

## Resignation/Termination Checklist

This checklist is intended to be a quick guide to assist Area Leaders (AL) in providing for a smooth transition when an employee is voluntarily leaving Extension.

*If the AL has an employee who is transferring to another University department or if the AL has an involuntary employee termination, it is important to work with the Director and/or Assistant Director of Operations as well Bryan Dodrill or Dawnielle Essig as there are additional steps that are not included in this document.*

### Notification:

- Receive signed letter of resignation with termination date/last working date.
- Determine if employee or manager will submit the resignation in Workday.
  - Employee submits resignation in [Workday-via Self Service \(PREFERRED METHOD\)](#)
  - Manager (AL) submits request for Separating an Employee (Voluntary or Involuntary) [via Workday](#)
    - If manager submits the request, Workday will require a signed letter of resignation to be uploaded, email and or digital signatures will not be accepted.
  - HR Service Center requests leave payout (if applicable).
  - HR Service Center adds employee to the daily OCIO notifications list and Finance Service Center list.
- Notify Director and Assistant Director of Operations
- Work with county staff to plan employee recognition if desired.
- If the resignation is a retirement, notify Dawnn Brown ([brown.1283@osu.edu](mailto:brown.1283@osu.edu)) and include the [Retirement Clock Request Form](#), so retirement clock can be ordered. Please complete all fields of the form to ensure proper delivery.
- If your staff member is retiring, refer them to the OSU HR webpage, Preparing to Retire (<https://hr.osu.edu/benefits/retirement/preparing-to-retire>)
  - Typically retirement dates are set for the end of the month. Otherwise, there may be a delay with medical coverage and receiving the first retirement check.
- If desired, employees may request an exit survey (via Qualtrics) by contacting [Bryan Dodrill](#) or [Dawnielle Essig](#).

### Account Access:

- Email
  - Employees leaving the university will immediately lose access to their University Email Service mailbox and will not have any email forwarding allowed for 60 days.
    - Retirees can setup email forward after 60 days. They will need to go to [MY.OSU.EDU](#) to enable the forwarding of their email. This will no longer be automatically changed.
  - All interaction with former employees will need to be made through their personal/home email address on record. It is important to verify the forwarding personal/home email address on record to confirm it is not an [\\*@osu.edu](#) address.
  - **Applicants for Lifetime E-mail Forwarding Service (LEFS):**
    1. Log in at [my.osu.edu](https://my.osu.edu) using your name.# and password. Choose "Change email Delivery" from the menu in the left navigation panel.
    2. You must select the option **Deliver my e-mail to the following address.**
    3. Type a non-OSU e-mail address (e.g., Gmail, Yahoo, etc.) in the space provided.
    4. Click **Submit**.
    5. Review the requested change and then click **OK**.
    6. Verify that a message indicating the change was successful appears. The e-mail forwarding should be effective in about 15 minutes.
  - If problems are encountered when setting up the forward, the employee will need to contact the Help Desk at 614.688.HELP
- Listservs
  - Identify from the employee the listservs in which they receive information. Send this information to your Operations admin support and they will make the appropriate contacts to have the individual removed from the listservs (i.e. program area, teams, stewardship, Extension miscellaneous, etc.)
- OneDrive and Microsoft Teams file ownership



- In regards to preventing OneDrive and Microsoft Team files from becoming inaccessible in the event someone leaves the university, a new Owner of the file will need to be established if the file or folder owner is due to leave soon.
  - **Area Leader will need to submit a ticket to OCIO to have ownership of OneDrive files changed to appropriate staff member..... this has to be completed administratively through OCIO.**
- The AL or another appropriate staff member should consider becoming the owner of all cloud files until the employee's replacement is hired.
- If files have already been rendered inaccessible, the supervisor will need to contact Steve Lichtensteiger ([lichtensteiger.3@osu.edu](mailto:lichtensteiger.3@osu.edu)) in order to have ownership changed to an active employee.
- 4-H On-line – does the employee have access to this database? Contact Kaylee Port ([port.17@osu.edu](mailto:port.17@osu.edu))
- County Webpage – does a different employee need to obtain access to the webpages? Contact Cheryl Buck ([buck.19@osu.edu](mailto:buck.19@osu.edu))
- Is this person a signatory on local checking account?
- Is this person an owner of a shared calendar (Outlook, Google, etc..)

### **Property Returned:**

- University Credit Card
  - Is PCard in individual's name? Cancel the current card and apply for a new PCard by contacting Jesse Buxton ([buxton.26](mailto:buxton.26))
- Laptop/desktop
  - Other OSU assigned property (equipment)
- Keys returned (office keys and desk/file cabinet keys)
- University parking pass

### **Other:**

- Work with your IT representative to transfer the computer equipment from your inventory or to prepare it for use by the new employee.
- Does this person have access to institutional data on their mobile devices or personally owned devices?
- The employee's BuckID should be turned in to the supervisor. A new ID can be obtained if the employee is retiring (BuckID offices are located on OSU Main Campus, Columbus [3<sup>rd</sup> floor of the Ohio Union, 1739 N High Street, hours M-F 8-5] and OSU Wooster Campus [Student Success Services, 1328 Dover Road, Skou Hall, Wooster])
- Remove from stewardship plans, identify replacement and send information to Carol Wagner ([wagner.1142@osu.edu](mailto:wagner.1142@osu.edu)). In some stewardship roles, additional training is required of the newly identified steward.
- The employee has 60 days from separation to view or make changes on the Employee Self Service website. Accessible information will include: personal information, paystubs and direct deposit, HR links, and email/email forwarding. Resources that are inaccessible after separation include W4, Benefits, Timekeeping, Leave, and Employee Health pages.
- Have employee log into the Workday at [workday.osu.edu](http://workday.osu.edu) and verify that their home mailing address is correct for follow up documents such as their W2.
  - Once logged in click on the cloud in the blue circle, then click on "View Profile" under employee name, then click on "Contact" in the red banner on left hand side.
- Direct the departing employee to the OSU HR webpage <https://hr.osu.edu/life-events/leaving-ohio-state/> for useful information to help manage the transition when leaving the university.
- Final timesheet submitted