

Transfer Employee Separation Checklist

Complete at the time of employee transfer to another university position. Retain in the departmental personnel file.

Employee Name:	Employee Campus ID:
Home Department:	Supervisor's Name:

****Note:** Individuals working for more than one department at time of separation should complete one checklist for each department.

EMPLOYEE AND DEPARTMENT REPRESENTATIVE

	Description	Completed By (Dept Rep Initials)
1	Update Asset Tracking Form to provide proof of return of equipment, etc.	
2	Obtain information needed to access computing or other information system accounts and/or equipment (e.g. encryption codes, passwords, etc.).	
3	Finalize timesheet (if applicable) & leave records.	
4	Finalize travel expense receipts & reports.	
5	Cancel future training or travel.	
	Repurpose Compass membership to another employee.	
6	If engaged in research as part of job, contact Research Administration to review research agreements, patents, intellectual property agreements, etc.	
7	Ensure phone voicemail password has been reset http://oit.ncsu.edu/telephony	
8	Update the MyPack Portal "Employee Self Service" with forwarding address or provide it to HR/Payroll representative for future correspondence.	
9	Contact Benefits at 919-515-2151 to discuss benefits continuation and to ensure benefit vendors have correct forwarding address. Check out more benefits Information.	
10	Schedule exit interview <ul style="list-style-type: none"> • SHRA, EHRA Non-faculty, & Post Docs: HR 919-515-6575 • Faculty: OIED 919-513-2099 	
11	Download and save on appropriate university resources all university data from personally-owned computers/devices (ex: laptop, tablet, smartphone) or computing accounts Grant access to the department.	
12	Remove university-owned software from personally-owned computers or devices.	

Departing Employee Signature: _____ Date: _____

DEPARTMENT REPRESENTATIVE

	Description	Completed
1	To ensure there is no break in service, DO NOT process a termination action at the department level for employees transferring to another NC State University department. The “new” employing department will submit paperwork directly to HRIM to process the transfer action.	
2	Review System Access Checklist and determine appropriate action.	
3	<p>If the employee is moving into a position on campus that <u>will also require access</u> to the same systems via SAR, no request is needed to revoke access for systems. On the employee’s effective date in the new position, the new department can process an action to add the new department(s) and remove the old department(s). The new department will not be able to submit the request prior to the effective date as the employee will show in their system until then. It is recommended that the current department contact the new department to coordinate actions. If both departments enter SAR requests, one will likely override the other so communication between the departments is key.</p> <p>If the employee is moving into a position that will <u>not</u> require access to these systems, submit a revoke/termination access request via SAR.</p>	
4	Terminate the individual’s signature authority on bank accounts (such as Foundation accounts).	
5	Deactivate Purchase Card and cellular plans.	
6	If the employee is transferring to another state agency or NC State University position, complete the SPA Transfer Appraisal for SPA employees and send to the new department. http://www.ncsu.edu/human_resources/forms/er/transappfrm.pdf	
7	Knowledge transfer: Update or create SOPs for position duties. Work with the people who will be taking over responsibilities until the position is filled to train and update them on the status of projects and tasks.	
8	Notify colleagues and co-workers of the employee’s departure.	
9	Contact Security Applications Technology (919-513-3111) to terminate security access for doors if needed.	
10	Process comp time payouts for transferring employees.	
11	Account for non-salary compensation adjustments.	
112	Update organizational chart and other references to employee (department directory, staff listing, web site).	
13	Transfer the employee’s leave in the web leave system to the new department. WebLeave	
146	Retain the individual’s student access (student email account, Moodle, etc.) if applicable.	
15	Create appropriate reply-back messages and forwarding rules for the individual’s voicemail .	
18	Ensure files on local or network drives that the individual administers or can access are also accessible to other department personnel. Verify appropriate public record copies of the files exist.	
19	Document, re-assign, and terminate, if appropriate: <ul style="list-style-type: none"> • Any external accounts used for university business by the individual • Individual’s administration of departmental email lists, groups, generic accounts, items in web registry or use of individual email aliases or departmental aliases. • Any resources (e.g., conference rooms, projectors, etc.) • 	
20	Send departmental Personnel File to new department.	

Departmental Representative Signature _____ Date _____