



## 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	<b>Done</b> N/A	<b>Supervisor initials</b>
Collect electronic, paper, and project files when appropriate	<b>Done</b> N/A	<b>Supervisor initials</b>
Disconnect phone, voicemail, and data connection	<b>Done</b> N/A	<b>Supervisor initials</b>
Remove from all building access list	<b>Done</b> N/A	<b>Supervisor initials</b>
Change shared passwords	<b>Done</b> N/A	<b>Supervisor initials</b>
Remove mail folder (if applicable)	<b>Done</b> N/A	<b>Supervisor initials</b>

## HR staff

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

## Transfer

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

## Termination

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

## 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

## 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)	