

Separating/Transfer Procedure Checklist

Employee Name:	
MSU ID:	
Department:	Termination/Transfer Date:
Checklist Completed by:	Today's Date:
New Mailing Address:	
City, State, Zip	

Per University Policy, HRM 60-405, departments/units are required to maintain this form in the department for three years when there is separation from employment /change of position. DO NOT send the form to Human Resources Management.

	Description	Date Completed (If Not Applicable, mark as N/A)
<input type="checkbox"/>	Complete the Employment Action Form (EAF) and submit to HRM with letter of resignation	

University Assets and Financial Steps

<input type="checkbox"/>	Return University fuel, procurement and/or travel card(s) to department	
<input type="checkbox"/>	Return office key(s) (i.e., lab, desk, cabinet, and storage area) and ID badge(s)	
<input type="checkbox"/>	Return University-owned property and/or equipment (computers, laptop, tablet, books, mobile devices, storage media, supplies, tools, uniforms, etc.)	

Shared Files/Systems (Electronic Access should be cancelled unless there are extenuating circumstances requiring access to continue)

<input type="checkbox"/>	Confirm transfer or deletion of all electronic files from OneDrive, local drive, personally owned computers, mobile devices, cloud storage, and storage media (e.g., flash drives, etc.)	
<input type="checkbox"/>	Complete removal procedure(s) for all system access (e.g., shared network drives, databases, Banner, Outlook, PageUp, departmental software, subscriptions etc.) Submit helpdesk ticket, if appropriate.	
<input type="checkbox"/>	Remove electronic door access, if appropriate	
<input type="checkbox"/>	Discontinue voice mail or plan for recovery of messages left for departing employee	

Payroll/Benefits

<input type="checkbox"/>	Make sure leave has been audited and processed	
<input type="checkbox"/>	Make sure time sheets have been submitted and approved (Make sure department pays compensatory time for employees separating from the University or transferring to another department)	

Miscellaneous

<input type="checkbox"/>	Share information about Exit Interview Survey (generated electronically to the employee)	
<input type="checkbox"/>	Contact Parking and Transit Services to end accrual of charges for digital parking permit	

I confirm that all property has been returned to the appropriate office, all appropriate contacts have been made to discontinue access to technology, and that I have reviewed my workspace prior to my departure.

Supervisor Signature

Date (mm/dd/yyyy)