

Termination Checklist

This checklist is intended to be a helpful tool to assist with the general tasks for terminating an employee.

General

- Has a resignation letter been received and forwarded to the appropriate departments?
- Are they a Foreign National? See Non-Resident Alien Flowchart:
http://www.finance.upenn.edu/ftd/Documentation/NRA_Flowchart.pdf
- Has an exit interview been scheduled?
- PennWorks
 - Has the distribution 'Stop Date' been entered?
 - Has the Termination been processed?
 - Any vacation payout? Overpayments, etc.?
 - Has Paid Time Off (PTO) record been deleted to prevent future accruals
 - Has the employee updated 'My Profile' for a Home/Permanent address change?
- Has a PennKey and Password been deactivated?
- Has their Penn Directory (Organization) information been removed?
- Has employee submitted last purchasing card statement with supporting receipts (as applicable)?
- Do any University units or third parties need to be contacted? e.g. removal from listservs or as a key contact

Penn Access Removed

- Has Penn e-mail been removed?
- Has the appropriate documentation been submitted to remove access to Penn systems? SRFS Systems, PennERA, BEN Financials, PennWorks, ATLAS, etc.
- Has TEM default reviewer been removed?
- Does a replacement person need to be identified for approval via systems? i.e., Access Administrator, PennWorks approver, PO Manager default approver?
- Computer
 - Change any passwords on all Penn electronic/computers to which employee has had general access
 - Return all computer discs, tapes, USB flash drives
 - Remove any Penn licensed software from personal home computers
 - Identify location and access to all computerized information (Backups, i.e. Disaster Recovery, Penn + Box, etc.)
- Do any University organizations or third parties need to be contacted? e.g. removal from internal listservs and/or as a key vendor contact)

Penn Property Returned

- | | |
|--|--|
| <input type="checkbox"/> PennCard | <input type="checkbox"/> Computers, home and/or office |
| <input type="checkbox"/> Keys for buildings, suite, office, lab, desk, cabinets, equipment, vehicles, etc. | <input type="checkbox"/> Penn licensed software |
| <input type="checkbox"/> Building access | <input type="checkbox"/> Phones, Tablets, iPads, etc. |
| <input type="checkbox"/> Corporate Credit Cards, Purchasing, Fleet, Event, Travel, TAC, etc. | <input type="checkbox"/> Books, journals and other office literature |
| <input type="checkbox"/> Equipment, furnishings, supplies, etc. | <input type="checkbox"/> Business purpose Tokens |
| | <input type="checkbox"/> Uniforms |
| | <input type="checkbox"/> Other _____ |

Other

- Has the employee contacted the following areas, if applicable:
 - Penn Benefits Center (888-736-6236) re: Medical, Dental, Vision and Life Insurance
 - Retirement Benefits (877-736-6738)
 - Human Resources for Tuition Benefits (215-898-7281)
 - Parking Services (215-898-8667)

* For Penn Faculty...

- Do they have any grants? If so, are they proposing to transfer the grant? Relinquishment Form completed? Progress, programmatic and/or technical reports submitted to Sponsor? Close-outs completed? Research material reviewed?
- Are they teaching? Grades outstanding? Outstanding advising or dissertation activity?