Retirement Manager's Checklist

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This checklist outlines the steps that a manager should apply when reviewing an employee's retirement.

RETIREMENT CHECKLIST		
Upon learning of a retirement, complete the following portion of the checklist:		
Notification	○ Ensure employee has submitted a Letter of Retirement with the effective date in writing. ○ Forward letter of Retirement to HRSC. ○ Advise employee that HRSC will send a retirement package which contains all required forms and information for Group Life and Extended Health benefits. ○ Advise employee to contact Plannera for pension options and information. ○ Advise employee in writing of employer acceptance of termination.	☐
Entitlements	○ Advise employee that annual entitlements are earned and will be pro-rated for the fiscal year to last day paid. Any negative entitlement or other bank balances (e.g. time in lieu) will be processed in accordance with the Salary Overpayment and Recovery Guidelines.	☐
Timecards	○ Ensure all timecards have been entered by running the Timecards Missing Inquiry. ○ If all timecards have not been entered, request employee to submit missing timecards for processing. ○ If there are any future dated timecards please have employee delete them. ○ Ensure employee timecard delegate status is terminated (contact Ministry Administrator for assistance when applicable)	☐
Outstanding Debts	○ Check with Financial Branch to verify if there are any outstanding debts: • Accountable Advance • Education Advance • Petty Cash Advance • Relocation Expense • Travel Advance * Indicate debt details on Termination Notification Form. See Timecard/Termination form section below.	☐

Government Systems	○ Five days prior to termination submit a request to remove computer access including specific applications [i.e. One Client Service Model (OCSM), remote access (i.e. VPN, Connectra, etc.), mailboxes, etc.].
	○ Send request to remove MIDAS access to your MIDAS ministry approver prior to the employee's last day of employment:
	  ○ MIDAS Financials to your Financial/Corporate Services Branch
	  ○ MIDAS HR/Payroll to your Business Partner Team.
	  ○ MIDAS Time keeping Administrator to PSCMIDAS-MHD@gov.sk.ca
	○ Advise employee to remove all applications from home computer that were obtained through the Employer/Microsoft agreement.
	○ Provide updates to appropriate coordinator:
	• Distribution Lists (internal) • Email Groups (admin support)
	• Telephone Records/Government (Financial/Corp (Corporate Services) • Signing Authorities Directory Services)
	• Organization Charts (Business Partner Team) • Scheduling Lists(internal)
	○ Ensure that government landline phone calls are not forwarded to personal cell phones
	○ Record passwords pertaining to accessing telephone messages and computer files.
	○ Advise employee to record final voicemail greeting with phone number of contact person.
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Staff Planning/ Replacement	○ Please refer to Taskroom for information about the staffing process. Your HR Business Partner is also available for support.	☐
Work Transition	○ Obtain a summary of project work, process documentation, location of files (physical and electronic), and any other items related to the transfer of knowledge. ○ Advise employee to transfer any electronic work files from personal drive to Ministry shared drive or disc (if applicable). ○ Develop a transition plan for departing employee's workload. This should include timelines and an outline of temporary job and training responsibilities. ○ Communicate work transition plan to co-workers and any other stakeholder(s).	☐
Retirement Recognition	○ Contact HRSC to validate employee service. ○ Draft Retirement letter for recognition of years of service. ○ Forward to Deputy's Minister's office to forward to Minister's office for signature. ○ Discuss retirement banquet and/or gift with employee as per FAM 4320. ○ As per FAM 4320, arrange for permanent head to present letter and/or gift to retiring employee. ○ SGEU Retirement Certificate Request Form: ➢ https://www.sgeu.org/member-dashboard/forms/sgeu-retirement-certificate-request-form	☐
Prior to employee's last day, complete the following: **If Termination date is prior to today's date this prompts immediate action**		
Timecards / Termination Notification Form	○ Complete Termination Notification Form and send to HRSC. ○ Ensure supplementary pay requests are submitted to HRSC (e.g. TAHD). ○ Ensure all timecards have been completed.	☐
Government Property	Collection of government property may occur on the last day of employment or as appropriate, including but not limited to: • Security / Access Card • Calling Card(s) • Cell Phone / Blackberry/ Pager • Credit Card(s) / Purchasing Card* • ID Card • Keys /Uniform • Computer / Office Equipment *If employee is an authorized purchaser, contact suppliers and vendors to remove employee as authorized purchaser.	☐
HRSC / Plannera Employee Communication	○ If In Scope, contact shop steward to advise of retirement. ○ Advise employee to contact HRSC if he/she has an address change for T4 purposes. ○ Advise employee of their last pay date and the time period it covers. ○ Advise employee that their final pay stub and entitlement report will be available on PSC Client. ○ Advise employee to contact the HRSC to discuss the conversion option for Group Life Insurance.	☐
Record of Employment	○ Advise employee that the ROE will be sent electronically to Service Canada.	☐

Saskatchewan