

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?

<input type="checkbox"/> Quest <input type="checkbox"/> Computer/information system access (see below) <input type="checkbox"/> Keys/fobs <input type="checkbox"/> Alarm code <input type="checkbox"/> Phone password/directory	<input type="checkbox"/> Name plate/tag <input type="checkbox"/> Room bookings <input type="checkbox"/> Laptop bookings <input type="checkbox"/> Other:
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One to Two Weeks Prior to Leaving

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

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

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

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

<input type="checkbox"/> Arrange for office to be cleaned <input type="checkbox"/> Arrange for at-home office equipment to be returned to the ACO <input type="checkbox"/> Other:
