



**RCJTC EMPLOYEE EXIT PROTOCOL AND CHECKLIST**

<b>EMPLOYEE NAME:</b>		<b>LOCATION:</b>	
<b>SUPERVISOR:</b>		<b>TERMINATION DATE:</b>	
<b>DATE CHECKLIST INITIATED:</b>		<b>DATE CHECKLIST COMPLETE:</b>	

It is the supervising manager’s responsibility to ensure that the following steps are taken when an employee leaves the Renfrew County Joint Transportation Consortium so that RCJTC property is returned and access to facilities and information systems is restricted as soon as possible in order to limit potential liability for the RCJTC.

**Section 1 - Employee Documentation**

Upon notice of resignation or termination of employment, the employee’s supervising manager completes and forwards all applicable documentation to the Human Resources Department as soon as possible to effect the accurate and timely processing of the final payment due to the employee compliant with Employment Standards and HRDC requirements.

	<b>Manager’s Responsibility</b>	<b>Contact Department</b>	<b>Action to be Taken by Contact Department</b>
<input type="checkbox"/>	Complete the CS1 form and submit letter of resignation or intention to retire, if applicable.	Human Resources	Update HRP system, place documentation in employee file.
<input type="checkbox"/>	Submit most recent attendance record.	Payroll	Issue final payments and Record of Employment.
<input type="checkbox"/>	Note and calculate all monies owing employee, i.e. vacation pay, overtime, or other monies due.	Human Resources Payroll	Issue final payments due employee.
<input type="checkbox"/>		Benefits	Terminate benefits (including notification to applicable registered pension plan).
<input type="checkbox"/>	Identify any outstanding expense claims due the employee (if applicable) and forward a completed Expense Claim form.	Accounts Payable	Settle outstanding Expense Claim(s).

**Section 2 – Position Replacement or Closure**

Upon notice of resignation or termination of employment, the employee’s supervising manager will need to consider and address tasks relative to position replacement or if applicable, position closure; items for consideration are noted below.

	<b>Manager’s Responsibility</b>	<b>Contact Department</b>	<b>Action to be Taken by Contact Department</b>
<input type="checkbox"/>	If position is no longer active, notify Human Resources and provide	Human Resources	Deactivate position in HRP and notify applicable union.

<b>Manager's Responsibility</b>	<b>Contact Department</b>	<b>Action to be Taken by Contact Department</b>
rationale.		
<input type="checkbox"/> If position is to be replaced, review Job Description, update where required, and request posting.	Human Resources	Amend job description, submit for job evaluation rating, and post position according to applicable union Collective Agreement.

### Section 3 – Financial

Upon notice of resignation or termination of employment, the employee's supervising manager will need to consider items with financial implication; items for consideration are noted below.

<b>Manager's Responsibility</b>	<b>Contact Department</b>	<b>Action to be Taken by Contact Department</b>
<input type="checkbox"/> Notify the areas within Finance if employee leaving has signing authority for cost centres and/or school/social cash bank accounts (i.e. social committee, milk program, etc.).	Finance	Transfer cost centre responsibility or close cost centres if applicable.  Remove from signing authority registers.
<input type="checkbox"/> Petty cash reconciliation.	Finance	Update A/P system.
<input type="checkbox"/>	Finance	Cancel purchasing card.

### Section 4 – Security

Upon notice of resignation or termination of employment, the employee's supervising manager arranges for the disabling of all applicable technology accounts and facility access that may be assigned to their employee.

*Note: There is a distinction between deleting and disabling user and login IDs and e-mail accounts. Deleting IDs and accounts could result in the loss of data and other relevant information if there is an audit or forensic review of the departing employee's work. Disabling IDs and accounts will prevent access and help preserve relevant audit and forensic information.*

<b>Manager's Responsibility</b>	<b>Contact Department</b>	<b>Action to be Taken by Contact Department</b>
<input type="checkbox"/> Request network user IDs be disabled.	Information Technology	Remove network rights and from network groups.  Delete/Copy/Archive employee's personal files from network folder(s) and/or laptop/desktop.  Disable Windows login account.  Disable access to directories/shared drives and distribute/archive computer files as instructed.
<input type="checkbox"/> Request disabling of access to computer accounts.	Information Technology	Disable remote access through web site and/or dial up.  Disable e-mail account.  Forward e-mail account as instructed. Activate automated e-mail reply.

Manager's Responsibility	Contact Department	Action to be Taken by Contact Department
		Unsubscribe employee from e-mail listservs and mailing lists.  Disable access to Financial, H.R., Trillium, and other network systems. Change Administrator passwords for all applications and accounts that departing employee had or may have had.
<input type="checkbox"/> Request that the security access code to facility is changed.	Plant	Change electronic security access code to physical building.  Communicate new security code to staff at the facility.

### Section 5 – Communication

Upon notice of resignation or termination of employment, the employee's supervising manager will need to consider some items relative to general administrative housekeeping and communication; items for consideration are noted below.

Manager's Responsibility	Contact Department	Action to be Taken by Contact Department
<input type="checkbox"/> Request that the telephone voicemail and extension be deactivated.	Information Technology	Deactivate the voicemail and telephone extension (or reassign as requested).  Update voicemail directory.
<input type="checkbox"/> Request the updating of the appropriate directories.	Information Technology  Information Technology  Individual Department(s)	Remove employee from the telephone directory.  Remove references to employee on the web site.  Update staff/department lists and organizational charts.
<input type="checkbox"/> Request the cancellation of cell phone/PDA (i.e. Blackberry) accounts.	Information Technology	Cancel service with cell phone/PDA providers.

Exit interview requested:     Yes     No                      Exit interview completed:     Yes     No

**SUPERVISOR'S SIGNATURE:** \_\_\_\_\_

**RCJTC EMPLOYEE EXIT PROTOCOL AND CHECKLIST**

This form is to be reviewed with and signed by the employee and the supervisor on the last date of employment.

<b>EMPLOYEE NAME:</b>		<b>DATE:</b>	
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**Please indicate that these items have been returned by the employee to the RCJTC. If it is not applicable, please indicate with N/A.**

- \_\_\_\_\_ Keys – desk/workstation, cabinets, office, buildings, vehicles, etc. (return to Plant and department)
  - \_\_\_\_\_ Communication Systems – cell phone, PDA (i.e. Blackberry), pager, etc. (return to I.T.)
  - \_\_\_\_\_ Computers – laptop, computer hardware, computer software/manuals, digital cameras (return to I.T.)
  - \_\_\_\_\_ Passwords – obtain special passwords unique to employee, i.e. computer log on, protected files, speciality software programs, voicemail
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- \_\_\_\_\_ I.D. Card (return to I.T.)
  - \_\_\_\_\_ Purchasing Card (return to Finance)
  - \_\_\_\_\_ Reference Material and/or Departmental Equipment (please specify)
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- \_\_\_\_\_ Other (please specify)

**Employee’s Personal Property**

- \_\_\_\_\_ Departing employee removed their personal property from their desk and office.
- \_\_\_\_\_ Employee was notified of availability of Community/Union Assistance Services (only if appropriate in cases of non-voluntary departure)

<b>We hereby acknowledge that the above list and all noted Board property checked has been returned to the Renfrew County Joint Transportation Consortium.</b>	
Departing Employee Signature: _____	Date: _____
Supervisor Signature: _____	Date: _____

Completed form to be forwarded to Human Resources for inclusion in the employee’s personnel file.