

**UNIVERSITY OF MICHIGAN HEALTH SYSTEM - DEPARTMENT OF PATHOLOGY OFFBOARDING CHECKLIST**

**GENERAL INSTRUCTIONS**

*This form is used to document the return of Health System property and allow for the proper processing of employee transfers and separations. The form is to be completed by the Direct Supervisor or designee for every transferring or separating employee. The form is a tool for the Supervisor/Department, so upon completion of the form, the form can be filed with the Supervisor or maintained in department records. It is not required to be maintained in the employee's Blue Folder.*

**SECTION I: Identification**

Employee Name: \_\_\_\_\_ Employee ID: \_\_\_\_\_  
 Supervisor Name: \_\_\_\_\_ Last Day Worked (mm/dd/yy): \_\_\_\_\_  
 Separation  Unique name: \_\_\_\_\_  
 Transfer  Dept Transferring To: \_\_\_\_\_

1. Send an email to Kevin Newman (kmnewman) with the last date worked, if the employee is eligible for rehire, and transfer information (if applicable).
2. Contact Audrey for scheduling a voluntary exit interview with employee.

**SECTION II: Return of Property and Systems Audit**

*For any items that are not applicable to the employee, please indicate "N/A" in the "Date Returned" column.*

Property	Action (Separation/Transfer)	What to Do	Supervisor Initials	Date Returned (mm/dd/yy)
Employee's Payroll	Separation or Transfer	Verify vacation balance with employee Confirm any outstanding tuition reimbursement. Notify Payroll Office if retro termination has potential overpayment. Notify grant administrator if applicable (e.g. vacation payout). Inform employee of date of their last check and when they should expect to see vacation/PTO accruals paid out.  <a href="http://finops.umich.edu/payroll">http://finops.umich.edu/payroll</a>		
MCIT Systems i.e. Novell, Outlook, CareWeb, MiChart, MLearning, UMCL or other Health System specific systems Pathology Department: SCC, Pathnet, Atlas, WBI, web applications, death registry and other Pathology specific Clinical Systems	Separation or Transfer	Complete a PathAccountRequest-scc which can be found on the W drive under the GROUPS/PathAccounts folder and submit to Path-PDS-Operations.		
MasterControl	Separation or Transfer	Notify MasterControl Email Group Path-MCHelp		
ITS Systems i.e. MPa hways/Wolverine Access/eEmploy/WebNow/Data Warehouse  See - <a href="http://www.itcs.umich.edu/accounts/endaccount/">http://www.itcs.umich.edu/accounts/endaccount/</a>	Separation or Transfer	To terminate/delete access any staff member can complete the Online Access Request form at <a href="https://weblogin.umich.edu?cosign-accessrequest.dsc&amp;https://accessrequest.dsc.umich.edu/servlet/MaisDominoLogin">https://weblogin.umich.edu?cosign-accessrequest.dsc&amp;https://accessrequest.dsc.umich.edu/servlet/MaisDominoLogin</a> . The form is authorized and submitted to Access Services by the Unit Liaison for processing. To have the request expedited the Unit Liaison should contact Access Services 764-HELP (764-4357) once it has been submitted.		
Web page directory & Email lists	Separation or Transfer	Pathology Data Systems: Beth Gibson (bethgibs) individual mailing list owners		
Other System Access: i.e. Health System Data Mart	Separation or Transfer	Remove access via process for system OARS - <a href="http://goo.gl/ISKlp">http://goo.gl/ISKlp</a> CTools - <a href="https://ctools.umich.edu/portal">https://ctools.umich.edu/portal</a>		
Building/Office Keys	Separation or Transfer	Collect; retain for reassignment or return to Key ID office		

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Key Card for off site buildings (Arbor Lakes, Domino Farms, etc)	Separation or Transfer	Return to your department's contact or building security. Call 3-6376 if unable to obtain or return keys same day.		
ID Badge	Separation	Collect/return to KeyID office. Call 3-6376 if unable to obtain or return.		
Purchasing Card (P-Card)	Separation or Transfer	Collect and destroy. Fill out Pcard form ( <a href="http://finance.umich.edu/node/2023">http://finance.umich.edu/node/2023</a> ) and fax to: 734-764-3574		
Pager	Separation or Transfer	Return to Supervisor		
PDA/Blackberry (if issued by Department)	Separation or Transfer	If purchased by dept can be reallocated to another staff member		
Cell Phone (if issued by Department)	Separation or Transfer	If purchased by dept can be reallocated to another staff member		
Headset and Accessories (if issued by Department)	Separation or Transfer	Collect and retain as departmental resource		
Laptop/tablet and Accessories (if issued by Department)	Separation or Transfer	Collect and retain as departmental resource		
Hard Drive or Jump Drives (if issued by Department)	Separation or Transfer	Collect and retain as departmental resource		
M-Token (Wolverine Access) (if issued by Department)	Separation or Transfer	Collect and return to ITS Access Services (2019 ASB Box 1432 via campus mail)		
Uniform (if issued by Department)	Separation or Transfer	Based on departmental policy		
Employee's Computer Files and Personal Network Storage,	Separation or Transfer	Transfer work related emails to another employee and save work files to shared drive. MCIT recommends that you submit a MCIT service request for electronic device to be reimaged/wiped to remove any legacy data for next user.		
Books, Binders, or Notes that may be required for future work	Separation or Transfer	Collect and retain as departmental resource		
Patient information (records, appts, etc.) completed or reassigned	Separation or Transfer	Instruct employee to save electronic records to shared space and collect paper records		
Security Equipment (Security Dept only)	Separation or Transfer	Collect and retain as departmental resource		
Tools or Equipment (Maintenance/Facilities only)	Separation or Transfer	Collect and retain as departmental resource		
Blue Folder (UMHHC Staff only)	Separation or Transfer	If transfer, send to new department; if separation, keep in dept file for 7 years		
Voicemail/ITCOM	Separation or Transfer	Update voicemail/out of office or make account changes		
Other Equipment/Items:	Separation or Transfer	Remove access via process for that system		

\*See UMHHC Policy 01-04-511: Assignment and Retrieval of IT Access and Property

**SECTION III: Supervisor (or Designee) Discussion Checklist**

**Process Items - Transfers**

- Employee or you has updated voicemail ( <http://itcom.itd.umich.edu/exchange/voicemail/guide-vmonly.php> ) and email (if appropriate <http://itcs.umich.edu/itcsdocs/s4380/#settings> ) with an 'out of office' reply, indicating a contact person.
- Employee has been reminded to confirm their parking pass will work for their new location.

**Process Items - Separations**

- The employee's termination paperwork was completed and sent to HR.
- If required, a Termination Letter has been completed. (i.e., Employees terminated during probation and marked "Not Eligible for Rehire" are required to receive Termination Letters)
- The employee has been informed of their rehire status, expected date of their last check, and whether their accrued PTO/Vacation will be included. (Check information from your timekeeper)
- The employee has been reminded to contact the Benefits office regarding questions on COBRA coverage, their 403(b) account, etc. (HR/Payroll Service Center at 734-615-2000)
- The employee has been reminded to update their status in Wolverine Access if their home address is changing (for year-end W2 purposes) and in MCommunity to indicate their departure and destination, if desired ("Notice" section <http://itcs.umich.edu/itcsdocs/s4380/> )
- The employee has emptied their office/desk/locker of their personal belongings.
- The employee has updated voicemail and email with an 'out of office' reply, indicating a contact person.
- The employee has been reminded to contact the Campus Parking Office for information on turning in the parking pass in. (Employee is responsible for the cost of the parking pass until it is returned to the Parking Office - 777 North University - at 734-764-8291 )
- The employee has updated email forwarding in MCommunity to receive email after university access is terminated ( <http://itcs.umich.edu/itcsdocs/s4380/#settings> )