

DEPARTMENT TERMINATION/RETIREMENT CHECKOUT FORM
Brigham Young University

This form will help guide a department through an employee's retirement/termination process, reminding the department of items to collect and systems to consider changing. Departments should start this process a week before the employee's final work day. Completing these items will help for a smoother transition for the employee and department.

EMPLOYEE'S NAME: _____ **BYU ID#:** _____

DEPARTMENT: The department is responsible for contacting the following areas to inform them of the employee's retirement date and to encourage the retiring employee to resolve any outstanding issues before leaving the University:

1. Remind the terminating/retiring employee about the following:

- ☐ Return all library books and materials and pay any fines (ext. 2-6061)
- ☐ If the employee participates in Cougar Cash Payroll, have them call the ID center (ext. 2-7829)
- ☐ Have the employee account for any outstanding purchasing/travel transactions
- ☐ Return all equipment, software, supplies, etc. to the department.
- ☐ Email: work with your college CSR to forward your BYU email to another email provider and to migrate your Outlook archive to a personal computer.

2. Items to Collect:

- ☐ Department Bookstore Card, reassign or destroy
- ☐ Department Campus Card, reassign or destroy
- ☐ Equipment or supplies – Collect University/Department property (e.g. cell phones, iPads, pagers, tablet, computers, uniforms, etc...)
- ☐ Keys – Collect and verify that all BYU keys are returned to the appropriate office
- ☐ Purchasing Card and COD Checks Assigned to Individual - Notify Purchasing Card Office of COD check number ranges and then destroy card and check stock (contact Purchasing Card Office 2-3872)
- ☐ Purchasing Card and COD Checks Assigned to Department - Collect and provide to college/division controller for Reassignment (contact Purchasing Card Office 2-3872)
- ☐ Corporate Card and Travel Card – return to Travel Office (C-141 ASB, 2-3872)

3. Administrative Systems:

(If the terminating employee has access to any of these systems, the department should notify the following administrators to take the actions indicated below.)

- ☐ CASHNet – Change Transact Payments cashiering system rights (contact Treasury Services 2-4759.)
- ☐ Department Computer Programs - Invalidate all department computer program access rights (invalidate passwords, etc...)
- ☐ Y-Expense Travel System – Change Approver assignment (contact Travel Department 2-2909)
- ☐ Fast Track – Change Associate Buyer or an Approver assignment, (contact Purchasing Department 2-7008)
- ☐ Financial System – College/Division Controller should contact Financial Services (2-4703) to change general ledger Operating Unit manager and contact person assignments.
- ☐ Manager or contact persons should cancel delegated rights within the Business Objects system (contact Financial Solutions for questions 2-7488)
- ☐ Submit supervisor eForm changes for ½ time or student employees reporting to the terminating employee
- ☐ Purchasing - Change eProcurement approval workflow assignment (contact Purchasing 2-7010)
- ☐ Sponsored Research Grants and Contracts – Department Chair to contact Research Accounting (2-7548) to discuss issues regarding termination for Principal Investigators.
- ☐ Sponsored Research Grants and Contracts – Department Chair to contact the Office of Research and Creative Activities (ORCA, 2-3841) to discuss issues surrounding termination for Principal Investigators
- ☐ Termination – Complete online eForm Termination for staff and administrative employees (HR 2-4092)
- ☐ Travel Card – Be sure transactions have been reconciled in Y-Expense (Contact Travel Dept 2-5644)
- ☐ Department Cell Phone Plan: let the cell phone office know an employee with a department plan is terminating.
- ☐ Veracity Long Distance-Cancel employee's long distance access code on Veracity website (through Route Y)