Indiana University South Bend
Terminating Staff Employee Checklist

__ 1. Complete terminating eDoc (see policy #7.2, D., How to Process Separations)
   __ a. Day after last day on the job is normal effective date.
   __ b. Payroll will complete the terminal pay eligibility section.
   __ c. Include permanent forwarding address for accurate W-2 information.
   __ d. Update ePTO (PAE staff), confirm with HR that it has been done for final payout processing.
   __ e. Send copy of resignation letter to human resources.

__ 2. Review the terminal pay hours determined by Payroll (see policies #7.3 and #7.4, Separation Pay)
   __ a. Unused bonus holidays.
   __ b. Holiday falling on next workday (if applicable).
   __ c. Compensating time off previously earned but not taken.
   __ d. Unused vacation (SS/SM) or PTO (PAE) up to maximum.
   __ e. Honorary service vacation up to maximum.
   __ f. Portion of income protection/sick leave accrual (for retirees only).
   __ g. Call Payroll (x4437) to confirm budget commitment date.

__ 3. Ask employee to contact Human Resources (x4358) about any insurance/retirement questions.
   __ a. Cash out of PERF or TIAA-CREF.
   __ b. COBRA Continuation of health coverage.
   __ c. Conversion of life insurance.
   __ d. Call Human Resources to either schedule an exit interview or complete the Exit Interview Questionnaire

__ 4. Assure the return of any University property and satisfaction of any financial obligations, as applicable.
   __ a. Return of any keys which the employee signed for (call Facilities Management, x4386).
   __ b. Return of any University uniforms, tools or safety equipment.
   __ c. Return of parking permit (call Parking, x5528).
   __ d. Payment of any outstanding parking fines (call Parking, x5528).
   __ e. Return of any library books (call Library, x4380).
   __ f. Payment of any library fines (call Library, x4380).
   __ g. Return of any audio-visual or other equipment (call IMS, x5578).
   __ h. Payment of any outstanding obligations at the Bursar’s office (call x5526).
   __ i. Return of OTP Token (call OIT, x5566 to deactivate).
   __ j. Return of any University credit cards (call Accounting Services, x4112).
   __ k. Return of telephone calling card (call Accounting services, x4112).