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, eThority 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 Fiscal Officer Listing, Account Manager Listing, Account Responsibility, Account Supervisor Listing or Account Supervisor Search templates in eThority 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 eThority 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 a specific account.
3. Organization Manager – The KIM Deprovisioning email is sent to the org manager 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 org 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
    a. If the person is a cardholder, notify OPRPM (pcard@hawaii.edu) to terminate the PCard
    b. Obtain approval from the cardholder for any charges during the final billing cycle. The cardholder may sign the CentreSuite transaction listing and note the appropriate account(s) and object code(s) to charge for each transaction.
    c. Once the PCard transactions have been uploaded to KFS, attach the cardholder's authorization to the PCDO and also submit a trouble ticket requesting superuser approval on behalf of the cardholder. The trouble ticket should specify the PCDO edoc number, first name, last name and username of the terminated/transferring employee.
        i. If the cardholder is unable to authorize the transactions, obtain authorization from the cardholder's supervisor or someone who can certify that the transactions are valid.

   d. If the person is a reallocator or reconciler, request an update to these assignments by contacting OPRPM (pcard@hawaii.edu).

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, a FMO-1 form should be completed to terminate or transfer the authority as appropriate.