

CHECKLIST FOR EMPLOYEES LEAVING THE UNIVERSITY OF HAWAI'I

The following is a checklist of items to be completed upon an employee's exit.

ITEM	ACTION TO BE TAKEN
☐ PNF	Submit original PNF to Payroll by deadline; otherwise, notify Payroll of termination at 956-7444. Fax draft PNF to Payroll at 956-5031. Distribute copies as appropriate.
☐ Form D-60	Ensure employee completes Form D-60 to cancel direct deposit; process salary assignment cancellation after the vacation payout.
☐ Mailing Address and Phone No.	Check if the employee's address and phone number are current
☐ Publication	Provide the "What you may need to know as you leave University of Hawai'i Employment" document to employee.
☐ Medical	Complete EC-1 and Request for Treatment as an Assistance Eligible Individual form (applicable for involuntary termination), and submit to EUTF within 30 days. Inform employee EUTF coverage will end on last day of pay period in which he/she terminates. COBRA information will be mailed to home by plan carrier.
☐ Form G-2	Complete within 45 days of employee's termination. Submit original to Payroll (if vacation payout); distribute copies as appropriate. For employee participating in post-separation vacation payout program, coordinate with The Island Savings Plan (call 1-888-712-5642, press 2 for local office) for deferral to deferred compensation plan (see schedule of deadlines www.hawaii.edu/ohr/benefits/PSVPD%20Lag%20Payroll%20Schedule.pdf) and/or contact OHR for deferral to tax sheltered annuity plan (call 956-8643 at least 6 weeks prior to last day of work). Form G-2: www.hawaii.edu/ohr/bor/forms/g2.pdf
☐ Form G-2A	If employee is participating in early vacation payout program, complete Form G-2A. Coordinate with The Island Savings Plan (call 1-888-712-5642, press 2 for local office) for deferral to deferred compensation plan (see schedule of deadlines www.hawaii.edu/ohr/benefits/EVP%20Lag%20Payroll%20Schedule.pdf) and/or contact OHR for deferral to tax sheltered annuity plan (call 956-8643 at least 8 weeks prior to last day of work). Form G-2A: www.hawaii.edu/ohr/download/vacpay05.pdf
☐ ERS Contributions for Vacation Payout	Employees hired prior to 1971 and in the contributory or hybrid plan qualify for the high 5 average final compensation (AFC), which includes lump sum vacation pay. Complete Form D-60 to collect retirement contributions on the lump sum vacation pay. Coordinate submission of Form D-60 to ERS with schedule of vacation payout.
☐ Leave Donation	For instructional faculty who have less than 60 days of accumulated sick leave, check if employee wishes to donate sick leave to the central leave bank. If yes, have employee complete the Leave Sharing Donation Form (UH Form 68). UH Form 68: www.hawaii.edu/ohr/bor/forms/uh68.pdf
☐ Bus Pass, Handi-Van or Van Pool Voucher	Cancel enrollment in processing system within 45 days of separation. Inform employee of last bus pass/Van Pool voucher/Handi-Van voucher to pick up at UHM Parking Office.
☐ Keys (office, desk, cabinet, etc.)	Ensure keys are returned before close of business on last day of work
☐ Faculty/Staff ID	Collect ID before close of business on last day of work; destroy and dispose ID
☐ Resignation letter, Exit Interview questionnaire	Upon receipt of resignation letter, provide exit questionnaire to resigning employee www.svpa.hawaii.edu/svpa/apm/pers/a9810.pdf

ITEM	ACTION TO BE TAKEN
<input type="checkbox"/> Monthly BOR Report of Delegated Actions	Report resignation/retirement of faculty/APT employee
<input type="checkbox"/> Uniforms, State-owned Tools, Equipment and Supplies	Ensure any uniforms and/or State-owned items are returned before close of business on last day of work. Items include but not limited to cell phones, pagers, notebooks, cameras, PDAs, etc.
<input type="checkbox"/> Pcard	Ensure Pcard is returned at least 3 days before last day of work. Employee should complete the last Transaction Log. For pending items, employee must provide the supervisor or department secretary necessary documentation to complete the log.
<input type="checkbox"/> Computer access	Transfer or delete files in user's account; unsubscribe from all Listservs; notify departmental Local Area Network (LAN) administrator to delete/disable login
<input type="checkbox"/> Application Security Worksheets	Submit appropriate security worksheets to delete access for all applications (e.g., Banner, PeopleSoft, FMIS, etc.) Banner – contact appropriate campus coordinator FMIS – www.fmo.hawaii.edu/fmis/fmissfor.html PeopleSoft/HR datamart/Non-PeopleSoft HR – www.hawaii.edu/ohr/hris/
<input type="checkbox"/> Voice mail password, alarm code	Obtain voice mail password (if changed) and delete employee's alarm code