![Ontario Tech University logo]

Resignation/Retirement Checklist

The following checklist should be used as a reference guide when a continuing or limited term academic or non-academic employee's employment with the University ceases. A number of the items appearing on the checklist may require coordination with other departments within the University or with the shared service providers at Durham College.

Not all action items may be applicable to each employee situation. It is the responsibility of the Faculty/Department in which the staff member is employed, to take the lead in communicating with other departments that a resignation or retirement is being initiated.

Employee Name:	Banner ID: 100
Department/Faculty:	

check one: ☐ resignation   ☐ retirement

effective date: _____

Action Items	Primary Responsibility	Date Completed
1. Forward letter of resignation to H.R. Advisor.	Department/Faculty	
2. Prepare final pay.	Payroll	
3. Prepare Record of Employment.	Payroll	
4. Confirm lieu time and vacation owing.	Human Resources	
5. Provide final pension and benefits notice to Sunlife.	Human Resources	
6. Provide employee with final Pension and Benefits Departure Summary.	Human Resources	
7. Schedule meeting to discuss transition of pension and benefits (retirement).	Human Resources	
8. Schedule Exit Interview with employee (continuing).	Human Resources	
9. Update HRIS/Banner.	Human Resources	
10. Inform Parking (parking@dc-uoit.ca) by email of employee departure (full time employees only) and copy Payroll (uoit.payroll@uoit.ca).	Department/Faculty	
11. Return parking tag to Parking Office.	Employee	
12. Consult with IT Services regarding the following: - cancel account(s)/deactivation - change telephone message and access if required - change email to redirect enquiries to another employee if required - request list of employee assets	Department/Faculty	

Action Items	Primary Responsibility	Date Completed
13. Retrieve I.T. issued assets from employee and return to I.T. Services: - laptop - cell phone other:	Department/Faculty	
14. Retrieve department/faculty owned assets from employee.	Department/Faculty	
15. Key and ID/Proxy Card Return: - request list of keys that have been assigned to employee from Facilities by emailing servicedesk@dc-uoit.ca - retrieve keys and photo ID/proxy card from employee and request that photo ID/proxy card be deactivated by contacting servicedesk@dc-uoit.ca - return keys and photo ID/proxy card to Facilities	Department/Faculty	
16. Ontario Tech Credit Card: - notify Finance of employee's departure date as soon as possible - retrieve credit card from employee - obtain outstanding receipts from employee - forward credit card and receipts to Finance	Department/Faculty	
17. Consult with the Office of Research Services regarding the following, if applicable (faculty only): - research funding (e.g. grants, awards, contracts) - intellectual property matters (e.g. patents, licenses, etc.) - equipment, materials and/or supplies - ethics (human, animal) - health and safety (e.g. radiation, biosafety, lasers) - research personnel (e.g. students, technicians, Post Docs or other paid positions/contracts)	Faculty	
18. Consult with Office of Graduate Studies regarding the following, if applicable: - determine existing TA or RA commitments employee has with students (full time continuing faculty only) - remove access to admissions portal - removing graduate faculty status - complete "Change of Supervisor Form" to ensure supervision and financial support for graduate students is provided for	Faculty	
19. Notify Library of employee departure by emailing library@dc-uoit.ca	Department/Faculty	
20. Notify staff and colleagues of employee departure if applicable (draft communication provided by HR Advisor).	Department/Faculty	
21. Other considerations where applicable (add/subtract items): - magazine subscription cancellations/changes - cancellation of memberships - removal of employee name and contact information from departmental/faculty websites	Department/Faculty	