



Voluntary Termination or Transfer Checklist

Employee information

Name	
Position	
Department	
Transfer/Term Date	
Manager	
Address and Phone Number	

Supervisor/manager

Accept signed resignation letter and send to senior HR leader, ELR-Help and/or UIHC-ELR	Done N/A	Supervisor initials
Collect electronic, paper, and project files when appropriate	Done N/A	Supervisor initials
Disconnect phone, voicemail, and data connection	Done N/A	Supervisor initials
Remove from all building access list	Done N/A	Supervisor initials
Change shared passwords	Done N/A	Supervisor initials
Remove mail folder (if applicable)	Done N/A	Supervisor initials

HR staff

Schedule exit interview with employee	Done N/A	Supervisor initials
Complete final time record and provide a copy to ITS Billing Administrator	Done N/A	Supervisor initials
Update organizational chart	Done N/A	Supervisor initials
Modify Workflow routing paths	Done N/A	Supervisor initials
Update HR system access	Done N/A	Supervisor initials
Notify appropriate personnel of employee's exit: Include name, Hawk ID, department, supervisor, and term/transfer date	Done N/A	Supervisor initials

Transfer

Initiate transfer form	Done N/A	Supervisor initials
Forward original personnel and medical files (ADA exceptions) to new university department. Maintain original grievance file	Done N/A	Supervisor initials
Disconnect phone, voicemail, and data connection	Done N/A	Supervisor initials

Termination

Initiate termination transaction into Workflow	Done N/A	Supervisor initials
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Maintain original personnel, grievance, and medical file for the current year plus four years (ADA exception), then purge	Done N/A	Supervisor initials
Remove from approved drivers list in Employee Self-Service	Done N/A	Supervisor initials
Contact University Benefits if necessary	Done N/A	Supervisor initials
Cancel signature authority	Done N/A	Supervisor initials
If the employee is a foreign national, contact Immigration Services to obtain guidance	Done N/A	Supervisor initials
Discuss unused vacation, unused sick time, life insurance termination, COBRA, flexible spending accounts	Done N/A	Supervisor initials

Employee responsibilities

Update Self-Service address and direct deposit	
Return personal parking hang tag and access card to Parking and Transportation or transfer parking permit	
If leaving the university and over the age of 55, contact 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	
Review ITS information for retirees (if applicable)	
Revise and remove delegates on electronic calendar	

Update ownership for shared departmental accounts and resources	
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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 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 the employee	
University ID card	
All equipment (drives, cables, tools, laptops, PDAs, cell phones, etc.)	
VISA procurement cards, reconcile pending charges and enable another user to reconcile final statement (turn in card to manager)	