

## Exit/Transfer Checklist for Supervisors

To ensure a smooth separation for employees leaving the University and/or transferring internally to another department, please complete the following steps (if applicable) in the PSU exit/transfer process.

**Please remember it is essential to communicate the change to your department and other departments.**

PSU ID Number	Last Name	First Name	Middle Name

Last Day Employee Worked	Last Day Employee Paid	Department

### In Advance of the Employee's Last Day at PSU or in the Department

<input type="checkbox"/>	<b>Employee's letter of resignation</b> Submit the employee's letter of resignation and/or a completed "Employee Separation/Transfer Form" to the Office of Human Resources immediately.	<input type="checkbox"/>	<b>Outstanding charges and/or travel advances</b> Ensure that the employee reconciles any outstanding charges and/or travel advances. Work closely with the Accounts Receivable Office to complete final steps with the employee on these items.
<input type="checkbox"/>	<b>"Separating Employee" webpage</b> Refer the separating employee to the "Separating Employee" link on the HR website. <a href="http://www.pdx.edu/hr/separating_employees">http://www.pdx.edu/hr/separating_employees</a>	<input type="checkbox"/>	<b>Procurement cards</b> Collect any procurement or credit cards that may have been issued to the employee and return to the appropriate department administrator.
<input type="checkbox"/>	<b>Refer a transferring employee to HR</b> Refer transferring employees who may be changing to or from a benefits-eligible position to the Office of Human Resources for assistance with enrollment and/or termination of benefits.	<input type="checkbox"/>	<b>Outstanding library books or charges</b> Verify with the employee and the library that the employee does not have any outstanding books or charges with the PSU Library.
<input type="checkbox"/>	<b>Outstanding petty cash</b> Where applicable, return custody of outstanding petty cash amounts to the appropriate department administrator.	<input type="checkbox"/>	<b>Administrator access to department web page</b> Contact University Communications to disable website administrator access to department web page.
<input type="checkbox"/>	<b>Electronic approvals</b> Update department's Electronic Approval and proxy authorization to remove separating employee and add a replacement approver.	<input type="checkbox"/>	<b>Last day collection of items</b> Discuss and plan for last day collection of <i>applicable</i> items below.

### On the Employee's Last Day at PSU or in the Department

<input type="checkbox"/>	<b>PSU ID</b> Gather the PSU Identification card and return to ID Card Services in Neuberger Hall.	<input type="checkbox"/>	<b>PSU Parking/Transit Pass</b> Gather any PSU Parking/Transit passes and return to Transportation and Parking Services in the Academic Student and Rec Center (1 <sup>st</sup> floor on 6 <sup>th</sup> Ave).
<input type="checkbox"/>	<b>PSU building, department and/or desk keys</b> Gather the PSU building key, department and/or desk keys. Return building keys to the Facilities & Planning Department. Return desk keys to the appropriate department administrative staff.	<input type="checkbox"/>	<b>Laptops, cell phones, and other equipment</b> Gather any University and/or department property, including laptops, flash drives, cell phones, pagers, and other equipment that may have been issued to the employee during their employment.
<input type="checkbox"/>	<b>Telecommunications access codes/passwords</b> Identify Telecommunications access codes/passwords - disconnect and notify Telecommunications.	<input type="checkbox"/>	<b>Personal belongings</b> Verify that the employee has gathered all personal belongings before leaving.
<input type="checkbox"/>	<b>Department website and listings</b> Remove references to the employee on departmental web pages, publications, listservs, and databases.	<input type="checkbox"/>	<b>PSU Faculty/Staff directory</b> Remove employee from PSU Faculty/Staff directory.

### Signatures

<b>Employee Signature</b>		<b>Date</b>	
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<b>Supervisor Signature</b>		<b>Date</b>	
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**Forward completed & signed checklist to Office of Human Resources.**