



**IMPORTANT:** Contact HR when an employee is terminated under any conditions other than voluntary resignation. Use this packet as documentation when an employee leaves your department. You do not need to turn this in to HR.

**Employee's Information**

Name	Title	Employee ID
Department Name and Code		Time in Position

**Termination Documentation (retain all documentation in your department)**

- Resignation Notice received from employee. Hourly paid employees should provide two weeks' notice. Monthly employees should provide 30 days' notice. Employee should submit a signed and dated resignation notice such as: I am resigning my position of JOB TITLE effective DATE... provided this date works for the department.
- Establish terms of separation. Employee and department should discuss: performance objectives for the remaining work schedule; job sharing while transitioning to another department; time and attendance, if different from regular schedule; determine any paid leave to be taken until date of separation; or department may accept or reject the date provided. PTO payouts are based on University FTE which is tied to base pay only. In cases of termination or retirement, no payment will be made for remaining hours in the ESL account.
- Give employee a Termination Memo/Packet. Employee should receive and sign a memo (reviewed by HR) from the supervisor or department terminating the employee that provides the following:
  1. Effective date of termination
  2. Amount of paid leave payout if employee is benefits eligible (some grants do not pay terminal leave<sup>1</sup>)
  3. Checklist to return all equipment (next page of this packet)
  4. Checklist for Employee Leaving Job (last page of this packet)
  5. Exact date and time to arrange for pickup of personal items
  6. Information for dispute resolution (see the Staff Handbook, section 3.21)
- Submit all final timesheets to report hours worked or leave exceptions. Final paychecks will be automatically deposited up to 60 days after termination if employee has electronic deposit. All deductions (including parking) will continue unless employee makes other arrangements. If eligible, the employee may receive a leave payout for any accrued leave hours. <sup>1</sup> Contact Payroll and Employee Services (PES) at 405-325-2961 for questions.
- Submit termination ePAF. This normally terminates access to most university systems such as email, Self-Service, and Purchasing. For immediate removal of access, call HR Employee Relations at 405-325-5594.
- To remove access to HRMS PeopleSoft financials, reporting, or transactions, submit the User Access Form to Payroll and Employee Services ([ou.edu/payroll/managers-and-coordinators/ePAF.html](http://ou.edu/payroll/managers-and-coordinators/ePAF.html)).

**Employee Items and Access**

- Personal items collected by employee. If employee cannot collect personal items, the department may A) send the employee a memo and set up a day/time for the employee to pick up the items or B) collect and itemize the items, and tell the employee to coordinate with their department to pick up the items.
- Reset employee's voicemail password and owner. Go to [askit.ou.edu](http://askit.ou.edu) or [needhelp.ou.edu](http://needhelp.ou.edu) for help.
- Process all outstanding travel claims in Concur and collect Travel Card. For help, contact Financial Services at 405-325-3021.
- Process all outstanding Pcard transactions in Works and collect Pcard. For help, contact Purchasing at 405-325-2811.
- Change passwords to any shared accounts such as a department email account that the employee could access.
- Remove access to other off-site or campus systems.

<sup>1</sup>**NOTE:** Employees appointed to grants and contracts accounts are expected to use all earned paid leave time during the specified period of their appointment unless the grant or contract contains a separate account with sufficient funds to pay for accumulated leave time upon termination of the employee or unless the department to which the employee is transferring is willing to accept it. If such funds are not available, paid leave time must be transferred into the extended sick leave account at the time the employee terminates or the grant or contract is discontinued.



**IMPORTANT:** Contact HR when an employee is terminated under any conditions other than voluntary resignation.

Documentation of the return of all university property provided to any employee shall be maintained in the departmental files and is subject to compliance review by Internal Audit. This Receipt of Property Checklist will satisfy that documentation requirement. Complete this form whenever an employee separates employment from a university department. This includes: 1) Transfer to another department within the university; 2) Transfer to the Health Sciences Center campus or the Tulsa campus; 3) Voluntary or involuntary termination of employment with the University of Oklahoma.

**Terminating Employee Information**

\_\_\_\_\_  
Name Title Employee ID

\_\_\_\_\_  
Department Name and Code Time in Position

Property Item	ID Number or Description	Received By	Date Received
<input type="checkbox"/> Keys (including desk and cabinet)			
<input type="checkbox"/> Computers (CPU or monitors)			
<input type="checkbox"/> University furniture or pictures			
<input type="checkbox"/> Uniforms			
<input type="checkbox"/> OU Photo ID			
<input type="checkbox"/> Laptops			
<input type="checkbox"/> Cell phones or pagers			
<input type="checkbox"/> Tablet or other device			
<input type="checkbox"/> University PCard and/or Travel Card			
<input type="checkbox"/> Flash drives			
<input type="checkbox"/> OU or department parking permit			
<input type="checkbox"/> Protected Health Information (PHI)*			
<input type="checkbox"/> Tools:			
<input type="checkbox"/> Other:			
<input type="checkbox"/> Other:			

\*PHI: Employee has been informed that s/he may not maintain any protected health information (PHI) and has confirmed by signing below that no PHI will be retained in any format, including on any personally-owned devices, without prior written approval of the supervisor.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Department Representative (print name)



This checklist is provided by Human Resources as a guide when separating from your current department due to 1) a transfer to another OU department/campus or 2) leaving the university for other employment, personal reasons, or other termination. Employees on J-1 and H-1B visas should contact International Faculty and Staff Services at 405-325-4010 prior to their last day of employment.

**Employee Information**

Name	Title	Employee ID
Department Name and Code		Time in Position

**Documentation**

- If you are resigning or retiring, submit a signed and dated resignation notice such as: I am resigning my position of JOB TITLE effective DATE...provided this date works for the department.
- Establish terms of separation. Employee and department should discuss: performance objectives for the remaining work schedule; job sharing while transitioning to another department; time and attendance, if different from regular schedule; determine any paid leave to be taken until date of separation; or department may accept or reject the date provided.
- Sign the Termination Memo/Package. Employee should receive and sign a memo from the supervisor or department terminating the employee that provides the following:
  1. Effective date of termination.
  2. Amount of paid leave to be paid if you are benefits eligible (some grants do not pay terminal leave<sup>1</sup>).
  3. Property Clearance Checklist to return all equipment (keys, mobile devices, credit cards, etc).
  4. Exact date and time to arrange for pickup of personal items
  5. Information for dispute resolution (see the Staff Handbook, section 3.21 or call HR Employee Relations at 405-325-5594)
- Complete the Receipt of Property Checklist with your supervisor.

**Paychecks, Leave, and W-2 - Contact Payroll and Employee Services (PES) at 405-325-2961 for questions.**

- Submit all final timesheets to report hours worked or leave taken. Final paychecks will be automatically deposited up to 60 days after termination if you have electronic deposit. All deductions (including parking and athletic tickets) will continue unless employee makes other arrangements. If eligible, the employee may receive a leave payout for any accrued leave hours.<sup>1</sup>
- Make sure your mailing address is correct in Employee Self-Service at [hr.ou.edu/Self-Service](http://hr.ou.edu/Self-Service). To ensure receipt of Form W-2 for income tax purposes, contact Payroll if that address changes and provide correct home mailing address on or by December 31.

**Benefits**

- You may need to contact the Human Resources Benefits office (405-325-1826) about the following:
  - Your vesting status in retirement plans or rolling over accounts.
  - Benefits deductions on final pay checks.
  - Last day of benefits coverage.
  - COBRA ([hr.ou.edu/COBRA](http://hr.ou.edu/COBRA)).
  - Continuation of tuition fee waivers.
  - Retirement counseling and forms required.

\_\_\_\_\_  
*Employee Signature*

\_\_\_\_\_  
*Date*

<sup>1</sup>**NOTE:** Employees appointed to grants and contracts accounts are expected to use all earned paid leave time during the specified period of their appointment unless the grant or contract contains a separate account with sufficient funds to pay for accumulated leave time upon termination of the employee or unless the department to which the employee is transferring is willing to accept it. If such funds are not available, paid leave time must be transferred into the extended sick leave account at the time the employee terminates or the grant or contract is discontinued.