

# R.I.T Department of Human Resources - Employee Transfer Checklist

Employee Name  Emp Number  Last Day Worked in current Dept

The transferring employee's current supervisor should complete this form prior to the employee departure. The current department should not process a Termination EAF form for employees transferring to another department within RIT.

New Dept Name New Supervisor Name

New Internal Mailing Address New Supervisor Phone Number

Transfer Checklist Completed by New Supervisor Email

DONE	N/A	<b>SUPERVISOR ACTIONS ON OR BEFORE EMPLOYEE'S TRANSFER DATE</b>
		If exempt, employee should update sick and vacation leave records and provide copies to new manager.
		KRONOS: Remove supervisor access as applicable. Kronos access request form: <a href="https://www.rit.edu/fa/controller/sites/rit.edu/fa.controller/files/files/forms/Kronossecurityrequest.pdf">https://www.rit.edu/fa/controller/sites/rit.edu/fa.controller/files/files/forms/Kronossecurityrequest.pdf</a>
		Review approval authority for Oracle HR and Financial transactions and adjust as necessary. More information can be found at: <a href="https://www.rit.edu/fa/controller/AMEFinHRTrans">https://www.rit.edu/fa/controller/AMEFinHRTrans</a>
		Obtain from departing employee a summary of project work, process documentation, manuals, location of files (physical and electronic) and other items related to the transfer of knowledge before the employee departs the department.
		Voicemail—If the employee is not keeping their phone number in their new job, ask them to: <ul style="list-style-type: none"> <li>- Update their voice mail greeting to advise callers of the employment change and a number to call for assistance (option 3 then 1)</li> <li>- Set their line to not accept new a message (option 5 then 7) until a new incumbent takes over the position and the line.</li> </ul>
		Remove employee from department internal phone and e-mail lists.
		Move local files to shared drives. Consult records management policy for retention requirements. <a href="http://www.rit.edu/academicaffairs/policiesmanual/c220">http://www.rit.edu/academicaffairs/policiesmanual/c220</a>
		Change password on any shared computer accounts
		Collect department issued equipment (laptops, manuals, cell phones, software, uniforms, or other tools)
		Send department personnel file records to the Human Resources Dept attention of your HR Manager
		Obtain forwarding address for new employee so any personal mail can be sent to new department.
		Cancel/Transfer University-paid subscriptions and memberships in professional organizations
		Remove employee's name from building directory, distribution lists and phone lists
		Collect all keys (office, building, desk, and file cabinets)
		Change codes on door entry systems and/or contact Public Safety to remove card swipe access

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The credit card from the old department should be cut up and an email sent to the Institute Card Administrator in the Controller's Office to cancel the card. The Procurement Card information:  
<https://www.rit.edu/fa/controller/pcard>

Provide new department manager with written performance input on the employee for the period of the year the employee was in your area. This will assist the new manager in completing the employee's annual performance appraisal. No overall rating is required to be submitted by the old manager.

Remove/delete access to network drives and any departmental Outlook calendars, including delegate access  
Submit an ITS work request: <https://www.rit.edu/its/help-support/work-requests>  
Contact your department, college or division system administration to remove access to non-RIT controlled resources

End date Oracle responsibilities that are no longer applicable to the employee in their new position  
- Oracle access for current employees in your department can be viewed in Manager Self-Service by running the report called "Oracle Responsibilities Report".  
- Human Resources Manager Self-Service <https://www.rit.edu/fa/humanresources/sites/rit.edu.fa.humanresources/files/forms/mssrequest.pdf>  
- General Ledger, Accounting and Purchasing applications: [https://www.rit.edu/fa/controller/sites/rit.edu.fa.controller/files/files/docs/Oracle%20Financial%20App%20\\_12.12.17%20a.pdf](https://www.rit.edu/fa/controller/sites/rit.edu.fa.controller/files/files/docs/Oracle%20Financial%20App%20_12.12.17%20a.pdf)  
Submit an ITS work request to remove SIS/PeopleSoft roles that are no longer applicable to the employee in their new position. <https://www.rit.edu/its/help-support/work-requests>

Travel cards are issued to individuals and not departments; there is no need to cancel the individual's travel card. You may wish to determine if the employee is transferring to a different department where the card will be needed, and if not, suggest that the account be closed.  
- To close the account and cancel the card, cut up the card and sent it and an email to the Institute Card Administrator, Valerie Russell at [vdrcto@rit.edu](mailto:vdrcto@rit.edu) .  
- Travel Card Procedures can be found at: <http://finweb.rit.edu/controller/travel/travelcards.html>

If the employee is a petty cash custodian the old department should contact the Controller's Office to designate a new petty cash custodian and determine any other actions that need to be taken with regard to the petty cash fund (such as depositing or reconciling funds). If applicable, safe combinations should be changed.

Remind employee to remove personal items from their work area

Remind employee to retrieve any University email files, or files on other University email servers and systems, that they wish to retain.  
**Note: Employee must have the supervisor permission to copy any University files or records.**

Remind employee to retrieve or delete any personal files/information on their PC, office/department server, lab server, central file space, etc.

## Other Departmental Specific Items

Supervisor  
Name

Supervisor  
Signature

Date