Employee Departure Checklist
Guide for Managers and Administrators

The process we undertake when an employee is departing from McMaster University through any reason, is a critical component of managing positive employee relations and experiences.

The intent of this checklist is to help guide Managers and Administrators through the process of voluntary resignations/departures and standard end of contract situations. (Please contact your Employee and Labour Relations Advisor for other situations).
The steps and timelines outlined below will enable you to ensure that all key elements of the process are executed in an efficient, compliant, and respectful manner.

Should you require assistance at any point throughout the process, please connect with your HR Advisor or FHS HR anytime.

### STEP 1: CONFIRM EMPLOYEE INFORMATION AND DEPARTURE DETAILS
(ASAP upon employee notification of resignation or at least 1 month prior to contract end)

This checklist is being completed for:

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<td>ID</td>
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**Position**

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**Manager**

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<th>Exit Date</th>
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Hold meeting with the employee to:

- Confirm plans to end employment based on current contractual arrangement **OR**
- Confirm date of resignation and ensure employee submits a formal resignation letter

- Address any related questions, confirm preferences for announcements, going away-parties, etc. and set expectations regarding required transition plans

- Refer employee to available career transition support (**as appropriate**) i.e.:
  - Homewood Health McMaster’s Employee and Family Assistance Program
  - McMaster’s Employee Career Services

### STEP 2: NOTIFY KEY INTERNAL PARTNERS TO CONFIRM REQUIRED CHANGES
(1-2 weeks prior to employee departure)

- **Notify HR:** Send HR Event Form and copy of resignation letter (if applicable) to HR Advisor or FHS HR representative. HR will ensure pay, pension/GRRSP, benefits are terminated, as applicable. Notifications from departments pre-termination are critical so that RoEs can be issued on time to meet CRA compliance requirements.
An Exit Interview may also take place upon employee and/or department request. Please contact your E/LR Advisor for assistance.

- **Notify Financial Affairs** who will:
  - ✓ Cancel any corporate credit cards; Diners, BMO Procurement Card, etc.
    Contact aphelp@mcmaster.ca
  - Notifications pre-termination are critical so that cards may be cancelled in alignment with an employee’s departure in order to mitigate risk and meet audit requirements.
    - ✓ Mosaic Finance Modules (travel and expense, etc.) – role access will be removed when employee terminates in system
    - ✓ Employees should complete final expense reports in advance of their departure from McMaster.
      - ✓ End MPDA/PDA allocations (if applicable) (Chris Sylvester – sylvest@mcmaster.ca)

- **Notify Department/Team members:** Hold meeting(s)/ send announcement(s) to share information and plans with the Department/Team. A farewell event may be planned based on the situation and employee preferences in alignment with University expense policy.

- **Notify University Partners/ Business Contacts:** of any related changes based on the nature of the role via call/e-mail as appropriate.

### STEP 3: COLLECT MCMASTER PROPERTY AND FINALIZE DEPARTURE DETAILS (Last day of work)

- Ensure employee has all personal belongings and any work related items have been transitioned.
- Collect Electronics (Laptop, Cellular Telephone and any Peripherals)
- Collect Employee ID Cards and Office Keys
- Collect All Access Cards (Axiom)

  Disable Office/Lab/Building access by emailing axiomrep@mcmaster.ca with the employee name, employee ID#, card # located above the bar code, and location(s) of access to be disabled.

  For FHS employees in a hospital building with swipe access:
  Disable Office/Lab/Building access by calling HHS Security at extension 76444 with employee name and ID. If you work within a St. Joseph’s Healthcare Hamilton location, please contact SJHH security within your building.

- Terminate Systems Access:
  - ✓ MACID - is not terminated it will be automatically maintained for life
  - ✓ Mosaic HR Modules – role access will be removed when employee terminates in system, however, Self Service will still be available for 18 months for collection of pay and T4/T4A information
  - ✓ McMaster email will be automatically terminated within 30 days
  - ✓ MacDrive, JIRA, Confluence, Office 365 Microsoft TEAMS Chat access (may depend on termination status)

### STEP 4: COMPLETE POST DEPARTURE LOGISTICS (within 1-2 Days of employee departure date)

- Ensure Office Servers Access is Disabled: [https://www.mcmaster.ca/uts/services/networkdrives/view_members.html](https://www.mcmaster.ca/uts/services/networkdrives/view_members.html)
| ☐ | Ensure MacID is removed from all MacDrive folders |
| ☐ | Remove employee name from EDL and Email lists - [https://edl.mcmaster.ca](https://edl.mcmaster.ca) |
| ☐ | Remove employee name from Department Website Contact List |
| ☐ | Remove employee name from University Directory Listing - [https://directories.mcmaster.ca/faculty-staff/](https://directories.mcmaster.ca/faculty-staff/) (Update Your Listing) |
| ☐ | Reset Telephone Name Display and Voicemail - [https://telecom.mcmaster.ca/voicemail.cfm](https://telecom.mcmaster.ca/voicemail.cfm) |
| ☐ | Forward Telephone Calls to ____________ |
| ☐ | Verify that Email and Email ID Suspended |
| | ✓ CSU revokes from termination report 30 days after termination date |

### OTHER DEPARTMENT SPECIFIC ITEMS (TO BE ADDED BY DEPARTMENT AS REQUIRED)
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