Employee Terminating or Transferring Checklist

Employee Information

NAME: 
POSITION: 
DEPT: 
TRANSFER/TERM DATE: 
MANAGER: 
ADDRESS AND PHONE: 

UNIVERSITY HUMAN RESOURCES

Employee Terminating or Transferring Checklist
Updated 3/2021

Supervisor/Manager

Accept signed resignation letter and send to Senior HR Director, ELR-Help and/or UIHC-ELR for efilng

☐ Done ☐ N/A Supv. Initials: 

Collect electronic, paper and project files when appropriate

☐ Done ☐ N/A Supv. Initials: 

Disconnect phone, voice mail and data connection (Contact ITS (tnsconnect@uiowa.edu, 335-2945)

☐ Done ☐ N/A Supv. Initials: 

Remove from all building access list (Send email to building coordinator)

☐ Done ☐ N/A Supv. Initials: 

Change shared pass codes/passwords

☐ Done ☐ N/A Supv. Initials: 

Remove mail folder (if applicable)

☐ Done ☐ N/A Supv. Initials: 

HR Staff

Schedule exit interview with employee

☐ Done ☐ 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

☐ Done ☐ N/A Supv. Initials: 

Update Organizational Chart

☐ Done ☐ N/A Supv. Initials: 

Modify Workflow routing paths

☐ Done ☐ N/A Supv. Initials: 

Update HR System Access

☐ Done ☐ N/A Supv. Initials: 

Notify appropriate personnel of employee's exit: include name, Hawk ID, department, supervisor, and term/transfer date

☐ Done ☐ N/A Supv. Initials: 

Transfers

Initiate transfer form (confirm with dept.)

☐ Done ☐ N/A Supv. Initials: 

Forward original personnel and medical files (ADA exceptions) to new University dept. Maintain original grievance file

☐ Done ☐ N/A Supv. Initials: 

Disconnect phone, voice mail and data connection (Contact its-tnsconnect@uiowa.edu, 335-2945)

☐ Done ☐ N/A Supv. Initials: 

Updated 3/2021
### Terminations

<table>
<thead>
<tr>
<th>Task</th>
<th>Status</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiate termination transaction into workflow</td>
<td>![Done]</td>
<td>N/A</td>
</tr>
<tr>
<td>Maintain original personnel, grievance and medical file for this year plus four years (ADA exception), then purge.</td>
<td>![Done]</td>
<td>N/A</td>
</tr>
<tr>
<td>Remove from approved drivers list in Driver's License Review System/Self-Service</td>
<td>![Done]</td>
<td>N/A</td>
</tr>
<tr>
<td>Inform partner offices as needed (FSDS, Benefits, TAT, Worker's Compensation, etc)</td>
<td>![Done]</td>
<td>N/A</td>
</tr>
<tr>
<td>Cancel Signature Authority</td>
<td>![Done]</td>
<td>N/A</td>
</tr>
<tr>
<td>If employee is a foreign national, contact Immigration Services to obtain guidance regarding the employee's eligibility to stay in USA</td>
<td>![Done]</td>
<td>N/A</td>
</tr>
<tr>
<td>Discuss: Unused vacation time payout, unused sick time non-payout, life insurance termination, COBRA, flexible spending accounts</td>
<td>![Done]</td>
<td>N/A</td>
</tr>
</tbody>
</table>

### 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*
  *unless retiring or transferring to another position
- 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)