

Transferring Employee Checklist: Campus Staff

This checklist is for employees hired through competitive recruitment.

Note: You should review the following list with your manager to find out which items are applicable to your situation.

Employee Responsibilities

- Submit a letter of resignation, including the date you will leave your current position. Talk to your manager about whether you will be requesting to use accrued paid time off such as vacation or compensatory time off prior to your last day in the department.
- Tell your manager what department you will be moving to, the start date, and the name of your new manager.
- Employees transferring within the UW to another benefits eligible position need not take any action regarding 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.
- Provide your manager with the access necessary to retrieve departmental data/information. Move files to departmental shared drives.
- Provide your manager with your voicemail access code.
- Update contact information in Workday.
- Update email autoreply to inform senders of your transfer, and to include appropriate contact information.

Manager/Departmental Responsibilities

- Personnel File 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 network access removal, email help@uw.edu.
- **Communications Access:** Remove access as necessary <https://itconnect.uw.edu/tools-services-support/voice-video/phones/>.
 - Cancel/change access to UWATS account.
 - 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 Enterprise Service Desk at help@uw.edu.
- **Cancel ProCurement Card or Reconciler Account Access:** When a cardholder changes departments, it is necessary to email all cancellation requests to 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. See Procurement Services for more information.
- **Travel Card Cancellation:** Request cancellation of your Travel Card by emailing procard@uw.edu with the Cardholder name and the last 4 digits of the account number. Please note, upon separation from the UW, outstanding balances must be paid in full and the canceled card will need to be turned into your department per your department's policy or destroyed.
- **Discontinue records retrieval authorization** (Records Management Office), via urc@u.washington.edu.
- **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.