

Department Termination Checklist

Termination/ Retirement Process

Employee First & Last Name: _____ Employee ID Number: _____
 (Please print clearly)

Termination Date: __ _____

Item/ Task	Action Required
<input type="checkbox"/> Resignation/ Retirement Letter	<p>Human Resources Phone 220 – 5932 Fax 210-6855</p> <p>Ensure employee has submitted the resignation or retirement letter. Send original letter to Workforce Administration. Retain a copy for your department records as required.</p>
<input type="checkbox"/> Termination Form	<p>Human Resources Phone 220 – 5932 Fax 210-6855</p> <p>Access Termination form from the Human Resources website http://www.ucalgary.ca/hr/ (select Forms > Administrators > select appropriate employee type. Complete form and attach original resignation or retirement letter, and send to Workforce Administration. Retain a copy for your department records as required.</p> <p>To avoid overpayment, send the letter and form before the applicable deadline (Reference “Deadline to send hire/change information to HR for applicable Pay”). Deadlines can be viewed at http://www.ucalgary.ca/hr/administrators/deadlines_schedules.</p>
<input type="checkbox"/> All IT-related Services, including: - UCIT (Network/ IT Account) - Email - Electronic Calendar - Mainframe / Business Administration Systems Access - DTP File Server User Shares & Group Shares - Webdisk File Storage - Portal Applications - SecurID - VPN	<p>Information Technology Phone: 220-5555 Email: itsupport@ucalgary.ca Fax: 282-9199</p> <p>Complete and submit the Central Services Access Change http://www.ucalgary.ca/it/accounts/forms/centralservices/.</p>
<input type="checkbox"/> - Telephone - Voicemail - TeleWeb	<p>IT – Telecom</p> <p>To request a change (termination) of the telephone, voicemail and TeleWeb contact your Departmental Telecom contact for assistance at http://www.ucalgary.ca/it/telephone/contacts . If appropriate, ask the employee to leave their password(s).</p>

<input type="checkbox"/>	MailMan Lists	Information Technology	Visit IT's Email Services site at http://www.ucalgary.ca/it/self_help/email/mailman/#unsubscribe for information on removing the employee from various Mailman lists.
	Equipment/ Software	Information Technology	Ensure all necessary equipment and/or software is returned (e.g. Laptop, including loaners at home, Palm Pilots, pagers, cell phones, etc.)
<input type="checkbox"/>			Cancel Shaw Cable/ TELUS internet access if paid for by the department.
<input type="checkbox"/>	Parking	Parking Services Phone: 220-6771 or 6772	Have employee call Parking Services to make arrangements to release the parking spot and return the Parking pass.
<input type="checkbox"/>	Campus Recreation	Outdoor Program Centre Phone: 220-5038	Check for any outstanding rental equipment from Campus Recreation.
<input type="checkbox"/>	Library	Circulation Phone: 220-5963	Check for any outstanding books on loan. Check for any outstanding library fines.
<input type="checkbox"/>	Financial Services (Treasury & Investments)	Financial Services Phone: 220-8717	Faculty Housing Loan Program: ensure that the person has no outstanding payments on the program. Notify Payroll Services if outstanding amounts are owed for collection purposes.
<input type="checkbox"/>	Outstanding Advances/ Expenses	Accounts Payable Phone: 220 – 3108	Check for any outstanding travel advances. Check for any outstanding petty cash advances. Check for any outstanding expenses to be paid out. De-activate U of C American Express Corporate Card, if appropriate. PER equipment purchases.
<input type="checkbox"/>	Petty Cash	Cashiers Office Phone: 220 – 3134	Check if any outstanding Petty Cash is being held by terminating employee. Remove employee from the list of signing authorities on Petty Cash expenses.
<input type="checkbox"/>	Keys	Department, or Campus Security Phone: 220 – 5333	Ensure all necessary keys (e.g. office, filing cabinet, desk, building/ access card keys) are returned prior to the employee's departure.
<input type="checkbox"/>	Electronic Cards	Department, or Campus Security Phone: 220 – 5333	Obtain all electronic access cards to departments, labs, etc. Obtain SecurID fob. Obtain Campus Card and return to Campus Security.
<input type="checkbox"/>	Drivers List	Department	Remove terminating employee from the list of approved drivers, if appropriate.
<input type="checkbox"/>	Business Cards	Department	Ensure all business cards are left behind.

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| <input type="checkbox"/> Phone List | Department | Update your departmental phone list – consider department website and TeleWeb. |
| <input type="checkbox"/> Home Address | Department | Ensure that the most current home address is in the system and inform the employee that if they move within a year of their departure from the University, they must update their home address with Human Resources (220-5932) to ensure that their T4/T4A's are sent to an accurate address. The employee's final pay, Record of Employment and other time-sensitive termination documents will be mailed to the home address on file at the time of termination. |
| <input type="checkbox"/> FOIP Reference Sign-Off | Department | Obtain a signed Freedom of Information and Protection of Privacy Program (FOIP) approval for written or verbal reference requests. |
| <input type="checkbox"/> Communication | Department | Communicate employee departure to applicable stakeholders. |
| <input type="checkbox"/> Business Administration Systems Double-check | Department – Budget Officer | Double-check in Business Administration Systems that termination has been entered. |

Comments	
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Authorization/Departmental Signature

Printed Name

Date Signed

Contact Information

Forward completed form to:



Beverley Shevchenko

A202 Administration Building

~~**Fax: 210-6855**~~

Upon receipt of the form, Payroll will issue the employee's final pay and mail, along with other employment documents, to the home address on file.