

University of Kansas

University Departure Checklist

Departing Individual Information

Departing Individual Name:
Supervisor or Unit Designee Name:
School/Department/Center/Unit Name:

University Departure Checklist and Review

Pursuant to the Employee and Affiliate Departure Policy, all departing faculty and staff employees and affiliates (except for affiliates with less than one month of service) and their designated supervisor or unit designee are to complete and verify that the applicable checklist tasks are completed prior to the date of departure. If the departure is sudden or the departing individual is otherwise unable to complete the checklist, the supervisor or unit designee should complete the checklist as necessary and work with Human Resource Management (HRM) representatives as appropriate.

Departing Individual	Yes or N/A	Unit Responsibilities	Yes or N/A
Submit resignation letter with date of resignation to your supervisor or unit designee as soon as possible.		The supervisor or unit designee provides a copy of the termination/resignation letter with unit acceptance to the Shared Service Center for processing. An Affiliate Data Sheet is to be completed by the unit for Affiliate appointments ending early.	
Notify any committees or boards on which you serve, including community memberships or affiliations.		Confirm the departing individual has received and is completing the Departure Checklist and related activities.	
Refer to HRM's Leaving Employment and Benefits Transition webpage regarding COBRA continuation of health insurance, leave payout, email and accounts access, accessing retirement funds, etc. Contact benefits@ku.edu with questions.		Inform departing individual that HRM Benefits will provide a letter with information about continuing health insurance, accessing retirement funds, etc. Inform departing individual of leave payout information on HRM's Leaving Employment and Benefits Transition webpage.	
Submit applicable information to your supervisor or unit designee regarding the change in status/supervision of employees, students, fellows, or post-docs, including mentorship, advising, funding, and employment status. It is your responsibility to properly manage the transition of your employees/students as well as help identify new areas of mentorship, funding changes, or work with HRM on employment related changes.		Reassign any direct reports to a new supervisor. Communicate supervisor updates to the Shared Service Center for Processing.	
Provide your supervisor or unit designee a list of all University work product files (paper or electronic) labeled with the network file location, data systems, websites, social media and other accounts to which you have access, including passwords for each account to ensure access and retrieval by your unit after departure.		Verify that all records/data have been received, transferred, and secured. Inventory locations of KU work product files and note any necessary passwords. Promptly change all passwords for University accounts to which the departing individual had access or otherwise terminate the departing individual's access to the account.	

<p>Identify and transfer or properly dispose of all sensitive information in accordance with Information Technology Security Policy. Consult with Information Technology to delete any remaining electronic files containing KU data from personal devices or electronic media. Secure personal emails & documents off of KU equipment.</p>		<p>Arrange with IT for voice, network, and network drive accesses to be terminated. If unit administrator wishes to disable or redirect email, contact HRM to coordinate those actions with IT. Review all list-serves the employee's email is active in to determine if earlier removal is needed. Turn off pins and other electronic or controlled access.</p>	
<p>Return all KU property and assigned equipment such as Duo security token, all keys, ID badges, purchase card, computers, tablets, phones, headsets, flash drives, files, office furniture, or other equipment.</p>		<p>Verify return of all KU property and assigned equipment such as Duo security token, all keys, ID badges, purchase card, computers, tablets, phones, headsets, flash drives, files, office furniture, or other equipment.</p>	
<p>Discuss with your supervisor or unit designee the status of all current responsibilities and projects. If requested, work with the supervisor to identify who might assume responsibility for any ongoing projects.</p>		<p>As appropriate, notify the following areas about the individual's departure:</p> <ul style="list-style-type: none"> • Academic/Research Dean/Director • Vice Chancellor for Research • Animal Care Unit • Environment, Health and Safety • Export Compliance • Global Operations & Security • Information Technology • International Affairs • Public Safety • Applicable Unit Advisory Board(s) <p>Identify who will assume responsibility for ongoing projects and activities upon departure of the employee to continue services/operations.</p>	
<p>Contact Environment, Health and Safety (EHS) to close out labs, shops, studios, and dispose of hazardous materials, etc. using the EHS Off-Boarding and Space Closeout Procedures and Checklist, as applicable. Contact the Office of Research to determine the retention requirements or disposal of non-hazardous research samples.</p>		<p>Supervisor or unit designee verified action has been completed.</p>	
<p>Work with departmental administration on office clean-out processes. KU Recycling may be contacted for additional bins and pick up. Complete an Online Work Request, noting the office number, date bins are needed, materials to be collected, and the approximate amount. When bins are full email kurecycling@ku.edu to schedule a collection pick up with normal collection route.</p>		<p>Supervisor or unit designee verified action has been completed.</p>	
<p>If teaching, verify that all grades have been submitted and that the department has received any student or course related products or materials associated with the courses taught.</p>		<p>Supervisor or unit designee verified action has been completed.</p>	
<p>If a supervisor, verify that all evaluations, transition memos, correspondence, time/absence reporting in HR/Pay, etc., have been</p>		<p>Ensure all time and absences have been appropriately reported and approved in HR/Pay for the departing individual and any subordinates.</p>	

completed and/or delegated, and that personnel-related documents are placed in a central file.			
Contact your unit's Information Technology staff member to discuss the retention, redirection, and/or disposition of email, home directory files, websites, and other electronic materials. Confirm wording of out-of-office email message and contact points for future inquiries.		Confirm that access to all electronic files and paper documents has been transferred to someone in the unit. Identify if access needs to be removed to IT resources prior to University timeframes and work with HRM if acceleration is needed.	
Arrange for forwarding or other disposition of mail/outstanding orders placed which may be received by the unit after your departure.		Supervisor or unit designee verified action has been completed.	
Provide supervisor with list of all website and social media accounts maintained.		Review website and social media outlets to remove departing individual contact information, photo, etc. If necessary, provide new contact resource.	
Arrange with supervisor or unit designee for an announcement of your departure to contacts, including email departure notices.		Supervisor or unit designee verified action has been completed.	
Settle any outstanding travel, spending, fines, etc.		Process all outstanding reimbursement and/or travel expenses.	
Provide information for any fiscal resources and account usage.		Terminate access to fiscal resources and accounts.	
For departing individuals who hold international visas, consult International Support Services to discuss the departure impact for visa status. H1-B Employees: <ul style="list-style-type: none"> • Discuss effect of H-1B withdrawal/transfer. • Discuss return transportation and grace period. • Discuss Labor Condition Application. J-1 Visiting Scholars: Discuss effect of J-1 end/shortening/transfer of program. OPT/CPT: Discuss effect of departure with granting institution. For departing individuals who hold international visas, consult Global Operations & Security (GOS) to discuss any Export Control related issues concerning the transfer of equipment, information, and technology outside the United States. Contact GOS at gos@ku.edu .		For H-1B Employees: <ul style="list-style-type: none"> • Direct departing individual to International Support Services to discuss effect of H-1B withdrawal and grace period. • Discuss return transportation and Labor Condition Application with International Affairs. J-1 Visiting Scholars: Direct departing individual to International Support Services to discuss effect of J-1 end/shortening/transfer of program. OPT/CPT: Direct departing individual to International Support Services at the granting institution to discuss related impact. For departing individuals who hold international visas, consult Global Operations & Security (GOS) to discuss any Export Control related issues concerning the transfer of equipment, information, and technology outside the United States. Contact GOS at gos@ku.edu .	
Contact the Office of Research to initiate the review and management of grant activities.		Supervisor or unit designee verified action has been completed.	

<p>If a researcher/faculty member is moving from KU to another institution, initiate the process for the transfer of active sponsored projects to the new institution by referring to the Research Employee Separation Checklist. Note: GOS should be consulted prior to transferring any projects outside the United States. Contact GOS at gos@ku.edu.</p>		<p>Supervisor or unit designee verified action has been completed.</p>	
<p>If a researcher/faculty member and not moving to a new institution, initiate the process of appointing a new principal investigator for any active projects by referring to the Research Employee Separation Checklist. Note: GOS should be consulted prior to transferring any projects to ensure the new PI understands if there are any export controls on the project. Contact GOS at gos@ku.edu.</p>		<p>Supervisor or unit designee verified action has been completed.</p>	
<p>Consult with GOS at gos@ku.edu if you are:</p> <ul style="list-style-type: none"> • Involved in sponsored research with export controls, technology control plans or other security restrictions per the contract/grant/agreement • Needing to transfer information, animals, technology, materials, equipment, technical data, or software internationally or within the United States. • In the U.S. on a visa. <p>Complete Exit Interview Survey.</p>		<p>Verify personnel required to consult with GOS has occurred.</p>	
<p>If a researcher or faculty member moving from KU to another institution and research staff and/or graduate students will be following you to the new location, contact your Dean's Office, Graduate Studies Office, and HRM for assistance.</p>		<p>Verify with departing individual that contact has been made for any following staff and students in compliance with University procedures.</p>	
<p>If applicable, schedule a US Government Security Clearance debriefing with the National Industrial Security Program Security Staff.</p>		<p>Supervisor or unit designee verified action has been completed.</p>	
<p>Update your address information in HR/Pay through employee self-service if applicable. For more information visit How do I Change My Address.</p>		<p>Instruct departing individual to provide current address in self-service HR/Pay for accurate W-2 reporting.</p>	
<p>Remove all personal items from your office or assigned space.</p>		<p>Ensure the departing individual's office and all labs or other facilities have been cleared of all personal items, hazardous materials, and that all contents have been removed or reallocated. Notify spacemanagement@ku.edu regarding vacancy.</p>	
<p>Contact kupark@ku.edu regarding terminating parking permit.</p>		<p>Supervisor or unit designee verified action has been completed.</p>	
<p>Complete electronic Exit Interview Survey.</p>		<p>Recommend the departing individual complete the electronic Exit Interview Survey.</p>	

		Obtain the completed departure checklists, review them for any needed follow-up, acknowledge their completion, notify any needed parties, and retain applicable checklists in departmental records for three years from the departure date or submit to HRM for retention purposes.	
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KU Departure Checklist Completion Acknowledgement

Faculty/Staff/Student Employee/Affiliate		Supervisor or Designee	
I have completed all applicable checklists and departure tasks related to my role. Name: _____ Date Signed: _____		I have reviewed and acknowledged completion of all applicable checklists and departure tasks. Name: _____ Date Signed: _____	

Submission Instructions

1. Change file name to "University Departure Checklist_ [departing individual's last name-first name]".
2. The departing individual submits the completed checklist(s) via email to the supervisor or unit designee's email address.

Links

- Employee and Affiliate Departure Policy: <http://policy.ku.edu/HRM/employee-affiliate-departure>
- Affiliate Data Sheet: <https://humanresources.ku.edu/affiliates>
- EHS Off-Boarding and Space Closeout Procedures and Checklist: <https://ehs.ku.edu/ehs-forms>
- Electronic Exit Interview Survey: https://kusurvey.ca1.qualtrics.com/jfe/form/SV_4GUtsxqAmk7k3NX
- How do I Change My Address: <https://payroll.ku.edu/how-do-i-change-my-home-address>
- Information Technology Security Policy: <https://policy.ku.edu/IT/info-technology-security-policy>
- International Support Services: <https://iss.ku.edu/>
- Interview Questionnaire: <https://gos.ku.edu/resources>
- Leaving Employment and Benefits Transition: <http://humanresources.ku.edu/benefits/leaving>
- Online Work Request: <https://maximo.ku.edu/maximo/webclient/login/login.jsp?appservauth=true>
- Research Employee Separation Checklist: <http://research.ku.edu/document/657>