

Catholic Archdiocese of Atlanta

RECORDS CHECKLIST for DEPARTING EMPLOYEES

Employee Name: _____

Last Day of Work: _____

The following checklist is provided to help departments address the disposition of the records in the possession of, or those created by, a departing employee. It is divided into two sections – one for the Employee, and one for the Employee’s Supervisor. Form must be completed and returned to Human Resources before employee can receive final paycheck.

EMPLOYEE ACTIONS: Check off appropriate task when completed.

DONE	N/A	PAPER RECORDS
___	___	Records (documents, files, folders, correspondence, memos, reports, etc.) given to supervisor.
___	___	Research/data notebooks/reference materials/subject files returned to department.
___	___	Audio Visual materials and photographs returned to the department or transferred to Archives.
___	___	Personal records separated and removed from the premises.
___	___	Absolutely no archdiocesan records may be destroyed without permission from the Chancellor.
___	___	For assistance, contact the Office of Archives and Records, 404-978-0796.
DONE	N/A	ELECTRONIC RECORDS
___	___	Retrieved and/or deleted any personal files or personal information on your office computer, departmental/local server, and from central file spaces, like shared drives.
___	___	Retrieved personal email files, or files on the email servers, that you wish to retain.
___	___	Obtained the permission of the department head to copy any digital files or records.
___	___	Relayed (transferred, copied) to the appropriate administrator any and all archdiocesan data files, electronic documents and records, that are stored on your office computer, home computer, or in your personal server files spaces.
___	___	If you possess sole access rights to an administrative database, software application, information system, etc., that is necessary for program or department/agency administration or operations, you have transferred the passwords to the appropriate administrator, or arranged for an administrator to be given the access needed to assure continued operations.
___	___	Removed any archdiocesan owned/licensed software loaded/installed on a home computer.
___	___	For assistance, contact the Information Technology Office, 404-885-7241.

Employee Signature: _____

Date: _____

SUPERVISOR ACTIONS:

Done	N/A	RECORDS/ DATA SYSTEMS
___	___	Notified the Archives and Records Department and the Information Technology Department, of the employee’s departure, so that data systems access and email accounts will be terminated, and all archdiocesan digital and paper records are retrieved.
___	___	Asked the employee to transfer all archdiocesan records (paper and electronic) held in his/her work area or home office/computer to his/her supervisor. In particular, prevented the employee from retaining, copying, deleting, destroying or removing in any way archival, confidential or sensitive records. Records transferred to: _____ Date: _____
___	___	Obtained passwords to any administrative database, software application, information system, etc., for which the employee possesses the sole access rights and that are necessary for program, agency or archdiocesan administration operations.
___	___	Deleted the employee’s access to department data systems, email servers, voice mail systems, and email lists. Removed any passwords or file protections (file access passwords) unique to the departing employee. Immediately deleted the employee’s access to any protected health information if relevant, as defined under HIPAA.

Supervisor Signature: _____

Date: _____

RETURN THIS FORM WITH SIGNATURES TO THE HUMAN RESOURCES OFFICE PRIOR TO THE EMPLOYEE’S LAST DAY OF WORK.