

**Transfer/Termination Checklist
Department Responsibilities**

Instructions:

Departments need to complete this form with any employee who is separating from employment or transferring to another unit. It should be used to certify that all University property has been returned, rights to access University property or services have been appropriately discontinued, and forms and files are processed appropriately.

Name of Departing Employee _____

Responsible Person(s) Supervisor/Manager/Dept Staff. Enter appropriate name in this column.		Date/initial	N/A
	University Property: Computer _____ Cell phone _____ Pager _____ Software _____ Tools _____ Manuals _____ Uniform _____ Library books/materials _____ Research equipment, data/databases: _____ Other: _____		
	Access Codes & Keys: Security/alarm codes/keys _____ Office keys _____ Desk Keys _____ Filing cabinet/furniture keys _____ Building access codes/keys _____ Departmental parking placard/key(s) _____ University vehicle keys _____		
	Computer & Phone Access: Unsubscribe from email distribution and list serves by notifying list serve owners _____ Revoke passwords: email _____ system access _____ workflow routing _____ shared pass codes _____ Remove files from hard drive & server _____ Clear voice mail password _____ Purge messages _____		
	Miscellaneous Office Issues to Address: Reassign duties and/or projects in process _____ Determine location/access to all work related files _____ Reassign access to account(s) _____ Cancel Signature authority _____ Complete Change of Address form _____ Remove mail box/slot _____ Update departmental phone lists _____ Update employee databases _____ Update building or floor directories _____ All personal items are removed from work area _____ Submit employee's final time record to Payroll _____ Confirm accurate transfer of any research accounts to another unit or institution: _____		
	UI Cards (return to appropriate UI Dept): Reconcile account & collect procurement card _____ Corporate American Express Travel Card _____		
	Employee ID Card _____ UI retirees may maintain a UI ID. UI Health Care ID cards should be returned to Hospital Human Resources. Employees with IowaOne cards should destroy them.		
	Other: _____		

Transfer/Termination Checklist
Human Resources Responsibilities

Responsible person(s): HR Unit Rep/Or Designate Enter appropriate name in this column.		Date/Initial	Not Applicable
	Review HR separation process with departing employee and give him/her the "Transfer/Termination Checklists".		
	If employee is terminating , initiate termination transaction into Workflow for electronic signatures prior to the date of termination . If employee is transferring , confirm that new department initiates transfer form. Verify that any Workflow forms in this employee's inbox have been approved and/or forwarded.		
	Schedule and complete Exit Survey/interview		
	Advise employee to see Benefits to arrange necessary appointments and complete paperwork		
	Send employee's final time record to Payroll		
	Review University guidelines regarding P&S and Merit personnel files in the Operations Manual or view the information at: http://www.uiowa.edu/~our/opmanual/iii/07.htm#72		
	Advise foreign nationals in an employment-based nonimmigrant status and those in the process of obtaining employment-based permanent residency to contact Immigration Services to obtain information regarding their immigration status upon termination of employment with The University of Iowa.		
	If terminating, explain that access to the SelfServe site for payroll and benefit purposes will continue but requires that password is kept up to date. If access is denied, follow "Sign-in Help" instructions on the site. https://login.uiowa.edu/uip/login.page?service=https://hris.uiowa.edu/portal/		
	Other:		