

KFS Checklist for Terminated or Transferring Employees

If an employee will be terminating employment from the University or will be transferring to another UH position that would affect their responsibilities in the system, please review this checklist to insure that KFS system attributes and routing have been updated.

1. Security Access – Process a KFS Security Form (FSO-40) to remove or change access from KFS, JasperReports Server and PageCenterX as applicable.
2. Account Attributes
 - a. Check if the person is assigned as a fiscal officer, account supervisor or account manager on any accounts. The Account Responsibility report in JasperReports Server can assist in finding the affected accounts.
 - i. Update the account(s) for new assignments. The Account Global can be used to update multiple accounts with the same values.
 - ii. If a new person cannot be assigned, establish account delegate(s) or account supervisor delegate(s) to make sure eDocs are not stuck in routing.
 - b. Check if the person is assigned as an Account Delegate. The Account Delegate Listing in JasperReports Server or the Account Delegate/ Account Supervisor Delegate Lookup in KFS can assist in finding the affected accounts.
 - i. Update the account delegation as appropriate. Account Delegate Global can be used to completely replace the delegation on multiple account(s) or the Account Delegate eDoc can be used to inactivate delegation for a specific account.
3. Organization Manager – The KIM Deprovisioning email is sent to the Organization Manager of the user's primary chart-org who is usually the lead FA. If there is a change in the lead FA, an Organization Maintenance eDoc should be processed to update the Organization Manager to the new FA. Note: Only orgs that are used as primary chart-orgs on the user security (FSO-40) need to be updated. For example, if all of your users have primary chart-org at the college/campus level (e.g., KA-KA or MA-DNNS) then you only need to update that org and not all the orgs in the college/campus.
4. eDocs ENROUTE – If any eDocs are enroute, update the account attributes and/or account delegates and then request a re-queue of the eDoc(s) by submitting a trouble ticket. If you need to find out which documents are enroute to the person, submit a trouble ticket including the first name, last name and user name of the terminated employee.
5. PCard - If the person is a cardholder, refer to the PCard website (<https://pcard.intranet.hawaii.edu>) for more information and notify OPM (pcard@hawaii.edu) to terminate the PCard.
6. Mailing lists – If the person was subscribed to the kfs-user, uhfo-l or other mailing lists, they should be advised to unsubscribe from each list.
7. Fiscal and Purchasing Authority – If the person had fiscal and purchasing authority, an FMO-1 form should be completed to terminate or transfer the authority as appropriate.