



# Administration & Finance

## Policy & Procedure

[www.umb.edu/administration/finance/index.html](http://www.umb.edu/administration/finance/index.html)

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**Issuing Office:** Human Resources

**Policy Number:** FY08-HRS-001-00

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### **Instructions: Employee Exit Check Out Form**

**Policy Name:** Employee Exit Policy

**Original Date Issued:** Wednesday, September 10, 2008

Revision #: N/A

Last Update: N/A

When a UMB employee is terminating from the campus or transferring to another department on campus, or taking a leave of absence from the university, this form should be completed by the Department Head or designee at least two weeks before the employee's last working day, or as soon as reasonably possible. When the submit button is clicked, the completed form will be issued to key UMB departments: Contracts and Compliance (Procard and Property), Facilities, IT, Controller/Bursar, Human Resources, Library, Budget, Campus Services, ORSP, Public Safety, Academic Affairs and Assistant Deans.

The Employee Exit Check Out Form is part of the Employee Exit Policy. The purpose of the form is to ensure the safeguarding of University assets and resources as employees terminate from UMB and/or transfer within the UMB campus.

This policy/form is applicable to all employees except non tenured system faculty. Students with any items listed on this checklist must also have this form completed.

### **Instructions**

**Submitted by:** Enter first name, last name and email address of the Department Head or designee completing this form.

**Exiting Employee's Information:** Enter first name, last name and employee ID of exiting employee. Enter the exiting employee's Department Head, Phone #, Department and work location. Example: Quinn 3/040.

**Last Working Date:** The last date the employee will be working for UMB. Some employees take vacation before being terminated from payroll.



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Termination Date from Payroll: The termination date on the PA form.

Required Date for Follow-up: Two weeks from the Last Working Date.

**Type of Exit**: If the employee is resigning or transferring with a standard two week notice, check Standard Exit Notification or Transfer of Position. If the employee is taking a leave of absence with notice, check Leave of Absence and provide Expected Date of Return.

If circumstances warrant immediate action, check EMERGENCY Exit Notification.

**Computer Applications and Security**: In accordance with the University's Data and Computing Standards, ALL University system accounts and access will be DELETED for terminated employees on the Last Working Date. If the Department Head is requesting an extension of time for any application, the application should be checked with a deletion date.

**Department Head Checklist**: Department head should check these tasks when completed.

**SUBMIT**: When the submit button is clicked, this form will be electronically sent to the key departments listed above, including the submitter. Each department will respond to the submitter and Department Head by email within 2 business days with a copy to the employee with the inventory of property/system access/financial obligations of the employee, etc

Print the form as soon as you submit it. Two weeks after the employee's Last Working Date, the Department Head should complete and sign the final checklist and submit to the HR Director of Personnel Services.

**Department Head Final Checklist**: On the "Required DATE for follow-up" above, confirm the date the PA was submitted to HR and that all tasks were completed, have Department Head sign and send to HR.

If you have questions, please contact Clare Poirier, Director, Personnel Service, 7-5189.



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### **Reminder:**

1) On the last working day, the Department Head confirms all employee tasks have been accomplished. Within two weeks, the Department Head forwards the Employee Exit Check Out Form electronically to Human Resources. If the employee has any items outstanding, the Department Head should notify the Bursar by email to bill the employee on the *Bursar's Employee Billing Form* and inform the Bursar of the original purchase price of the property and the Asset ID # and Tag #. Equipment will be billed at the original purchase price. Copy this email to Property Office. This must be done in accordance with MGL, Chapter 647, An Act Relative to Improving the Internal Controls within State Agencies.

2) Human Resources will send the Employee Exit Survey to the employee as soon as it receives the Employee Exit Check Out Form. The purpose of the survey is to obtain exiting employee feedback to improve the operations and work environment of the UMass Boston campus