

## **Checklist for Classified and Professional Staff Transferring to Another UW Position**

(Employees and managers of the academic medical centers – please contact your Human Resource department for new employee guidelines.)

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 using vacation time prior to your last day in the department.
- Tell your supervisor what department you will be moving to, the name of your new supervisor and the date your new appointment will start.
- 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 (i.e., from staff to professional staff).
- Turn in all building/departmental keys (building, office, file cabinets).
- Return any departmental equipment which may be in your possession.
- Turn in other UW materials - including, but not limited to:
  - ProCard
  - SecurID
  - Travel VISA card
  - Sprint card
  - Pager
  - Cell phone
  - Laptop
- Provide supervisor with passwords to computer departmental files.
- Provide supervisor with voice mail access code.
- Update address in Employee Self Service: <http://www.washington.edu/admin/payroll/ess/ess.cgi>
- Update your voice mail message to advise callers of your employment change and a number to call for assistance
- Ensure that your leave records are up to date and that you retain a record of your final leave balances in your current department.

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Employee Name \_\_\_\_\_ EID Number \_\_\_\_\_  
Termination Date \_\_\_\_\_ Mailing Address \_\_\_\_\_  
Phone Number \_\_\_\_\_  
Email Address \_\_\_\_\_

### Supervisor/Departmental responsibilities

#### Leave Records

- Receive letter of resignation or notification of appointment end date.
- Update leave records in preparation of employee's separation from your unit. If necessary, obtain signed time sheets. If your department uses the form 220 and the employee is unavailable to sign, write "employee is unavailable for signature" on the employee's signature line (the 220 should not be sent to the employee for signature).
- Transfer copies of the leave records to the employee's new department

**Forwarding Address:** If employee has not updated their forwarding address on Employee Self Service, update their forwarding address information on OPUS.

**Building Access:** Receive all keys (office, building, desk, and file cabinets) and building use permits. Remove employee from electronic building access 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](mailto:nebula-support@cac.washington.edu).

**Communications Access:** Remove access to communications – see <http://www.washington.edu/admin/comtech/> for items listed below

- Cancel/change access to UWATS account
- Transfer or cancel voice mail, obtain voice mail password \_\_\_\_\_
- Return and cancel pagers
- Return cell phones
- Return Sprint cards

**Systems Access:** Remove access to Payroll and OPUS review functions

- Send an email to [opushelp@u.washington.edu](mailto:opushelp@u.washington.edu) to delete the employee as a reviewer for your Payroll Unit Code. This email should include the individual's name, UW NetID, and PUC. Consider updating PERM distribution list.
- To cancel access to OPUS, the PTR online system, and to remove individuals from the pronline mailing list, email [pronline@u.washington.edu](mailto:pronline@u.washington.edu).
- If the employee will have Payroll responsibilities in another department, the employee should be removed from your Payroll Unit Code but their access to OPUS and the PTR online system does not need to be cancelled. The employee's new supervisor should contact [opushelp@u.washington.edu](mailto:opushelp@u.washington.edu) to provide them with access to a different Payroll Unit Code.
- To remove individuals from the Payroll mailing list and the Payroll Coordinator list, email [payroll@u.washington.edu](mailto:payroll@u.washington.edu).
- Cancel SecurID and access to Keynes
  - To remove access for an individual, email [adminapp@u.washington.edu](mailto:adminapp@u.washington.edu). Include the person's name, usercode, the reason why access should be deleted, and the serial number of their SecurID card (if known). All employees must return the SecurID card to C&CI, Box 352830. Employees who are changing departments will need to re-apply for access in the new department by completing and sending an application form available at: <http://www.washington.edu/admin/adminsystems/forms>  
For more information, see <http://www.washington.edu/admin/adminsystems/INTRO/> For more information, see <http://www.washington.edu/admin/adminsystems/INTRO/>

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### Cancel ProCurement Card or Reconciler Account Access

- Department Administrators should email [procard@u.washington.edu](mailto:procard@u.washington.edu) or send a memo to the ProCurement Card Program in Financial Services to request the following:
  - Cancel cardholder's ProCurement Card
  - Cancel web access for cardholder and/or reconciler
  - Remove reconciler email addresses associated with department cardholder accounts
  - Submit cardholder names that were the responsibility of the previous reconciler
  - Designate new reconciler and provide their UW NetID name
  - Submit new reconciler email address to replace the previous one
- Administrators must destroy and dispose of the ProCurement Card for employees who are transferring to another department. In some instances accounting defaults can be changed to the new department so the employee can use the ProCurement Card in their new department. The Administrator of the new department should submit a new application for the transferring employee.
- For additional questions, call the ProCurement Card hotline at 543-5252.

### Travel VISA card

- Travel cards are issued to individuals and not departments; there is no need to cancel the individual's travel card. You may wish to determine if the employee is transferring to a different department where the card will be needed, and if not, suggest that the account be closed.
- To close the account, email [trvlcard@u.washington.edu](mailto:trvlcard@u.washington.edu) with the name and the last 4 digits of the account number. Cut the card after cancellation and send it to the Travel Office Box 351117.
- For more information, call 543-5867 or 543-0658.

### Remove access to Petty Cash funds

- If the employee is a petty cash custodian notify Payables Administration at [apcsvc@u.washington.edu](mailto: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 (UW Records Management Office)

- Send an email to [urc@u.washington.edu](mailto:urc@u.washington.edu)

### Remove OASIS access (Equipment Inventory System)

- Email [eio@u.washington.edu](mailto:eio@u.washington.edu) and include the employee's name, UW NetID, and org codes.
- For additional questions, see <http://www-oasis.cac.washington.edu/admin/adminsystms/oasis>

### Remove UW Development Advance access

- Send an email to [devhelp@u.washington.edu](mailto:devhelp@u.washington.edu) to remove an employee's access to Advance. In the email, include the employee's name and the date they are separating or transferring to another department.
- For additional questions, call the Development Help Desk at 206-221-3947.

**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>

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