

Supervisor Checklist: When a Staff Employee Separates Employment with IU

When a Staff employee separates employment with Indiana University (voluntarily or involuntarily) this checklist will help guide supervisors through the process. The items on this list will vary depending on the employee's position (union representation, FTE, etc.) and duties. A version of this checklist for the employee is also available.

SEPARATION POLICIES

☐ Review key policies in the "Separation" section of the policy manual for the employee's group (listed on the right).

Specifically, review the correct procedure for the following issues:

- ☐ When separating employee involuntarily, follow the applicable policy, e.g., Corrective Action for performance and Reduction in Force for reduction of employees.
- ☐ Clear the final written notice of all involuntary separations with the campus Human Resources office *before* distributing the notice to the employee
- ☐ Identify whether or not a notice period is required
- ☐ Identify whether the employee is required to use accrued time off during such notice period
- ☐ Identify the Separation Pay policy for the employee
- ☐ Process the separation according to the procedure in the Separation from the University policy. Consult with the campus Human Resources office for appropriate termination codes to use, especially if corrective action or medical issues are involved.

- [Voluntary and Involuntary Separation](#)
- [Layoff](#)
- [Reduction in Force](#)
- [Reduction in Force \(Part-Time employees\)](#)

BENEFIT PLANS

☐ Inform the employee to read the booklet, "[Benefits After Separation](#)." This document addresses the benefit plans listed to the right.

☐ Medical and dental benefits are discontinued immediately following separation. The employee will be contacted by campus Human Resources with information about continued coverage under COBRA.

- Insurance (basic, long-term, accident)
- Medical and dental plans
- Tax Saver Benefit (TSB) Plan
- IU Tuition Benefit
- Retirement plans
- IU Retiree status
- Separation pay

INFORMATION POLICIES

The University Information Policy Office addresses information policy, privacy, and security on its [Safeguards for Domain 5 Information Security & Privacy Program](#)

- ☐ Can I immediately disable a terminated employee's accounts?
- ☐ What should I do when an employee is leaving the university or changing departments?
- ☐ How can I ensure departing employees no longer have access to departmental resources?

FILES, E-MAIL, TELEPHONE

Inform the employee how to:

- ☐ Vacate her/his office or work site (including transfer of electronic and paper work files)
- ☐ Forward e-mail messages, if applicable
- ☐ Handle telephone calls (change greeting, forward, or cancel), if applicable

Continued on next page

UNIVERSITY PROPERTY

Ensure the employee turns in all of the following, where applicable:

- ☐ Building/departmental keys (building, office, file cabinets, storage, etc.)
- ☐ Laptop, cell phone, PDA, etc.
- ☐ Uniform, tools, equipment, etc.

CANCEL ACCOUNTS

- ☐ E-mail and computer accounts (if the employee retires, s/he retains email and certain other computing account privileges indefinitely)
- ☐ Long-distance telephone authorization
- ☐ University credit card
- ☐ Other similar accounts

ADMINISTRATIVE

- ☐ Make sure the employee's timesheet is complete and accurate.
- ☐ Obtain the employee's forwarding address.

OTHER

For printout of final pay deposit records, the employee should contact FMS-Payroll (812-855-0375).

For information about specific business such as parking permit, SRSC membership, etc., the employee should contact the related offices directly.