

IT Guidelines for Handling Exiting Employees: Asset Reclamation Checklist

Employee Name: _____
 UBITName: _____
 Employee Phone Number: _____
 Person Number: _____
 Department Name: _____
 Supervisor: _____
 Separation Date: _____
 Transfer to another UB department? Yes No
 Transfer Dept. Name: _____
 Transfer Date: _____

Note: Mark N/A for non-applicable items.

<input type="checkbox"/>	In the case of an emergency where access to the Computing Center Building must be immediately revoked, notify JoAnn Greenzweig at 645-3558.
<input type="checkbox"/>	Final electronic SUNY timesheet submitted. Staff employee must work majority of the month to earn accruals.
<input type="checkbox"/>	Removal from STAFF-L, UNOFFICIAL STAFF-L, Clarity, and/or other internal department lists.
<input type="checkbox"/>	If changing permanent home address, list here so Payroll can send W2:
<input type="checkbox"/>	If immediate account termination is required, notify the UBIT Help Center with the exact date and time of closure. Otherwise, account will terminate 2-4 weeks after employee's last date on payroll. Note: If employee is an active student, account will not terminate.
<input type="checkbox"/>	Removed locally provided access to accounts on departmental equipment.
<input type="checkbox"/>	Notified employee that software licensed to employees, installed on personally owned equipment, must be uninstalled. (employee initial) _____
<input type="checkbox"/>	Files/records copied to departmental location
<input type="checkbox"/>	Employee notified that copies of UB records held on personally owned devices must be deleted. (employee initial) _____
<input type="checkbox"/>	Voicemail PIN: _____
<input type="checkbox"/>	Voicemail PIN changed
<input type="checkbox"/>	Keys collected
<input type="checkbox"/>	UB Card collected
<input type="checkbox"/>	Physical assets returned (e.g. laptop, chargers, tools, etc). Retain a copy of the asset return form(s).
<input type="checkbox"/>	Employee had access/knowledge of departmental P-card
<input type="checkbox"/>	P-card access has been terminated
<input type="checkbox"/>	P-card has been returned to the department designee
<input type="checkbox"/>	Canceled signature authority

[]	Advise employees to take any “personal” files with them that may exist in personal workspace locations such as UBFS, Myfiles, UBbox, local My Documents, or other workspaces.
[]	Advise employee to transfer any data files that they “own” such as class curriculum, as needed.
[]	Work with employee and employee’s supervisor to ensure that all necessary work-related files are transferred from the employee’s personal workspace to a shared workspace.

Note: Mark N/A for non-applicable items.

Supervisor’s Signature: _____ Date: _____

Revised: 01/2018