Transfer/Separation Checklist

Covered Individual Information

Name (Last, First, Middle Initial):	PSU Employee ID #:
Job Title & Appointment Type:	Last Day Employed/Engaged or Date of Transfer:
Work Unit & Department:	Name of Supervisor/University Contact:

Part I – University Property

Item	Yes	No	N/A	Comments
Keys/Access Cards obtained/Card Swipe access disabled (building/department/office/filing cabinets/desk/etc.)				
Second Factor Authentication Token				
ID Card/Security Badge				
Purchasing Card				
Parking Permit				
Cellular Phone/Phone Card				
Books/Supplies/Training Materials				
Laptop/Tablet/Other Computer Equipment (include storage devices and other media)				
Any property for which the individual is listed as custodian in the Property System.				
Other Dept./Area Specific Items (Please specify & attach additional documentation if necessary)				

Part II – System Access

Item	Yes	No	N/A	Comments
Access Account				
IBIS				
ISIS				
Local IT Accounts and Network Access (including shared drives and user-managed groups)				
Database Access				
Other Dept./Area Specific Items (Please specify & attach additional documentation if necessary)				

Part III – Miscellaneous

Item	Yes	No	N/A	Comments
Resignation letter obtained				
Time & attendance verified				
EAP information provided				
Employee Benefits Division contact info provided				
Personal files from computer cleared/personal belongings removed				
Work files moved to a shared drive				
Telephone forwarded /coverage obtained/discontinued				
Email autoreply created/email forwarded/listserv admins notified				
Departmental email alias(es) removed				
Termination/Transfer Form Processed				
Salary, short-term or travel advances collected				
Long-term advances independently verified and transferred to new custodian				
ERS travel reports finalized				
Other Dept./Area Specific Items (Please specify & attach additional documentation if necessary)				

Part IV – Preparer's Signature – (Please Print & Sign)

_____   _____   _____

(Print)   (Sign)   (Date)