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TERMINATION OF EMPLOYMENT
CHECKLIST

for Association Technologists

TERMINATION OF EMPLOYMENT

INITIATION

- ☐ HR determines the need, timing, and terms of separation.
- ☐ HR notifies IT. Give IT as much advance notice as possible if the departure is expected!

PROPERTY

- ☐ Recover association's physical property in possession of the terminated employee (e.g., laptop, cell phone, security key, home printer, software). Change all local passwords on these devices.
- ☐ Ensure that the employee's laptop does not have any software that would allow the former employee to gain access remotely.
- ☐ Require terminated employee to sign a document confirming that all property has been returned to the association.

EMAIL & NETWORK ACCESS

- ☐ Change all passwords including Active Directory, AMS login, and any other systems. Revoke any multi-factor authentication tokens.
- ☐ If a personal cell phone or tablet was set up to access association email, wipe or remove the email account. We have found that this is best done by the HR manager during the exit interview, as it minimizes the chance of accidentally wiping personal information from the user's personal device. Remember – you only want to remove your association's data!
- ☐ Create an out-of-office message on terminated employee's email box in accordance with association's communication guidelines. A good out-of-office message may include both an email address and a phone number for another department member or supervisor.
- ☐ Remove terminated employee from generic email distribution lists, such as "all staff."
- ☐ Remove terminated employee from specialized email distribution lists or aliases.
 - Make sure someone else is a member, so messages are not overlooked.
 - If the user was responsible for any shared mailboxes or calendars, reassign responsibility.
- ☐ Provide access to terminated employee's email and files (local and network).
 - Ensure that any association files that may have been stored in the cloud are stored on the network.
 - Determine who will need access to the terminated employee's network files.
 - Assign someone to monitor email.
 - Determine length of time email box will be available.

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PHONE

- ☐ Change the employee's telephone voicemail password.
- ☐ Change the employee's outgoing voicemail message in accordance with association's communication guidelines, or forward extension to another department member.
- ☐ Assign someone to monitor voicemail or disable voicemail entirely.

PERSONNEL

- ☐ Require related staff to change their passwords if there is any risk of shared passwords.
- ☐ Contact vendors that the terminated employee managed or worked with, including, but not limited to:
 - Outsourced IT support
 - Enterprise system support (finance, AMS, HRIS, Intranet, etc.)
 - Office access
 - Payroll
 - Banking
- ☐ Remove terminated employee from authorized list of contacts.
 - Remove or change credentials (usernames/passwords).
 - Add a replacement staff person if necessary.

VERIFICATION

- ☐ Depending on the size of your environment, you may want to audit your system to ensure only current employees have access. Twice a year, HR should provide IT with a list of current staff members, and a second list of all employees terminated in the past six months. This will allow IT to verify that no terminated employees are still in the system.

*In some cases, you may perform these steps in a different order. For instance, you may have a user who is departing as an employee but staying on as a consultant. In such a case, the user may need to be removed from distribution lists and from access to files, but retain her email address. Such requirements should be coordinated in advance with IT.