

Voluntary Termination or Transfer Checklist

Employee Information

NAME:

POSITION:

DEPT:

TRANSFER/TERM DATE:

MANAGER:

ADDRESS AND PHONE:

Supervisor/Manager

Accept signed resignation letter and send to Senior HR Director, ELR-Help and/or UIHC-ELR for efilng	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____
Collect electronic, paper and project files when appropriate	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____
Disconnect phone, voice mail and data connection (Contact ITS (tnsconnect@uiowa.edu , 335-2945))	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____
Remove from all building access list (Send email to building coordinator)	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____
Change shared pass codes/passwords	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____
Remove mail folder (if applicable)	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____

HR Staff

Schedule exit interview with employee	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____
Complete final paper Employee Time Record and send to Payroll. Provide a copy of the final ETR to ITS Billing Administrator	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____
Update Organizational Chart	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____
Modify Workflow routing paths	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____
Update HR System Access	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____
Notify appropriate personnel of employee's exit: include name, Hawk ID, department, supervisor, and term/transfer date	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____

Transfer

Initiate transfer form (confirm with dept.)	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____
Forward original personnel and medical files (ADA exceptions) to new University dept. Maintain original grievance file	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____
Disconnect phone, voice mail and data connection (Contact its-tnsconnect@uiowa.edu , 335-2945)	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____

Termination

Initiate termination transaction into workflow	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____
Maintain original personnel, grievance, and medical file for the current year plus four years (ADA exception), then purge.	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____
Remove from approved drivers list in Driver's License Review System/Self-Service	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____
Contact benefits if necessary	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____
Cancel Signature Authority	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____
If employee is a foreign national, contact Immigration Services to obtain guidance regarding the employee's eligibility to stay in USA	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____
Discuss: Unused vacation time payout, unused sick time non-payout, life insurance termination, COBRA, flexible spending accounts	<input type="checkbox"/> Done	<input type="checkbox"/> N/A	Supv. Initials: _____

Employee Responsibilities

- Update self-service address and direct deposit. (Access to site for payroll and benefits will continue for 18 months but requires a password to be kept active and current.)
- Return personal parking hang tag and access card to University parking, or transfer University employee parking permit
- If leaving the University and over the age of 55, call University Benefits at 335-2676 (preferably 3 months prior to separation)
- Contact ITS Help Desk to unsubscribe from any personal subscribed Listservs
- Fill out a cancellation from Recreational Services Payroll Deduct Membership at the Campus Recreation and Wellness Center, Field House, or Hawkeye Tennis Recreation Complex
- Clear voice mail password; remove personalized message
- Disable work phone number from Duo authentication. Contact ITS for assistance if necessary.
- Review IT information for retirees (if applicable)
- Revise and remove delegates on electronic calendar
- Update ownership for shared departmental accounts and resources. Contact ITS for assistance

Items To Be Returned By Employee

- Office keys
- University vehicle keys
- Software (media) and/or software licenses (site licensed and non-site licensed)
- If employee has university issued tablet (iPad, Surface, etc.), contact ITS-Techservices@uiowa.edu, prior to final day of employment
- Desk Keys
- Filing cabinet keys or other furniture keys
- If the employee received equipment/furnishing accommodations, it is to stay in the department unless other arrangements, including financial reimbursement, are made with employee
- University ID card (retirees keep, if IowaOne card, they keep)
- All equipment (drives, cables, tools, laptops, PDA's, cell phones, pages, etc.) including equipment at home
- VISA procurement cards, reconcile pending charges and enable another user to reconcile final statement (turn in card to manager)