



DEPARTURE / RETIREE / TRANSFER CHECKLIST

The following checklist is intended to assist the supervisor or administrator of a departing employee as well as the departing employee (who may be leaving Rice, retiring, or transferring to a different department at Rice). Please note that not all tasks will apply to every situation, and when in doubt, please check with your school or division administrator.

Task	Supervisor/ Administrator responsibility	Employee responsibility	Completed? (Sup & EE initial)
Web time entry (WTE), PTO, Concur and other department approval authorizations	Update WTE approver (through Payroll, payroll@rice.edu)	n/a	
	Update PTO report approver or delegate (through HR, x2232 or people@rice.edu)	Update Concur assistant, travel arrangers or expense delegates in the Concur portal	
	Update Concur approver (through Payables office, concur@rice.edu)	n/a	
	Update any other department/division approval process	n/a	
Remove/transfer signature authority and access to Rice systems	Follow department/division process	n/a	
Final time sheet or PTO reports	Approve any final timesheets or PTO reports. Submit final PTO balance (or estimate) on termination form for final payout	Submit final timesheet or PTO report through Esther (or through other department process if not on WTE)	
Termination form	Follow department/division process for signatory approvals. Submit completed termination form to HR before the employee's last date of employment	n/a	
Resignation or other letter	Submit resignation or other letter to HR along with termination form	Submit resignation notice or letter to supervisor	
Key(s) - building/office/file cabinets/etc.	Follow departmental procedures for returning university keys	Follow departmental procedures for returning university keys	

University technology	Follow departmental procedures for returning university technology (cellphone, storage devices, laptops, etc.)	Follow departmental procedures for returning university technology (cellphone, storage devices, laptops, etc.)	
Rice ID/Pcard/Faculty club card/Parking card	Collect from employee on their last day and send to HR (MS-92), with the exception of Rice retirees, who exchange ID and Parking cards for Retiree cards.	Submit to supervisor or department administrator on last day. Retirees should exchange ID card at RUPD for retiree ID, and parking card at parking office for Retiree parking. Retirees keep existing Faculty club card.	
Uniforms/tools/other equipment	Follow departmental procedures for returning uniforms, tools, or and other equipment.	Follow departmental procedures for returning uniforms, tools, or and other equipment.	
Library books and other university property	N/A	Return all library books and other university property prior to your last day	
Expense reports through Concur/other reimbursements	Approve final expense reports or reimbursements.	Submit final expense reports or reimbursements and attach supporting receipts.	
Clear outstanding amounts due to the university	n/a	Employee will need to clear any outstanding amounts due to the university (through the Cashier's office), such as any parking fines, library fees, faculty club charges, and any other fees due to the university.	
Transition plan	Work with your employee on developing a transition plan (including outstanding projects, tasks, locations of files, etc.)	Complete transition of work (including outstanding projects, tasks and locations of files). <ul style="list-style-type: none"> • Notify department • Out of office message on email and voicemail • Cleaning out office • Farewell 	
Update employee contact information (if changing)	Update Rice and/or departmental online directory with new point-of-contact, if applicable.	Update address, telephone, or email through Esther, if changing. Update W-2 consent in Esther if interested in receiving W-2 electronically	

Note: A departing employee's access to Rice systems through their net ID will be disabled once the termination form is processed

Supervisor signature / Date

Employee signature / Date