

Role	Steps to be Taken <u>On or Before</u> Employee's Last Day
<b>Department HR Specialist</b> - OR - <b>Designated Personnel within Department</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Initiate the <a href="#">Terminate Employee business process</a> in Workday (use the <i>Change Job business process</i> for laid off C&amp;T employees who have opted to enter the IEP). <b>*Note:</b> Initiate retirement terminations as soon as possible; initiate non-retirement terminations no more than two pay periods in advance to avoid blocking other updates (e.g., manager changes, etc.) you may wish to make to the employee's record prior to the termination date. Enter the termination date in Workday. Please ensure timely entry of the termination date as it has impacts to Benefits and Pay.</li> <li><input type="checkbox"/> If the position will be backfilled, use the <a href="#">Create Job Requisition business process</a> to initiate.</li> <li><input type="checkbox"/> Notify Department DSP of the upcoming termination to obtain a complete list of computer equipment and/ or cell phone equipment that must be returned upon employee's departure.</li> <li><input type="checkbox"/> Verify that the timecard approver has signed off on final timecard <b>prior to</b> payroll run date, to ensure that TVP is paid out in the final paycheck.</li> <li><input type="checkbox"/> Does the terminated employee have any Moveable Equipment Inventory ("MEI") equipment assigned to them either by a purchase in their name or subsequently assigned to them by their department? If so, it is required that a new, active Yale staff person be assigned to the asset in the MEI System. This new assignee may be the Lead Administrator.</li> <li><input type="checkbox"/> If the terminated employee is a Principal Investigator and is planning to take MEI equipment with him/her to a new institution to further their research, the proper approval from their Department's Chairperson and the Provost must be obtained <b>before</b> the equipment leaves Yale.</li> <li><input type="checkbox"/> Does the terminated employee submit expense reports or have a Yale Purchasing Card? If so, ensure all expense reports and Yale Purchasing Card transactions are processed and fully approved before the employee's last day.</li> <li><input type="checkbox"/> Ensure that any of the employee's Workday inbox tasks about other workers are completed, cancelled, or reassigned by the end of the employee's last day.</li> <li><input type="checkbox"/> For assistance, please contact Employee Services at <a href="mailto:employee.services@yale.edu">employee.services@yale.edu</a> or 203-432-5552.</li> </ul>
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<b>Department HR Specialist</b> - OR - <b>Designated Personnel within Department</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Collect relevant University items from employee (if applicable):                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Laptop / Computer Equipment</li> <li><input type="checkbox"/> Cell phone / Tablet</li> <li><input type="checkbox"/> Tools / Uniform / Name Badge</li> <li><input type="checkbox"/> Keys</li> <li><input type="checkbox"/> Yale Purchasing Card</li> <li><input type="checkbox"/> Parking Permit and Passes</li> <li><input type="checkbox"/> ID Card (NOTE: Retirees and staff entering the IEP retain their ID card)</li> </ul> </li> <li><input type="checkbox"/> Request access termination for applicable systems through the <a href="#">IT Service Portal</a>, for example:                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Email, Calendaring, and YaleConnect                                     <ul style="list-style-type: none"> <li><input type="checkbox"/> Confirm date of deactivation with manager or HRG prior to requesting</li> </ul> </li> <li><input type="checkbox"/> Express Shipping Website Access (E-Ship)</li> <li><input type="checkbox"/> SciQuest Legacy (request must come from business office)</li> <li><input type="checkbox"/> Legacy Oracle / DWH Portal (request must come from business office)</li> <li><input type="checkbox"/> Desk phone and cell phone                                     <ul style="list-style-type: none"> <li><input type="checkbox"/> Reset desk line to remove employee's name</li> <li><input type="checkbox"/> Reset voicemail</li> <li><input type="checkbox"/> Terminate cell phone plan</li> <li><input type="checkbox"/> Ethernet</li> </ul> </li> </ul> </li> <li><input type="checkbox"/> Contact the ITS Helpdesk at 203-432-9000 or <a href="mailto:helpdesk@yale.edu">helpdesk@yale.edu</a> to terminate the following system access:                             <ul style="list-style-type: none"> <li><input type="checkbox"/> FileNet</li> <li><input type="checkbox"/> Shared Drives</li> </ul> </li> <li><input type="checkbox"/> Return ID card to the appropriate <a href="#">ID Center</a> (can be sent via campus mail).</li> <li><input type="checkbox"/> Miscellaneous access termination requests and additional tasks:                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Purchasing Card (submit <a href="#">Purchasing Card Request Form</a> to cancel card)</li> <li><input type="checkbox"/> Remove meeting / conference room booking access</li> <li><input type="checkbox"/> Terminate building access by emailing Access Control at <a href="mailto:432.open@yale.edu">432.open@yale.edu</a> (Central Campus) or <a href="mailto:785.open@yale.edu">785.open@yale.edu</a> (Medical School Campus)</li> <li><input type="checkbox"/> Other applicable systems (e.g., YBT, Hopper, Salesforce, <a href="#">IRES</a>, Voyager)</li> <li><input type="checkbox"/> SharePoint (including department specific sites, if applicable)</li> <li><input type="checkbox"/> Update any departmental directories not automatically updated by Workday</li> </ul> </li> </ul>