Employment Separation Checklist

Employee Information

Name: ___________________________ Employee ID: ________________
Title: ____________________________
Department/School: ____________________________ Grade: ________________
Union (If applicable): ____________________________
Department HR Representative Name and Email: ____________________________

Date of Hire (mm/dd/yyyy): ____________________________ Last Day of Work (mm/dd/yyyy): ____________________________
Termination Effective Date (mm/dd/yyyy): ____________________________ (This date should be the next day after the last day of work; for example, if the employee’s last day of work is June 30, then the termination effective date is July 1.)

TYPE OF SEPARATION:

☐ Resignation
☐ Involuntary: ☐ Discharge ☐ Release ☐ Job Elimination ☐ Retirement

Was this termination reviewed and approved by CUMC Human Resources? ☐ Yes ☐ No (if no, provide reason):

HR Client Manager Name and Email: ____________________________________________

Next Steps

☐ Process employee termination as soon as possible after being notified or after separation has been communicated to the employee.
☐ If system access is required to be shutdown prior to employee departing, please contact your HR Client Manager.

Voluntary Terminations and Resignation:

☐ Process termination on E-Term for Officers of Administration and Support Staff. For instructions on how to process terminations via E-Term, go to “Employment Termination on MSS and PAF” in the Manager Toolkit: http://managers.hr.columbia.edu/tig/paf-index/termination-mss-paf
☐ Submit a Personal Action Form (PAF) for Officers of Instruction, Officers of Research, etc.
☐ Make sure that you have the employee’s resignation letter or confirmation of employee’s verbal resignation in your department file as well as the employee’s vacation track record as part of the termination supporting documentation.

Retirement and Involuntary Termination (latter includes, Discharge, Release or Non-renewal):

☐ Submit a Personal Action Form (PAF) for job eliminations and retirement along with supporting documentation (termination letter; letter of intent to retire; copy of separation agreement. For instructions on how to process terminations via PAF, go to “Employment Termination on MSS and PAF” in the Manager Toolkit: http://managers.hr.columbia.edu/tig/paf-index/termination-mss-paf
☐ Severance pay: $_________________ (Severance pay must be reviewed and approved by your HR Client Manager prior to communication with the employee). You must obtain all required signatures on layoff agreements within the allotted period.
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University Property

☐ Collect all keys (Office/Laboratories/Restrooms).

☐ Collect all CUID’s and any affiliated ID’s. This would also include access badges such as a Dosimetry badge.

☐ Collect all electronic devices, such as laptops, IPADS, pagers, cellular phones and other equipment (including USB’s, CD’s, DVD’s)

☐ If there is an agreement between the department and the employee to change ownership of devices then the property must be cleansed of CU data by the CUMC IT Department prior to removing the device from CUMC.

☐ Electronic and paper documents.

☐ Collect/Cancel P-Card/Corporate credit cards.

☐ Close/Collect/Transfer any Petty Cash Accounts.

Key Contact Information

<table>
<thead>
<tr>
<th>Description</th>
<th>Department</th>
<th>Contact Number/Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Relations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Process and Procedures</td>
<td>CUMC Human Resources</td>
<td>212-305-4357 Option #1</td>
</tr>
<tr>
<td>• Guidance/Advise</td>
<td>CUMC Human Resources</td>
<td>212-305-4357 Option #1</td>
</tr>
<tr>
<td>• Exit Interview</td>
<td>CUMC Human Resources</td>
<td>212-305-4357 Option #1</td>
</tr>
<tr>
<td>Disable UNI, Domain/Exchange Accounts, FFE, AP/CAR, Activate or Remove any email forwarding if it exists and Clear/Change all computer passwords</td>
<td>CUMC IT CUIT</td>
<td>212-305-HELP 212-854-1919 <a href="mailto:5help@columbia.edu">5help@columbia.edu</a></td>
</tr>
<tr>
<td>Deactivate CUID</td>
<td>CUMC Public Safety</td>
<td>212-305-8100 <a href="mailto:cumc-idoffice@columbia.edu">cumc-idoffice@columbia.edu</a></td>
</tr>
<tr>
<td>Deactivate IDX or CROWN access</td>
<td>Shared Practice</td>
<td>201-346-3100</td>
</tr>
<tr>
<td>Stop Payroll</td>
<td>CUMC Payroll</td>
<td>212-305-2258</td>
</tr>
<tr>
<td>Cancel Signatory Authorization</td>
<td>Controller’s Office</td>
<td>212-854-4683</td>
</tr>
<tr>
<td>Cancel P-card/Corporate Credit Cards</td>
<td>Purchasing</td>
<td>212-854-4179 <a href="mailto:pcard@columbia.edu">pcard@columbia.edu</a></td>
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<tr>
<td>Parking Cancellation</td>
<td>Parking Office</td>
<td>212-305-1056</td>
</tr>
<tr>
<td>Clear/Change Voicemail Telephone/Passwords</td>
<td>Telecommunications</td>
<td>212-305-7777</td>
</tr>
<tr>
<td>For Students Receiving Employee Tuition Assistance</td>
<td>Student Administrative Services</td>
<td>212-342-4790</td>
</tr>
<tr>
<td>Benefit Related Tuition Assistance Questions</td>
<td>HR Benefit Service Center</td>
<td>212-851-7000</td>
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<tr>
<td>Housing Related Issues</td>
<td>Housing Facility Services</td>
<td>212-305-HELP Option #2</td>
</tr>
<tr>
<td>Visas/Immigration Affairs Inquires</td>
<td>Immigration Affairs</td>
<td>212-305-8165</td>
</tr>
<tr>
<td>Outstanding Books/Fines</td>
<td>Library</td>
<td>212-305-3605</td>
</tr>
</tbody>
</table>
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Benefits

☐ Advise departing employees to schedule an appointment with the HR Benefits Service Center (212-851-7000) as soon as possible.

☐ Provide employee with COBRA information. (You may obtain this information from your HR Client Manager)

☐ Number of accrued and unused vacation days: __________________

☐ Number of accrued and unused personal days: __________________

Counseling

Consult with your HR Client Manager for any questions or concerns regarding counseling services and resources.

☐ Provide employee with Employee Assistance Program information (http://hr.columbia.edu/benefits/eap)

Other Termination Issues

1. Encourage employee participation in the Exit Interview Report. The primary purpose of the exit interview is to help Columbia examine or correct problematic management policies or practices.

2. Give terminated employee Department of Labor Record of Employment form. Obtain employee signature on the tear-off at the bottom of the form and forward to:

Columbia University Medical Center Human Resources
650 West 168th Street, Box 29
Room 101
New York, NY 10032