



### Employee

<b>Name</b>		<b>Net ID</b>	
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### Instructions

This checklist will assist you in completing the many tasks needed to transition an employee leaving your department and/or the college. Use your discretion to determine which tasks are appropriate to the functions within your area.

**Asterisks indicate that a security concern exists and the task should be completed immediately, if appropriate.**

Support contact information and other helpful reminders are provided on the back of this form.

Task	Completed	Date	Department Support	Comments
* Create Termination PA (Personnel Action) request in OnBase			Finance Center	
Resignation letter received, forwarded on to HR			HR	
Vacation days taken (Exempt only), noted within PA request			Finance Center	
Begin transition plan			Department Director, HR	
Exit interviews will vary by department. HR sends exit survey.			HR	
* Terminate building access & DartCard services			Campus Billing & DartCard	
* Complete Security Access Form to remove Single Sign On Includes: IRA, OnBase, Fundriver, Journals, Payroll, DORR			Oracle Processing	
* Remove access to 3 <sup>rd</sup> party software applications			Various	
* Retrieve keys: building, desk, other			Department	
Discontinue professional memberships, if appropriate			Department	
* Dartmouth Equipment returned				
Laptop, tablet, monitor, keyboard, cell phone			Department	
Office equipment / furniture			Department	
Tools / equipment / safety equipment			Department	
Other (please list)			Department	
Cell phone bill / stipend ended			Finance Center	
Internet bill / stipend ended			Finance Center	
Personal property removed			Department	
Voice mail forwarding message set			Employee and Supervisor	
Voice mail password reset / shared			Employee and Supervisor	
Employee's electronic files & emails saved			Employee and Supervisor	
Schedule time to reimage any computing resources			IT	
Change all group passwords: emails, security alarm codes			Supervisor	
iExpense transactions settled			Finance Center	
* Corporate card canceled and returned			Procurement	
* P-Card canceled and returned. Comment if p-card approver.			Procurement	
Settle college advances and/or outstanding loans			Finance Center	
Discuss any funds owed (incl. Petty Cash & Change Funds)			Campus Billing & DartCard	
Remove employee name from website, org chart			Web Group	
Communicate staff changes, as appropriate			Department Supervisor	

### Contact Information

<b>Employee Personal Email</b>		<b>Phone Number</b>	
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DEPARTMENT NAME	TEAM EMAIL	TEAM PHONE
Human Resources	<a href="mailto:Human.Resources@Dartmouth.edu">Human.Resources@Dartmouth.edu</a>	(603) 646 3411
Information Technology Services	<a href="mailto:Help@Dartmouth.edu">Help@Dartmouth.edu</a>	(603) 646 2999
Campus Billing & DartCard Services	<a href="mailto:Dartmouth.Card@Dartmouth.edu">Dartmouth.Card@Dartmouth.edu</a>	(603) 646 3724
Campus Planning & Facilities	<a href="mailto:Campus.Planning.and.Facilities@Dartmouth.edu">Campus.Planning.and.Facilities@Dartmouth.edu</a>	(603) 646 2439
Facilities Operations & Management	<a href="mailto:Facilities.Operations.and.Management@Dartmouth.edu">Facilities.Operations.and.Management@Dartmouth.edu</a>	(603) 646 2508
Oracle Processing	<a href="mailto:Oracle.Processing@Dartmouth.edu">Oracle.Processing@Dartmouth.edu</a>	(603) 646 3004
Dartmouth Payroll	<a href="mailto:Dartmouth.Payroll@Dartmouth.edu">Dartmouth.Payroll@Dartmouth.edu</a>	(603) 646 2697
Procurement	<a href="mailto:Procure-to-Pay@Dartmouth.edu">Procure-to-Pay@Dartmouth.edu</a>	(603) 646 3011
Admin and Provost Finance Center	<a href="mailto:Admin.and.Provost.Finance.Center@Dartmouth.edu">Admin.and.Provost.Finance.Center@Dartmouth.edu</a>	(603) 646 1310
Arts and Sciences Finance Center	<a href="mailto:ASFC@Dartmouth.edu">ASFC@Dartmouth.edu</a>	(603) 646 2028
Geisel School of Medicine Finance Center	<a href="mailto:Geisel.Finance.Center@Dartmouth.edu">Geisel.Finance.Center@Dartmouth.edu</a>	(603) 650 1238

## Emails

Under normal circumstances, employee accounts **expire 30 days after termination**. For certain operational reasons, which may include a position's access to highly sensitive information, access may be terminated earlier if approved and requested through the Office of Human Resources.

The departing employee is expected to **set an auto-reply message** on their account prior to their departure. This is a good way to inform people that the employee will no longer be with Dartmouth, and to indicate to whom college-related business messages should be sent in the future.

## Shared Files

If an employee does not give access to files and emails after termination, and if the electronic files are in a shared space (e.g. OurFiles, SharePoint, 0365 Groups, file server, etc.) then ITS can grant the supervisor access. If the data is in the employee's email account or personal file space (e.g. MyFiles or OneDrive), then the supervisor will need to tell ITS what they are looking for, and an ITS staff member will log into the account, retrieve the appropriate data and provide it to the supervisor.

## Benefits

Employees should be encouraged to review the HR website titled "Leaving Dartmouth" to make sure all of their benefit information is clear and updated:

[https://www.dartmouth.edu/~hrs/benefits/leaving\\_dartmouth.html](https://www.dartmouth.edu/~hrs/benefits/leaving_dartmouth.html)

Employees should update their address in Employee Self-Service (employee.dartmouth.edu)

Employee Net IDs will continue to be active for use in accessing the Employee Self Service system only for an additional 17 months after their email accounts have expired. Please remind the employee that they will need to remember their Net ID and password to access their information in this system.

## Dartmouth IDs

These are to be collected. Ex-employees should not be able to present themselves as still being affiliated with the College and continue using their ID for discounts or other privileges that the card allows, regardless of whether it is technically active or not.