



Employee

Name _____ NetID _____

Personal Email _____ Personal Phone _____

Instructions

- This checklist is intended to assist you in completing the many tasks needed to transition an employee leaving your department and/or Dartmouth. Use your discretion to determine which tasks are appropriate for your area.
- **Asterisks indicate that a security concern exists and the task should be completed immediately, if appropriate.**
- Support contact information and other helpful reminders are provided at the end of this form.

Task	Complete	Date	Department Support	Comments
Resignation letter received, forwarded on to HR (more info)			HR	
* Submit Termination PA (Personnel Action) request using the General Request eForm			Finance Center	
Vacation days taken (Exempt only), noted within PA			Finance Center	
Provide employee with Employee End of Employment Checklist			Department Supervisor	
Communicate staff changes, as appropriate			Department Supervisor	
Begin transition plan			Department Director, HR	
Exit interviews vary by department. <i>HR sends exit survey.</i>			Department, HR	
iExpense transactions settled			Finance Center	
* Corporate card canceled and returned			Procure-to-Pay	
* PCard canceled and returned. Comment if PCard approver.			Procure-to-Pay	
Settle Dartmouth advances and/or outstanding loans			Finance Center	
Discuss any funds owed (incl. Petty Cash & Change Funds)			Campus Billing & DartCard	
* Complete System Access Form to remove Single Sign On <i>Includes: IRA, OnBase, Fundriver, Journals, Payroll, DORR</i>			Financial Systems Access	
Voicemail forwarding message set			Employee and Supervisor	
Voicemail password reset / shared			Employee and Supervisor	
Employee's electronic files & emails saved (more info)			Employee and Supervisor	
Employee's email autoreply message set (more info)			Employee and Supervisor	
* Return keys: building, desk, other			Department	
* Return Dartmouth ID card (more info)			Department	
* Dartmouth Equipment returned				
Laptop, tablet, monitor, keyboard, cell phone			Department	
Office equipment / furniture			Department	
Tools / equipment / safety equipment			Department	
Other (please list)			Department	
Change all group passwords: emails, security alarm codes			Supervisor	
Remove employee name from website, org chart			Department Webmaster	
* Remove access to 3 rd party software applications			Various	
Discontinue professional memberships, if appropriate			Department	
Cell phone bill / stipend ended			Finance Center	
Internet bill / stipend ended			Finance Center	
Personal property removed			Department	
* Terminate building access and DartCard services			Campus Billing & DartCard	
Schedule time to reimagine any computing resources			IT	