UNIVERSITY OF DENVER

Manager's Checklist for Separating Employees

The Manager's Checklist for Separating Employees is a guide to assist managers of employees transitioning roles on campus or leaving the University of Denver. Please note that each unit may have additional requirements or protocols and individuals must inquire within their unit to ensure all requirements.

Employee Exit Survey: When a separation is processed, an automated email will be sent to the employee. They will only have access to the survey **while employed**. Please encourage separating employees to complete the survey process prior to separation. Employees can contact our HR Partners, at AskHRPartners@du.edu with questions regarding this process or to request and in-person exit interview.

- Operational Responsibilities
  - ✓ Collect letter of resignation (if resigning) from employee.
  - ✓ Submit a separation request (myDU.edu> Employee Resources > Administrative Resources and Processes > Separations > Employee Exit Survey) prior to the biweekly or monthly payroll deadline. See the Payroll folder in PioneerWeb for important deadlines.
  - ✓ Direct employees to the Separations page of the HRIC website to learn about transitioning their benefits (if benefitted) and related information.
- Administrative (as applicable)
  - ✓ Notify key constituents of the employee's departure.
  - ✓ Remove access to department folders/shared drives.
  - ✓ Change password on shared accounts or mailboxes.
  - ✓ Change voicemail passwords.
  - ✓ Remove employee from applicable web pages/listings.
  - ✓ Arrange to remove employee's name from department email distribution/contact lists.
  - ✓ Change voicemail message to reflect departure and include information on new point of contact.
  - ✓ Log in to PioneerTime and approve the employee's timesheet on their last day (note: you will not be able to do this after the employee's last day).
  - ✓ Work with the employee to review all Zoom cloud recordings. Have them delete any that are no longer needed. If any need to be kept by your department, you or the employee can email support@du.edu requesting to transfer them to another user.
  - ✓ Before their last day of employment, employees should set up a delegate (either their supervisor or business officer) in their Travel & Expense (Concur) account for any outstanding expenses. Instructions for setting up a delegate are attached below.
- Items to Collect (as applicable)
  - ✓ Key(s) to office(s), work/mail room(s), and filing cabinet(s).
  - ✓ P-card, EcoPass, & DU ID should be destroyed - All are deactivated upon separation
  - ✓ Laptop/desktop and all related equipment (power cords, keyboards, etc...) as well as any other property of the University of Denver.

Setting up Expense Delegates

Modified on: Wed, Nov 2, 2022 at 2:28 PM

Learn how to set up expense delegates in Pioneer Travel & Expense.

F.A.Q.

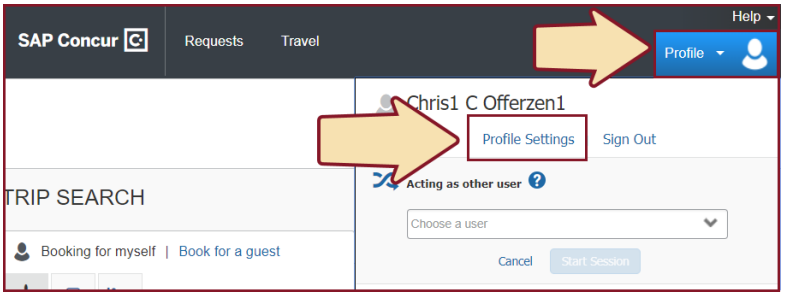
How are delegates used in Pioneer Travel & Expense?

Delegates in Pioneer Travel & Expense are generally employees who are responsible for helping a superior compile and document expense reports. **When setting up a delegate, keep in mind that only the person who made the purchases on an expense report can submit the expense report.** Delegates can, however, add receipts, book travel, and prepare the reports.

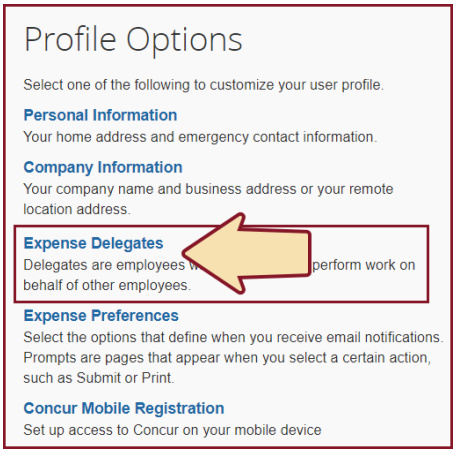
1. (https://dusharedservicescenter.freshdesk.com/support/solutions/articles/30000034033-logging-in-to-pioneer-travel-and-expense)**Log in to Pioneer Travel & Expense** (https://dusharedservicescenter.freshdesk.com/en/support/solutions/articles/30000034033).

2. Make sure your e-mail address has been verified in Pioneer Travel & Expense. This process will not work properly if your email isn't verified.

3. Click **Profile > Profile Settings.**

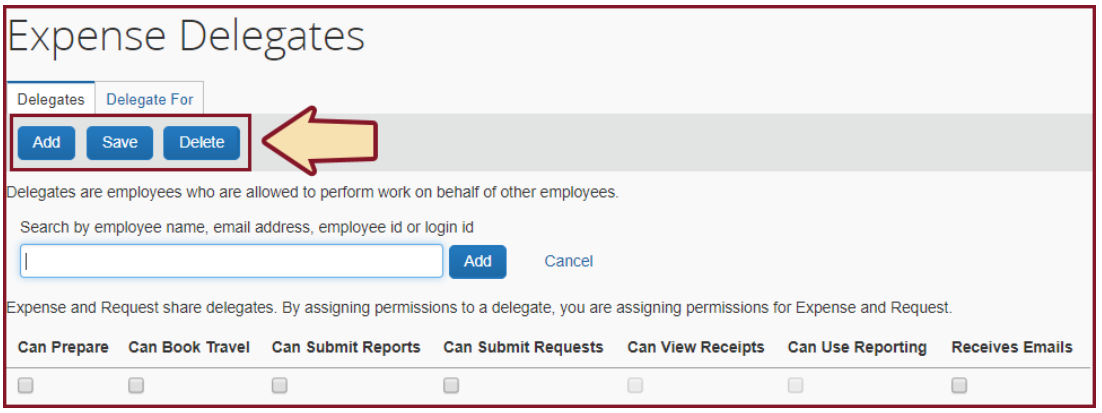


4. Click **Expense Delegates.**



5. Click the **Add** button.

6. Search for the employee by name, when found, click on their name.



7. Select the check boxes to assign the desired permissions for this delegate, when finished, click the **Save** button.

Important Note:
There can only be two delegates with "**Can Use Reporting**" permissions for each user.