

The following checklist should be completed when someone terminates (by resignation, involuntary termination, retirement, reaching appointment end-date, or graduating) his/her MSU employment or otherwise separates from a department (by transfer, layoff, extended leave of absence). Not all items may apply to a given individual. For example, in cases where a person terminates one type of appointment but begins another, some checklist items will not apply. Departments are to give a copy of the employee section of the checklist to faculty, staff and graduate assistants who will be terminating or separating from the department; discuss any items requiring resolution; complete the unit section of the form; and retain /distribute the completed checklist as described on page 4. Contacts are listed for topics that may require special assistance.

EMPLOYEE ACTIONS BY LAST WORKING DAY

PERSONAL

Done N/A

- 1. Remove personal items from work areas.
- 2. Provide forwarding address to your department.
- 3. HR Benefits will send you a letter about termination/continuation of applicable benefit programs. Call 353-4434 if you have questions about the letter.
- 4. The applicable Human Resources Office will send you an exit questionnaire if you are terminating from the University. If you prefer to schedule an exit interview, call Human Resources at 353-3720, or Academic Human Resources at 353-5300.
- 5. If relocating, update home address in ESS.

RETURN ALL UNIVERSITY PROPERTY

- 1. Keys (building, office, desk, files, vehicles, lockers, etc.)
- 2. Parking decal/gate card (forward to DPPS so parking deduction is stopped).
 - a. Official retirees who will need continued parking privileges should contact DPPS for a retiree parking decal.
- 3. Computers/laptops/palm pilots or other peripheral equipment (e.g., printers, cameras)
- 4. Cellular phones/pagers
- 5. Records (documents, files, correspondence, etc.)
- 6. Research/data notebooks (you may retain a copy)
- 7. Patient/client files
- 8. Credit/procurement/travel/calling cards, and related receipts
- 9. Petty cash fund
- 10. Library books, CD texts, periodicals
- 11. Access cards (e.g., to the University Research Containment Facility, Bio-Physical Sciences, Veterinary Teaching Hospital)
- 12. Radiation Detection Badges
- 13. Uniforms/gear/tools/instruments/job accessories

FINANCIAL

Settle outstanding accounts, including:

Done N/A

- 1. Charges owed to your department
- 2. Charges owed to other departments (e.g., Library, Parking, Student Accounts)
- 3. Reimbursements owed to you (e.g., travel expenses)

If you will be continuing on the payroll in a different capacity (e.g., on-call), request discontinuation of payroll deductions by contacting the appropriate office(s):

- . Union Dues (Call appropriate union and payroll)
- . Development Fund
- Benefit Spending Accounts (Dependent Care, Health Care)
- . MSU Community Charitable/United Way Campaign

ELECTRONIC RECORDS

- 1. Retrieve or delete any personal files/information on your office/home PC, office/department server, lab server, central file space (AFS), etc.
- 2. Retrieve any University email files, or files on other University email servers and systems, that you wish to retain. Note:
 - a. Files are purged when your email account is closed.
 - b. You must have the permission of the appropriate unit administrator to copy any University files or records.
 - c. MSU retirees are eligible to continue their MSU email accounts indefinitely; students may continue using their accounts for two years after graduation. If you will have a new email address, make arrangements for your email to be forwarded.
- 3. Return (transfer, copy, etc.) to the appropriate unit and/or University administrator(s) any unit or University data files, electronic documents and records, etc. that are stored on your personal work PC or in your personal server file spaces.
- 4. If you possess sole access rights to an administrative database, software application, information system, etc., that is necessary for program or unit administration or operations, transfer the passwords to the appropriate unit administrator, or arrange for a unit administrator to be given the access needed to assure continued operations.
- 5. Delete or return any University owned/licensed software that is contained on a home computer. For assistance, contact the technology staff in your college and/or unit. For MSU/email matters, contact IT Services Support Desk, (432-6200).

MISCELLANEOUS

- 1. If you were responsible for any laboratory or hazardous chemicals, gas cylinders, biological materials (e.g., animal tissue, diagnostic specimens, microorganisms, cultures), biohazardous materials (e.g., infectious substances and CDC Select Agents), controlled substances, radiological materials and/or hazardous wastes, provide evidence of consultation with Environmental Health & Safety (EHS) to your supervisor regarding the disposition of these materials.
- 2. If you were responsible for patients or other clients, make arrangements with your supervisor for others to assume their care/service.
- 3. Foreign National employees should contact the Office of International Students and Scholars to determine if there are other requirements related to their status.

TERMINATION PROCESSING

Done N/A

- 1. Confirm final paid leave usage for support staff.
- 2. Complete Termination Form in EBS Portal.
- 3. Obtain the employee's forwarding address; share with units needing future contact, e.g., Alumni, Development, Office of Intellectual Property.
- 4. Confirm accuracy of final check/deposit notification; mail to employee.

If the employee was designated as an Emergency Action Team member or as the Environmental Steward for your unit, please name a replacement and communicate the changes as necessary. _____

EQUIPMENT/PROPERTY

- 1. Arrange for the return of University property (see examples listed in employee section).
- 2. Encourage the return of Library books.
- 3. Determine applicable equipment reassignment (e.g., computers, vehicles, etc.).

FINANCIAL

- 1. Check for personal charges on credit cards, personal calls on phones, etc. Obtain reimbursement by check made payable to MSU. Note: These amounts cannot be payroll deducted without signed authorization by the employee.
- 2. Obtain petty cash fund and provide notification of new custodian to the Cashier's Office (355-5023).
- 3. Terminate "direct bill" travel authorization and Corporate Travel Card through the Travel Office (355-5000).

DATA SYSTEMS/RECORDS

- 1. Ask the employee to return any University records (e.g., paper, electronic, email) held in his/her work area or home office/computer to his/her supervisor.
 - a. In particular, prevent the employee from retaining, copying, or removing in any way protected health information, as defined under HIPAA. This includes, but is not limited to, any and all medical records. For assistance with HIPAA questions, contact the Office of the General Counsel, 353-3530.
- 2. Review these records for possible transfer to other staff member or archiving (e.g., paper or email communications related to federal grants).
- 3. Obtain password rights to any administrative database, software application, information system, etc., for which the employee possesses the sole access rights, and that is necessary for program or unit administration or operations.
- 4. Notify Information Technology Services about the employee's departure, so that data systems access and MSU email accounts will be terminated. Note: Official retirees are eligible to continue their MSU email accounts; students can continue their accounts for two years past graduation. For assistance, contact IT Services Support Desk, (432-6200).
- 5. Delete the employee's access to unit data systems, email servers, voice mail systems, email lists, etc.; remove any passwords or file protections (file access passwords) unique to the departing employee.
 - a. Immediately delete the employee's access to any protected health information, as defined under HIPAA. This includes, but is not limited to; access to the electronic medical record system and to any email and server systems on which protected health information is communicated or maintained. For assistance with HIPAA questions, contact the Office of the General Counsel. (353-3530).

Done N/A

- ___ ___ 6. Delete authorization for unit-paid merit 800# internet access.
- ___ ___ 7. Change codes on door entry systems; deactivate building/area access; notify DPS to deactivate identification card access.
- ___ ___ 8. Provide for continuing security of confidential records (e.g., human subject research records).
- ___ ___ 9. Change safe combinations.
- ___ ___ 10. Change building directories and phone number listings.
- ___ ___ 11. Change names on subscriptions, institutional memberships, etc.
- ___ ___ 12. In cases of involuntary termination, access to the above items should be discontinued as of the time notice of termination is given. Particular attention should be given to data systems, personal health information/medical records, offices, phone systems, and restricted areas.

SAFETY

- ___ ___ 1. Contact Occupational Health (355-9137) for employees who were in ongoing health monitoring programs, e.g., asbestos.
- ___ ___ 2. Notify Environmental Health & Safety (EHS) of termination of all employees who were participating in required training safety programs, so that participation lists will be current, and unnecessary reminders will not be generated.
- ___ ___ 3. Determine presence of any laboratory or hazardous chemicals, gas cylinders, biological materials (e.g., animal tissue, diagnostic specimens, microorganisms, and cultures), biohazardous materials (e.g., infectious substances and CDC Select Agents), radiological materials, controlled substances, and/or hazardous wastes in the applicable work areas. Review disposition of them with the employee. For assistance, contact EHS at 355-0153.
- ___ ___ 4. Ensure that all research-related materials that will remain at MSU are properly labeled and are in approved containers.
- ___ ___ 5. In accordance with the EHS equipment release procedures, ensure that all equipment (including fume hoods, freezers, refrigerators, biosafety cabinets, centrifuges, and incubators) is cleaned and decontaminated.
- ___ ___ 6. Review whether unit Disaster Response Plan needs to be adjusted.

For assistance, contact Environmental Health & Safety (EHS) (355-0153).

RESEARCH

- ___ ___ 1. Determine continuation arrangements for existing research projects/grants.
- ___ ___ 2. Arrange transition of laboratory notebooks for ongoing MSU research.
- ___ ___ 3. Complete a "Material Transfer Agreement" for any materials being removed from MSU.
- ___ ___ 4. Determine presence of undisclosed inventions or other intellectual property.
- ___ ___ 5. Determine presence of film, negatives or other original data from research settings that may be property of the University.
- ___ ___ 6. Identify any transition issues related to human subjects.
- ___ ___ 7. REQUIRED -- Employee acknowledges continuing obligation not to disclose beyond their employment at MSU any export controlled or other confidential information, technology or material, except as required by law or regulation.

Done N/A

- — 8. Choose one of the following:
- — a. During employment at Michigan State University employee was not involved in developing, using or handling any technology or work product involving export controlled or access controlled technology or technical information.
- — b. During employment at Michigan State University, employee was involved in developing, using or handling technology or work product involving export controlled or access controlled technology or technical information. (Alert MSU Office of Export Control & Trade Sanctions 432-4499)

For assistance, contact the Office of the Vice President for Research & Graduate Studies (355-0306).

TEACHING

- — 1. Make transition arrangements for capturing student grades for the semester.

Employee Name: _____ Department: _____

Unit Administrator Signature: _____ Date: _____

Distribution: _____

- Retain original in department file.
- If the employee had responsibility for any laboratory or hazardous chemicals, gas cylinders, biological materials (e.g., animal tissue, diagnostic specimens, microorganisms, cultures), biohazards (e.g., infectious substances and CDC Select Agents), radiological materials, controlled substances, and/or hazardous wastes, send copy to Environmental Health & Safety (EHS).
- If intellectual property issues have been identified, send a copy to the Vice President for Research & Graduate Studies.