

FACULTY/DEPARTMENT CHAIR/DEAN CHECKLISTS

FACULTY RETIREES

(Faculty) is retiring from the University as of (Date). In preparation for this departure, faculty and Department Chairs or Deans (or as requested by your Department) should complete the following checklists prior to the last day worked.

Employee Checklist:

- Regular Retirement** – Faculty should provide notice to the Department Chair and/or Dean as outlined in the Faculty Handbook. **THIS IS EXTREMELY IMPORTANT as your notification starts the separation process and allows further communication on pertinent information.** You should also complete the Regular Retirement Request Form at the following link: <https://sl.richmond.edu/gb>
- Early Retirement** – Faculty: For more information regarding recommended advance notice as well as Early Retirement eligibility for tenured faculty and continuing faculty, please visit the following link: <https://hr.richmond.edu/benefits/common/retirement/early-retirement-plan-faculty.pdf>. To apply, please visit the following link: <https://sl.richmond.edu/gc>
- Faculty Phased Retirement Program** – The Faculty Phased Retirement Program is intended to provide long-serving tenured faculty members with the opportunity for a gradual transition from full-time teaching to full retirement. The Phased Retirement Program may last either two or three years. The following link has more information: <https://hr.richmond.edu/current-employees/ready-to-retire/phased-retirement.html>
- If applicable, enter your forwarding address into BannerWeb (i.e. your permanent mailing address so we can send your W-2). This must be done prior to your last work date as BannerWeb access ceases **immediately** upon separation.
- Return University property (equipment, furniture, peripherals purchased with University funds whether currently housed in your office or home) to your Dean's Office or as otherwise requested by your School/Department. Note: Any equipment or furniture purchased with University funds is the property of the University, even if purchased with funds from a professional development account.
 - Keys to offices and classrooms. Under normal circumstances offices must be vacated not more than two weeks after graduation for the Spring semester or two weeks after final exams for the Fall semester. If it is agreed to allow exceptions, the Dean's and/or Department Heads should fill out the online request access form at <https://onecard.richmond.edu/using/card-access-request.html>

- University ID badge and/or ID card (arrange with department's administrative coordinator in A&S or with the Dean's Office in Law, SPCS, JSLS, and RSB). – contact One Card at <https://onecard.richmond.edu>
 - University credit card (where applicable)
 - University communication devices (Blackberry, cell phone) – contact Telecom Inbox
 - Parking permit/pass – remains active
 - GRTC tap card – automatically deactivated
 - Other University property
 - Remove all personal items from your assigned office
- University computer and accessories (cables, mouse, computer bags). **Retirees** interested in purchasing your University computer upon retirement, please see the following link: <https://hr.richmond.edu/retirees/index.html>
 - Approve all outstanding timesheets/leave reports as soon as they are submitted for any employee who reports to you. If applicable, send the name of who will be approving timesheets and/or leave reports while the position is vacant to URHR@richmond.edu.
 - Arrange any loan payoff/continuation (if applicable). Employees participating in any loan programs available from the University will be subject to fulfilling the repayment requirements specified in the loan agreement.
 - Ensure that work/open projects/student exams, etc., are accessible, including BOX folders.
 - Contact the Telecom Inbox two weeks before your last day for transferring the financial responsibility and for possibly purchasing the cell phone. If not purchasing the cell phone, you will need to work with the Telecom Office to reset the device back to its original settings.
 - Tuition Remission benefits for full-time faculty see the following link: <https://hr.richmond.edu/retirees/index.html#retiree-tuition>
 - Complete the IS Checklist for Faculty and Staff Separating from Employment at the following link: <https://is.richmond.edu/accounts-passwords/SeparationChecklist.pdf>

Please note: Network computing accounts for faculty will expire sixty (60) days after separation of employment, unless you are a student.

- If you do not have Direct Deposit, your final check will be mailed to the permanent address on file. If there is a change of address and you are not able to update your permanent address on BannerWeb prior to your last work date, please contact the Payroll Office at payroll@richmond.edu and Human Resources at URHR@richmond.edu to have the check mailed to the correct address and to have the address updated in our Banner system.

- Human Resources will send each faculty separating from the University a “Faculty Separation/Retirement Memo” with notification of benefit status following the last work date.
- Return this form to your Department Chair (or Dean in Law, RSB, SPCS, or JSLS) when completed.
- Upon retirement, you will automatically become a member of the Dunlora Society! The Dunlora Society was founded so that retirees have an opportunity to remain connected to the University. The society focuses on keeping the shared sense of community alive, while maintaining a continuing relationship with UR for its members. There is no membership fee. Human Resources host two events a year... spring and fall. It’s a nice and complimentary event with food and beverage, followed by a presentation/performance. It’s a great opportunity for you and a guest to stay engaged with other retirees from the University. The invitation will be sent to your richmond.edu address, so make sure you set up forwarding so it will bounce over to your personal address.

Department Chair or Dean’s Checklist:

- Have the Separation/Retirement PAF (Personnel Action Form) completed and sent to Human Resources at URHR@richmond.edu as soon as you are notified the faculty member plans to resign or at the conclusion of a term appointment. The PAF is located at the following link: <https://hr.richmond.edu/forms/index.html>. **THIS IS EXTREMELY IMPORTANT as this notification starts the separation process and allows further communication with the employee on pertinent information. Please make sure there are Preparer and Approver signatures on the PAF.**
- Make sure the faculty member has approved all current timesheets and/or outstanding leave reports for which they are responsible prior to their separation. If applicable, send the name of who will be approving timesheets and/or leave reports while the position is vacant to URHR@richmond.edu.
- Collected items should be returned to the following departments or otherwise as requested by the Department Chair or Dean.
 - Keys -- Facilities
 - University ID badge and/or ID card – One Card at <https://onecard.richmond.edu>
 - University credit card (where applicable) – PCard Office
 - University computer, etc. – Help Desk. Retirees interested in purchasing their University computer upon retirement, please see the following line: <https://hr.richmond.edu/retirees/index.html>
 - University communication devices (Blackberry, cell phone) – Telecom Office
 - Parking permit/pass – remains active
 - GRTC tap card – automatically deactivated

- Other University property – the appropriate department
- Remove all personal items from your assigned office

- Ensure your faculty member completes the items on the employee checklist before the last day of work.

- Ensure your faculty member has completed the IS Checklist for Faculty and Staff Separating From Employment at the following link: <http://is.richmond.edu/accounts-passwords/SeparationChecklist.pdf> with special attention to:
 - Any network access
 - Work folders in BOX
 - Work-related emails
 - Work-related files on their computer
 - ****IMPORTANT****

If work related files or e-mails have not been transferred from the departing faculty member before the last work date, approval from the Department Chair or Dean will be required in order to gain access to the relevant accounts.

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