

**Form 3501 FR.31
Termination Checklist**

REVISION DATE: 5/29/13

Employee Name: _____

Department: _____

University Personal Identifier:

Last Day of Employment: _____

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- Reason for Termination:
- | | | |
|-------------------------------------|--------------------------------------|---|
| <input type="checkbox"/> Retirement | <input type="checkbox"/> Resignation | <input type="checkbox"/> Fixed Duration |
| <input type="checkbox"/> Discharge | <input type="checkbox"/> Layoff | <input type="checkbox"/> Casual |

Other Information: _____

- The employee has cleared all outstanding **advances and Pcard transactions**.
- The **Human Resources Notification Form** has been completed, authorized and submitted, in time to collect rolling advance if C&T.
- The employee's **labor schedule** has been end-dated.
- Any necessary **distribution adjustments** for the employee's compensation charges have been submitted and approved.
- Forwarding address** has been obtained from the employee.
- Are there any Department email accounts this individual is responsible for? If yes, please list accounts and provide the Name and NetID of the new responsible owner so the account can be transferred.
- Are there any Dependent NetIDs this individual is responsible for? If yes, please list accounts and provide the Name and NetID of the new responsible owner so the account can be transferred.
- Petty Cash Custodians – complete a final reconciliation of fund and submit form 2815 FR 03 to change the custodian or close the fund.
- Bank of America CashPro – please contact Treasury Services with name and termination date.

Return Relevant University Items:

- | | |
|---|---|
| <input type="checkbox"/> Badge | <input type="checkbox"/> Computer equipment, beeper, cell phone, etc. |
| <input type="checkbox"/> Dining Hall Card, Stock Room Card | <input type="checkbox"/> Safety equipment |
| <input type="checkbox"/> Keys | <input type="checkbox"/> Tools, uniform |
| <input type="checkbox"/> ID card (except C&Ts going to IEP) | <input type="checkbox"/> Personnel Policy and Procedure Manual |
| <input type="checkbox"/> Purchasing card | <input type="checkbox"/> Other University manuals |
| <input type="checkbox"/> Telephone card | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Parking permits and passes | _____ |

Deactivate/Discontinue User Accounts and Access:

<ul style="list-style-type: none"><input type="checkbox"/> NetID: Send email to user.accounts@yale.edu (Note: Terminating access to the employee's NetID will <u>not</u> automatically terminate access to most Yale applications)<input type="checkbox"/> Delete or Transfer DWH Portal Scheduled Reports (contact dw.usersupport@yale.edu)<input type="checkbox"/> Orbitz<input type="checkbox"/> STARS<input type="checkbox"/> BMS (YSM Only)<input type="checkbox"/> FMT (YSM Only)Use START www.yale.edu/start to terminate access to:<ul style="list-style-type: none"><input type="checkbox"/> Accuship<input type="checkbox"/> TSM<input type="checkbox"/> Email/calendar<input type="checkbox"/> PPP,VPN<input type="checkbox"/> SciQuest<input type="checkbox"/> START and People Lists (TAC, Approvers, etc.)<input type="checkbox"/> Telephones, Cell Phones, TANs, Calling Cards, Pagers<input type="checkbox"/> Oracle Financials, Procurement and HR	<ul style="list-style-type: none"><input type="checkbox"/> Effort Reporting<input type="checkbox"/> VIP Card / Number (see your VIP manager or call Scott Lucker to ascertain the VIP manager) See www.yale.edu/access to terminate access to:<ul style="list-style-type: none"><input type="checkbox"/> ALICE<input type="checkbox"/> Banner<input type="checkbox"/> DARC Y<input type="checkbox"/> Eportal<input type="checkbox"/> Etravel<input type="checkbox"/> GSPS<input type="checkbox"/> ID Card<input type="checkbox"/> Kronos<input type="checkbox"/> Liberty<input type="checkbox"/> Network Neighborhood Access<input type="checkbox"/> Remedy<input type="checkbox"/> Terminal Server<input type="checkbox"/> VSS
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Security Considerations:

- Cancel security access/alarm codes Cancel security authorizations