UNIVERSITY OF WATERLOO
FACULTY OF ARTS

Employee Exit Checklist

Completed by _____ Date: _____

Please indicate if employee is: ☐ staying with University of Waterloo (UW) or ☐ leaving UW

Employee Information

Name:	End date:
Position:	Supervisor:
If internal, forwarding address (department, building, room): Supervisor:	Old extension number: New extension number:

What Access Does Employee Have?

☐ Quest ☐ Computer/information system access (see below) ☐ Keys/fobs ☐ Alarm code ☐ Phone password/directory	☐ Name plate/tag ☐ Room bookings ☐ Laptop bookings ☐ Other:

One to Two Weeks Prior to Leaving

☐ Email department to advise ☐ Offer position internally ☐ Review job description ☐ Seek Mission Critical approval ☐ Post position in myHRINFO ☐ Identify job specific issues	☐ Set up interviews ☐ Meet with employee to discuss upcoming tasks ☐ Remind to clear personal files from computer ☐ Revise training manual	☐ Email external contacts to advise of change ☐ Create a list of immediate and upcoming concerns, prepare a time-line ☐ Other:

One Week Prior to Leaving

☐ Plan going away event, invite Faculty, Staff, if retiring, and invite family members ☐ Prepare initial training plan, identify deadlines and items of urgent attention	☐ Arrange time for an exit interview ☐ Update department telephone list ☐ Identify employee email lists ☐ Review job schedule and due dates ☐ Purge old files ☐ Prepare desk for next employee	☐ Other

Last Day

☐ Schedule last meeting to hand over task list ☐ Leave voicemail directions ☐ Set up auto-forward email	☐ Return keys and security fob ☐ Send email to Debbie Pallas to remove from email lists ☐ Delete photocopy/print pass code	☐ Send Request Tracker (RT) to remove security alarm access ☐ Other:

Computer Access

☐ Software programs unique to position. Please specify: ☐ Shared drives/emails. Please specify ☐ SharePoint access (list addresses):	☐ Financial Online Reporting Environment (FORE) access ☐ Concur access ☐ Exchange Calendar ☐ Human Resources (HR) access (payroll, recruiting) ☐ OnBase access ☐ JobMine access ☐ Vacation database ☐ Advise Arts Computing Office (ACO)	☐ Voicemail access code ☐ Administrative access/WatIAM ☐ Waterloo Content Management System (WCMS) access ☐ Access to social websites ☐ Email ☐ Recommended training for new member ☐ Other:

Supervisor

☐ Arrange for office to be cleaned ☐ Arrange for at-home office equipment to be returned to the ACO ☐ Other:	