



VICTORIA UNIVERSITY
IN THE UNIVERSITY OF TORONTO

Employee Departure Checklist

Guide for Managers and Administrators

The process we undertake when an employee is departing from Victoria University 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 departures** (resignation, retirement, term contract departure).

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.

STEP 1:	CONFIRM EMPLOYEE INFORMATION AND DEPARTURE DETAILS • ASAP upon employee notification of resignation • 3 4 months prior to retirement • At least 1 month prior to term contract end date
This checklist is being completed for:	
Name	
Job Title	
Manager	
Exit Date	
Hold meeting with the employee to:	
☐	• Confirm plans to end employment based on current term contractual arrangement • Confirm date of retirement and provide notice to HR • Confirm date of resignation and ensure employee submits a formal resignation letter Resignation letter must include the following: ○ Date of issue ○ Last date worked/effective date of separation ○ If vacation time will be taken leading to the last date of work this should be clearly outlined
☐	Address any related questions, confirm preferences for announcements, going away-celebrations, etc. and set expectations regarding required transition plans
Consider Staffing Needs	
☐	Identify your staffing needs (to be discussed with dedicated HR Generalist)

STEP 2:	NOTIFY KEY INTERNAL PARTNERS TO CONFIRM REQUIRED CHANGES <i>(Minimum of 1 2 weeks prior to employee departure OR 3 4 months prior to retirement)</i>
☐	Notify HR at vic.hr@utoronto.ca who will: ✓ Share all relevant termination documents with Finance/Payroll and advise ROE to be issued ✓ Advise Payroll of the last day paid, vacation payout owed, and support for reason of termination for Payroll files and audit support ✓ Ensure benefits are terminated and notice of pension separation is prepared, as applicable ✓ Conduct an Exit Interview upon employee request Notifications from department pre-termination should be sent via email to HR and should include a copy of the resignation or Intent to Retire letter (if applicable). HR to Terminate Systems Access: ✓ Dayforce – terminated role will become available to employee for collection of pay and T4/T4A information ✓ UTORauth database – employee record will be terminated upon exit (expiry date to be inputted in the database by HR) ✓ Email account, VoIP services and central enterprise systems (AMS, ROSI, Quercus) – HR to submit a work request to decommission account ✓ Office servers access (network shared drive access) and O365 license – HR will advise IT to disable access Employees moving to another UofT department will keep their UTORid, email address, and O365 license. <i>Faculty retirees from Victoria University can keep their credentials. Alumni from Victoria University can set up an alumni email at Alumni Email University of Toronto Alumni (utoronto.ca).</i>
☐	Notify Finance at vic.finance@utoronto.ca who will: ✓ Cancel associated corporate credit cards once returned to the Finance Department ✓ Discontinue accounting system access for employee (if applicable) and collect e-token ✓ Discontinuing signing authority and obtain updated form when replacement is hired
☐	Notify Department/Team members: • Hold meeting(s)/ send announcement(s) to share information and plans with the Department/Team

STEP 3:	COLLECT VICTORIA UNIVERSITY PROPERTY AND FINALIZE DEPARTURE DETAILS <i>(Last day of work)</i>
☐	Ensure employee has all personal belongings and any work-related items have been transitioned
☐	Collect Office Keys, Fobs, and Punch Time Cards (if applicable)
☐	Collect Electronics (Laptop, Cellular Telephone and any Peripherals) to be returned to IT Department <i>Phone plan should be cancelled if a work issued mobile phone has been provided to the employee.</i>

STEP 4:	COMPLETE POST DEPARTURE LOGISTICS (within 1 2 Days of employee departure date)
☐	Reset Telephone Name Display and Voicemail
☐	Request employee name be removed from University Directory Listing – contact vicu.its@utoronto.ca
☐	Forward Telephone Calls to appropriate proxy.

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