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HUMAN RESOURCES

TRANSFER PROCESSING CHECKLIST
Faculty and Staff

The following checklist has two purposes:

- To outline the required and recommended tasks that may need to be addressed when someone transfers from one department at Clemson University to another department within Clemson University
- To serve as documentation that required tasks have been completed. All items may not apply to a given individual, and department-specific actions may need to be taken in addition to the actions noted on this checklist.

Section I: Transferring employee information

Employee Name:_____ Employee ID: _____
Department Name: _____ Dept. Number: _____
Position Title:_____ Separation Date: _____
Supervisor Name:_____

Section II: To be completed by the supervisor in conjunction with the transferring employee before the effective transfer date.

TRANSFER PROCESSING		
Done	N/A	
☐	☐	Ensure that the transferring employee 1) has been contacted by OHR with offboarding information and 2) has a copy and understands the Employee Checklist for Transferring Employment within Clemson University.
☐	☐	Obtain all information needed to access computing or other information systems accounts and/or equipment – passwords for example.
☐	☐	Finalize timesheet and leave records; notify HR partner if not correct.
☐	☐	Cancel enrollments in training classes and conferences to avoid "no-show" fees.
☐	☐	Obtain voice mail access code. Change voicemail. Submit request to ithelp@clemson.edu to reset password prior to new hire arriving.
☐	☐	Download and save (on appropriate University resources) all University-owned data from personally owned computers/devices (laptop, tablet, smartphone) or computing accounts and obtain access.
☐	☐	Ensure University-owned software is uninstalled from personally owned computers and devices.

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☐	☐	Collect or verify return of department property: (check applicable items) ☐ Access cards / ID cards ☐ Keys (building, office, desk, files, vehicles, lockers, etc.) ☐ Department credit/procurement cards ☐ Computers/laptops, cameras, iPads, chargers, etc. ☐ Cell phones / pagers and chargers ☐ Uniforms/tools/instruments, etc. ☐ Library books, audio/video materials, periodicals ☐ Parking decal ☐ Official parking placard ☐ Other ☐ Other ☐ Other Please list any University property not returned, and explain why:
☐	☐	Verify transfer of any University records (e.g., paper, electronic, email) held in employee's work area or home office/computer to his/her supervisor. In particular, prevent the employee from retaining, copying, or removing in any way confidential or sensitive records.
☐	☐	Obtain passwords to any administrative database, software application, information system, etc., for which the employee possesses the sole access rights, and that is necessary for program or unit administration or operations.
☐	☐	Delete the employee's access to department data systems, email servers, voice mail systems, email lists, etc. or ensure employee's access to department data systems will be terminated on last day in department. Contact IT Help Desk (ithelp@clemson.edu) for assistance.
☐	☐	Notify your HR partner about the employee's departure, so that the separation can be entered into CUBS.
☐	☐	Deactivate building/area access.
☐	☐	Change building directories, Campus Directory, and update list servs.
☐	☐	Change names on subscriptions, institutional memberships, etc.
☐	☐	Create appropriate reply-back messages and forwarding rules for the individual's email account.
☐	☐	Create appropriate reply-back messages and forwarding rules for the individual's voicemail.
☐	☐	Notify colleagues and co-workers of the employee's departure.

☐	☐	If the employee was engaged in research as a part of the job, contact the Research Division to review research agreements, patents, intellectual property agreements, etc.

*Employee Signature:_____Date: _____

**Supervisor Signature:_____Date: _____

*The employee's signature certifies that all applicable activities as denoted on this Transfer Processing Checklist have been completed and discussed as appropriate.

**The supervisor's signature certifies that the employee and supervisor have completed all applicable activities as denoted on this Transfer Processing Checklist and that all administrative procedures as outlined above have been completed.

SECTION IV -- DISTRIBUTION

- Give the transferring employee a completed and signed copy of this Transfer Processing Checklist.
- Submit the original to the HR partner to be retained in the departmental file.