

Manager's Separation Checklist

Use this checklist when an employee is leaving DU. See the separation-specific checklist from Section Separation – Specific Addenda. For internal transfers, faculty appointment changes, student employees, or other special situations, contact your HR Business Partner to confirm which steps apply.

When you learn the employee is leaving

- ☐ Contact your HR Business Partner. Within the first 24 hours of notice.
- ☐ Send the employee's resignation/retirement notice to HR and the Unit's Business Officer.
- ☐ Confirm the employee's last day worked and separation date with HR and the Unit's Business Officer.
- ☐ Work with HR on any required approvals or documentation.

At least 2 business days before the termination meeting.

- ☐ Ensure the separation request is submitted by the Business Officer. Owner: Manager
- ☐ For involuntary separations, provide final-pay information to Payroll. Owner: Manager
- ☐ Approve the employee's final timesheet/timecard before access ends.
- ☐ Confirm when system/building access should end. Owner: Manager/ HR/ IT
- ☐ Make a plan for transferring work, files, responsibilities, and important contacts. Owner: Manager + Employee
- ☐ Tell the employee where to return University property. Owner: Manager

Employee responsibilities before leaving

- ☐ Submit outstanding expenses and timesheets. At least 2 business days before last day of work, if applicable.
- ☐ Complete knowledge transfer and transfer University records/files. At least 2 business days before last day of work if applicable.
- ☐ Update voicemail/email or other transition information as directed. On the last day of work.
- ☐ Return keys, ID/EcoPass, P-card, computer/technology, and other DU property to: _____. On last day of work.
- ☐ Complete the exit survey, if desired.

On last day of work

- ☐ Confirm University property was returned. Owner: Manager/Department
- ☐ Confirm access was removed or changed. Owner: IT/Security
- ☐ Update department contacts, websites, distribution lists, and coverage as needed.
Owner: Manager/Department

After the last day of work

- ☐ Notify HR Partner of any unresolved issues. Owner: Manager

Separation-Specific Addenda**Voluntary resignation**

- ☐ Written resignation received. Owner: Manager
- ☐ Resignation acknowledgment sent. Within the first 24 hours of notice. Owner: Manager
- ☐ Notice period and last day confirmed. Owner: Manager
- ☐ Any request to shorten or extend notice reviewed with HR. As soon as it is known.
- ☐ Counteroffer or retention discussion, if any, handled separately from offboarding.
Owner: Manager/ HR
- ☐ Reason for leaving captured appropriately.

Retirement

- ☐ Written retirement notice received. Owner: Manager
- ☐ Benefits/Retirement consultation offered or completed. Owner: HR
- ☐ Retirement effective date verified. Owner: Manager
- ☐ Recognition/announcement preferences confirmed. Owner: Manager
- ☐ Emeritus or retiree-status process reviewed, if applicable

Involuntary termination

- ☐ Decision basis and supporting documents reviewed. Owner: Manager/ HR
- ☐ Consistency and risk review completed. Owner: Manager/ HR/ OGC
- ☐ Required approvals obtained. Owner: Manager/ HR
- ☐ Termination letter and script finalized. Owner: Manager/ HR/ OGC
- ☐ Final pay and benefits materials ready. Owner: HR
- ☐ IT/security timing confirmed. Owner: HR/IT
- ☐ Meeting participants and location confirmed. Owner: Manager/ HR

- ☐ University property return and personal belongings retrieval plan confirmed. Owner: Manager
- ☐ Post-meeting department communication approved. Owner: Manager

RIF / position elimination – Work with your HR Partner on all Dates

- ☐ Business rationale and future-state structure documented. Owner: Manager/ HR/ OGC
- ☐ Affected position(s) and selection criteria reviewed. Owner: Manager/ HR
- ☐ Impact analysis completed. Owner: Manager
- ☐ Finance and leadership approvals completed. Owner: Manager/ HR/ OGC
- ☐ Severance eligibility and materials confirmed. Owner: Manager/ HR
- ☐ Notice sequence and communication plan finalized. Owner: Manager/ HR
- ☐ Position control and recruitment implications confirmed. Owner: Manager/ HR
- ☐ Post-RIF reconciliation completed. Owner: Manager/ HR

Questions? Contact your HR Business Partner before completing any separation action.