# Classified and Professional Staff

# Transferring Employee Checklist

(This form is for employees hired through a competitive recruitment process – it is not for reassignments or data changes)

**Note**: Employees should review the following list with their supervisors to find out which items are applicable to their situation.

## Employee Responsibilities

* Submit letter of resignation, including the date you will leave your current position. Talk to your supervisor about whether you will be requesting to use annual leave or comp time prior to your last day in the department.
* Tell your supervisor what department you will be moving to, start date, and the name of your new supervisor.
* Employees transferring within the UW to another benefits eligible position need not take any action in regards to their benefits unless there is a change in employee status (e.g., from classified staff to professional staff).
* Turn in all building/departmental keys (building, office, file cabinets) and equipment.
* Pro-card
* Travel VISA card
* Pager
* Cell phone
* Laptop
* Provide supervisor with access necessary to retrieve departmental data/information. Move files to departmental shared drives.
* Provide supervisor with voice mail access code.
* Update contact information in Workday.
* Update email auto-reply to inform senders of your transfer, and to include appropriate contact information.

## Supervisor/Departmental Responsibilities

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| **Leave Records:** Receive letter of resignation or notification of end date. |
| **Workday:** Complete Workday inbox items, update departmental contact information if not done by employee. |
| **Building Access:** Receive all keys (office, building, desk, file cabinets) and building use, along with departmental equipment (cell phones/laptops). Remove access to electronic building locking system database (Proxy card). |
| **Equipment:** Collect UW issued-equipment such as laptops, cell phones, software, or other tools. |
| **Electronic and Paper Files:** Determine location of computer and paper files; if necessary, move office files to shared drives. Obtain departmental computer passwords and computer access codes. |
| **Computer Access:** Remove/delete access to network directories and electronic calendar. For the Nebula network, email nebula-support@cac.washington.edu. |
| **Communications Access:** Remove access as necessary <http://www.washington.edu/itconnect/phones/>.   * Cancel/change access to UWATS account * Return and cancel pagers * Return and cancel cell phones * Transfer or cancel voice mail as necessary |
| **Systems Access:**   * Contact local system administrators to remove local access * Remove access to UWConnect user group by contacting the ISC at [ischelp@uw.edu](mailto:ischelp@uw.edu). |
| **Cancel ProCurement Card or Reconciler Account Access:**  When a cardholder changes departments, it is necessary to email all cancelation requests to [procard@uw.edu](mailto:procard@uw.edu). The card and viewing access will be canceled but it is the cardholder's responsibility to destroy and dispose of the card. For additional questions, call the ProCurement Card hotline at 543-5252. |
| **Travel VISA card**:  Email [uwcts@uw.edu](mailto:uwcts@uw.edu) to request the card be canceled. Please include the cardholder’s name and the last 4 digits of the account number. Cut the card after cancellation and send it to the Corporate Travel Services Box 351120. Cards are issued to individuals, so it is not necessary to cancel a Travel Card for a transferring employee. For more info, call 543-7171 or email [uwcts@uw.edu](mailto:uwcts@uw.edu). |
| **Remove access to Petty Cash funds**:  If the employee is a petty cash custodian notify Payables Administration at apcsvc@u.washington.edu or 206-543-4500. If the employee is an authorized signer contact the bank to update the signature card. |
| **Discontinue records retrieval authorization** (Records Management Office), via [urc@u.washington.edu](mailto:urc@u.washington.edu). |
| **Remove OASIS access** (Equipment Inventory System) at [eio@u.washington.edu](mailto:eio@u.washington.edu), with employee’s name & NetID. |
| **Remove UW Development Advance access:**  Contact Development at [devhelp@u.washington.edu](mailto:devhelp@u.washington.edu) or 206-221-3947 to remove an employee’s access to Advance. In the email, include the employee’s name and the date they are transferring to another department. |
| **Review, purge and close department personnel file**. Retain as instructed in UW Records Retention Schedule. See <http://www.washington.edu/admin/recmgt/uw.gs8.html> for more information. |

**Note: If you find that any of this information is outdated, please contact uwhr@u.washington.edu.**