

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. Utilize this form to certify that all University property is retrieved, rights to access University property or services are appropriately discontinued, and forms and files are processed appropriately.

Name of Departing Employee _____

Department: _____

Last Date of Work: _____

Supervisor: _____

| Responsible Person(s) Supervisor/Manager/Department Staff. Enter appropriate name in this column. | Task | Date/initial |
|---|---|--------------|
| | <p>Human Resources (HR): Sign and Route Form 101 (EHRA) or Form 201 (SHRA) with resignation letter to HR.</p> <p>Final Performance Management Plan signed by supervisor and employee. Submit to HR.</p> <p>Finalize timesheet and leave records.</p> | |
| | <p>University Property: Computer _____ Cellphone _____ Software _____ Tools _____ Manuals _____ Uniform _____ Library books/materials _____ Research equipment, data/databases: _____ Other: _____</p> | |
| | <p>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 _____</p> | |
| | <p>Computer & Phone Access: Unsubscribe from email distribution and list serves by notifying list serve owners _____ Revoke passwords: <ul style="list-style-type: none"> • email _____ • system access _____ • workflow routing _____ • shared pass codes _____ Remove files from hard drive & server _____ Clear voice mail password _____ Purge messages _____</p> | |

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| | <p>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: _____</p> | |
| | <p>Procurement Cards: Reconcile account & collect procurement card _____ Corporate American Express Card _____ Reconcile account & Collect Travel Card _____</p> | |
| | <p>One Card Building Access: Submit Building Access Authorization request access change: _____</p> | |
| | <p>Other:</p> | |