

Employee Departure Procedures

NOTE: The website URL for **Workday reference guides** that are referenced in this section is:
<https://confluence.esg.wsu.edu/display/WKB/Workday>

OVERVIEW

When an employee resigns, retires, dies, or is otherwise separated from employment at the University; the employing department is responsible for ensuring that all applicable personnel, payroll, computing, financial, facility, property, and safety-related procedures are completed.

To facilitate this process, departments are to document the completion of required items, either by using the Departure Checklist included with this section or a departmental checkout document. The Departure Checklist includes items that are to be completed prior to or immediately after the departure of an individual from department or University employment.

This list is not all-inclusive and a department may have additional requirements. The department attaches notation of the completion of any additional departure requirement to the Departure Checklist or includes the information on a departmental checkout document.

Responsibility

The employee's supervisor is responsible for completing and/or reviewing each of the applicable departure items. In some departments, the department's personnel officer is responsible for completing the personnel/payroll departure items, e.g., personnel actions, time and absence calendars (see [Personnel/Payroll](#)).

Form Completion and Approval

To ensure that all departure procedures are completed, the supervisor enters the date each item is completed on the Departure Checklist.

The supervisor, and the departing employee, when applicable, sign the completed Departure Checklist.

Retention

The department retains the completed checklist in the department's employee file. See *BPPM* 90.01 for retention requirements.

CHECKLIST ITEMS

Items to be completed by the department or the employee at the employee's departure are listed below by category. **NOTE:** Depending on the employee's responsibilities, only some of these items may be applicable.

Leaving the Department

If the employee is leaving the department, but remaining a University employee, the department completes *only* the items indicated in **Part A** (see [Part A](#)).

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Leaving the University

If the employee is leaving the University, the department completes the items indicated in **Part A** and *also* completes the items indicated in **Part B** (see [Part B](#)).

Principal Investigator Leaving

If the employee leaving the University is a principal investigator (PI), the department completes the items indicated in **Part A**, **Part B**, and **Part C** (see [Part C](#)). A principal investigator is defined as the senior member of a research team, i.e., the individual with primary responsibility for the design and conduct of a research study.

Part A

The department completes the items in **Part A** if the employee is leaving the department but remaining a University employee.

Personnel/Payroll

Complete the following steps related to personnel and payroll:

- Complete a job change through Workday. See the Workday Change Job reference guide. NOTE: If the employee is transferring to another department within the University, the receiving department processes the job change.
- Send the employee's time or leave reports (signed paper copies prior to Workday processing) to the new department or HRS.

Financial

Complete the following steps related to financial accounts and activity:

- Remove the employee's name from University department bank accounts (see *BPPM 30.65*).
- Cancel the employee's departmental purchasing card (see *BPPM 70.08*).
- Obtain and reconcile any cash advances issued to the employee (see *BPPM 40.21*).
- Remove the employee's name from any till or petty cash fund (see *BPPM 30.50* and *30.51*).
- Remove the employee's toll call authorization and obtain any calling cards. See 85.41.

Approval Authority

Complete the following steps related to any approval authority the employee may have:

- Remove the employee's expenditure authority (see *BPPM 70.02*).

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Approval Authority (cont.)

- Remove the employee's appointing authority (see *BPPM* 60.10).
- Remove the employee's authorization to approve travel (see *BPPM* 95.01 and 95.05).
- Remove the employee's authorization to approve contracts (see *BPPM* 10.10).

Information Services

Complete the following steps related to information services the employee has access to:

- Remove the employee's access to departmental personal computer accounts, including those which allow remote access to departmental resources.

For Windows personal computers, notify department Information Technology Services (ITS) staff to remove the employee's Network ID from authorization groups that grant access to departmental resources.

For Macintosh personal computers, update personal computer passwords to discontinue the employee's access.

- Update accounts and passwords for departmental network and systems access.
- Update any associated websites.
- Remove the employee's authorization to access student and/or financial data warehouse and/or other enterprise systems (e.g., OPDRS). Contact the Crimson Service Desk for assistance; telephone 509-335-4357.
- Update the active telephone listings in Information Technology Services (ITS), the department, and in Workday.

NOTE: If the employee is leaving the University, remove the employee's name from active telephone listings in ITS and the department.

Workday Roles

If the employee is transferring to another department within the University, the department must submit role change requests in Workday to remove authorizations for the employee to use Workday functions associated with the department's accounts.

NOTE: Within 24 hours of the employee's separation from the University and upon verification from HRS, ITS automatically removes the employee's access to Workday.

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RONet Applications

An employee leaving the University may close their Registrar's Office Network (RONet) account by:

1. Logging into RONet
2. Selecting *Your Account*
3. Selecting **Close**

If the employee is transferring to another department where RONet is needed, the employee may access their RONet account and deselect any applications that are no longer needed.

Alternatively, the department may provide notification to the Registrar's Office of the employee's separation from the department or University by sending an e-mail to:

eit.helpdesk@wsu.edu

Registrar's Office Actions

Upon notification from the employee or department of the employee's separation from the University, the Registrar's Office:

- Removes the employee's RONet account authorizations.
- Disables the employee's RONet account.
- Removes the employee's administrative access to registration and academic planning and records applications through the myWSU portal.

Records Management

Complete the following steps related to business records the employee is responsible for:

- Transfer all University records to the employee's successor or the department records coordinator (see *BPPM 90.01*).
- Locate and secure all records which are subject to litigation holds and open public record requests. (see *BPPM 90.12* and *90.05*).

Facilities/Property

Complete the following steps related to University facilities and property the employee is responsible for:

- Obtain all keys and key cards to offices and buildings that were issued to the employee.
- Obtain all University equipment, e.g., tools, computer equipment, portable electronic devices, reference materials, software, which were issued to the employee.

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Facilities/Property (cont.)

- Ensure that office, laboratory, and locker spaces are left clean and all the employee's personal items are removed.
- Obtain all research data, including research log books.

| Safety

Complete the following steps related to workplace safety:

- Complete and route a Departure Notice if employee worked with radiation machines, radioactive materials, hazardous chemicals, Drug Enforcement Administration (DEA) controlled substances, and/or biohazardous materials (see *BPPM* 60.38).
- Receive a termination bioassay if the employee used radioactive materials or radiation machines (see *SPPM* 9.50).
- Obtain the radiation monitoring badge if the employee used radioactive materials or radiation machines (see *SPPM* 9.30).
- Receive final surveillance documentation if the employee worked with chemical carcinogens.

Part B

If the employee is leaving the University, the department completes the items indicated in **Part B** below, as well as the items in **Part A**. (If the employee is a principal investigator, the department also completes **Part C**.)

| Personnel/Payroll

Complete the following steps related to personnel and payroll:

- Have the employee contact supplier agencies, e.g., credit union, Parking Services, to stop any automatic payroll deductions. Deductions that are not stopped prior to termination are withheld from the employee's remaining paycheck (see *BPPM* 55.49).
- Have the employee notify applicable committees and boards of their departure from the University.
- Refer the employee to the Washington Employment Security Department website for unemployment benefits information:

esd.wa.gov/

(*RCW* 50.20.140)

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Financial

Complete the following steps related to financial accounts and activity:

- Obtain the employee's University travel charge card (see *BPPM 95.03*).

Information Services

Complete the following steps related to information services the employee has access to:

- Cancel the employee's UNIX accounts (see *BPPM 85.37*).
- Cancel the employee's e-mail and calendar accounts.
- Update the employee's status for CougarCard (see *BPPM 10.08*).

Facilities/Property

Obtain the employee's parking permit and garage access card, if applicable.

Contact Information

Complete the following steps related to the employee's contact information:

- Have employee update mailing address file by selecting the employee profile in Workday. See *BPPM 90.70* and the Workday Modify Your Personal Information reference guide.
- Obtain a forwarding address and personal e-mail address for the employee.

Part C

If the employee leaving the University is a principal investigator (PI), the department completes the items indicated in **Part C** below, as well as the items in **Part A** and **Part B**.

Sponsored Projects

Complete the following steps related to sponsored projects:

- Transfer responsibility for the employee's grants to their new employer or complete a change of principal investigator for the grants. See ORSO Guideline #3 and the IACUC Resources website.
- Complete disposition of the employee's contracts and subcontracts. See the ORSO Guidelines and the IACUC Resources websites.
- Review all outstanding invoices with Sponsored Programs Services for charges applicable to the employee's grants and contracts.

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Facilities/Property

Complete the following steps related to University facilities and property the employee is responsible for:

- Clear and close laboratory areas (see *BPPM* 60.38, and *SPPM* 4.24, 4.25, and 4.26).
- Complete disposition of research equipment. See *BPPM* 20.76, 20.78, 40.16, the ORSO Guidelines website, and the IACUC Resources website.
- Complete disposition of research animals. See IACUC Policy #5.

Safety

Complete the following steps related to workplace safety:

- Complete disposition of biological materials. See *SPPM* 4.24 and 5.40, and the Office of Research Assurances Biosafety website.
- Complete the transfer or disposal of radioactive materials. See *SPPM* 9.50, 9.60, and 9.70.
- Complete disposal of chemical wastes (see *SPPM* 5.66).
- Complete disposition of other hazardous materials (see *BPPM* 20.77, and *SPPM* 5.40 and 5.66).
- Complete and submit an Area Evaluation/Release form (see *BPPM* 60.38) to the Radiation Safety Office and/or Environmental Health and Safety, as applicable. NOTE: Failure to submit the form may result in fees incurred by the vacated department.

Intellectual Property

Complete transfer of technology and intellectual property. See *Executive Policy* EP27 and *Faculty Manual* Section IV. If software was developed, see also *Executive Policy* EP8.

Research

Transfer permission to conduct research with human subjects group to the employee's successor. See the Institutional Review Board website at:

irb.wsu.edu/