<table>
<thead>
<tr>
<th>Role</th>
<th>Steps to be Taken On or Before Employee’s Last Day</th>
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| Department HR Specialist - OR - Designated Personnel within Department | ☐  Initiate the Terminate Employee business process in Workday (use the Change Job business process for laid off C&T employees who have opted to enter the IEP). *Note: 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.  
☐  If the position will be backfilled, use the Create Job Requisition business process to initiate.  
☐  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.  
☐  Verify that the timecard approver has signed off on final timecard prior to payroll run date, to ensure that TVP is paid out in the final paycheck.  
☐  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.  
☐  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 before the equipment leaves Yale.  
☐  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.  
☐  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.  
☐  For assistance, please contact Employee Services at employee.services@yale.edu or 203-432-5552.  
☐  Collect relevant University items from employee (if applicable):  
☐     Laptop / Computer Equipment  
☐     Cell phone / Tablet  
☐     Tools / Uniform / Name Badge  
☐     Keys  
☐     Yale Purchasing Card  
☐     Parking Permit and Passes  
☐     ID Card (NOTE: Retirees and staff entering the IEP retain their ID card)  
☐  Request access termination for applicable systems through the IT Service Portal, for example:  
☐     Confirm date of deactivation with manager or HRG prior to requesting  
☐     Email, Calendaring, and YaleConnect  
☐     Express Shipping Website Access (E-Ship)  
☐     SciQuest Legacy (request must come from business office)  
☐     Legacy Oracle / DWH Portal (request must come from business office)  
☐     Desk phone and cell phone  
☐     Reset desk line to remove employee’s name  
☐     Reset voicemail  
☐     Terminate cell phone plan  
☐     Ethernet  
☐  Contact the ITS Helpdesk at 203-432-9000 or helpdesk@yale.edu to terminate the following system access:  
☐     FileNet  
☐     Shared Drives  
☐  Return ID card to the appropriate ID Center (can be sent via campus mail).  
☐  Miscellaneous access termination requests and additional tasks:  
☐     Purchasing Card (submit Purchasing Card Request Form to cancel card)  
☐     Remove meeting / conference room booking access  
☐     Terminate building access by emailing Access Control at 432.open@yale.edu (Central Campus) or 785.open@yale.edu (Medical School Campus)  
☐     Other applicable systems (e.g., YBT, Hopper, Salesforce, IRES, Voyager)  
☐     SharePoint (including department specific sites, if applicable)  
☐     Update any departmental directories not automatically updated by Workday |