Transferring Employee Checklist: Transfer Within TAMUK

INSTRUCTIONS: This form should be used by a Supervisor and HR Liaison as a checklist to document activities completed during and following the exit process for transferring employees. This is a replacement for the previously used exit checklist form. Choose which type of transfer (within TAMUK) and follow the actions required for that type. Not every action listed is applicable in every transfer, but the comprehensive list is provided as a mechanism to confirm good management practices and to protect university property. If the action required does not apply to this employee's transfer, please write "N/A" in the blank.

Employee Name: _____ UIN:_____

Last Day Worked: _____ Title_____

Department: _____ Supervisor:_____

(1) DEPARTMENT Actions Required: (initials of employee completing process, N/A if not applicable)

_____Transferring to: _____
_____New Title: _____
_____Change job in Workday

Retrieve, cancel, deactivate, or secure the following:

_____Office and/or desk keys collected & verified/returned to Physical Plant x3312
_____Managers–Finalize all leave requests & timecards
_____Phone extension (department requisition)
_____Communication devices collected
_____Facility access codes cancelled (for your building)
_____Marketplace account access cancelled x4965 or x3905
_____FAMIS account access/signature authority updated x3905
_____Tex-An- notify of department change x2011
_____Laserfiche access changed/deactivated x3814
_____FedEx/Kinko & Staples Account changed/deactivated x3814
_____Procurement card collected x3814
_____Travel card collected, vouchers/receipts completed x3950
_____Turn in position specific logins and passwords for external accounts and databases to Superior

PRINT NAME of Transferring Employee	SIGNATURE of Transferring Employee	Date
PRINT NAME of Supervisor/Designee	SIGNATURE of Supervisor/Designee	Date

(2) PAYROLL AND HUMAN RESOURCES Actions Required: (initials of employee completing process)

_____Resignation/Transfer Letter from current department
_____LeaveTraq updated—change managers
_____Comp Time Balance Paid Out: _____ hours
_____Final Timesheet for current department
_____Change mail stop code (Employee Personal Data form)

PRINT NAME HR Employee	SIGNATURE HR Employee	Date