

Department Separation Checklist for Managers

Use this checklist to ensure all required separation tasks are completed for departing employees. Complete only the items that apply.

Confirm the Employee's Separation

- Obtain the employee's resignation or separation notice.
- File the resignation documentation in the department personnel file.
- Verify the employee's last day worked.

Provide the Employee Checklist

- Send the employee the Employee Separation Checklist and include any department-specific instructions.

Submit PASS Transaction

- Submit the PASS Transaction in PeopleSoft HCM using the appropriate termination code and effective date.
- If the employee is transferring to another Texas state agency, use the appropriate transfer termination code.
- If the employee is a supervisor or timekeeper, also process the PASS Transaction(s) necessary for updating the reporting structure for the team and update the timekeeper designations in PeopleSoft HCM appropriately.

Finalize Outstanding Personnel Records

- Finalize and close any outstanding personnel records, such as performance improvement plans, written reprimands, performance evaluations, or related documents, in [Perform2Achieve](#). Contact your [HR Consultant](#) if you have any questions.

Submit Final Timesheets

- Ensure employees' final timesheets are submitted for approval. You should also review the timesheets prior to the final period to ensure no timesheets are left outstanding.

Collect University Property and Protected Health Information (PHI)

- Collect all university-issued items no later than the last working day, including keys, badges, corporate travel cards, Buy Cards, computers, computer cords, and any other equipment.

- If applicable, confirm that any protected health information (PHI) in the employee's possession (e.g., at home, in a vehicle, bag, or on a computer) has been returned or destroyed in accordance with policy.

Update Department Records

- Update organization charts, webpages, telephone directories, shared mailboxes, distribution lists, and other department records.

Building and Systems Access

Unless otherwise notified directly as provided below, university access to buildings and systems will be removed on the effective date as submitted on the PASS transaction. If system or building access needs to be removed earlier, please make individual, direct requests as provided below.

- **Physical Access to Buildings:** For immediate access removal, contact badgeaccess@mdanderson.org or call 713-792-2343.
- **University System Access:** For immediate access removal, email idm@uth.tmc.edu.
- **Department-based systems:** Notify department administrator of specific access removal for department-based systems.
- **Copy Codes:** Contact Copy Services and submit a request form.
- **Corporate Travel Card or BuyCard:** Contact the Program Administrator – Johnathan Lawrence at 713-500-8192 or via email at Johnathan.D.Horton@uth.tmc.edu.

Exit Interview Information

After employees become inactive in the system, the Exit Survey link will be sent to the personal email address on file.

- Refer **classified and A&P** employees to their [HR Consultant](#) for exit interview questions.
- Refer **faculty** to the school's [Faculty Affairs](#) office.