DMH EXIT CHECKLIST

| | | | Workforce Member's Name: _____ Date: _____ Manager's Name: _____ Manager's Signature: _____ | | |

Step	Required Action	Complete? ✓ = *Action completed*	Purpose	Contact Person	Time Frame
1	**Complete Notice of Separation Form** (See the URL link to the Form below.)	☐	To notify Human Resources of employee's intent to separate from the agency. Will automatically be routed to HR who will follow up with the exiting employee and/or their manager as needed.	DMH Human Resources Liaison, Designee or Area HR Manager. Please note that the DMH HR Assistant is the primary contact for Central Office voluntary separations.	Form should be submitted online as soon as practicable after a Workforce Member's notice is given to their supervisor.
2	**Complete Network Request Form – Offboarding Notification** (See the URL link to the Form below.)	☐	To ensure disablement of employee network and access to systems and/or identity transfer to new Commonwealth Positions where necessary. This is separate from the Shared Access Request Form.		
3	**Confirm Personal Contacts on File**	☐	To ensure employee continues to receive communications regarding benefits and any HR related updates.		

4	**Collect Computer**	☐	To ensure equipment is returned to EHS/DMH inventory for reassignment and to ensure database is updated for accurate count of equipment, unless Workforce Member is transferring to another location or position within the Commonwealth, then follow EHS IT instructions.	IT Help Desk	Upon Workforce Member's last day within the unit.
5	**Collect Cell Phone**	☐	To ensure equipment is returned to EHS/DMH inventory for reassignment and to ensure assigned telephone number is deactivated, unless Workforce Member is transferring to another location or position within the Commonwealth, then follow EHS IT instructions.	IT Help Desk	Upon Workforce Member's last day within the unit.
6	**Collect Parking Pass**	☐	To ensure all relevant information is shared with EHS/DMH Facilities, Human Resources and Building Management.		Upon Workforce Member's last day within the unit.

2

DMH EXIT CHECKLIST

7	**Notification given to EHS Support Services/IT Help Desk**	☐	To ensure former Workforce Member is "deleted" from all EHS/DMH networking systems, including e-mail.	IT Help Desk	Request to IT Help Desk should be made at least two weeks prior to departure date with an effective date as of Workforce Member's last day within the unit. DMH-DL-ITRequests@massmail.state.ma.us
8	**Complete Facilities Work Order Form** (See the URL link to the Form below.)	☐	To ensure EOHHS-Facilities and Building Management are alerted to the employees exit and to initiate a cleaning request for the office space.		
9	**Collect Workforce Member Access Card/Photo ID**	☐	To ensure former Workforce Member access to designated DMH areas is terminated and vacated space is identified.		Upon Workforce Member's last day within the unit.
10	**Collect Keys (Unit, Office, File Cabinet, etc.)**	☐	Where applicable, to recover any unit, office door or file cabinet keys from departing Workforce Member. Also, any other office keys when appliable, to bathroom, firebox, etc.		Upon Workforce Member's last day within the unit.
11	**Update Org Charts, Contact Lists**	☐	To ensure all responsibilities and workload has continued coverage after the employee has exited their position.		

3

DMH Exit Checklist v. 2025 05

12	**Assess Workload and Redistribute Responsibilities**	☐	To ensure that emails received by the exiting employee are redirected accordingly. Can be requested post-exit by manager or with the Network Request Form.		
13	**Auto-Reply/Out of Office**	☐	To ensure no loss of Active EPRS if a supervisor/manager is leaving mid-fiscal year. Only relevant if exiting employee is a supervisor/manager.		
14	***Super/Mgr Only* Turn over copies of EPRS for Reporting Employees**	☐	To ensure all responsibilities and workload has continued coverage after the employee has exited their position.		
15	**Terminate/Suspend Voice Mail**	☐	To ensure former Workforce Member access to Voice Mail is Terminated/Suspended.		Upon Workforce Member's last day within the unit.

16	**Ensure Records are Dispositioned or Retained and Accessible, if needed.** Review the Workforce Member's records (hardcopy and electronic) to determine which records can be dispositioned, which need to be retained, and, of the records that need to be retained, which need to be readily accessible to other Workforce Members and how best to ensure that access.	☐	To verify what records the Workforce Member has and where they are located (file cabinets, storage spaces, computer drives, email, etc.) To determine which records need to be retained and which can be dispositioned properly. It is a good time to ensure that records are being properly maintained and when appropriate to clean file cabinets, storage rooms, offices, etc. so it does not become a problem for the Workforce Member's successors.		Start review as soon as practicable after a Workforce Member's notice is given to their supervisor. **Note**: Any emails that should be accessible following the Workforce Members departure should be saved on a shared Drive or forwarded to the Workforce Member who is assuming the departing Workforce Member's duties.
17	**Conduct Exit Interview**	☐			
	Instructions		Managers with departing Workforce Members are responsible for ensuring that all 11 action steps, if applicable, are completed. After completing all required steps, please fill in check boxes, sign, and date this checklist, and provide one copy (either hard copy or preferably scanned and emailed) to the DMH Human Resources Liaison or Area Employment Services Manager.		

5

DMH EXIT CHECKLIST

Featured Links:

Step	Link Name	Link URL
Step 1	Separation Form	https://app.smartsheet.com/b/form/c1919cc0204044758c7b8887c9bfd50a
Step 2	Network Request Form	https://massgov.sharepoint.com/sites/EHSInformationTechnology/Lists/EOHHS%20Forms/DispForm.aspx?ID=30&e=6qmEB3
Step 8	Work Request Form	https://eohhsintranet.ehs.state.ma.us/realestate/request_form.asp