

EMPLOYEE/SUPERVISOR CHECKLISTS

STAFF RETIREES

(Employee) is retiring from the University as of (Date). In preparation for this departure, employees and supervisors should complete the following checklists prior to the retirement date.

Employee Checklist:

- ☐ Regular Retirement – Staff: Submit your notification of retirement to your supervisor and HR as soon as your decision to leave UR has been finalized, but at least two (2) weeks prior to the retirement date. Advance notice is recommended. **THIS IS EXTREMELY IMPORTANT as your notification starts the retirement 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 – Staff: For more information regarding recommended advance notice as well as Early Retirement eligibility for staff, tenured faculty, and continuing faculty, please visit the following link: <https://hr.richmond.edu/benefits/common/retirement/employee-benefits-retirement/early-retirement-policy.pdf>. To apply for early staff retirement, please visit the following link: <https://sl.richmond.edu/gd>
- ☐ For hourly staff employees, submit your final pay period hours through your last day worked, including any sick leave taken, in BannerWeb or TimePro.
- ☐ For exempt staff employees, submit and have approved any outstanding leave reports inclusive of the last day worked.
- ☐ If applicable, enter your forwarding address into BannerWeb prior to your retirement (i.e. your permanent mailing address so we can mail your W-2). BannerWeb access continues only until your last day worked.
- ☐ Return University property to your Supervisor.
 - Keys
 - University ID badge or ID cards – contact One Card at <https://onecard.richmond.edu/>
 - University credit card (where applicable)
 - University communication devices (Blackberry, cell phone) – contact Telecom Inbox
 - University uniforms
 - Tools (where applicable)
 - Parking permit/pass – remains active
 - GRTC tap card – automatically deactivated
 - Other University property

- ☐ Return University computer and accessories (cables, mouse, computer bags) to IS HelpDesk. Retirees interested in purchasing your University computer upon retirement, please visit this link: <https://spidertechnet.richmond.edu/TDClient/1955/Portal/Requests/ServiceDet?ID=35287>
- ☐ 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 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 staff see the following link: <https://hr.richmond.edu/benefits/education/remission/index.html>
- ☐ Complete the Exit Interview Survey (optional) found at the following link: https://richmond.ca1.qualtrics.com/jfe/form/SV_1FHwKHrnn9hFrNj
- ☐ Exit Interview – Your feedback helps us create a better workplace. Please contact your HR Business Partner to schedule an interview. To identify your HR Business Partner, visit the following link: <https://hr.richmond.edu/contact/department-contacts.html>
- ☐ Complete the Checklist for Faculty and Staff Separating from Employment at the following link: <https://is.richmond.edu/accounts-passwords/SeparationChecklist.pdf>

Please note: Faculty and staff retirees receive a new (empty) Gmail account. The address for this account is the same as your regular Richmond.edu e-mail address. You will also have access to move personal files to the Google Drive cloud storage through the Richmond.edu Gmail account.

- ☐ Retirees and their spouses may join the Osher Lifelong Learning Institute through a special membership rate for UR faculty, staff, and retirees. Your first one-year Silver membership as a retiree is FREE. Thereafter, the cost is \$25 per year.
- ☐ 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.

Supervisor Checklist:

- ☐ For all retirements complete the Separation/Retirement PAF found at the following link: <https://hr.richmond.edu/forms/index.html>. Send the completed PAF and employee's retirement notification to URHR@richmond.edu as soon as you are notified the employee plans to retire. **THIS IS EXTREMELY IMPORTANT as this notification starts the retirement process and allows further communication with the employee on pertinent information. Please make sure there are Preparer and Approver signatures on the PAF.**
- ☐ Approve all outstanding timesheets/leave reports as soon as they are submitted prior to the employee's last day worked.
- ☐ If applicable, send the name of who will be approving timesheets/leave reports while the position is vacant to URHR@richmond.edu.
- ☐ Collected items should be returned to the following departments:
 - Keys -- Facilities
 - University ID badge and/or ID card – One Card – contact One Card at <https://onecard.richmond.edu>
 - University credit card (where applicable) – PCard Office
 - University communication devices (Blackberry, cell phone) – Telecom Office
 - University uniforms – the appropriate department
 - Tools (where applicable) – the appropriate department
 - Parking permit/pass – remains active
 - GRTC tap card – automatically deactivated
 - Other University property – the appropriate department
- ☐ Employee should return University computer and accessories (cables, mouse, computer bags) to IS HelpDesk. Retirees interested in purchasing their University computer upon retirement, please visit this link: <https://spidertech.net.richmond.edu/TDClient/1955/Portal/Requests/ServiceDet?ID=35287>
- ☐ Ensure your employee completes the items on the employee checklist before the last day of work.
- ☐ Ensure your employee has completed the Checklist for Faculty and Staff Separating from Employment at the following link: <https://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 emails have not been transferred from the departing employee before the last work date, the supervisor will be required to seek VP approval to gain access to the relevant accounts.

Revised 1/6/23