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**Out-Processing for Individuals: Supervisor Procedures**

Procedures for the Supervisor

When an individual separates from the University, there are certain procedures that must be completed by both the supervisor and the individual. Please follow these guidelines to ensure compliance with policies.

In addition to using this checklist for separations from the university, supervisors are encouraged to use this Out-Processing Checklist for items that also apply to internal transfers from one University department to another. See items indicated with *Internal Transfer*.

Upon Notification of Upcoming Separation:

1. In cases of resignation, please obtain a letter of resignation from the individual. This letter must state the individual’s last day of employment and the reason for the resignation. A sample resignation letter is available at http://www.umw.edu/documents/document/sample-resignation-letter.
2. Give the individual a copy of the Out-processing of Individuals: Individual Separation Checklist (Checklist).
3. Prior to the date of the individual’s departure from the University, the supervisor will meet with the individual to discuss and complete the Checklist, outlining the individual’s obligations before leaving the University.
4. Ensure that the Office of Human Resources is notified immediately (via phone call or email – contact x1214 or jobs@umw.edu) upon receipt of the resignation letter. The original letter of resignation must be forwarded to the Office of Human Resources. Resignation letters must be received in the Office of Human Resources before any replacement actions (i.e. Recruitment) will be taken. The supervisor must retain a copy of the resignation letter.

Please consult with the Office of Human Resources before separating an individual for cause. All involuntary separations must be authorized by the Office of Human Resources.

1. Take some time to meet with the individual and get feedback about his/her work experience at UMW. This may provide you with useful information for future individuals.
2. Ask the individual to contact the Office of Human Resources to schedule an opportunity to complete an online exit interview.
3. Once all obligations have been satisfied, both the supervisor and the individual must sign the Out-processing of Individuals: Individual Separation Checklist. The supervisor must send the original document to the Office of Human Resources within 24 hours of the individual’s departure from the University; the supervisor must keep a copy of this document.

** Out-Processing of Individuals: Individual Separation Checklist**

**Send the completed checklist to the Office of Human Resources within 24 hours after the individual’s last day of employment.**

I. Individual Information

Individual's Name:       Individual Banner ID:

Supervisor:       Department:

Last Date of Engagement:       Category:

UMW Email:       Personal Email Address:

II. Out-processing Checklist

| **Item to collect, discuss, or remove access:**  Assess all items for individuals who are separating from the University; assess only items marked Internal Transfer for individuals who are transferring from one University department to another. | | | **Supervisor's initials:** (Initials or N/A required for each item) | **Date:** | **Contact for more information:** |
| --- | --- | --- | --- | --- | --- |
| Resignation Letter: |  | In cases of resignation, please obtain a letter of resignation from the individual. This letter must state the individual’s last day of employment and the reason for the resignation. A sample resignation letter is available at http://www.umw.edu/documents/document/sample-resignation-letter. |  |  | HR – x1214 |
| Final Paycheck: |  | Individual must contact Payroll about final pay if changing direct deposit account. |  |  | Payroll – x1045 |
| Leave Forms: | Internal Transfer | Individual’s leave forms completed & submitted to Payroll (if appropriate) prior to individual’s separation date; contact payroll if there are questions. |  |  | Payroll – x1045 |
| Final Timesheet Approval: | Internal Transfer | Individual’s final timesheet (if appropriate) is turned in; contact Payroll if there are questions. |  |  | Payroll – x1045 |
| Benefits: |  | An Individual with state benefits has been instructed to attend a meeting with the Benefits’ Administrator. |  |  | Benefits Administrator – x1210 |
| Current Reconciliation Log (SPCC): | Internal Transfer | Coordinate the cancellation of the account with the SPCC Program Administrator. Finalize all approval in the Works system. Transfer all paper files to the Supervisor; make sure that the credit card is destroyed or returned to the Program Administrator. |  |  | Procurement Services – x1057 |
| UMW Contract Administrator: | Internal Transfer | Contact Procurement Services and arrange for the transfer of the contract to another person. |  |  | Procurement Services – x1127 |
| UMW Local Finance Card: | Internal Transfer | Turn in a UMW Local Finance Card to Accounts Payable (if applicable). |  |  | Accounts Payable – X1224 |
| Voice Mail Password: | Internal Transfer | Have the individual share his / her Voice Mail Password with the Supervisor. |  |  | Help Desk – x2255 |
| Equipment/Pager/Cell Phone/ Computer/iPad/ Radio/etc.: | Internal Transfer | Return any University property to the appropriate office. |  |  | Supervisor |
| Manuals/Books: |  | Any University owned manuals or books must be returned. |  |  | Supervisor |
| Travel Advance: | Internal Transfer | Any travel advance must be repaid (if appropriate). |  |  | Accounting – X1230 |
| Individual Tuition Assistance: |  | Any Individual Tuition Assistance must be repaid (if appropriate). |  |  | Accounting – X1230 |
| Keys: | Internal Transfer | The Individual must turn in all University keys to the Locksmith or to the UMW Police. |  |  | Locksmith – x1369 |
| ID Card: |  | The Supervisor must collect the individual’s EagleOne ID card and send it to the EagleOne Center. If a secondary EagleOne card was issued to a family member, that card must also be turned in. |  |  | Supervisor |
| Address: |  | The individual must provide a forwarding address to the Payroll Office and the Office of Human Resources. |  |  | Payroll – x1045  HR – x1214 |
| Accounts: |  | The individual must settle any outstanding accounts with the Office of Administration and Finance and/or Bookstore. |  |  | Bookstore – x1017  Cashier – x1251 |
| Uniforms / Lab Coats: | Internal Transfer | Uniforms and / or lab coats that were issued to the individual must be returned. |  |  | Supervisor |
| Library: |  | Return all library materials to the Library and pay any fines. |  |  | Library – x1125 |
| Name Badge: |  | The individual’s name badge must be turned in to the supervisor. |  |  | Supervisor |
| Parking Decal: |  | Instruct the individual to remove parking decal(s) from his / her vehicle(s); return the decal(s) to the Parking Management Office. |  |  | Parking – x1129 |
| Exit Interview: |  | The Office of Human Resources will contact the individual to schedule an Exit Interview. |  |  | HR – x1214 |
| Interview with Supervisor: | Internal Transfer | The individual is encouraged to take some time to give feedback to his / her supervisor about the work experiences at UMW. This provides useful information for the supervisor and the University on what improvements can be made in the future. |  |  | Supervisor |
| Evaluation Completed: | Internal Transfer | Complete an Interim or Final Evaluation, as required. |  |  | HR – x1214 |
| System / Email Accounts: | Internal Transfer for specific system access | Access to electronic accounts is terminated w/in 24 hours of the individual’s departure. Note: Retirees keep access to email for life. |  |  | Help Desk – x2255 |

III. Individual / Supervisor Signatures

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Individual Signature Date

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Supervisor Signature Date

***Signatures above certify completion of all out-processing procedures/notifications required by the Office of Human Resources. Return this form to the Office of Human Resources no later than 24 hours after the individual’s last day at the University.***