# Employee Terminating or Transferring Checklist

## Employee Information

<table>
<thead>
<tr>
<th>NAME:</th>
<th>TRANSFER/TERM DATE:</th>
</tr>
</thead>
<tbody>
<tr>
<td>POSITION:</td>
<td>MANAGER:</td>
</tr>
<tr>
<td>DEPT:</td>
<td>ADDRESS AND PHONE:</td>
</tr>
</tbody>
</table>

## 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: 

## Transfer

- 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: 

**Termination**

Initiate termination transaction into workflow
- □ Done □ N/A Supv. Initials:

Maintain original personnel, grievance, and medical file for the current year plus four years (ADA exception), then purge.
- □ Done □ N/A Supv. Initials:

Remove from approved drivers list in Driver’s License Review System/Self-Service
- □ Done □ N/A Supv. Initials:

Contact benefits if necessary
- □ Done □ N/A Supv. Initials:

Cancel Signature Authority
- □ Done □ 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
- □ Done □ N/A Supv. Initials:

Discuss: Unused vacation time payout, unused sick time non-payout, life insurance termination, COBRA, flexible spending accounts
- □ Done □ 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-Teachservices@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)