SEPARATION CHECKLIST FOR SUPERVISORS

Employee information

Employee Name: _____   Supervisor Name: _____

Department: _____   Last Day Worked: _____

When an employee is separating from the District, the supervisor of the departing employee is required to complete and return this checklist to the Human Resources Department no later than the employees last day of work.

The following employee separation checklist outlines important tasks to complete prior to the employee's last day in the office.
Note: Items on this checklist may not apply to every employee.

UPON NOTIFICATION	
☐	**Ensure employee completes Initiates the separation process by completing the Notice of Resignation/Retirement/Separation form:** T h i s provides written notice when resigning or retiring.
☐	**Submit the Notice of Resignation/Retirement/Separation to Human Resources**
☐	**Discuss the status of work assignments and any pertinent information for team/department, collaborate with employee regarding a plan to transition work and provide a report/list/summary of pending or in progress assignments.**
☐	**Ensure employee completes the "Leaving Office" Conflict of Interest Form 700, if applicable (email from Human Resources)**

PRIOR TO LAST DAY	
☐	**Ensure employee transfers access to any folders and files to another District employee as directed**
☐	**Ensure employee transfers passwords for sole access rights to any administrative database, software application, information system, etc., that is necessary for program or unit operations, to the appropriate administrator, or arrange for an administrator to be given the access needed to assure continued operations**
☐	**Ensure any District owned/licensed software that is contained on an employees home computer is deleted or returned. For assistance, contact the IT Help Desk**
☐	**Remove employee access from Department mailboxes, Teams/Zoom groups, custom distribution lists and user access to external software/systems**
☐	**CMT: Update Position Reporting, Delegation of Authority and complete any pending actions (e.g. Evaluations)**
☐	**Legal Holds: Contact swchumanresources@swccd.edu**
☐	**Ensure reconciliation of District Purchasing Card, Credit Card, and/or any other transactions**

☐	**Determine if any advances or petty cash need repayment, such as:**
	   • **Moving and Relocation Reimbursement (Under 2 years)**
	   • **Cash Advances**

☐	Check with Payroll and Benefits regarding any outstanding Accounts Receivable

LAST FEW DAYS

☐	Ensure employee removes all personal items from workspace.
☐	Work with employee on drafting outgoing email and voice messages
☐	Collect electronic devices: laptop and/or cell phone, etc.
☐	Collect purchasing card and return to or notify Administrator
☐	Collect employee ID/access card
☐	Remove all other secured access
☐	Collect all other District property
☐	Update department website information

Department retains this form to document clearance of the above items.