TEXAS A&M
UNIVERSITY
KINGSVILLE®
HUMAN RESOURCES

Transferring Employee Checklist

INSTRUCTIONS: This form should be used by Employee, Supervisor and HR Liaison as a checklist to document activities completed during and following the exit process for transferring employees. Not every action listed is applicable in every transfer, but the comprehensive list is provided as a mechanism to confirm good management practices. If the action does not apply to this employee's transfer, please write "N/A" in the blank.

Employee Name: _____ UIN:_____

Last Day Worked: _____ Title: _____

Department: _____ Supervisor: _____

EMPLOYEE & DEPARTMENT Required Actions:

(initials of employee completing process, N/A if not applicable)

_____ Tranfering to: _____

_____ New Title: _____

_____ Initiate Job Transfer in Workday: _____

Retrieve, cancel, deactivate, or secure the following:

_____ Physical Plant x3312
(Building/Door Keys turned in)

_____ Procurement x3814
(P-Card turned in)

_____ Travel x3950
(T-Card turned in)

_____ Phone Extension
(Department Requisition)

_____ Desk Keys turned into Supervisor

_____ Turn in position specific logins and passwords for external accounts, and databases to Supervisor

_____ Office equipment turned into Supervisor
(Ex. Laptop, Tablet)

_____ Facility Access Codes Cancelled
(For your Building)

_____ Finalize all leave requests and timesheets
(Non-Exempt Employees)

_____   _____   _____
PRINT NAME of Transfering   SIGNATURE of Transferring   Date
Employee   Employee

_____   _____   _____
PRINT NAME of Supervisor   SIGNATURE of Supervisor   Date

HUMAN RESOURCES Required Actions:

_____ Resignation/Transfer letter from current department or Employee

_____ Comp time pay out: _____ Hours

_____ New PD/Offer Letter Created and Signed

_____   _____   _____
PRINT NAME of HR   SIGNATURE of HR   Date
Representative   Representative