



Human Resources Division

Departmental Exit Procedures Checklist

This checklist should be completed for each staff member who resigns/retires from their position.

Name of Staff Member:	
Department:	
Position Title:	
End Date:	
Pre-Exit Preparations	✓
Check the date of resignation/retirement is appropriate as per contractual period of notice	
Letter of resignation/retirement to be accepted by head of department and/or director before sending original to Divisional Office. Then follow up it has been progressed to HR	
Notify department/divisional staff of resignation/retirement. Check with staff member to ascertain when it can become public knowledge	
Organise payment of any personal expenses on University p-card if relevant	
If a leave approver, ensure someone else has system access to do this (Email: payroll@otago.ac.nz)	
If an online timesheet approver, ensure someone else has system access to do this (Email: payroll@otago.ac.nz)	
If a FinanceOne or Marketsite approver, ensure someone else has access to do these	
If a budget holder, ensure someone else has delegation to approve expenditure	
Check the Staff Web Kiosk to ensure all annual and sick leave already taken, has been entered into the system	
Advising the Research Office (if employee was engaged in research and/or grant related work)	
Organise replacement cover for departmental roles such as Fire Warden, First Aid, DHSO, DIF etc	
Organise farewell function	
Obtain University staff ID card and forward it to the Proctors Office, notifying the Security Office to deactivate swipe card access	
Arrange for removal from University phonebook and department website	
Obtain office keys, if relevant	
Obtain University p-card, if relevant	
If staff member has a role based email account, organise for this to be transferred to another staff member	
If there is a genuine need for continuing access to University IT services this needs to be arranged via the External Username/ID Card Access Request Form	
Remove financial delegations and access to Finance One. (Forms can be found at: http://www.otago.ac.nz/financialservices/FSDForms/index.html)	
Remove any work related systems access (e.g. Business Objects - Contact: ITS Service Desk, Extn: 8888, Email: its.servicedesk@otago.ac.nz)	
Identify work to hand over to others	
Enter final online timesheet, if relevant	
Ensure staff member removes all personal belongings from work area	