Employee Separation Checklist

This checklist is to be used as a guideline for employees separating from a department or the institution. It is intended to provide resources and points of contact. Not all items on the checklist will apply to every situation.

TASK	COMPLETE	N/A
Employees submit a letter of resignation. • Handwritten or an email to immediate supervisor. **Ensure HR gets a copy immediately so HR can:** • Provide the employee with an informational letter covering benefits, payouts, address changes, and accessing their W-2. • Update HR records. • Initiate WSU's Employee Separation workflow which generates tasks for the supervisor, business office, IT, security, budget, library, and facilities. • Submit final pay information to the HR Service Center.	☐	☐
Supervisor responds with written acceptance of the departure (cc' HR).	☐	☐
Notify department and appropriate stakeholders of upcoming departure and updated point of contact.	☐	☐
Contact WSU Tech Support for assistance with phone routing, email account autoreplies or forwards, email listservs, computer access and/or software.	☐	☐
Submit Web Request Form to WSU MarComm and request they remove all WSU website references to the departing employee.	☐	☐
Update department signage.	☐	☐
ARRANGE MEETING(S) WITH EMPLOYEE. Utilize meeting time to:		
Discuss status or projects.	☐	☐
Determine if they have created department/club social media accounts with their personal credentials. If this occurred contact WSU MarComm.	☐	☐
Plan for transfer of knowledge to supervisor and/or team	☐	☐
Attain feedback on position description accuracy	☐	☐
Review turning in university property. This includes all items purchased with university funds (books, software, office items, computer peripherals, etc.). • **WSU Credit Card** → Business Office • **WSU ID Card & Department Copy Card** → Campus Card Office • **WSU Keys** → Facilities Services • **RCTC Keys** → RCTC Campus Safety Office • **WSU Laptop/Tablet** → Information Technology (Winona or Rochester location) • **WSU Library Materials** → Darrell W. Kruger Library • **WSU Parking Permit** → Parking Services Office	☐	☐
Ensure final expenses are submitted to the WSU Business Office	☐	☐
Ensure final leave requests and timesheet are submitted prior to their last day	☐	☐
Plan for removal of personal items from work area	☐	☐