



Instructions: Employee Exit Transfer Form

When a UMass Boston employee is exiting the university or transferring to another department on campus, the exit form should be completed by the Department Head or supervisor at least two (2) weeks before the employee's **Last Working Date** or as soon as reasonably possible. When the submit button is clicked, the completed form will be issued to key UMB departments: Contracts and Compliance (Procard and Property), Facilities, IT, Controller's Office, Access Control, Human Resources, Library, Campus Services, Public Safety, ORSP, and Academic Affairs.

The Employee Exit & Transfer Form is part of the Employee Exit & Transfer Policy. The purpose of the form is to ensure the safeguarding of University assets and resources as employees terminate from UMB and/or transfer within the UMB campus.

This policy and form is applicable to all employees of the university including benefitted and non-benefitted employees. It also applies to persons who work on this campus not in the capacity as a university employee (i.e, food services, Bookstore, Cleaning services, etc), consultants, visitors, undergraduate students and graduate student employees who have access to university equipment, office(s), systems, etc.

Instructions on how to complete form:

Type of Exit: If the employee is resigning or transferring with a standard two (2) week notice, check Standard, Transfer of Position, or Transfer in UMass System. If an employee is retiring from UMB check Retirement.

If circumstances warrant immediate action, check IMMEDIATE.

Submitted by: Enter first name, last name and email address of the Department Head or Supervisor completing this form.

Employee's Information: Enter first name, last name, email and employee ID of exiting employee. Enter the exiting employee's Department, Department Head, email, telephone number, Last Working Date, Termination Date from Payroll.

Last Working Date: The last date the employee will be working for

UMB. Some employees take vacation or work intermittent before being terminated from the payroll system.

Termination Date from Payroll: The termination date indicated on ePAF. (Electronic Personnel Action Form).

And complete department and work location (Example: Quinn Administration Building 3/040).

Computer Applications and Security: In accordance with the University's Data and Computing Standards, ALL University system accounts and access will be DEACTIVATED for exiting employees on the Last Working Date.

Exception: If the Department Head or Supervisor is requesting an extension for a specific period of time for any application, the application should be checked with a deactivation date entered. UMass Boston retirees may maintain access to their email.

Department Head Checklist: Department head or supervisor should check these tasks and confirm whether the exiting employee has completed these tasks before the Last Working Date.

Employee Notifications: Department Head must confirm that the employee has been informed of their obligations.

SUBMIT When the submit button is clicked, this form will be electronically sent to the key departments listed above, including the submitter and Department Head. Each department will respond to the submitter and Department Head by email within 2 (two) business days with a copy to the employee identifying property, system access, and financial obligations of the employee, if applicable.

If you have questions, please contact Human Resources at 7.5150.

Note:

If any keys, property, etc have not been returned to the department head, notify Human Resources.