

Faculty of Medicine & Dentistry

Academic Employment Separation Checklist Items

Responsible to complete: Department Administrator or APO

Faculty Member:

Date of Termination:

Purpose:	
Itemize responsibilities of departing individual department and dean's office for an academic departure.	
- Please initial corresponding box as items completed - Please elaborate as required if completing electronically or attach additional information attached sheet(s)	
The FACULTY member is responsible to:	
<input type="checkbox"/>	Provide a formal letter of resignation or completed retirement form to Department Chair.
<input type="checkbox"/>	Meet with Chair/Divisional Director/APO to determine the following:
<input type="checkbox"/>	Support staff terminations or transfers.
<input type="checkbox"/>	Transition of patient care plans and records
<input type="checkbox"/>	Graduate student reassignments – Notify FGSR -
<input type="checkbox"/>	Research Associate, Post-doctoral fellow terminations or transfers
<input type="checkbox"/>	Teaching commitments reallocations
<input type="checkbox"/>	Research transition issues (grants, equipment, lab closeout, etc.)
<input type="checkbox"/>	Request for alternate/appropriate continued appointment if applicable i.e., Professor Emeritus/Transfers/adjuncts
<input type="checkbox"/>	Advise adjunct departments and affiliations with UA Research Groups, Centres and Institutes.
<input type="checkbox"/>	Complete lab closeout and return to original state. www.ehs.ualberta.ca
<input type="checkbox"/>	Office cleanup and return to original state.
THE DEPARTMENT IS RESPONSIBLE TO:	
<input type="checkbox"/>	Note the MED account will disable automatically one (1) business day after PeopleSoft employee status is updated. <u>If MED account needs to be disabled immediately contact MEDIT via phone 780-492-9731, email support@med.ualberta.ca, online</u>

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	https://servicedesk.med.ualberta.ca to disable access to network files, and desktops.
	The following IT related questions need to be answered by the departing employee or direct supervisor:
<input type="checkbox"/>	Disposition of network files?
<input type="checkbox"/>	Disposition of desktop files/iron keys/portable storage?
<input type="checkbox"/>	Disposition/reallocation of the desktop computing equipment (desktop, printer etc.)?
<input type="checkbox"/>	Disposition of software licenses associated to desktop/laptop?
<input type="checkbox"/>	Disposition of access to faculty systems with CCID access, ARO, UME Admissions, UofA Bursary System, Standing Committee System, Outpatient System? (Note: FARM access is automatically removed)
<input type="checkbox"/>	Termination of any AHS accounts (i.e. Email, Netcare, eClinician etc.)?
<input type="checkbox"/>	Disposition of Google Applications (drive, calendar, email) ownership permissions?
<input type="checkbox"/>	Contact Information Systems and Technology (IST): IST must be notified via telephone, email or online to disable access to the CCID. Note IST will set the individual up with an alternate access for bear track etc. CAUTION ** ensure you co-ordinate with the employee and IST for timing.
<input type="checkbox"/>	Chair to recommend to Dean – Adjunct or Professor Emeritus appointment (if applicable) along with any commitments of laboratory space or other resources. The time commitment for these resources is to be specified.
<input type="checkbox"/>	Department to change (TAMIS – U of A) Phones and update FARM.
<input type="checkbox"/>	Department to notify the FoMD Office of Research (Director of Research) of departure as soon as this has been confirmed.
<input type="checkbox"/>	Obtain list of grants from RSO – close, extend, change PI or transfer
<input type="checkbox"/>	Ensure all funding agencies are notified including Northern Alberta Clinical Trials & Research Centre – Discuss and Co-ordinate with RSO/FoMD Office of Research regarding who to notify ? Endowed Chairs – Dean to thank donors?
<input type="checkbox"/>	Revise signing authority forms etc.

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<input type="checkbox"/>	Determine & resolve disposition of major purchases through PER/PEA. https://policiesonline.ualberta.ca/PoliciesProcedures/Pages/DispPol.aspx?PID=37
<input type="checkbox"/>	Remove access to HOMER/MEDSIS/ E-class/FoMD Moodle
<input type="checkbox"/>	Determine Intellectual Property impacts related actions in accordance with UAPPOL Patent Policy and related procedures https://policiesonline.ualberta.ca/policiesprocedures/policies/patent-policy.pdf
<input type="checkbox"/>	Determine Relocation Allowance Repayment? for AHS 36 Months for UA 24 Months.
<input type="checkbox"/>	Ensure trainees have a new supervisor or are transferred.
<input type="checkbox"/>	Remove eTRAC, PeopleSoft Access & EDRMS
<input type="checkbox"/>	Ensure Corporate Card and Travel Card are returned. Ensure balance owed to U of A are collected.
<input type="checkbox"/>	Lab close-out procedure – www.ehs.ualberta.ca
<input type="checkbox"/>	Research Equipment transfer negotiated by Department according to University of Alberta policies and procedures (see “Equipment and Furnishings Asset Management Policy” (provide link: https://policiesonline.ualberta.ca/PoliciesProcedures/Pages/Facilities-Properties-and-Equipment.aspx)).
<input type="checkbox"/>	Notifies Security, Health & Safety Advisor https://www.med.ualberta.ca/about/facilities/security to coordinate:
<input type="checkbox"/>	Obtain the exiting faculty members keys to their office, research space and buildings in accordance with Faculty policy
<input type="checkbox"/>	<p>Disable faculty member’s ONEcard access, PIN codes and passwords for any U of A space intrusion alarm systems.</p> <p>The faculty member may retain their ONEcard under the following conditions:</p> <ul style="list-style-type: none"> • They will be maintaining a relationship with the university • They are an alumni or student of the university <p>Separating faculty members with funds or other services attached to their ONEcard account must attend the ONEcard Office in HUB Mall to close out their account and turn in their card.</p> <p>In all other conditions the faculty member must provide their ONEcard to their supervisor upon separation. The supervisor will forward the card to Mark Noble, who will return it to the ONEcard Office.</p>
<input type="checkbox"/>	Collect and return the faculty member’s AHS identification/access card to AHS Protective Services.

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<input type="checkbox"/>	Ensure that the faculty member <ul style="list-style-type: none"> ▪ completes a Laboratory Closeout in accordance with U of A Environment, Health and Safety requirements. ▪ disposes of surplus equipment in accordance with UAPPOL SMS requirements. ▪ disposes of hazardous chemicals in accordance with U of A Environment, Health and Safety requirements. ▪ notifies U of A Environment, Health and Safety to adjust applicable Biosafety Registries and Radioisotope Permits as required.
<input type="checkbox"/>	Clinical Arrangements to be considered:
<input type="checkbox"/>	Access to electronic medical records (eClinician, Netcare, etc.)
<input type="checkbox"/>	PACS access (diagnostics)
<input type="checkbox"/>	Signature
<input type="checkbox"/>	TANDEM
<input type="checkbox"/>	Remote User Access, FOB must be returned
<input type="checkbox"/>	Northern Alberta Clinical Trials & Research Centre
<input type="checkbox"/>	Specialist on Call – Notify Medical Affairs
<input type="checkbox"/>	AARP Arrangements: If the individual is a member of an AARP, the department must ensure the AARP – letter of termination – Schedule C, is signed by the physician and send copies to Alberta Health, Alberta Medical Association, AHS – Finance Department. Any Billings need to be completed for this individual.

DEAN'S OFFICE

When the Department Chairs submits the resignation to the Dean as per Article 17 of the Faculty Agreement, it should include a Pay Action Form with the end date

The Dean will prepare a letter to the staff member accepting the resignation copying the Department Chair, the Provost, the Departmental APO, Vice Deans (Education, Faculty Affairs, Research), Chief Operating Officer and AHS Medical Affairs if a clinical Dept ** Each of the above individuals are responsible to advise their respective areas.

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The faculty member hereby agrees to reimburse the University for any costs outstanding as by:

- Cheque enclosed
- Authorized deduction from payroll

APO Signature

Date

Faculty Member Signature

Date