



Departments must make separation actions in a timely and expeditious manner to ensure (1) proper internal controls and (2) good business operations as part of [VCU's Enterprise Risk Management Program](#), [VCU's Code of Conduct](#) and the [state's Agency Risk Management and Internal Control Standards \(ARMICS\)](#). Use the checklist below to document separation actions.

IMPORTANT! When an employee dies while in service and the death...

- is work related, contact Employee Relations **immediately** – do not use this checklist.
- is **not** work related, use the checklist below:

Home Department Responsibility Checklist includes, but may not be limited to, the following actions:

For ALL employees, as applicable:

- Initiate a **TERME ePAF (NOAEPAF)** in Banner **immediately** using the last date of employment and termination code 5T77 (Death) (see [PAF Reference Guide](#) for instructions).
- Contact **Payroll Services** at payroll@vcu.edu or 828-0740 **immediately** with the last employment date and to request that the Banner name be changed to "The Estate of [Employee Name]."
- Submit [Final Timesheet](#) to hrdocs@vcu.edu **as soon as possible** to ensure that correct leave balances are reported.
- Notify **VCU Police - Access Control** at 828-9373 to terminate building access.
- Contact each of the **Banner Administrative Systems** (Finance at finsecurity@vcu.edu, Human Resources at hrsecurity@vcu.edu and Student at stusecurity@vcu.edu) to cancel Banner system access, as applicable.
- Complete a HelpDesk remedy ticket at www.ts.vcu.edu/ to cancel **Telecommunications** long-distance user code and access to the VCU email system (**Lotus Notes** or **Google appsforVCU**, as applicable).
- Use the applicable **Procurement Services'** email below to **immediately** cancel access to:
 - Purchase card (pcard) and travel card – email corpcard@vcu.edu.
 - eVA – email evapurch@vcu.edu.
- Refer the deceased's representative to **Payroll Services** (payroll@vcu.edu or 828-0740) for instructions regarding how the Estate may obtain the deceased employee's final pay.
- Request from the deceased's representative the return of all institutional **property** (e.g., keys, computer, cell phone, beeper, uniforms, etc.) and promptly return the employee's identification card to the **VCUCard Office** and parking decal, as applicable, to the **Parking Office**.
- Maintain all **records** (e.g., payroll, purchasing, etc.) in accordance with applicable record retention policies and procedures. *NOTE: All personnel and timekeeping records must be kept in a safe and confidential manner for five years.*
- Reasonably accommodate requests from the deceased's representative for the retrieval of personal effects from the workplace.

Additional steps for deceased employees who are faculty and classified staff:

- Notify **Benefits** at benefits@vcu.edu or 827-1723 **as soon as possible** so that a Notice of Claim can be filed on the employee's group life insurance coverage through VCU.
- Refer the deceased's representative to **Benefits** at benefits@vcu.edu or 827-1723 for information regarding retirement accounts and health benefits for surviving covered dependents.

For departments whose deceased employees are faculty researchers or receive extramural funding:

- If the deceased employee served as the Principal Investigator (PI) on a funded sponsored project, contact the **Office of Sponsored Programs (OSP)** for instructions. If the sponsored project under the deceased PI's leadership will be assumed by another VCU employee, contact OSP **immediately** to coordinate a change of PI. No funded sponsored project may remain active without a sponsor-approved PI leading the project. *NOTE: If such matters are not resolved, the home department assumes all financial responsibility for sponsor-imposed disallowances or penalties.*
- Contact **VCUeRA (VCU electronic Research Administration)** at erahelp@vcu.edu to cancel VCUeRA system access (grant proposals and contracts, IRB protocols and IACUC protocols), as applicable.
- Check to see if a current approved IRB or IACUC study(ies) exists. If either study is ongoing, notify OSP **immediately and either** (1) submit a change in IRB research form to name a new PI or an amendment to the protocol to name a new PI; **or** (2) close the study.
- Contact **Effort Reporting** at effortreport@vcu.edu to remove coordinator access, as applicable, and/or to resolve outstanding reports.

Required Signatures

IMPORTANT! To comply with state and university policies and procedures, this checklist **must** be completed above; **signed** below by the manager and personnel administrator; **and returned with the final timesheet** to VCU Human Resources through ImageNow¹ **within the pay period** in which the employee dies while in service. **If this form is not completed and returned within the specified timeframe, the department will be charged \$200.**

Manager: _____ (Print Name) _____ (Sign) _____ (Date)

Personnel Administrator: _____ (Print Name) _____ (Sign) _____ (Date)

¹ See instructions for emailing at www.hr.vcu.edu/pdf_docs/ImageNow_Email_Instructions.pdf and for faxing at www.hr.vcu.edu/pdf_docs/ImageNow_Fax_Instructions.pdf.