

Checklist for Managers When an Employee Is Retiring

At least 4-6 weeks prior to anticipated retirement date

- Receive employee's notification of intent to retire
- Encourage employee to review the Retiree Benefits website located on the Human Resources website (<https://hr.depaul.edu/Benefits/Retiree/index.html>). The website will provide information such as retirement eligibility, retiree medical details, and details of other benefits available to retirees of DePaul.
- Encourage employee to contact the Benefits Department of the Office of Human Resources at ext. 28232 to discuss steps to retire and to schedule a one-on-one session if necessary.
- Complete a Personnel Action Form (PAF) to notify Human Resources of the retirement. (For staff only)
- Notify employee that an optional exit interview is available through Employee Relations. The employee can contact Employee Relations at ext. 28500 to schedule an exit interview.

Prior to retirement date

- Collect employee materials
 - Collect keys
 - Office/Desk/Cabinets
 - Collect technology equipment
 - Cellular phone or PDA (cancel service)
 - Pager/Two-way radio
 - Laptop
 - Accessories
 - Collect building/DePaul identification card (s)
 - Forward DePaul ID to ID Card Services
 - Collect department materials and other proprietary items (e.g., files, records)
- Contact or have employee contact Laurie Krauel, Procurement Services, at ext. 25272 to deactivate Procard (if applicable)
- Inform employee that a new retiree ID can be obtained from ID Card Services. It will grant access to campus as well as the library.
- Complete the Information Services form at http://is.depaul.edu/communication/telephone/faculty_move.asp to deactivate phone access.
- Resolve scheduled trainings, workshops, and travel issues/reimbursements.
- If necessary, schedule a time for pickup of personal items. A property removal form will be needed (contact Facility Operations - Loop ext. 28682 LPC ext. 57377).
- Employee Exit Survey (optional) <https://hr.depaul.edu/Forms.html>

Once the Benefits Department receives and processes the retirement, an email notification is sent to NetAdmin to disable Peoplesoft access and to change the Outlook email account to a retiree account if applicable.

For questions regarding retirement processing, contact the Benefits Department at ext. 28232.