247 MacNider

**Tax Forms (W-2)** – obtain correct mailing address and forward to payroll. Phone 962-0046, CB # 1260

**Travel Advance Payback** – Collect any travel advance issued but not used

**Parking Permit** – collect parking permit and link to the following web site for information on how to cancel.

[http://www.dps.unc.edu/dps/permits/permit\\_cancellations\\_and\\_reassig.htm](http://www.dps.unc.edu/dps/permits/permit_cancellations_and_reassig.htm).

**Parking, library or other fines** – remind employee that all fines should be paid

**Medical Information Management** – Prior to leaving the university, physicians and other clinicians must visit the UNC Hospital's Physicians Workroom to "sign out" verifying that all patient records are complete.

### 6. Advise employee that Employee Benefits will send a packet of information concerning benefits and retirement account. If they have questions, have them contact Benefits at 962-3071.