

Leaving SF State – Manager/Supervisor Checklist for Departing Employees

This checklist will help managers process the departure of an employee. These tasks apply whether an employee is leaving due to resignation or retirement.

Resignation

- The employee should provide you with a **written resignation** as a letter or email. If the employee has not provided a written resignation, the supervisor or manager should request one. Keep a copy for your files or send a copy to local or central HR.

Complete Termination Form

Please note: To ensure an exempt employee is not overpaid, an E-trac needs to be created as soon as possible and in any event, by payroll cutoff date.

- Confirm termination date and **reason for leaving** with employee.
- For Administrative Staff employees, request the vacation tracker or balance from the employee if not tracked centrally in the department, including any recent time off. (Vacation for Sponsored Research, Support and Service Staff is calculated automatically and tracked centrally.)
- Make sure all exempt employees have updated their sick leave through the SF State Gateway.
- Request confirmation of address for W-2 and other mailings. Departing employees can confirm or change their forwarding through the SF State Gateway.
- Complete SF State clearance before payroll cutoff date.

The following offices are notified automatically when a Termination Form is processed:

- Travel Office to cancel the Travel Card
- Procurement Office to cancel the P-Card
- Parking Office to cancel Parking or T-Pass
- ITS to cancel roles access



Meet with the Employee

- Decide how the employee's departure will be communicated to others.
- Discuss work to be transitioned.
- Discuss location and access to any paper or electronic files.
- Discuss how phone, voicemail and email should be handled.
 - Set up an appropriate auto-responder with relevant contact information.
 - Remove the employee from email distribution lists, phone, and voicemail.
- Review any outstanding credit Pro card or travel Pro card reimbursements or need for receipts.
- Ensure any outstanding travel expenses have been entered in Concur.
- Direct employees to **review their benefits**, including COBRA.

Posting the Position

- Determine if you would like to replace the position.
- Obtain approval for posting of position.

Last Day of Employment

Ensure the employee returns the following Institute property:

- SF State ID/building access (proxy) card
- Keys (office, file cabinets, etc.)
- Files (paper and electronic)
- SF State-owned computer hardware (laptop, computer accessories, etc.)
- Computer software (including MIT software installed on any computer the employee owns)
- SF State-owned cell phones
- Travel/Pro cards
- SF State parking sticker/hang tag
- SF State Uniforms and personal protective equipment, if any
- SF State Library books
- Other SF State property: _____



At the end of the last day:

- Remove the employee's name from email distribution lists, internal/office phone lists, website, building directory, etc.
- Change voicemail message and password
- Remove access to departmental systems/door access code
- Disable security codes
- Other _____