**Mississippi University for Women**

**Employee Transfer/Separation Checklist – *Current Department***

**(This form should be maintained in the department for 3 years following the employee’s transfer.)**

Supervisors are responsible for completing this checklist when an employee transfers from your department to another University department. The checklist is categorized by area; however, it is the supervisor’s responsibility to ensure all applicable items are complete. There may be additional tasks specific to your department that you need to complete in addition to this checklist.

*Supervisors may also use this form when an employee separates from the University. Human Resources has a check-out process the employee will be required to complete by their last day*

*of employment. The check-out form and instructions will be emailed to the employee.*

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| **Employee’s Name:** |  **Banner ID:**  |
| **Current Job Title:** |  |
| **Current Department:** |  |
| **Effective Date:** |  |
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| **Date Completed** |  **For Department/Unit** |
|  | Supervisor asks employee to provide information regarding pending work, access paper and electronic files, etc.  |
|  | Deactivate employee (change log-in/passwords, etc.) in all external software programs specific to your department, including social media accounts.  |
|  | Update department staff directory on department web page. (Note: University Employee Directory will be updated once changes are made in Banner 9 by HR.) |
| **Date Completed** | **For Human Resources** |
|  | Employee submits resignation letter to supervisor. |
|  | Initiate the PAF for a university transfer (or termination if separating) and send through the approval process WITH the resignation letter attached. <https://www.muw.edu/images/admin/admin/hr/current/forms/pafmastnew091613.doc>  |
|  | Biweekly-paid employees submit time sheet and monthly leave record to the supervisor on their last working day in the current department. Forward both forms to HR. |
|  | Monthly-paid employees submit their leave record in Banner Self-Service on their last working day in the current department. |
|  | Remove Proxy access in Banner Self-Service. |
| **Date Completed** | **For ITS** |
|  | Supervisor requests access to employee’s desktop. |
|  | Remove Banner 9 access by completing the electronic form: <https://muw.edu/its> and click Banner, then Banner Access Request.  |
|  | Ensure phone name, voicemail and password is updated. |

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| **Date Completed** | **For Facilities** |
|  | Supervisor requests employee key list from Facilities Management. Employee returns all office and building keys for their current department to Facilities. Note: Employee will take the key list when returning keys, obtain a signature, and return signed key list to the supervisor. Lost keys should be reported to Facilities. *HR requests a key list for departing employees and will email the form and instructions for returning keys to the employee.* |
| **Date Completed** | **For Resources Management** |
|  | Retrieve all university property and contact Resources Management for an inventory audit. |
|  | Cancel and return Procurement Card (cancel PIN for Fuelman Card). |
| **Date Completed** | **For University Accounting** |
|  | If employee is a budget manager, contact Accounting for instructions and forms to remove access. |
|  | Finalize any expense receipts, reports and travel vouchers. |
|  | Cancel long-distance PIN code. |
|  | Cancel and return Travel Procurement Card. |
| **Date Completed** | **For MUW Police Department** |
|  | Remove ID card swipe access. |
| **Date Completed** | **Additional Tasks to Complete** |
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